



Judicial Council of California · Administrative Office of the Courts

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REPORT TO THE JUDICIAL COUNCIL

For business meeting on: June 27, 2014

Title	Agenda Item Type
Administrative Office of the Courts: A Report on Services Provided by Staff to the Judicial Council	Information Only
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Submitted by	Contact
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Executive Summary

The *Services Provided by the AOC Report* provides a high-level comprehensive inventory of all current programs, projects, and activities of staff to the Judicial Council in service to the judicial branch, sister branches of state government, the federal government, local and national justice partners, community organizations, and the public. This informational report demonstrates how staff services directly impact and align with the goals of the Chief Justice's Access 3D initiative that provides a framework and vision for the future of the judicial branch focused on equal, physical, and remote access for users of the California court system.

Previous Council Action

As a result of budget reductions in the past several years the staff to the council implemented a number of programmatic and organizational changes. In October 2012, the staff organization was restructured under the leadership of the new Administrative Director in response to the council's directives stemming from the report and recommendations of the Strategic Evaluation Committee (SEC)¹. The council accepted the SEC recommendations at its August 2012 business meeting and, to date, the staff has implemented/closed 108 of the restructuring directives. This effort has resulted in the generation of new or revised policies/procedures and organizational changes for staff offices.

¹*Strategic Evaluation Committee: Report on the Administrative Office of the Courts* (May 2012), available at www.courts.ca.gov/documents/SEC_Final_Report_May_2012_withcoverletter.pdf.

In 2013, correlative to the implementation of the directives and the announcement of the Chief Justice's Access 3D initiative, it was critical to catalog the agency's services provided by staff to the council. Due to staffing reductions and various workload pressures throughout the staff organization, the Executive Office determined it was imperative to review and catalog all activities to adequately and appropriately utilize remaining staff and set priorities for the organization. This report is the result of that effort.

Methodology and Process

The first step of the formal services review began in June 2013. With the assistance of the management team, the organization was able to compile an office-by-office catalog of all services currently provided. In addition, the Executive Office met several times to review the catalog to ensure that all services are needed and critical in today's environment. This review resulted in a determination that the services provided in the catalog are still vital and necessary.

Alignment with Access 3D

In August of 2013, the Chief Justice announced her vision and framework for ensuring access to the California judicial branch. The Access 3D initiative focuses on a three-dimensional approach to access—equal access, physical access, and remote access. As the staff services review was underway, it was logical to ensure the Chief Justice's Access 3D vision was a key component of this exercise. As such, during the Executive Office's review, the Access 3D vision was taken into consideration in determining the need for current services.

Attachment 1 – *AOC Services Aligned With Access 3D* reflects staff services and activities that support equal, physical, and remote access and identifies the offices that provide these services. Although access for court users is first and foremost provided through court systems and services, this document reflects the important and vital role that staff to the Judicial Council plays behind-the-scenes as an integral partner in providing systems, structure and support so that the courts can ensure that Access 3D occurs. As indicated in Attachment 1:

- *Equal access* is supported by a myriad of staff activities relating to litigant services (e.g., self-help, interpreter services), community programs and collaboration, courts systems support, diversity, judicial branch governance, and transparency and accountability programs and activities.
- *Physical access* that provides open courts that are safe, secure, well-maintained, cost-effective, and accessible is supported by numerous staff activities of the capital construction, facilities maintenance, and security programs.
- *Remote access* that allows court users to conduct court business online or remotely is supported by numerous staff information technology services relating to the development and maintenance of branch websites and the technological infrastructure necessary to provide online court services.

Catalog of AOC Services

Attachment 2 - *Catalog of Services Provided by the AOC* is a high-level catalog of all staff services currently provided, organized by division, office, unit, and program and including an

organizational chart and information on current staffing. This catalog includes services that directly benefit the judicial branch as well as internal administrative infrastructure services that also support staff's business operations such as payroll, human resources, information technology, and organizational management. Attachment 2 also contains information on common activities that occur in all offices across the organization (i.e., committee support, administrative support, support for public access to judicial administrative records).

As reflected in Attachment 2, the activities and services provided by the staff to the council are diverse and varied. From administrative services that support the necessary underlying infrastructure for the courts (i.e., fiscal, budgets, human resources, information technology, facilities maintenance, capital construction, etc.) to activities that support the development of rules of court and forms, provision of legal opinions and self-help services, and funding for specific activities and programs that support the operations of the courts, staff services represent a wide breadth of subject areas and topics. It should be noted that because this report was developed to capture very high-level summary descriptions of staff services, it in no way quantifies the workload behind each high-level service description.

The next logical step for this project is to quantify the workload associated with the services outlined in Attachment 2 to determine the staffing level for these services. This may result in several possible outcomes including: (1) whether there are more staff than the services require; or (2) whether there are insufficient staff to perform services adequately. Depending on the outcome, the council may need to make critical decisions in the future, including whether there will be a need to prioritize services to align with staffing levels, whether staffing should be realigned to support critical service areas, and/or whether some services should be eliminated.

As the catalog of services contained in Attachment 2 was being developed, the staff utilized this same information as the basis for creating a new document at a much higher level for a Joint Legislative Audit Committee meeting in March 2014 titled *Services Provided by the AOC*. This new *Services Provided by the AOC* document includes high-level descriptions of the information presented in Attachment 2 and is organized by service area identifying customers for these services. Subsequently, additional detail was developed for the services contained in this document to specify whether each service is mandatory, required, or discretionary, with reference to the respective mandates or requirements. Attachment 3, *Mandates and Directives for Services Provided by the AOC* is included as part of this report to provide additional information about the statutory mandates, rules of court, or other directives that form the basis for staff services.²

² At the request of the California State Auditor's office (CSA), the *Report on Services Provided by Staff to the Judicial Council* cover report, Attachment 3, and the related audio and captured live captions of the presentation at the June 27, 2014, Judicial Council meeting were redacted on July 7, 2014, to remove references to the CSA audit of the Administrative Office of the Courts

Policy and Cost Implications

At this point in this project, the only cost has been the utilization of staff in compiling and developing the catalog of services. During subsequent phases there may be policy implications as noted above.

Next Steps

As time and resources become available, the next step for this project as noted above is a workload study to determine whether the organization has too many or too few staff for the services catalogued in Attachment 2. As noted above, this may require critical decisions by the council regarding prioritizing staff services, realigning staffing to critical service areas to achieve council priorities, or the elimination of some services.

Relevant Strategic Plan Goals and Operational Plan Objectives

Although all of the programs, projects, and activities of the staff to the council support the goals and objectives of the Judicial Branch's strategic and operational Plans^{3,4}, the staff services review supports the following specific goals and objectives:

Goal III: Modernization of Management and Administration: "Justice will be administered by a highly qualified judicial and executive leadership team in a fair, efficient, and effective manner by using modern management practices that implement and sustain innovative ideas and effective practices."

- Objective 2: "Evaluate and improve management techniques, allocation of funds, internal operations, and services; support the sharing of effective management practices branchwide."

Goal IV: Quality of Justice and Service to the Public: "In order to remain responsive to the varying needs of diverse court users, the judicial branch will work with branch constituencies to better ascertain court user needs and priorities."

- Objective 1: "Foster excellence in public service to ensure that all court users receive satisfactory services and outcomes."

Attachments

1. *AOC Services Aligned with Access 3D*
2. *Catalog of Services Provided by the AOC*
3. *Mandates and Directives for Services Provided by the AOC*

³ Judicial Council of California, *Justice in Focus: The Strategic Plan for California's Judicial Branch 2006–2012* (2006), available at www.courts.ca.gov/5377.htm.

⁴ Judicial Council of California, *The Operational Plan for California's Judicial Branch, 2008–2012* (2008), available at www.courts.ca.gov/5377.htm.

AOC Services Aligned With ACCESS 3D

Access 3D is an initiative implemented by the Chief Justice to provide a framework for the judicial branch in serving customers. Focused on three elements—Equal Access, Physical Access, and Remote Access—Access 3D provides the foundation for all activities in the judicial branch.

As indicated in the following, the Administrative Office of the Courts (AOC) supports the tenets of Access 3D on a daily basis. This document is designed to complement the *Catalog of Services Provided by the AOC Report* that provides high-level information on all of the day-to-day services provided by AOC offices. Please note, the services and activities listed in this document are provided for the reader as *examples* of programs that specifically support the tenets of Access 3D, and are not inclusive of *all* AOC services provided in support of this initiative.

EQUAL ACCESS

LANGUAGE SERVICES

- **Facilitating language access by providing guidance on requirements governing court-provided interpretation, and providing court interpretations and translation services for limited or non-English speakers including interpreters in the courtroom, multilingual signage and forms, and bilingual court staff to assist limited-English-proficient court users at all points of contact with the courts.**
 - *Programs and activities include all language access activities at the Administrative Office of the Courts (AOC):*
 - *Interpreters (recruitment, testing, certifications, cross-assignments, education/training, labor negotiations assistance)*
 - *Forms translations*
 - *Self-help materials in different languages*
 - *Court signage in different languages*
 - *Online Spanish self-help center*
 - *Education for JusticeCorps and other self-help center staff on serving limited-English-speaking litigants*
 - *Remote Video Interpreting for American Sign Language interpreters*
 - *Offices: Court Operations Special Services Office (COSSO), Center for Families, Children & the Courts (CFCC), Human Resources Services Office (HRSO), Legal Services Office (LSO).*

LITIGANT SERVICES

- **Equal access and self-help programs for court users without attorneys.**
 - *Programs and activities include:*
 - *Self-help website (in English and Spanish)*
 - *Informational videos and pamphlets for court users*
 - *Self-help videos on resolving particular case types*
 - *Self-help funding*
 - *Sargent Shriver Civil Counsel Act grants*
 - *Equal Access Fund grants*
 - *Model Self-Help grants*

- *Plain-language Judicial Council forms in fillable and savable formats*
 - *Form-completion activities*
 - *Support to Legal Trust Fund Commission and the Advisory on Providing Access and Fairness (formerly Access and Fairness Advisory Committee)*
 - *Technical assistance and education for judicial officers, court staff, and justice partners*
 - *JusticeCorps*
 - *Family law facilitators offices*
- *Offices: CFCC, COSSO, Information Technology Services Office (ITSO), LSO*
- **Funding for court-appointed counsel as required by statute.**
 - *Programs and activities include:*
 - *Funding for dependency counsel to Dependency Representation, Administration, Funding, and Training (DRAFT) program courts and non-DRAFT courts.*
 - *Education to ensure quality representation from court-appointed dependency counsel in DRAFT and non-DRAFT courts*
 - *Court of Appeal Court-Appointed Counsel program*
 - *Offices: CFCC, COSSO, ITSO, LSO*

COMMUNITY PROGRAMS AND COLLABORATION

- **Collaborating with, developing, and maintaining effective relationships with justice partners, state agencies, other branches of government, and our communities to enhance branch services that provide all court users with access to justice.**
 - *Programs and activities include:*
 - *All realignment activities with California Department of Corrections and Rehabilitation and local justice system partners and community supervision (California Community Corrections Performance Incentives Act, Parolee Reentry Court Pilot Program, California Risk Assessment Pilot Project, pretrial programs)*
 - *Support to collaborative courts that focus on specific court users (mentally ill, veterans, drug users, elders, homeless)*
 - *Victims' services*
 - *Blue Ribbon Commission on Children in Foster Care, Court Appointed Special Advocate (CASA) Program, and the Child Welfare Council focused on outcomes for children including emerging issues such as child homelessness and poverty, children of incarcerated parents, and human trafficking*
 - *Collaborations with the state Health and Human Services Agency and the philanthropic community through the State Interagency Team and the Co-Investment Partnership*
 - *Local systems partnerships with state associations of county mental health directors, police and probation chiefs, defense and prosecuting attorneys, and county alcohol and drug treatment providers to address behavioral health issues in all case types*
 - *Violence Against Women Education Project for domestic violence issues*
 - *The Equal Access Program focusing on legal services for low-income persons*
 - *The Tribal Court-State Court Forum focused on issues relating to Native Americans*
 - *The Chief Justice's initiatives focused on educating California's children about the judicial branch and on reducing truancy*
 - *Collaboration with the National Center for State Courts-sponsored California Disposition Reporting Improvement Project (CA-DRIP) pilot to improve disposition reporting to the State of California Department of Justice*

- *Offices: CFCC, Criminal Justice Court Services Office (CJCSO), COSSO, ITSO, LSO*

COURT SYSTEMS SUPPORT

- **Developing, implementing, supporting, and sharing information on efficient and effective branch programs and services.**

- *Programs and activities include broad subject matter and technical expertise and services provided in all AOC offices to the branch, Supreme Court, Courts of Appeal, and trial courts to support day-to-day activities and to ensure that courts can run efficiently and effectively in both Operations and Administration service areas.*

Operations

- *Programs for which the AOC distributes funding (e.g., AB 1058, self-help, Access to Visitation grants, re-entry court grants, DRAFT, CASA, collaborative courts)*
- *Litigation management; legal advice; and rules, forms, and jury instructions developed for the council*
- *Research conducted to support and advocate for additional judicial resources*
- *Judicial Review and Technical Assistance resource guides, and courtesy reviews of files*
- *Psychotropic medication consultation program for courts*
- *Evaluation of best practices*
- *Office of Security services*
- *Business process reengineering*
- *Additional educational offerings in juvenile law to judicial officers, court-appointed counsel, and court partners including the Beyond the Bench multidisciplinary conference*
- *Multidisciplinary mandated education and technical assistance programs in child custody mediation, child support, and access to visitation*
- *Numerous judicial and staff educational offerings and materials developed by the Center for Judiciary Education and Research (CJER)*
- *Websites providing legal information for attorneys, court professionals, and court users (CalDOG, familieschange.ca.gov)*
- *Assigned Judges Program*
- *Judicial Branch Statistical Information System*
- *Resource Assessment Study (RAS)*
- *Jury improvement activities (including the model jury summons, juror orientation video, jury instructions, and other materials)*
- *Technical assistance to courts in creating management reports and measuring outcome from local case management systems in family and juvenile law*
- *Civil case coordination*
- *Identifying and disseminating effective practices in high-workload case types such as mental health cases*

Administration

- *Activities that support the Court Executives Advisory Committee and the Trial Court Presiding Judges Advisory Committee*
- *Data collection and dissemination*
- *Judicial payroll and benefits administration*
- *Workers' compensation administration*
- *Various human resources services through labor and employee relations assistance*

- Assistance, upon request, with cost-benefit analysis and funding for collaborative courts
- Liaison and support from the Office of Appellate Court Services (OACS)
- Grants assistance
- ITSO support for the Appellate Court Case Management System, Interim Case Management System (ICMS), California Courts Protective Order Registry (CCPOR), and Computer Aided Facility Management
- Offices: CFCC, CJCSO, CJER, COSSO, Fiscal Services Office (FSO), HRSO, Internal Audit Services (IAS), ITSO, LSO, Special Projects Office (SPO), Trial Court Administrative Services (TCAS), Trial Court Liaison Office (TCLO)

DIVERSITY

- **Providing services to the public and training to judicial officers and court staff that reflect the demands and needs of a diverse California, and enhance trust and confidence in the courts.**
 - Programs and activities include:
 - Activities of the Advisory Committee on Providing Access and Fairness (formerly Access and Fairness Advisory Committee)
 - Language access activities and programs mentioned under “Language Services” in the Equal Access section above
 - Assistance with the council’s statutory report on judicial officer demographics
 - Assistance to courts in completing their Equal Employment Opportunity Commission reports
 - Developing plans for meeting specific diversity goals for each court
 - Education for court staff, judicial officers, and court-appointed counsel on cultural competency addressing disproportional-type issues in juvenile and criminal courts and responding to California’s diverse population
 - Offices: CFCC, CJER, COSSO, HRSO, LSO
- **Appointing diverse members to the Judicial Council and its advisory committees and task forces to better represent the public.**
 - Programs and activities include:
 - AOC support to the Chief Justice in appointing members to the council and its advisory committees
 - Offices: Judicial Council Support Services (JCSS)

JUDICIAL BRANCH GOVERNANCE

- **Maintaining and utilizing an inclusive structure for branch policy decision-making and authority through the Judicial Council and its advisory groups and committees.**
 - Programs and activities include:
 - Direct support provided to the council to fulfill its constitutional responsibilities with transparency and public accountability
 - Audit reports provided to the council and its Advisory Committee on Financial Accountability and Efficiency for the Judicial Branch
 - Activities/programs that relate to council advisory groups and committees
 - The development of new laws, rules, forms, and jury instructions for consistent and equal access across the branch

- *Offices: CFCC, CJCSO, CJER, COSSO, FSO, HRSO, ITSO, Judicial Branch Capital Program Office (JBCPO), JCSS, LSO, Office of Communications (OC), Office of Governmental Affairs (OGA), Office of Real Estate and Facilities Management (OREFM), SPO, TCAS, TCLO*
- **Collaborating and advocating for adequate branch funding and important branch initiatives integral to providing access to justice.**
 - *Programs and activities include:*
 - *Budget monitoring and reporting*
 - *Supporting the council and Trial Court Budget Advisory Committee*
 - *Collaborating with the Office of Court Research (OCR) and CFCC to staff the Workload Assessment Advisory Committee (formerly SB 56 Working Group) and Workload-Based Allocation Funding Methodology/RAS activities*
 - *General legislative advocacy*
 - *Legislative proposal development*
 - *Offices: CJCSO, COSSO, FSO, LSO, OC, OGA, TCAS, TCLO*

TRANSPARENCY AND ACCOUNTABILITY

- **Demonstrating transparency and accountability through ongoing monitoring and reporting on the use and allocation of public funds.**
 - *Programs and activities include:*
 - *Budget monitoring, administration, and reporting*
 - *Various fund monitoring activities*
 - *TCAS fiscal/HR Phoenix systems*
 - *Internal audit services*
 - *Mandated reports provided to the Legislature by OCR*
 - *Staff headcount reporting*
 - *All FSO activities (Accounts Payable, General Ledger, Business Services unit contracting/procurement activities, Treasury Services)*
 - *Offices: COSSO, FSO, HRSO, IAS, JBCPO, OGA, TCAS*

PHYSICAL ACCESS

OPEN COURTS

- **Ensuring that courthouses throughout California are open to the public with service counters and operating hours convenient for court customers and that information about the courts is easily accessible for court users.**
 - *Programs and activities include:*
 - *Web services activities of ITSO, including the creation of a template for court use in developing their own court websites*
 - *ITSO services in support of the California Courts website (www.courts.ca.gov) to provide links to the various court websites as well as information about the court system as a whole*
 - *LSO services that support the process for publishing notifications about reduced court hours*
 - *Language Access services providing court information in languages other than English*
 - *Self-help website information that assists litigants in finding the appropriate court*

and court services

- *Educational materials such as delinquency, dependency, and child custody orientation videos for court users distributed through websites and AOC's YouTube posting*

- *Offices: CFCC, COSSO, ITSO, LSO*

SAFE, SECURE, WELL-MAINTAINED, COST-EFFECTIVE, AND ACCESSIBLE COURTHOUSES

- **Providing safe and accessible courthouses that are well-maintained as well as cost-effectively and sustainably designed.**

- *Programs and activities include:*

- *Activities involved with facilities maintenance, real estate, and capital construction*
- *Security expertise provided by the Office of Security*
- *Provision of security equipment*
- *Subject matter expertise*
- *Education/technical assistance support in serving court customers with disabilities and elderly persons, and children's waiting rooms*

- *Offices: CFCC, CJER, COSSO, ITSO, JBCPO, LSO, OREFM*

REMOTE ACCESS

E-COURT SERVICES

- **Developing branch websites for courts and judicial branch entities that are accessible by all users and provide current and relevant court information.**

- *Programs and activities include:*

- *The activities and web services templates of ITSO*
- *The self-help website*
- *The maintenance of and information contained in the California Courts website (www.courts.ca.gov) by offices across the AOC*

- *Offices: CFCC, CJCSO, CJER, COSSO, FSO, HRSSO, IAS, ITSO, JBCPO, JCSS, LSO, Office of Administrative Services (OAS), OC, OGA, OREFM, SPO, TCAS, TCLO*

- **Developing and supporting appropriate technology options that allow customers to conduct business remotely through video court appearances, telephonic appearances, electronic filing, standard-based interfaces for justice system partners and other service providers, and e-commerce.**

- *Programs and activities include:*

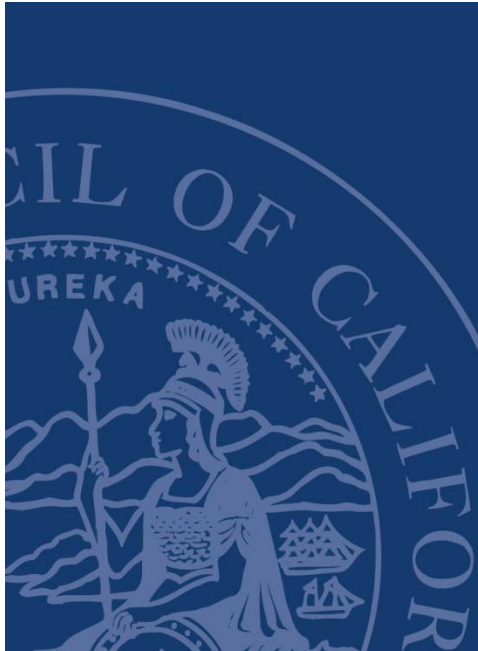
- *Programs provided by ITSO as it relates to technology solutions for remote access*
- *Pilot projects that involve remote interpreting or video-traffic arraignments*
- *Credit card programs through Treasury Services*
- *Interactive forms-completion programs and programs to assist courts in completing orders after hearing in domestic violence restraining order matters and in uploading them automatically to the CCPOR*
- *Appellate Court E-filing pilot and appellate case information website*
- *The use of video appearances in certain criminal court proceedings*
- *The development of rules, statutes, forms, master agreements, and other legal infrastructure that allow the provision of e-court services*

- *Offices: CFCC, CJCSO, COSSO, FSO, ITSO, JBCPO, LSO, OAS*

- **Developing and supporting technology solutions to provide access to judicial branch information and Judicial Council proceedings.**
 - *Programs and activities include:*
 - *AOC technological solutions and online publishing capability, through the California Courts website, to provide the public and California’s statewide court system with a variety of information services and resources regarding branch administration, court operations, and the Judicial Council’s policymaking process.*
 - *Offices: CJER, ITSO, JCSS, OC*

E-TECHNICAL INFRASTRUCTURE, SUPPORT, AND SECURITY

- **Ensuring that the branch’s court case management systems and technology are operating with a current technology infrastructure that will provide information security, stability, and functionality to allow data and information sharing across justice agencies and the branch.**
 - *Programs and activities include:*
 - *Addressing the activities of ITSO in its support to the numerous case management systems (CCMS V2 and V3, ICMS, Sustain)*
 - *Activities that provide sharing of data between courts and justice partners (CCPOR, CLETS, Appellate E-filing, E-Citations, federal Statewide Automated Child Welfare Information System-funded child welfare systems, etc.)*
 - *Technology infrastructure functionality that allows for Department of Child Support Services (DCSS) to access its statewide case management system (the CSE system supports the 1.2 million cases served by DCSS) in the child support and family law courtrooms in order to provide the court and litigants with real-time information during Title IV-D child support hearings*
 - *Technology infrastructure functionality and information security that allows the child support commissioners to access DCSS’s Internal Child Support Guideline Calculator to calculate child support orders and input that information directly into the DCSS case management system as required by federal regulation*
 - *Support to the California Tyler User Group, whose purpose is to share and discuss collaborative efforts among California courts implementing Tyler’s Odyssey case management system*
 - *Payroll accounting assistance for courts transitioning onto the Automated Data Processing payroll solution*
 - *Offices: CFCC, HRSO, ITSO, TCAS*
- **Maintaining and securing the underlying networks that support the functionality and confidentiality of case management systems, e-court services, and other branch technology.**
 - *Programs and activities include:*
 - *Services of ITSO in support of California Courts Technology Center*
 - *Data integration program/Integrated Services Backbone*
 - *Technical infrastructure services*
 - *Telecommunications LAN/WAN Technology Refresh and Equipment Trade-In*
 - *Managed network security systems*
 - *Offices: ITSO*



Catalog of Services Provided by the Administrative Office of the Courts

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PART I

CORE ACTIVITIES ACROSS DIVISIONS

There are common, core activities that occur in all offices across the organization relating to committee support, administrative support, and Public Access to Judicial Administrative Records (PAJAR) support.

Committee Support

Support provided by Administrative Office of the Courts (AOC) staff for approximately 34 Judicial Council advisory groups involves tasks and activities ranging from providing subject matter expertise and legal support to basic administrative support to the council’s internal committees, advisory groups, and task forces as indicated in the table below).

Table 1
Internal Committees
Executive and Planning Committee
Judicial Council Technology Committee
Litigation Management Committee
Policy Coordination and Liaison Committee
Rules and Projects Committee
Advisory Committee, and Task Forces
Administrative Presiding Justices Advisory Committee
Advisory Committee on Financial Accountability and Efficiency for the Judicial Branch
Advisory Committee on Providing Access and Fairness
Appellate Advisory Committee
California Blue Ribbon Commission on Children in Foster Care
Center for Judiciary Education and Research Governing Committee
Civil and Small Claims Advisory Committee
Civil Jury Instructions Advisory Committee
Collaborative Justice Courts Advisory Committee
Court Executives Advisory Committee
Court Facilities Advisory Committee
Court Interpreters Advisory Panel
Court-Ordered Debt Task Force
Court Security Advisory Committee
Court Technology Advisory Committee
Criminal Jury Instructions Advisory Committee
Criminal Law Advisory Committee
Family and Juvenile Law Advisory Committee
Mental Health Issues Implementation Task Force
Probate and Mental Health Advisory Committee
Sargent Shriver Civil Counsel Act Implementation Committee

Table 1

Task Force on Trial Court Fiscal Accountability
Traffic Advisory Committee
Trial Court Budget Advisory Committee
Trial Court Facility Modification Advisory Committee
Trial Court Presiding Judges Advisory Committee
Tribal Court-State Court Forum
Workload Assessment Advisory Committee

Core committee services are as follows:

Subject Matter Expertise and Legal Support – AOC staff provide vital subject matter expertise and legal support to aid committees in carrying out their charge. This includes:

- Assistance to the Committee Chair:
 - Developing an annual agenda consistent with the committee’s charge.
 - Developing content for committee meetings.
 - Presenting committee recommendations to the council.
- Implementation of Projects on Committee’s Annual Agenda
 - Legal Policy Analysis:
 - Providing legal and policy analysis and drafting of rules of court, judicial administration standards, forms, legislation, etc.
 - Analyzing and drafting briefs on policies and other areas of interest to committees.
 - Conducting research and providing options to the committee.
 - Presenting issues and concerns and assisting the committee in the development of recommended solutions.
 - Drafting surveys/questionnaires, compiling responses, and analyzing results.
 - Report Development:
 - Preparing memoranda, reports, and proposals for committee consideration.
 - Preparing council reports and presentations setting forth committee recommendations for council consideration.
 - Technical Assistance
 - Providing subject matter expertise.
 - Reviewing council pilot projects and other programs.

Administrative Support – Committee meetings include at least one in-person meeting and multiple conference calls throughout the year. AOC staff provide administrative the coordination, organization, and support necessary for productive and effective meetings. This includes:

- Meeting planning and coordination:
 - Scheduling in-person or conference call meeting dates.
 - Coordinating meeting rooms, catering, meeting room setup, audiovisual support, staff support, security, and local transportation.

- Coordinating speakers and presentations.
- Assisting the committee chair with developing and distributing materials including the agenda and meeting binders.
- Researching, recommending, negotiating, and preparing contracts for various services.
- Coordinating business travel arrangements and reservations.
- General committee support:
 - Staffing meetings and conference calls.
 - Managing and monitoring committee resources.
 - Preparing and distributing meeting minutes.
 - Preparing and processing travel claims and monitoring bills for payments.
 - Maintaining committee website information (e.g., posting of agendas, minutes, committee rosters).
 - Maintaining committee rosters.
 - Coordinating the committee's nomination process.

Centralized Administrative Support

The AOC organizational structure comprises 19 offices. A centralized administrative infrastructure provides necessary human resources, payroll, information technology, purchasing, and budgeting services to all offices. In addition, common administrative operations for offices include:

Office-Specific Administrative Operations

- Developing and managing the annual budget for the office and its individual units.
- Reconciling all invoices and payments and routing for appropriate approvals before providing to Accounting.
- Reviewing all purchase requests and contracts and ensuring accurate coding of procurement items, contract transmittal forms, and contracts.
- Reviewing monthly accounting ledgers and notifying the Fiscal Services Office of any errors.
- Assisting in development and maintenance of operational processes, procedures, and communications.
- Providing analytical support on special projects.

Office-Specific Managerial Activities

- Planning, directing, and overseeing operations and managing the work of staff.
- Developing and implementing work systems, procedures, and policies that enable the optimum performance of the staff.
- Coordinating office activities with other AOC offices.
- Responding to requests for information from the Judicial Council, the Executive Office, and others.
- Reorganizing the work and activities of the office in response to council directives and recommendations.
- Developing project plans for services that address the needs of the branch, the trial and appellate courts, and the AOC.
- Ensuring that the overall work of the office is managed in an effective and cost-efficient manner.

Public Access to Judicial Administrative Records (PAJAR) Support

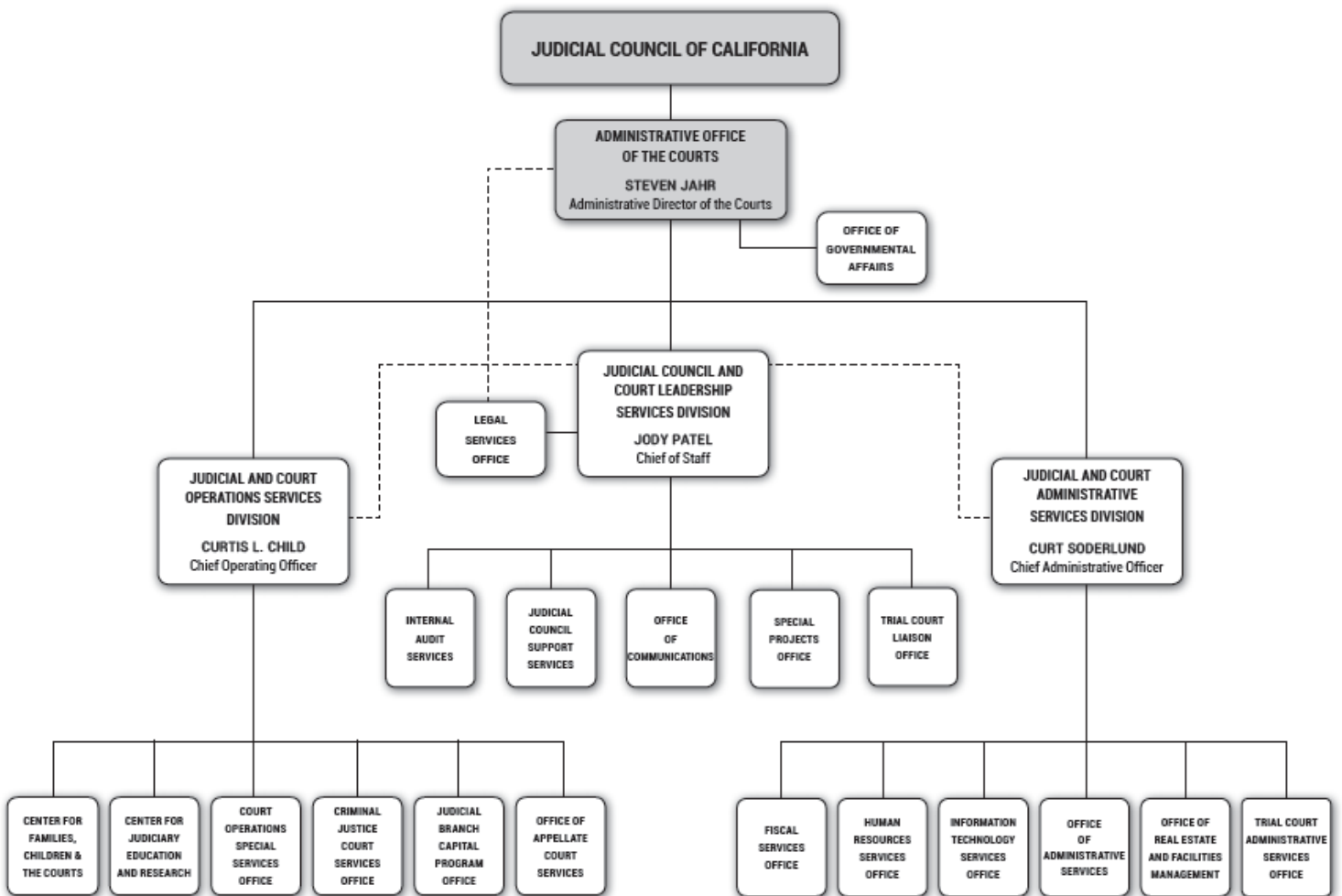
Effective January 1, 2010, California Rule of Court Rule 10.500 provides public access to nondeliberative and nonadjudicative court records, and budget and management information from the AOC. Requests for information received by the AOC in response to rule of court 10.500 are designated as PAJAR requests from the media, public and private organizations, and members of the judicial branch and members of the public.

To ensure that the AOC is timely and responsive in dealing with such requests, the Court Operations Special Services Office is responsible for coordinating responses with the appropriate AOC office(s) and subject matter experts.

PART II

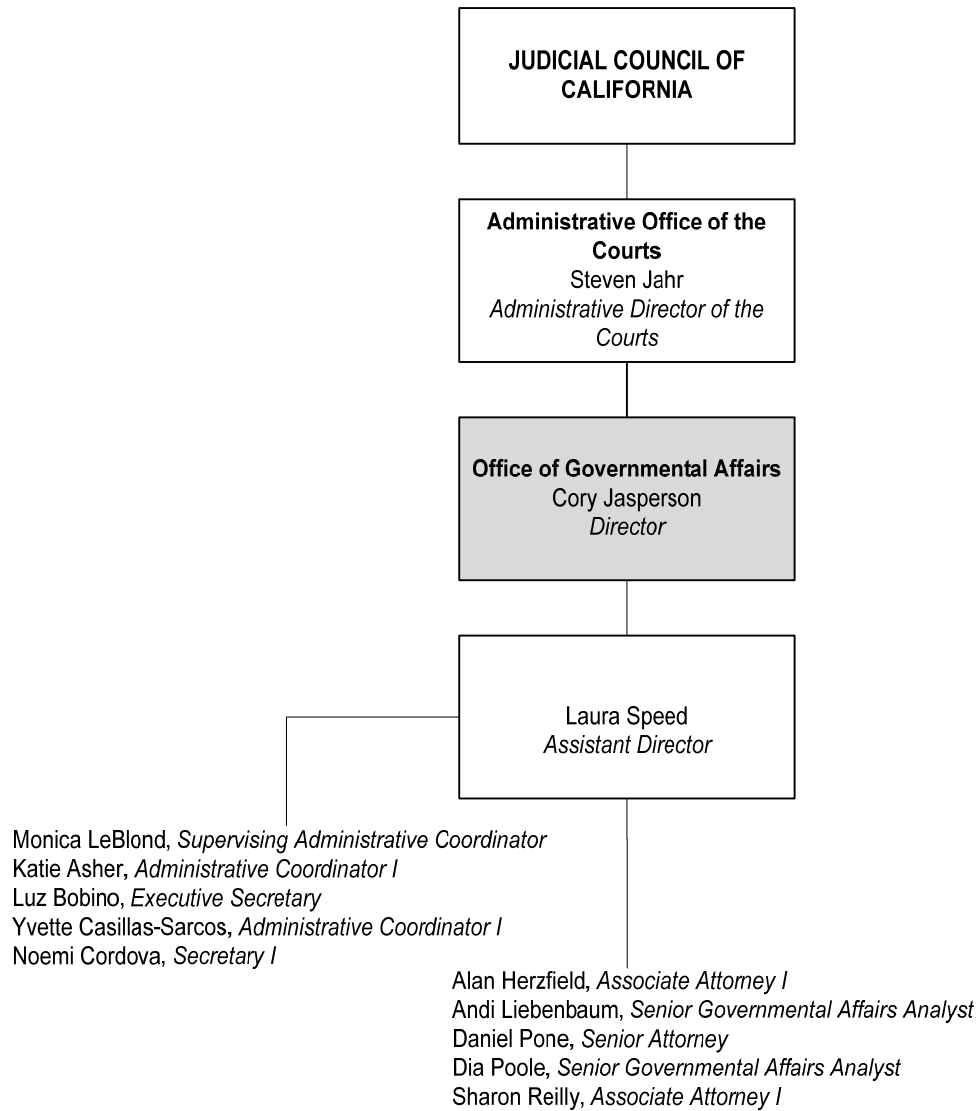
PROGRAMS, PROJECTS, AND ACTIVITIES

Administrative Office of the Courts



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Office of Governmental Affairs



OFFICE NAME: OFFICE OF GOVERNMENTAL AFFAIRS

Programs, Projects, and Activities

***Total Workforce: 12
12 filled authorized positions**

Provides logistical, administrative, analytical, and technical staff support to the Judicial Council's Policy Coordination and Liaison Committee (PCLC).

Develops Judicial Council-Sponsored Legislative Proposals

- Develops legislative proposals working with advisory committees and interested stakeholders.
- Develops and presents reports to PCLC recommending council sponsorship of legislative proposals.
- Works with legislators and legislative staff to advocate on behalf of the Judicial Council, including finding an author for sponsored proposals and coordinating with other interested stakeholder groups.
- Develops recommendations to PCLC and to the Judicial Council regarding annual Judicial Council legislative priorities.

Legislative Advocacy

- Develops and monitors legislation in several subject matter areas including: access to justice, civil law, civil procedure, small claims, court facilities, court interpreters, court reporters, court security, criminal law and procedure, domestic violence, family law and juvenile dependency, juvenile delinquency, probate and mental health, traffic, judges' compensation, judicial elections, and labor and employee issues.
- Provides technical assistance to legislators, staff, and justice partners on court-related legislative issues.
- Oversees the council's advocacy on legislative matters and represents the council in relations with other entities such as the Legislature, the Governor's office, the State Bar, specialty bar organizations, and other court-related professional organizations.

Serves as liaison and point of contact between executive, legislative, and judicial branches and judicial branch stakeholders.

- Educates the Governor and members of the Legislature and their staff about the judicial branch and issues of interest to the branch.
- Conducts meet and greets/orientations regarding the judicial branch for new legislators and their staff at the beginning of each new legislative session.

Provides legislative support (includes briefings on pending legislation and the state budget, and advice and recommendations on legislation proposed by the committee) to council advisory committees

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The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

(Criminal Law, Traffic, Family and Juvenile Law, Access and Fairness, Appellate, Civil and Small Claims, Collaborative Justice, and Probate and Mental Health as well as the Joint Legislation Working Group of Trial Court Presiding Judges Advisory Committee and Court Executives Advisory Committee and the Court Interpreter Advisory Panel).

Provides information and assists advisory committees in making recommendations to the PCLC for council positions on pending legislation or for council-sponsored legislation.

Prepares and submits detailed fiscal impact statements for pending legislation that impacts judicial branch operations.

Performs budget-related tasks that include but are not limited to:

- Advises and makes recommendations on the judicial branch proposal for the annual budget and prepares budget materials for branch leadership, legislators, legislative staff, and the executive branch.
 - Works with the Department of Finance and the Governor's office with the goal of securing adequate funding for the branch.
 - Makes presentations to courts, advisory committees, Bench Bar Coalition, legislators, executive branch, justice partners, etc. on branch budget concerns/issues.
 - Supports appropriate advisory committees, task forces, working groups, and Judicial Council internal committees in the drafting and pursuit of budget trailer bill language.
 - Coordinates with judicial branch stakeholders on budget advocacy and meets with groups to discuss the judicial branch budget such as the Open Courts Coalition, State Bar, etc.
 - Supports the activities involved with negotiating budget solutions with legislative and executive branch staff and judicial branch stakeholders.
-

Tracks statutory mandates on Judicial Council and Administrative Office of the Courts to adopt rules and forms, and to submit reports to the Legislature.

Acts as a liaison to provide advice and information on facilities issues and court construction and maintenance, while responding to site questions from legislators, meeting with local governments, and addressing funding issues.

Acts as a liaison and provides advice and information on branch technology needs.

Serves as primary staff to Trial Court Efficiencies Working Group and Ad Hoc Advisory Committee to identify court operations efficiencies, cost recovery or new revenue ideas, and shepherd efficiency bills through the legislative/budget process while serving as conduit of information between government entities and branch representatives.

Coordinates and oversees the selection and placement of fellows through the Judicial Administration Fellowship Program with California State University Sacramento.

Participates in the implementation of key pieces of legislation including conservatorships, SB 1407 and the many fine and fee changes it implemented, AB 2499 re: traffic violator school, criminal justice realignment, and court security funding realignment.

Co-sponsors, with the California Judges Association (CJA), the Day on the Bench Program where the legislators spend a day in court with a judge in their districts.

Coordinates all of the activities necessary for the annual liaison meetings between Chief Justice and multiple justice partners (including but not limited to, the State Bar, the California Attorney General, the California District Attorneys Association, the criminal defense bar, Consumer Attorneys of California, the California Defense Counsel, the California State Sheriffs Association, and the California State Association of Counties).

Coordinates the Chief Justice's annual State of the Judiciary Address and Networking Forum.

Coordinates all of the activities involved with the development and publishing of online and print editions of the annual *Summary of Court-related Legislation* in collaboration with the California Court Association Legislation Committee.

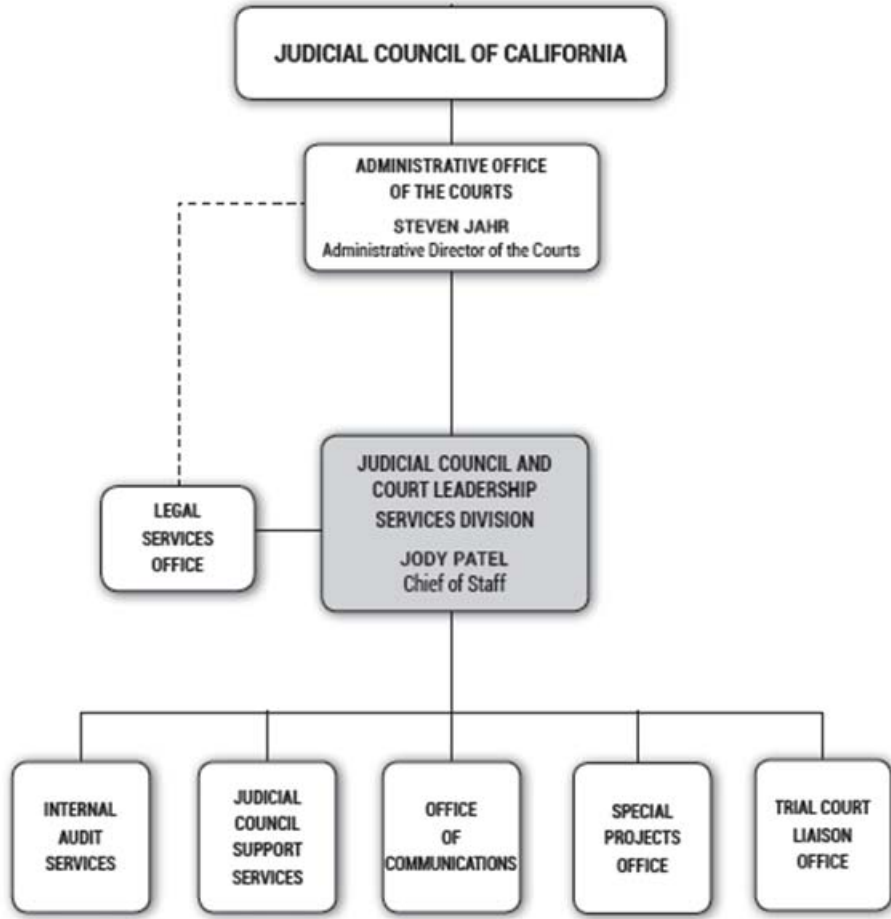
Provides logistical, administrative, analytical, and technical staff support to the Bench Bar Coalition.

Provides legislative updates at numerous meetings including: regional meetings, statewide meetings of Presiding Judges/court executive officers, Labor Academies and Labor Forums, meetings of the Administrative Presiding Justices Advisory Committee, CJA meetings, stakeholder meetings (California Department of Corrections and Rehabilitation, CJA Conference, California Court Association, Inc.) and similar venues.

Coordinates legislative informational and investigatory hearings that impact branch programs and projects.

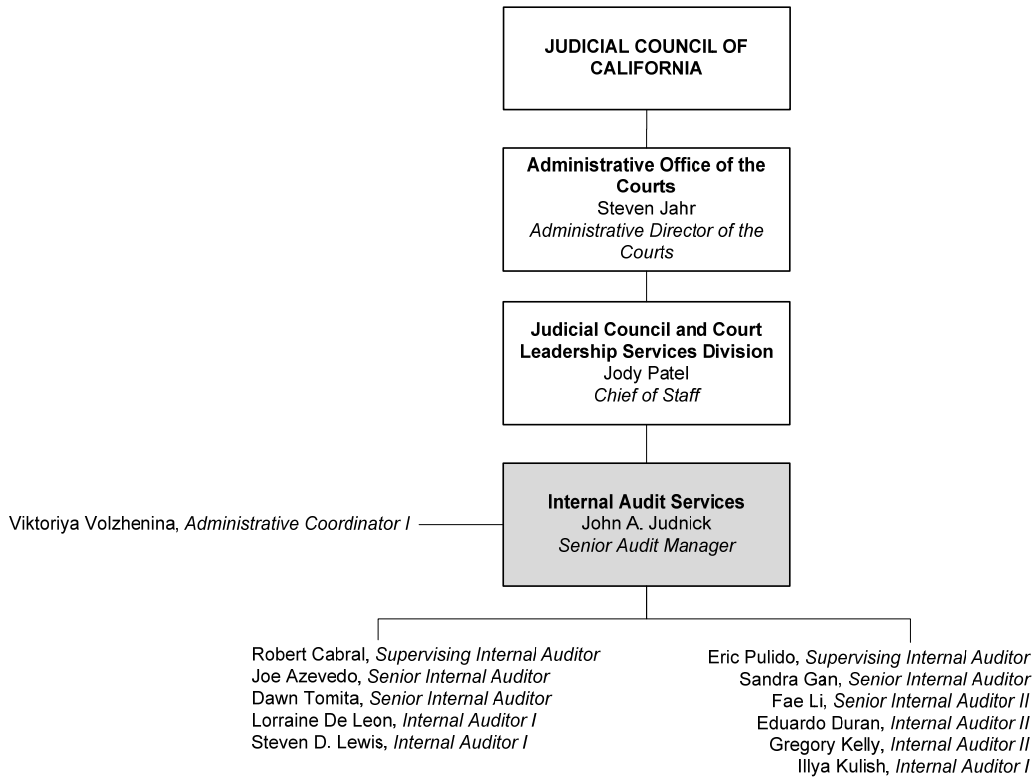
Tracks and advocates federal legislation affecting California courts as particular issues are presented or requests are received for participation from legislators or the National Center for State Courts.

JUDICIAL COUNCIL AND COURT LEADERSHIP SERVICES DIVISION



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Internal Audit Services



Last Updated: 10/10/13

OFFICE NAME: INTERNAL AUDIT SERVICES

Programs, Projects, and Activities

***Total Workforce:
13 filled authorized positions**

Conducts internal audits of the Administrative Office of the Courts (AOC) and other judicial branch entities on a risk-based methodology as part of an overall audit plan for the judicial branch.

Conducts internal audits of the superior courts (operational, financial, compliance, and performance) which include: regular cycle audits, special projects as requested, and other technical areas such as the assessment of domestic violence fines, penalties, and assessments as requested by the legislature on every audit.

Performs internal audits of the Office of Real Estate and Facilities Management and the Judicial Branch Capital Program Office with emphasis on the Facilities Maintenance unit, accounting and internal controls for capital construction projects, model court facility maintenance program, and Courthouse Construction Fund activities and reporting.

Performs special projects and non-audit consultative work as requested for judicial branch entities.

Provides independent technical evaluation, assessment, and analytical assistance utilizing expertise in all financial, operational, and compliance areas of the judicial branch.

Provides project management and consultative assistance for statutorily required compliance audits of financial statements and appropriate use of funds received, and the Judicial Branch Contract Law implementation audits.

Manages and monitors the Whistleblower hotline, and as appropriate, performs investigations based on whistleblower contacts.

Conducts special investigations as necessary or requested.

Provides project management when 'independent oversight' is necessary or requested for systems development projects, including performing or managing Independent Project Oversight and Independent Verification and Validation work; and for non-routine audits of the branch by other entities

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including Bureau of State Audits and State Controller's Office (SCO).

Provides technical consultative assistance regarding revenue distribution training in coordination and consultation with the SCO.

Provides staff support to various judicial branch committees including the Advisory Committee on Financial Accountability and Efficiency for the judicial branch, Judicial Branch Technology Committee, and the Court-Ordered Debt Task Force.

Provides technical advice and assistance for the semi-annual contract reporting to the legislature and the California State Auditor.

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Judicial Council Support Services



OFFICE NAME: JUDICIAL COUNCIL SUPPORT SERVICES

Programs, Projects, and Activities

***Total Workforce:
11.60 filled authorized positions**

Produces, coordinates, and provides logistical, administrative, analytical, and technical staff support for approximately eight and often more Judicial Council meetings each year in coordination with Administrative Office of the Courts (AOC) staff, as well as 20 – 30 Executive and Planning (E&P) meetings each year (most by telephone, but several in person).

Supports the Judicial Council circulating order process for necessary Judicial Council decisions between meetings.

Copyedits reports to the Judicial Council and to the Legislature, California Rules of Court, Judicial Council forms, Judicial Council meeting minutes, proposed jury instructions, high-level correspondence, and complex, citation-heavy documents (e.g., legal opinion memos).

Reviews and formats the raw text stream from a Judicial Council meeting for public website posting.

Catalogs Judicial Council meeting materials (agenda items).

Maintains websites (public, Serranus, AOC Intranet) with current information and resources about: Judicial Council leadership, governance, and decision-making; council membership and solicitation of nominations; council reports and presentations; and the council's advisory committees' activities.

Trains and provides support to AOC staff on working with the Judicial Council and constructing and writing reports for the Judicial Council and internal committees.

Evaluates Judicial Council report formats and guidelines for improvements and maintains and updates the Judicial Council report writing manual.

Supports the Chief Justice and E&P with activities relating to the appointment of Judicial Council members as liaisons to trial courts, AOC divisions, and advisory committees and task forces.

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Coordinates responses to mail requests/inquiries addressed to Judicial Council.

Collaborates with AOC Conference Services staff regarding hotel logistics for Judicial Council members attending Judicial Council meetings.

Prepares and submits proposed dates for each year's Judicial Council meetings to the Chief Justice based on research of calendars of related organizations and upcoming events.

Supports Chief Justice and E&P with the annual cycle of nominations and appointments for Judicial Council vacancies.

Supports the council with its orientation for new Judicial Council members.

Supports the Chief Justice and the internal committee chairs with their appointment of Judicial Council members to internal committees.

Supports Judicial Council members in their compliance with statutes requiring ethics training and filing of Statement of Economic Interest (Form 700).

Updates and revitalizes handbook for new Judicial Council members on an annual basis.

Supports Chief Justice and E&P with activities relating to the annual cycle of nominations and appointment process for advisory committee vacancies.

Supports Chief Justice (and sometimes E&P) with activities relating to the ad hoc cycle of nominations and appointment process for vacancies on executive branch commissions and other non-Judicial Council appointments (e.g. Veterans' Council, Federal-State Judicial Council, etc.).

Supports E&P in its oversight of the approximately 18 assigned advisory committees and task forces, including E&P review of the annual agendas of those advisory groups and annual conversations with the chairs of those groups.

Annually updates handbooks for advisory committee and task force members, and advisory group chairs.

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Facilitates Communications About Committees meetings, a forum/exchange for AOC staff who support committees and task forces to share information about roles and responsibilities of advisory groups to Judicial Council.

Supports the Judicial Council and E&P in its governance review of the Judicial Council Governance Policies, and of the council's practices, as directed by E&P and its chair.

Supports E&P/Rules and Projects Committee/Technology Committee with a long term project to review, evaluate, and improve the governance, structure, and organization of Judicial Council advisory groups.

Designs and typesets significant publications (both for print and online format), including reports to the legislature and other bodies.

Designs and typesets branch and Judicial Council logos, graphics for websites and correspondence, brochures, flowcharts, charts, posters, signage, maps, research reports, and other materials related to presentations (e.g., to the Legislature), displays on the public website and in public areas of the Ronald M. George State Office Complex, and AOC programs (e.g., Labor Academies conducted by HR, Law Day, facilities groundbreaking, etc.).

Provides support to the Supreme Court for oral argument calendar, publications, and other projects.

Maintains and updates *AOC Style Guide* and the style tip sheet for webcontent.

Manages the AOC Judicial Image Library and Locator photo database, including research on licensing, permission, and other photo rights issues.

Prepares printing specifications for bidding by vendors.

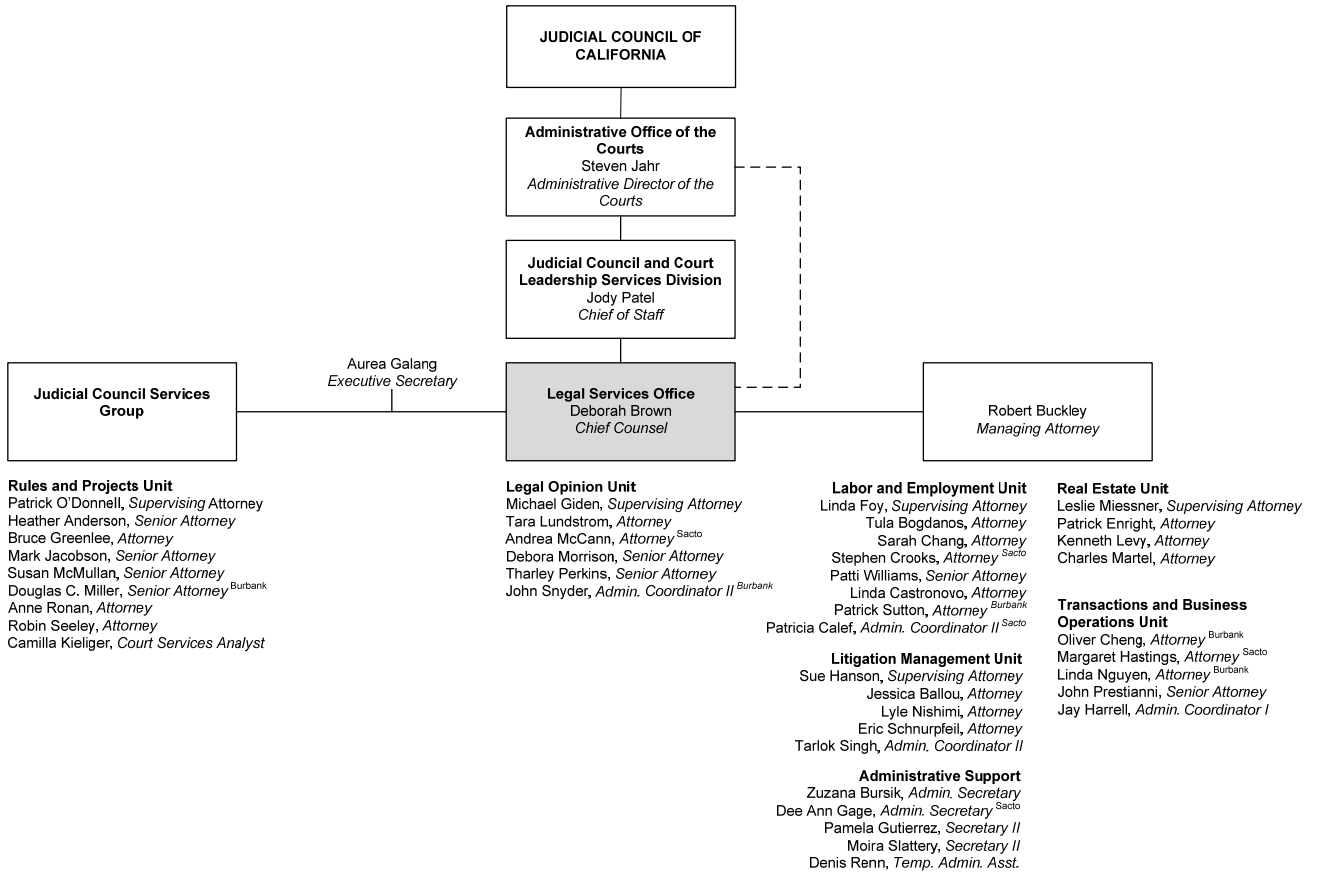
Creates templates for certificates of service, meeting agendas, staff business cards, and other materials; creates tip sheets to enable AOC staff to be self-sufficient in producing these materials.

Serves as agent for service of process for the Judicial Council, its members, and some AOC executives.

Edits comment charts in Judicial Council reports, and edits and typesets resolutions commemorating the retirement of judicial officers and court executive officers.

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Legal Services Office



OFFICE NAME: LEGAL SERVICES OFFICE

Programs, Projects, and Activities

***Total Workforce: 44.30**
43.30 filled authorized positions
1 employment agency temporary workers

UNIT NAME: *Rules and Projects*

Provides legal advice and staff assistance to the Judicial Council, its internal committees, its advisory committees, and other advisory groups, including drafting rules of court, standards of judicial administration, legislation, Judicial Council forms, and jury instructions; preparing reports on proposals for the council; and providing legal research and analysis on matters of significant importance to the judicial branch, the trial and appellate courts, and the public.

Internal Judicial Council Committees

- Executive and Planning Committee (E&P):
Provides legal advice and assistance to E&P with agenda items for council meetings; Judicial Council authority, rules, and procedures; branch wide and court governance issues; and other issues at the request of E&P.
- Rules and Projects Committee (RUPRO):
Provides primary legal and administrative support and assistance for RUPRO, including the review of all proposed rules, forms, standards, and jury instructions and consultation with advisory committees and their staff regarding pending rules, forms, standards, and jury instructions proposals.
- Judicial Council Technology Committee (JCTC):
Provides legal advice and assistance to the JCTC, including rule-making advice, advice on mandatory e-filing, and drafting guidelines for reports to the Judicial Council on remote video pilot projects.
- Policy Coordination and Liaison Committee (PCLC):
Provides legal advice and assistance to PCLC including reviewing and making recommendations on pending legislation, drafting Judicial Council-sponsored legislation, and preparing reports on Judicial-Council sponsored legislation.

Advisory Committees

Provides lead staff, legal counsel, and administrative support to these Judicial Council Advisory Committees and their subcommittees:

- Appellate Advisory Committee

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- Civil and Small Claims Advisory Committee
- Advisory Committee on Civil Jury Instructions
- Advisory Committee on Criminal Jury Instructions
- Probate and Mental Health Advisory Committee

Provides legal counsel and/or assistance to the following Judicial Council Advisory Committees for which the Legal Services Office (LSO) is not lead staff, and working groups, task forces, and joint subcommittees:

- Court Technology Advisory Committee
- Court Executive Advisory Committee (CEAC)
- Trial Court Presiding Judges Advisory Committee
- Court Records Management Working Group (part of CEAC)
- Joint Appellate Technology Subcommittee
- Protective Orders Working Group
- Joint Small Claims Writ Subcommittee
- Joint Summary Judgment Objections Subcommittee

Supreme Court Advisory Committee on the Code of Judicial Ethics

Provides legal assistance and staff support for this committee.

State-Federal Judicial Council

Provides legal assistance and staff support for this body, which is co-chaired by the Chief Justice.

Trial and appellate courts, Judicial Council, and Administrative Office of the Courts (AOC) management

- Provides subject matter expertise and technical assistance to trial and appellate courts, the Judicial Council and its committees, and other AOC divisions by providing legal research/analysis and oral/written/policy advice in these subject areas:
 - Appellate court practice and procedure
 - Alternative dispute resolution (ADR)
 - Civil and small claims practice and procedure
 - Civil case management
 - Civil discovery
 - Civil fees
 - Court savings and efficiencies
 - Court records
 - Complex litigation
 - Judicial administration
 - Electronic filing and service
 - Judicial ethics
 - Jury instructions
 - Law and technology

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

- Probate and mental health
- Remote video proceedings
- Responds to inquiries in areas of expertise from judges, court administrators, legislators and legislative staff, and other AOC offices.
- Plans and conducts educational activities in area of expertise by providing subject matter expertise to the Center for Judiciary Education and Research (CJER) in developing training materials; participating in CJER’s curriculum committees; drafting and reviewing materials for bench guides, bench handbooks, and websites; and planning and making presentations at conferences and training programs.

ADR Programs

Provides legal, technical, and other support for ADR programs in the courts, including assisting in the development of court-connected ADR programs and developing and disseminating ADR educational programs, materials, and resources for judicial branch and public.

Complex Litigation Program

Provides financial, legal, educational, and administrative support for the complex civil litigation programs in six superior courts.

Ethics Program

Acts as lead staff and counsel to the Supreme Court Advisory Committee on the Code of Judicial Ethics and manages the Commission on Judicial Performance insurance program.

Forms Modernization

Maintains and updates all California Rules of Court and Judicial Council forms and converts all Judicial Council forms into the Adobe LiveCycle format to address elimination of current forms program.

UNIT NAME: *Legal Opinion*

Provides legal advice to the trial and appellate courts, Judicial Council, and AOC management on broad spectrum of court and judicial branch administration legal issues.

In collaboration with other LSO units and AOC offices, prepares drafts of legislation, rules of court, and judicial branch policies.

In collaboration with other LSO units, provides legal advice and services to advisory groups and in support of Judicial Council-sponsored projects.

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Responds to requests for legal analysis on matters affecting the courts and other entities.

Provides statewide legal guidance and assistance as well as the review and preparation of reports regarding compliance with statutory requirements related to court closures and reduced court hours or services.

Reviews new and amended local court rules filed by superior courts with the Judicial Council to ensure compliance with rules of court; provides trial courts with legal advice about adoption of local rules; and assists the Chief Justice in her role, under rule 10.613(j), with reviewing and authorizing local court rules to take effect on dates other than those provided in Government Code section 68071.

UNIT NAME: *Transactions and Business Operations*

Provides legal and business advice and services to trial courts, appellate courts, Judicial Council, and AOC divisions/offices on wide range of transactional and business issues, including general legal advice on issues related to procurement, risk management, business administration, and operational initiatives.

Provides legal counsel to the courts and AOC for solicitation, contracting, and procurement of goods and services through contract execution, modification, and termination.

Provides advice on requirements for court/county memorandums of understanding (MOU) including the review/interpretation of advance notice safeguards per government code, terms and conditions in court/county MOUs per government code 77212, the review and negotiation of county MOUs per government code 77212, and the resolution of court/county disputes over interpretation and applicability of government code 77212 requirements.

Participates in drafting and providing proposed legislative language affecting business operations of the judicial branch.

Maintains and updates the Judicial Branch Contracting Manual and assists with implementation of Judicial Branch Contract Law.

Provides legal advice on privacy obligations (e.g., protection of personally identifiable information), gift acceptance, and copyright and related intellectual property issues.

Advises courts on structuring lease-finance transactions to comply with the debt limitations under the California Constitution.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Provides transactional assistance to Habeas Corpus Resource Center (HCRC) per AOC/HCRC agreement.

Advises and represents courts and AOC regarding external audits/investigations.

UNIT NAME: *Real Estate*

Provides direct legal support for acquisition, construction, renovation, operation, and maintenance of court facilities.

Provides legal opinions on facilities and real estate-related issues.

Provides legal support for Court Facilities Advisory Committee and Trial Court Facility Modification Advisory Committee.

Provides legal advice on facilities-related issues for appellate court facilities, agreements, and projects.

Provides legal advice and services to AOC divisions/offices to address emerging and ongoing facilities-related issues.

UNIT NAME: *Litigation Management (excluding employment litigation)*

- Litigation Management Program
 - Selects and directs outside counsel to defend courts, judicial officers, court employees, Judicial Council members, and AOC in over 200 lawsuits annually (# does not include employment matters).
 - Investigates and responds to claims against courts, judicial officers, court employees, Judicial Council members, and AOC.
 - Advises courts and AOC about ways to minimize risk of litigation.
 - Provides assistance with responses to subpoenas and disqualification statements upon request.
 - Prepares annual reports on claims and litigation for the Litigation Management Committee, courts, and AOC.
- Reports to Judicial Council on significant settlement and judgments (if any) per Judicial Council policy.
- Manages affirmative litigation on behalf of AOC and Judicial Council.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

- Provides staff support to the Judicial Council Litigation Management Committee, which includes consultation and settlement recommendations regarding significant lawsuits against courts, judicial officers, court employees, Judicial Council, AOC, issues of statewide importance, cases going to trial, and program development.

UNIT NAME: *Labor and Employment*

- Employment Litigation Management
 - Selects and directs outside counsel to defend courts, judicial officers, court employees, Judicial Council members, AOC, and AOC employees in pre-litigation (e.g., administrative complaints) and litigation matters involving employment issues.
 - Investigates and responds to claims involving labor and employment issues against courts, judicial officers, court employees, Judicial Council members, AOC, and AOC employees.
 - Selects and directs outside counsel to defend certain administrative proceedings involving trial court employees (e.g., Unemployment Insurance Appeals Board hearings, Department of Labor proceedings) as requested.
 - Provides information for inclusion in annual report to the Litigation Management Committee, courts, and AOC regarding program activities and expenditures related to employment claims and lawsuits.
 - Provides assistance with responses to subpoenas for personnel records upon request.
- Manages affirmative litigation on behalf of courts and AOC, including complaints and applications for workplace violence prevention temporary restraining orders on behalf of judicial officers and court employees.
- Provides staff support and assistance to the Litigation Management Committee by advising the committee regarding status of significant lawsuits against courts, judicial officers, court employees, Judicial Council, and AOC involving labor and employment matters and consulting with and providing settlement recommendations to the committee regarding such lawsuits.

Trial Court Employment Protection and Governance Act:

- Consults with and advises trial courts regarding labor relations matters, including: MOUs, labor relations rules, progressive discipline, terminations, layoffs, review of disciplinary decisions, and drafting and review of personnel policies/procedures upon request.
- Provides ongoing support to HRSO in addressing labor relations issues for trial courts.
- Provides defense counsel for courts in labor arbitrations and complaint matters before the Public Employment Relations Board upon request.
- Advises courts and AOC divisions regarding ways to minimize risk of labor and employment litigation in connection with hiring, discipline, management of employee leave, disability-based requests for accommodation, and wage and hour issues.
- Assists in and manages investigations of internal complaints of discrimination, harassment, retaliation, etc.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Consultative support for human resources (HR) activities:

- Provides legal advice in addressing personnel issues and guidance to courts and the AOC regarding evolving laws affecting personnel issues. Drafts personnel policies to promote compliance with applicable law and to avoid litigation.
- Consults with and advises courts and AOC divisions regarding workers' compensation issues and claims.
- Consults with and advises HCRC regarding employment issues and claims pursuant to AOC/HCRC agreement.
- Provides courts with annual summary of legal developments affecting HR management.
- Assists the Human Resources Services Office (HRSO) with annual review of conflict of interest requirements per Political Reform Act.

Serves as approved provider in developing and delivering educational programs to justices, judges, subordinate judicial officers, and court and AOC personnel on labor and employment issues (e.g., sexual harassment prevention, prevailing wage, employee leaves of absence, fundamentals of labor law).

PROGRAM NAME: *LSO General*

Reviews petitions for coordination of complex civil cases and prepares memoranda and draft orders for the Chief Justice relating to coordination petitions.

Assists courts with evaluating the need for and preparing requests for emergency orders under statute (trial courts) and rule (appellate courts), drafts proposed emergency orders, and assists the Chief Justice in evaluating and issuing emergency orders requested by courts.

Consults with and advises the Administrative Director, Division Chiefs, and Office Directors on legal issues affecting AOC programs and operations and on legal issues affecting planning, development, and review of AOC programs and policies.

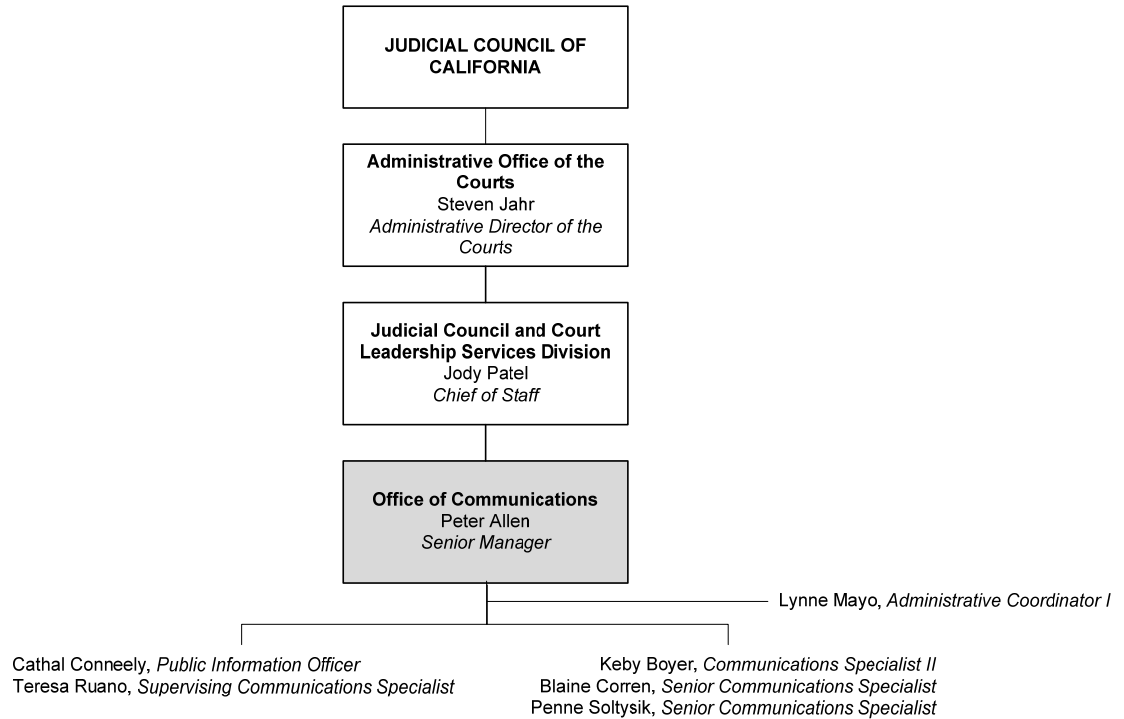
Provides legal assistance on branch legislative efforts to achieve efficiencies and raise revenues.

Works regularly with the Office of Governmental Affairs (OGA) and OGA's attorneys assigned to assist the Judicial Council with: responding to specific pending legislation affecting the courts, achieving the Judicial Council's legislative agenda, drafting Judicial Council-sponsored legislation and preparing reports to the Judicial Council, and implementing successful council-sponsored legislation.

Responds to inquiries about California court administration, practice, and procedure from the Legislature; justice partners; the National Center for State Courts and other national and state organizations; and the public.

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Office of Communications



OFFICE NAME: OFFICE OF COMMUNICATIONS

Programs, Projects, and Activities

***Total Workforce:
7 filled authorized positions**

PROGRAM NAME: *Communications Planning*

Researches, designs, implements, and evaluates communications plans in support of Judicial Council goals and objectives and Administrative Office of the Courts (AOC) priority programs.

Communications Consulting: Consults with the Chief Justice, Judicial Council, Judicial Branch, and AOC Leadership on communications.

Judicial Council Meeting Communications Activities: Coordinates and carries out a full range of communication-related activities for Judicial Council meetings including information dissemination to the branch; news releases to the media; web updates; and audio, video, and photography activities.

Chief Justice's Engagements: Supports all communications-related activities (including remarks and backgrounders) involved with the Chief Justice's calendar of engagements.

NewsLinks: Researches, posts, and distributes daily news and editorial coverage of the state and national judiciaries, legal issues, and justice system partners.

Court News Update (CNU): Develops, distributes, and assesses effectiveness of the weekly e-mail briefing on judicial administration.

Web Content and Development Projects: Consults with the Supreme Court, Judicial Council, and AOC clients on integrated communications for programs, projects, and activities on the web and on the development of web copy and content in partnership with the Information Technology Services Office.

eNewsletters Projects: Consults with offices or programs on the development, content, format, and facilitation of eNewsletters.

MediaNetwork: Administers and promotes listserves to support court staff involved in community outreach and media relations.

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PROGRAM NAME: *Communications Advice*

Advises the Chief Justice, Judicial Council and Court Leadership, and the Administrative Director of the Courts and Executive Office Leadership on communication channels, tools, and best practices for communications to the Judicial Branch.

Media Advice and Training: Provides advice and, as requested, training to branch leadership for dealing with the media. Advises judicial branch leadership on issues-related communications and coverage of projects or initiatives. Advises the courts, as requested, on media relations issues (from high-profile cases to sensitive operational issues) and provides additional support as appropriate.

Communications Training: Serves as moderators/faculty for communications training for the Conference of Court Public Information Officers, the National Center for State Courts' Institute for Court Management, and other AOC training events.

PROGRAM NAME: *Public Information Officer*

Provides a full range of communications services and initiatives in support of the work of the Supreme Court of California and, as required, the work of the California Courts of Appeal, the Commission on Judicial Appointments, and the Committee on Judicial Ethics Opinions.

Communications Advice and Support: Advises the court on communications best practices and opportunities, and supports the court's regular oral argument sessions and special outreach sessions.

Operational Support: Prepares and distributes various Supreme Court calendars and notices and manages the court's website *What's New* and *Recent News* sections.

News Release Activities: Drafts and disseminates news releases on the actions and activities of the supreme court, the Courts of Appeal, and the Commission on Judicial Appointments.

Media Inquiry Activities: Tracks and responds to inquiries from the media regarding the actions and activities of the Supreme Court, Courts of Appeal (district or division), Commission on Judicial Appointments or Committee on Judicial Ethics Opinions.

PROGRAM NAME: *Media Relations*

Builds relationships with the media by providing accurate, timely information and facilitated access to branch leadership and/or subject matter experts.

News Release Activities: Develops and disseminates news releases on judicial branch and AOC priority programs and initiatives.

Media Inquiry Activities: Provides direction for handling all media inquiries and tracks, responds to, and monitors all inquiries from the media.

PROGRAM NAME: *Public Outreach*

Supports the Judicial Council, the AOC, and the Judicial Branch in responding to inquiries from the public and justice system partners about the branch.

Web section Content Management: Manages and updates content on specified sections of the California Courts and Serranus websites.

Crisis Communications: Develops and manages crisis communications efforts and rapid responses for critical media-related branch issues.

Using and Protecting Copyrighted Materials: Provides guidance and support for the AOC to ensure the preservation of intellectual property rights of others and manages copyright request and permissions process for the Supreme Court, the Judicial Council, and AOC copyrighted materials.

Public/Court Phonenumber/E-mailbox: Answers calls and e-mails to the Office of Communications line and e-mailbox.

California Courts YouTube Channel: Manages the content strategy, upload, captioning (for 508 compliance), and metrics evaluation of video content on the channel and embedded in the California Courts website.

California Courts Twitter Account: Manages content strategy, tweets, and tracking for the account.

Fact Sheets: Manages the drafting and updating of high-profile fact sheets currently published on the California Courts website in consultation with subject matter experts.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Judicial Branch Capital Program Office/Office of Real Estate and Facilities Management:

- Provides communications advice and support to both offices and to their Judicial Council Advisory Committees—the Court Facilities Advisory Committee and the Trial Court Facility Modification Advisory Committee.
 - Manages milestone-based communications plan and responds to all media inquiries for all capital projects, including news releases, web updates, media advisories, and communications support for major events.
-

PROGRAM NAME: *Government Relations*

Supports the Judicial Council’s legislative activities by coordinating communications activities with the Office of Governmental Affairs.

Communications Support/Advice: Coordinates communications activities in support of the Judicial Council’s legislative priorities and advises on communications for individual programs and projects that involve the sister branches of government.

Media Relations: Coordinates communications to the media.

Media Materials: Develops print and web-based materials that can be used for media relations.

PROGRAM NAME: *Employee Communications*

Manages internal communications tools and channels and coordinates activities with the Executive Office and key internal stakeholders.

AOC Business Intranet Content Strategy and Management: Develops and implements content strategy for the entire intranet site in collaboration with key content stakeholders.

Executive Communications: Coordinates Executive Leadership Communications to facilitate two-way communications opportunities.

Agency Communications: Consults with AOC offices and units on employee communications for programs and projects and supports implementation and follow-up activities on messaging for agreed-upon activities.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

AOC Weekly eNewsletter: Manages the drafting and distribution of the *AOC Headlines* eNewsletter to all AOC staff.

Internal Communications Advisory Group: Coordinates regular meetings to seek input from key stakeholders on communications needs and initiatives for the AOC.

Special Projects Office

JUDICIAL COUNCIL OF CALIFORNIA

Administrative Office of the Courts
Steven Jahr
Administrative Director of the Courts

Judicial Council and Court Leadership Services Division
Jody Patel
Chief of Staff

Special Projects Office
Maureen Dumas
Manager

Michelle Brooke, *Court Services Analyst*
Marcela Eggleton, *Senior Court Services Analyst*
Thienan Nguyen, *Senior Court Services Analyst*
Kasey Stevens, *Senior Court Services Analyst*

OFFICE NAME: SPECIAL PROJECTS OFFICE

Programs, Projects, and Activities

***Total Workforce:
5 filled authorized positions**

Provides analysis of existing administrative and/or operational business processes and recommendations on reengineering opportunities for efficiencies and cost savings for the trial courts at their request.

Conducts internal business process and organizational review and analysis to develop recommendations for efficiencies within the Administrative Office of the Courts (AOC).

Provides support to the Trial Court Presiding Judge Advisory Committee/Court Executives Advisory Committee (CEAC) Joint Working Group on Trial Court Business Process Reengineering (TCBPR) Services through the development and delivery of regional TCBPR trainings, creation of TCBPR reference documents and tools, and creation of central repository of reengineering successes for the trial courts.

Provides project management and tracking of implementation activities of Judicial Council AOC Restructuring Directives.

Analyzes and provides assistance with the implementation of specific council directives.

Provides logistical and analytical support to the Task Force on Trial Court Fiscal Accountability and the creation of the Efficient and Effective Programs Knowledge Center.

Manages all aspects of the activities involved with reviewing and reporting on services provided by the AOC.

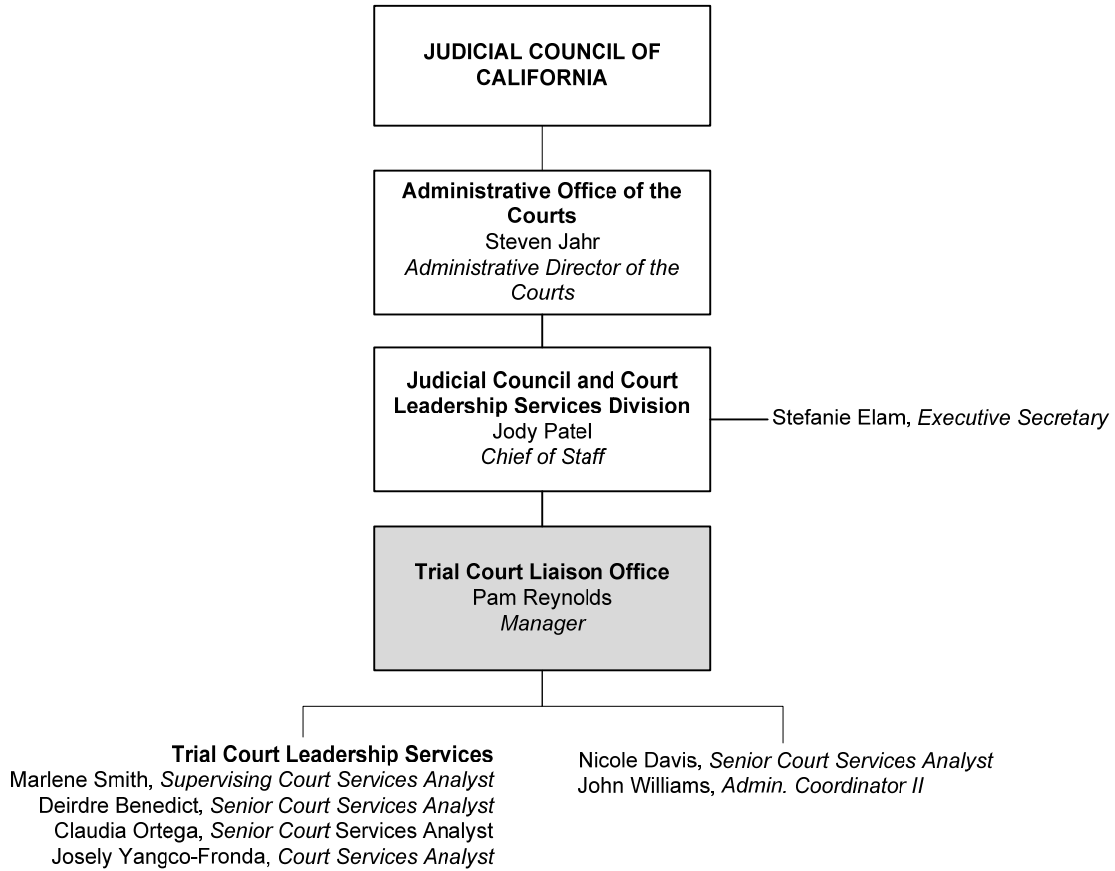
Evaluates and develops centralized policies and procedures structure for the AOC.

Provides staff support to the Chief Justice's commission on the future of the branch to begin in July of 2014.

*Total workforce numbers were gathered from the AOC HR Metrics by Office spreadsheet as of April 30, 2014. The number includes filled authorized positions, AOC temporary employees, employment agency temporary workers, and contractors. This report is updated regularly and posted here: <http://www.courts.ca.gov/policyadmin-aoc.htm>.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Trial Court Liaison Office



OFFICE NAME: TRIAL COURT LIAISON OFFICE

Programs, Projects, and Activities

***Total Workforce:
8 authorized filled positions**

Provides the Chief of Staff with direct high-level administrative and analytical support of the Judicial Council Court Leadership Services Division and organization-wide operations and administrative policies.

Assumes continuing role of former Regional Office to provide consultative services, technical assistance, and complex analytical support to the trial courts on a variety of court administration and operational matters.

Gathers, compiles, and analyzes data from other courts on a variety of operational and administrative issues and provides recommendations in response to information requests from courts.

Assists courts in addressing internal governance, management, and operational issues and evaluates and makes recommendations to courts on services or processes upon request.

Prepares trial court briefing sheets that are used by the Chief Justice, Judicial Council Members, and the Executive Team when visiting trial courts.

Provides project oversight for the Kings Court Case Management System replacement in cooperation with the Kings Superior Court, Administrative Office of the Court (AOC) Information Technology Services Office and Fiscal Services Office.

Coordinates court site visits by the Chief of Staff to meet with incoming presiding judges.

Serves as an impartial advocate, liaison, and facilitator to improve communications, build partnerships, and assist in resolving issues at the local and statewide levels.

Coordinates periodic regional meetings for presiding judges and executive officers that focus on matters of statewide interest (e.g., Workforce Allocation Funding Methodology).

Prepares the *Judicial Council Report on Limited Court Service Days* based on information received from trial courts.

*Total workforce numbers were gathered from the AOC HR Metrics by Office spreadsheet as of April 30, 2014. The number includes filled authorized positions, AOC temporary employees, employment agency temporary workers, and contractors. This report is updated regularly and posted here: <http://www.courts.ca.gov/policyadmin-aoc.htm>.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Provides conference-related services and support for the AOC Sacramento field office.

Maintains trial court leadership information.

UNIT NAME: *Trial Court Leadership Services*

Provides analytical and administrative support to Trial Court Presiding Judges Advisory Committee (TCPJAC) and the Court Executive Advisory Committee (CEAC), which provide forums for presiding judges and court executive officers to participate in the creation of administrative policies that affect the trial courts.

Provides staff support to the TCPJAC/CEAC Joint Legislation Working Group which reviews and provides input to the Office of Governmental Affairs (OGA) and the Judicial Council on council-sponsored legislation and other proposed legislation.

Provides staff support to the TCPJAC/CEAC Joint Rules Working Group which reviews proposed and existing rules and forms that have an administrative impact on trial courts, and makes recommendations on behalf of the committees.

Provides support to the TCPJAC/CEAC Trial Court Efficiencies Working Group which reviews proposals to create, amend, or repeal statutes to achieve cost savings or greater efficiencies for the trial courts and recommends proposals for future consideration to the Judicial Council's Policy Coordination and Liaison Committee (PCLC).

Provides support to the TCPJAC/CEAC Joint Trial Court Business Process Reengineering (TCBPR) Working Group which develops training and information on TCBPR for trial court leaders.

Provides support to the CEAC Records Management Working Group which develops and publishes subsequent updates to the Trial Court Records Manual.

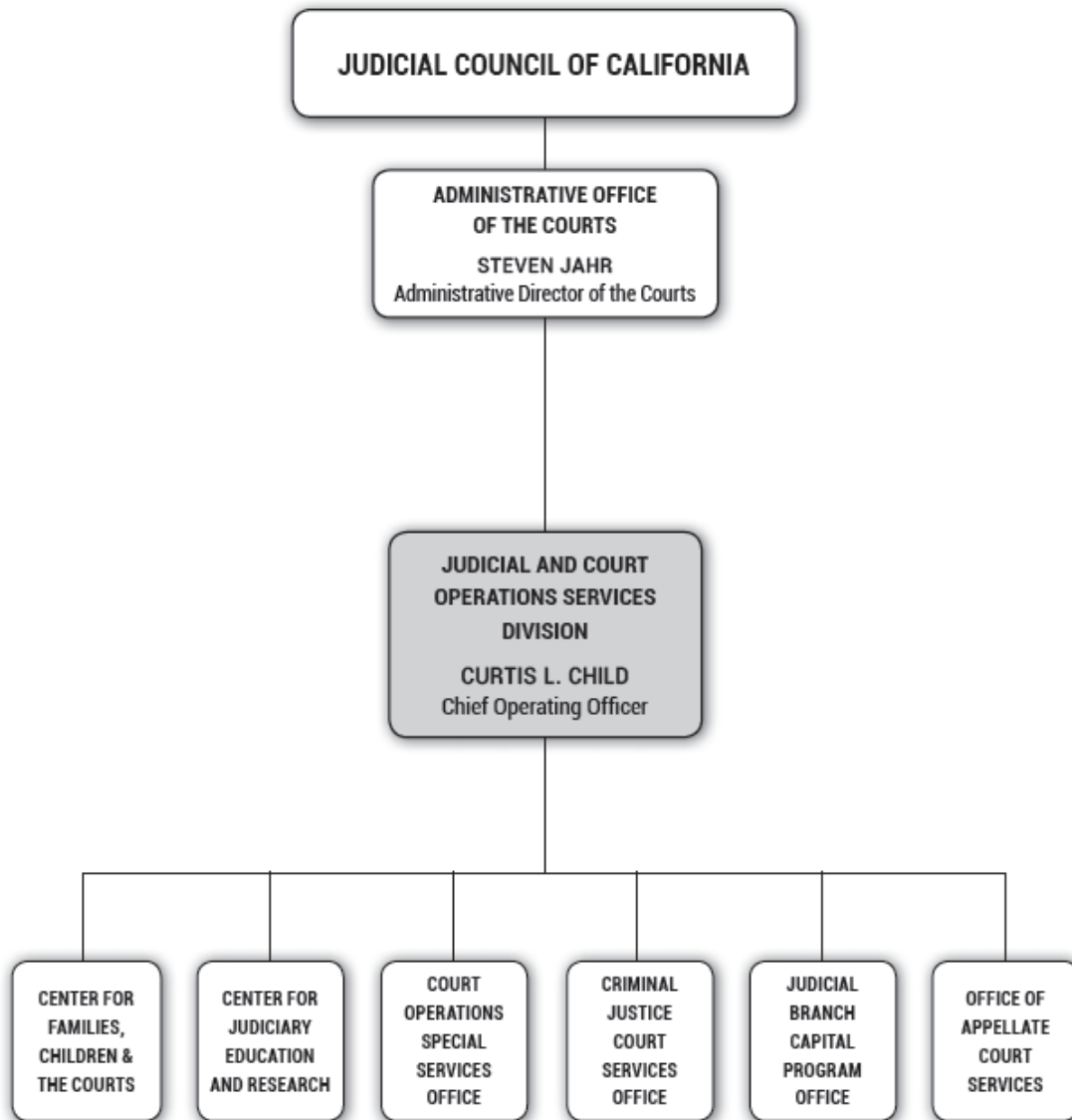
Provides staff support to TCPJAC in collaboration with the Legal Services Office on various California Rules of Court revisions for specific procedures (e.g., Procedure of Presiding Judges Reviewing and Investigating Complaints Against Subordinate Judicial Officers, Procedures for Reporting Attorney Misconduct, and Reporting on Use of Temporary Judges).

Provides staff support to CEAC to review minimum education requirements for trial court executive officers in conjunction with Center for Judiciary Education and Research.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

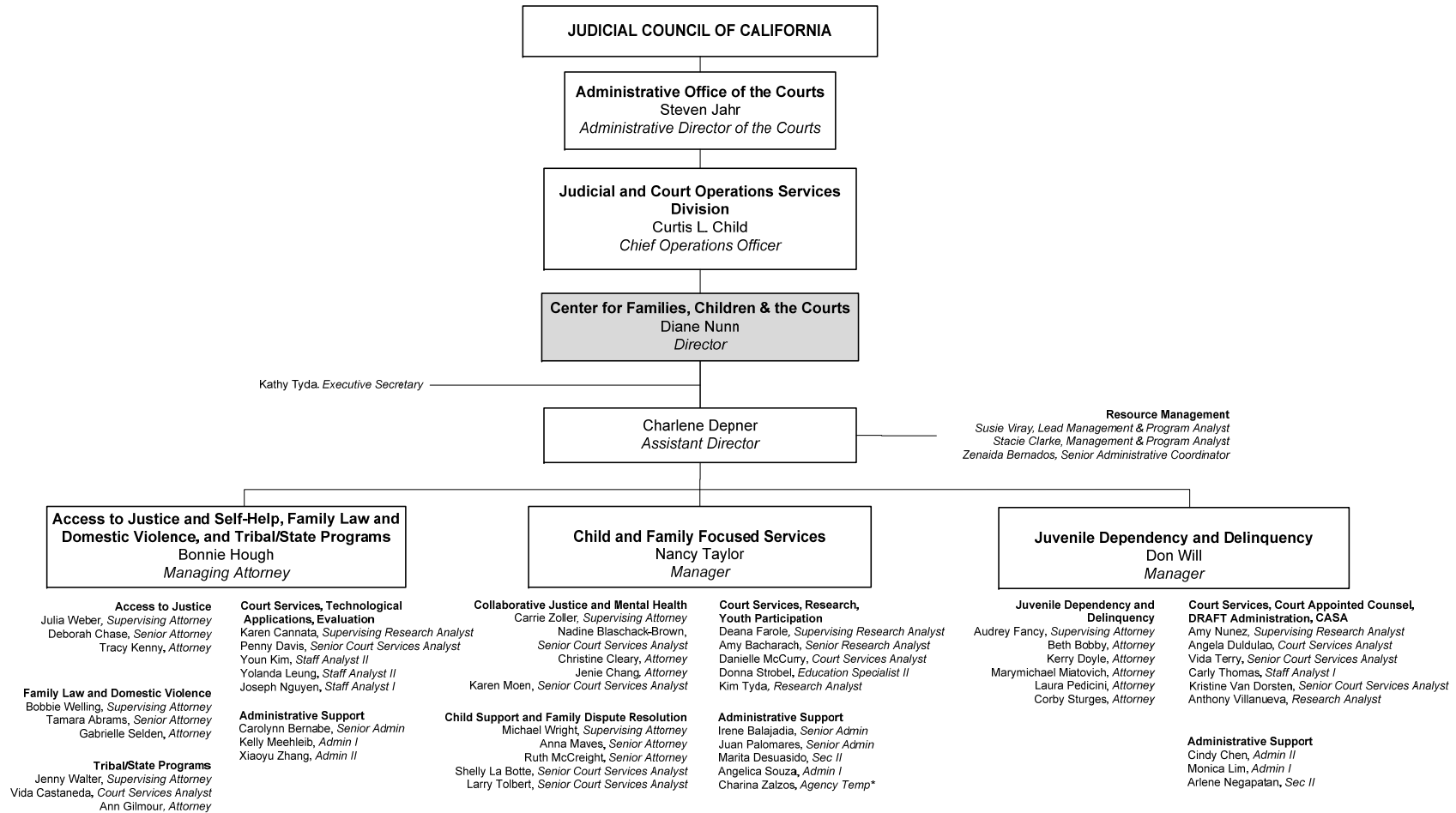
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JUDICIAL AND COURT OPERATIONS SERVICES DIVISION



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Center for Families, Children, & the Courts



Note: One CFCC authorized Accountant position and one Accounting Technician agency temporary employee are funded by CFCC to support AB 1058 Child Support and other grants. Both are supervised by the Financial Services Office.

*Agency temp (backfill for Admin I on leave)

OFFICE NAME: CENTER FOR FAMILIES, CHILDREN & THE COURTS

Programs, Projects, and Activities

***Total Workforce: 60.80
59.80 filled authorized positions
1 employment agency temporary workers**

PROGRAM NAME: *Self-Help and Access to Justice*

Provides legal, education, and program support and develops statewide self-help resources to the trial courts and local self-help centers.

Provides lead staff support to the Judicial Council's Advisory Committee on Providing Access and Fairness.

Provides lead staff support to the Sargent Shriver Civil Counsel Act Implementation Committee and evaluates seven pilot programs mandated by AB 590 Sargent Shriver Civil Counsel Act.

Provides lead staff support to the Legal Services Trust Fund Commission to administer earmarked funding provided in the state budget to legal services agencies.

Provides legal and program support and administers funds to participating courts and legal services for Self-Help Centers, Family Law Information Centers, Model Self-Help Programs, Equal Access Grants, and the Sargent Shriver Civil Counsel Indigent Services Program.

Provides: resources and technical assistance including promulgation of best practices; cost-benefit analysis; identification of potential resources for local courts for process simplification; pro bono and limited scope representation; and web-based resources and technology to assist self-help litigants, orders after hearing, computer-assisted completion of legal forms, and volunteer training materials.

Develops forms completion program to assist staff at self-help centers and court customers to efficiently and effectively prepare Judicial Council forms online.

Maintains Judicial Branch Online Self-Help Website content, providing updates, translations, links to legal resources, and videos.

*Total workforce numbers were gathered from the AOC HR Metrics by Office spreadsheet as of April 30, 2014. The number includes filled authorized positions, AOC temporary employees, employment agency temporary workers, and contractors. This report is updated regularly and posted here: <http://www.courts.ca.gov/policyadmin-aoc.htm>.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Provides updates in the law and new techniques for managing cases involving self-represented litigants; supports and collaborates with the Center for Judiciary Education and Research (CJER) on Self-Help content for Educational Materials Programs and material for judges and court staff.

Provides support to the Trial Court Budget Advisory Committee (TCBAC) in evaluating self-help funding.

PROGRAM NAME: *Family*

Provides education, legal, and program support to promote safe, effective, and efficient family courts.

Provides lead staff support to the Judicial Council's Family and Juvenile Law Advisory Committee.

Provides legal and program support, education and technical assistance, and manages direct funding to courts for the AB 1058 Child Support Program Funding and Administration.

Implements the legislatively mandated quadrennial Child Support Guideline Study.

Provides information, education, and technical assistance to the trial courts and manages direct funding to courts for safe access through the Access to Visitation Program. Maintains federally required outcome accountability data on Access to Visitation Programs.

Provides trial courts with legal information and technical assistance on access to visitation, child custody, child support, family centered case resolution, case processing, resource guidelines, and other family law matters.

Provides mandated legal and program support, technical assistance, education, and research pursuant to Family Code §1850. This includes: technical support for court implementation and operation of mediation services; provision of programs for the mandatory education of court personnel involved in family law proceedings including child custody mediators; recommending child custody counselors, evaluators, and family court services directors; maintenance of a uniform statistical reporting system; administration of funding for research, study, and demonstration projects; and research to support effective and efficient family law proceedings.

Provides technical assistance to courts and court stakeholders implementing technology for e-filing and case management in family proceedings including modifying all family, juvenile, child support, and domestic violence forms to become "smart forms" using Adobe Lifecycle, and developing document assembly programs.

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Provides education to meet mandatory requirements for child support commissioners, family law facilitators, child support administrators, and clerks. Consults with CJER to develop and provide educational programs for judicial officers.

Maintains and supports new websites (www.familieschange.ca.gov and www.changeville.ca.gov) designed to provide information on divorce and separation for children, teens, and parents.

Maintains Family Law Facilitator Database measuring the work of family law facilitator and self-help centers and the impact of the spectrum of services to self-represented litigants.

Develops tools and provides assistance supporting local court operational decision-making including: offering courts self-assessment tools that set out a comprehensive list of all legal requirements in child custody and domestic violence cases in a checklist format; monitoring changes in caseload, services, clients, and customer satisfaction for family court programs; filling court requests for assistance in analysis of court case management data to aid in identifying issues that the court may wish to address; providing technical assistance, upon request, to family courts in case flow management.

Conducts mandated assessment of judicial and staff trial court workload for the Judicial Council in conjunction with the Office of Court Research, and reports to the council and the Legislature.

PROGRAM NAME: *Family Violence*

Provides legal, education, and program support to courts in effectively serving litigants in cases involving allegations of family violence.

Provides lead staff support to the Violence Against Women Education Project Planning Committee.

Manages annual external funding from the US Office of Violence Against Women supporting educational materials and comprehensive curriculum-based education in domestic violence issues to judges and court staff.

Administers funding for form translations and instructional materials in domestic violence, family law, and elder abuse cases.

Note: Administration of the interpreter fund was moved to the new Language Access Support Programs unit in the Court Operations and Special Services Office in fiscal year 13-14. Funds for translations of forms and instructional materials will remain in Center for Families, Children & the Courts (CFCC).

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Provides trial courts with legal information, consultation, and technical assistance on domestic violence issues, administers Domestic Violence Safety Partnership grant funding to trial courts for education and technical assistance in establishing best practices, and updates bench guides on domestic violence.

Develops educational materials and provides education in domestic violence, sexual assault, stalking, teen dating violence, human trafficking, and elder abuse issues.

Provides subject matter expertise in further deployments of technological solutions, such as the California Courts Protective Order Registry.

PROGRAM NAME: *Tribal and State Courts*

Provides lead staff support to the Tribal Court-State Court Forum.

Administers funding for education and technology from US Office of Violence Against Women and the US Department of Health and Human Services.

Provides education, technical assistance, and resources supporting access to state courts, tribal/state court coordination, mutual recognition of orders, and compliance with the Indian Child Welfare Act.

Provides judicial education and technical assistance regarding federal Indian law as it applies to all civil and criminal cases.

Provides technical support on California's Tribal Customary Adoption Provisions.

PROGRAM NAME: *Juvenile*

Provides lead staff support to the Judicial Council's Family and Juvenile Law Advisory Committee.

Provides lead staff support to the Judicial Council's Blue Ribbon Commission on Children in Foster Care and provides program administration for the Chief Justice's Keeping Kids In School and Out of Court initiative.

Provides support and technical assistance on juvenile delinquency and dependency legal issues to judicial officers and local Blue Ribbon Commissions.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Provides staff support to the Juvenile Dependency Counsel Collections Program under the oversight of the Family and Juvenile Law Advisory Committee and the TCBCAC.

Provides staff support to the Child Welfare Council, a legislatively mandated body responsible for improving the collaboration and processes of the multiple agencies and the courts that serve the children and youth in the child welfare and foster care systems. Staff also provides support to Child Welfare Council Permanency and Data Committees and to the Implementation Task Force on Commercially Sexually Exploited Children.

Administers grants from the Federal Dependency Court Improvement Program (CIP) that provides statewide resources to reduce local court workload through legal, education, and program support to the courts. CIP provides funding for the Dependency, Representation, Administration, Funding and Training (DRAFT) program, psychotropic medication consulting programs, local Court Appointed Special Advocates (CASA) programs, and an extensive in-person and distance learning education program for local courts.

Provides training and assistance to dependency court-appointed counsel funding allocations for 38 counties.

Administers funding for 20 volunteer courts for court-appointed counsel through the DRAFT program. Activities include: competitive solicitations, management of attorney contracts including payment, education to attorneys, and performance measurement.

Implements the Cost Recovery Guidelines for Dependency Counsel and provides technical assistance to 58 courts in implementing collections, analyzing caseload, and proposing to the Judicial Council the mandated reallocating revenues net of collection costs.

Provides support to juvenile court stakeholder education program activities utilizing earmarked funds from California Department of Social Services IV-E funding including federal funds to reimburse CASA programs for education and training.

Administers funding for psychotropic medication orders in small local courts to reimburse the cost of consultation from a qualified psychiatrist on proposed psychotropic medication orders.

Administers Judicial Council CASA Grant Program funding to local CASA programs serving as volunteers to judicial officers, acting as liaisons to judicial officers using CASA volunteers in the courts, and

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providing program quality oversight.

Provides education and technical assistance for juvenile dependency mediators and directors as described in California Rules of Court, rule 5.518.

Offers judicial officers resources to effectively manage delinquency and dependency cases including courtesy file reviews and analysis conducted by attorneys through the Judicial Resources and Technical Assistance Program.

Develops and coordinates statewide and regional education including Beyond the Bench and other juvenile court-related trainings (supported by federal and state health and human services grants).

Develops and maintains the California Dependency Online Guide (CalDOG), which provides case law, distance learning, and a wealth of resources to judicial officers, attorneys, and other stakeholders.

Provides standardized reports by county to all trial courts on dependency outcome measures and effectiveness of court programs and agencies assisting the courts.

Works with courts to improve local case management systems to extract data and work toward compatibility with national exchange standards.

PROGRAM NAME: *Collaborative Justice and Mental Health*

Provides legal, education, and program assistance to courts about evidence-informed, cost-effective practices to address the increasing volume of high-risk, high-need cases involving families with issues related to substance addiction, mental illness, homelessness, as well as individuals and families in unique circumstances such as military families, elder abuse, human trafficking, or formerly incarcerated persons in re-entry.

In collaboration with the Criminal Justice Court Services Office, provides lead staff support to the Judicial Council's Collaborative Justice Courts Advisory Committee that serves as the oversight committee for the Substance Abuse Focus Grant program and makes recommendations to the Council for funding allocations.

Provides lead staff support for implementation of recommendations of the Task Force for Criminal Justice Collaboration on Mental Health Issues.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Provides program assistance and administers funding for collaborative justice projects in local courts.

Note: Activities relating to adult offenders in collaborative and mental health courts have moved to the Criminal Justice Court Services Office. CFCC addresses family issues involving adult offenders and their families in collaborative and mental health courts. CFCC and the Criminal Justice Court Services Office will continue to work together on these issues, as needed.

Offers courts evidence-informed practices pertaining to children in the courts in these areas: Access to treatment and services, assessment, medication and diagnostics, protocols to serve severely mentally ill and developmentally disabled children, children's mental health issues in family law, assessing and mitigating the effects of interviewing and testimony for child victims and witnesses, role of counsel for the child in protecting rights of the child regarding interviewing and testimony.

Provides consultation and educational programs to support a developing foundation of evidence to assist local courts in weighing the costs and benefits of adopting collaborative court strategies, including evaluations such as the Drug and Reentry Court Cost Studies and the Mental Health Court Evaluation.

Provides statewide, regional, and distance multi-disciplinary education programs, often externally funded and in collaboration with state and national partners, for judges, court staff, and justice partners at programs including the Youth Court Summit, Homelessness Summit, Reentry Court Roundtable, State Drug Court Symposia, and Veterans and Military Families Symposia.

Conducts research and analysis for local collaborative justice and mental health projects in the courts to identify cost effective practices, provides local court practitioners with data and tools to make sound programmatic and financially viable decisions, and supports applications for funding.

Conducts externally funded cost benefit studies of collaborative courts to assist in funding for local courts, based on Drug Court Cost Model. Evaluation and cost study projects include the California Drug Court Cost Study, the mental health court evaluation, and the reentry court evaluation.

Provides practical evidence-informed briefings on risk assessment, mental health and substance abuse issues, and trauma-informed services through research literature review and analysis.

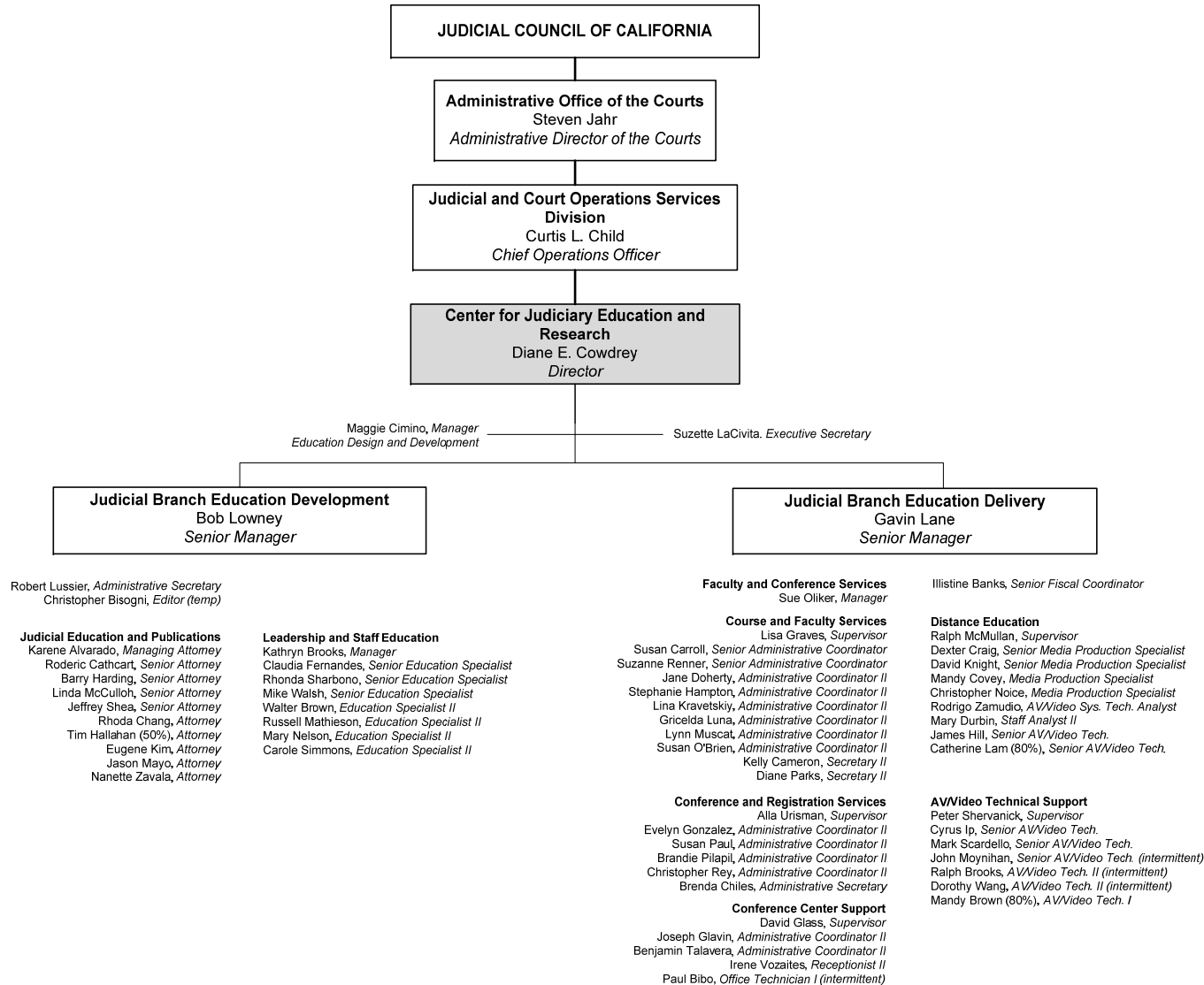
Develops Web-based tools to assist with data collection and cost benefit analysis at the local level, coordinates the development of a statewide database to assist local courts in tracking collaborative courts utilization and outcomes, and maintains a database of local collaborative courts by type and jurisdiction.

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Coordinates an internship program providing assistants in law, social work, psychology, and research from University of California, University of San Francisco, McGeorge School of Law, and others, to courts with projects such as legal research and case coordination, program development and evaluation, and developing research briefings and data collection tool.

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Center for Judiciary Education and Research



OFFICE NAME: CENTER FOR JUDICIARY EDUCATION AND RESEARCH

Programs, Projects, and Activities

***Total Workforce: 64.10**
62.10 filled authorized positions
2 employment agency temporary workers

Provides all programmatic, technical, and logistical support for:

- New Judge Orientation (a week-long education program for newly appointed or elected judges and new subordinate judicial officers (SJO)).
- Primary Assignment Orientations and Criminal/Experienced Assignment Courses (multi-day education programs for judges and SJOs).
- B.E. Witkin Judicial College (a two-week education program for newly appointed or elected judges and new SJOs).

Works with committees and workgroups of judges and justices to identify education needs, develop program content, recruit and train faculty, maintain curricula, and manage all logistics for Qualifying Ethics Training (required for bench officers participating in the insurance program covering all proceedings before the Commission on Judicial Performance).

Works with committees and workgroups of court leaders to develop program content, maintain curricula, manage technical and logistical services, and recruit and train faculty for Education for Judicial Leaders: Presiding Judge/Court Executive Officer Program, Supervising Judges Institute (multi-day programs for presiding judges, assistant presiding judges, supervising judges, court executive officers, and assistant court executive officers).

Works with curriculum committees and workgroups to identify specific content and faculty, and provide additional programmatic, technical, and logistical support for Advanced Judicial Education (multi-day courses that focus on complex areas of law, or specific assignments for experienced judges (e.g., Complex Civil, Death Penalty Trials, Advanced Civil, California Environmental Quality Act Overview)).

Works with committees and workgroups of justices, judges, and court staff to identify education needs, develop program content, maintain curricula, manage technical and logistical services, and recruit and train faculty to teach Institutes (two-day statewide education programs for key audiences including Justices, Judges, trial and appellate attorneys, and human resources professionals).

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Provides faculty development and programmatic, technical, and logistical support for Institute for Court Management (ICM) Programs (certification programs developed by the ICM for court managers and executives), held statewide and at local courts.

Develops program content, maintains curricula, manages technical and logistical services, and recruits and trains faculty to teach the Court Clerk Training Institute (CCTI) (an institute comprised of two one-week programs that provide courtroom and legal process education for trial court clerks in civil, criminal, family, juvenile and probate assignments).

Serves as primary subject matter experts and collaborates with other subject matter experts to develop and teach Sexual Harassment Prevention Training (offered live and via videoconference for the Administrative Office of the Courts (AOC) and Habeas Corpus Resource Center (HCRC) managers, supervisors, and leads; delivered in broadcast format for commissioners, referees, and trial and appellate court employees; delivered in facilitated broadcast format to Supreme Court employees). Staff also provides logistical and technical assistance to produce, deliver, and post the program and materials online.

Works with committees and workgroups of judges to identify education needs, develop course content, and maintain and update curricula for Temporary Judges Training (a series of online courses and other education resources to enable trial courts to comply with the required education for their temporary judges). Staff also designs, creates, and updates web pages and posts online materials to the web pages created for the audience.

Provides all programmatic, technical, and logistical support and serves as faculty for Education for Court Managers and Supervisors (CORE 40, Core 24, Leadership & Training Tools, Mid-Level Managers Conference—multi-day programs for managers, supervisors, and lead staff in the trial and appellate courts).

Provides support, instructional design, presentation skills, and development opportunities to assist volunteer faculty through Faculty Development Training (various faculty development training programs and design workshops that include entry-level programs, advanced courses delivered in the regional offices and by webinar, and program specific development for programs such as B.E. Witkin College, Qualifying Ethics, or ICM).

Serves as primary subject matter expert to provide consultation and training to the courts on the Americans with Disabilities Act (ADA). Training is provided via regional and local courses, new job aids, and a WebEx quarterly series, as well as consultation and training to the ADA coordinators in each court.

Supports and maintains the Training Coordinator Network for the trial and appellate courts through regular webinar business meetings and the Linking Individuals and Networking Courts (LINC) website providing a forum for the trial and appellate courts to share curriculum and courses. Currently, LINC is not operating due to staffing reductions.

Works with committees and workgroups of appellate court supervisors, staff, and attorneys to identify education needs; develop programs; and recruit and train faculty to provide education for appellate court staff, AOC staff, and managers via live, in-person trainings and videoconferences. Staff also provides audio/video support, including a dedicated equipment operator, as required, and performs other logistical and technical functions to provide videoconferences and to maintain these on education web pages.

Oversees the installation, maintenance, and repair of audiovisual (AV) videoconference equipment and collaborates with Audiovisual Services and Information Technology Services Office (ITSO) to provide user and technical support for videoconference meetings and training; oversees the yearly maintenance contract; and performs daily support of videoconferencing in the AOC appellate court meeting room.

Works with committees and workgroups of target audience stakeholders to identify education needs, recruits faculty subject matter experts, and leads the development of broadcasts for trial and appellate court staff (approximately 40 1–2-hour broadcast programs targeted for the trial and appellate courts judicial and staff audiences). Staff also creates broadcast facilitator guides for select programs that can be used by local courts to use DVD broadcast programs as part of local live training, and provides all the technical services necessary to produce the broadcasts and post them to education web pages.

Works with committees and workgroups of judges, court managers, supervisors, and staff to identify education needs; develops program content; provides all technical and logistical support; and recruits and trains faculty for Regional Judicial Education courses (one-day programs held regionally and at local courts).

Recruits faculty for Local Judicial Education courses (courses are held at local courts at the request of the presiding judges), and provides funding and some logistical support for courses at local courts.

Works with committees, workgroups, and subject matter experts to identify education needs; develop content; train faculty, maintain and update curricula; provide technical expertise to create the online product; and conduct regular maintenance and legal updates for short online educational resources for judges.

Works with committees, workgroups, and subject matter experts to identify education needs; develops content; provides technical expertise to create the online product; conducts regular maintenance; and updates the Short Online Educational Resources for court staff, supervisors, and managers.

Works with workgroups of judges to collect and develop essential bench tools on different topics (e.g., civil, criminal, family, traffic, unlawful detainer, small claims, juvenile, etc.), copyedits and formats the bench tools for uploading as files on Serranus, and conducts legal updates as needed.

Works with workgroups of court personnel at all levels to collect and develop essential court job aids for court staff, supervisors, and managers on different topics (e.g. case flow in probate, juvenile delinquency and dependency, felony, misdemeanor, family, civil, traffic, etc.); copyedits and formats the job aids for uploading as PDF files within toolkits on COMET; and updates them as needed.

Works with committees and subject matter experts to identify topics and develop content for online courses for judges. Staff drafts the legal content, designs the course, and produces graphics and all HTML coding required to develop and upload these courses to the web for use by judges and other audiences; staff provides regular legal updates to courses and builds files of statutes from the Legislative Counsel site for linking within online courses.

Works as subject matter experts with committees and other subject matter experts to identify topics and develop content for online courses for court staff, supervisors, and managers. Staff develops the content, designs the courses, produces graphics, copyedits, and completes all HTML coding required to develop and upload these courses to the web for use by court staff, supervisors, and managers. Staff also performs HTML coding required for periodic updating of online courses.

Designs and develops web pages to contain education materials for live events and distance education; creates and keeps current program calendars for all education events; uploads materials of all types, including online video content; maintains the content management process to keep online content current; and maintains sites and pages.

Provides WebEx courses, including all programmatic, technical, and logistical support for judges, trial and appellate court staff, managers, and supervisors, and conducts training on the use of WebEx for faculty as well as those who provide programmatic and technical support.

Develops new benchguides for judges to reflect developing law in assignments or underserved assignment areas at the direction of curriculum committees and working with workgroups of judges.

Writes, publishes, and conducts regular legal updates to Bench Handbooks (viewable or printable as PDFs on the internet) for judges on specific topics that don't fit the benchguide model.

Conducts the legal research needed to draft benchguides for review by judicial reviewers, copyedits them, and provides technical expertise to upload them on education web pages.

Maintains the legal treatise Civil Proceedings (a multi-volume set consisting of Discovery, Before Trial, Trial, and After Trial volumes). The second edition of After Trial was completed in early 2014. Staff copyedits new editions and updates the Benchbooks, codes material for printing, creates tables of statutes and cases, and checks proofs.

Working with the AOC Education Advisory Group and the Executive Office, identifies, develops, and delivers classes for AOC employees, using traditional face-to-face education, videoconferencing, and online education. Staff also coordinates the compliance requirements for AOC employees and the learning management system (HREMS), and identifies and supports subject matter experts who serve as faculty.

Serves as faculty in a number of different capacities, including teaching for AOC managers, supervisors, and staff; trial court managers, supervisors and staff; and, on occasion, justices, judges, and SJOs.

Provides staff support to the CJER Governing Committee (the advisory committee to the Judicial Council for education), and provides resources to enable the committee to achieve its projects and objectives for its Annual Agenda.

Provides staff support to nine curriculum committees: Appellate Practice, Civil, Criminal, Family, Judicial Branch Ethics & Fairness, Judicial Branch Leadership Development, Juvenile, Probate, Trial and Appellate Court Operations appointed by the CJER Governing Committee to provide subject matter expertise and educational recommendations for the Governing Committee's Education Plan as well as other educational efforts. Staff works closely to assist the Curriculum Committees in reviewing educational content on a regular basis and developing priorities for the two-year education plans.

Provides staff support for the Judicial Council Access and Fairness Advisory Committee by providing liaisons in the areas of Fairness Education and Access Education.

Provides administration, training, and support to all AOC divisions and offices that use WebEx technology to deliver education and hold committee meetings.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Provides consulting on design and delivery for products and programs developed locally by trial and appellate courts as well as other AOC divisions and offices (i.e., answering simple questions to complex projects that require significant time and expertise to complete). Staff sets standards for delivery and design that help to ensure consistency of practice and quality and conducts research and development efforts to find efficient and effective methods of delivering education.

Provides program analysis and evaluation expertise on a regular basis for all programs and products to ensure continual excellence in the programs and products developed by CJER.

Provides expertise and training in the area of access issues for both the courts and the AOC through the development of statewide education on topics that address current ADA challenges in the courts and to local courts when requested.

Creates and maintains education-based partnerships between the judicial branch and institutes of higher learning, nonprofits, and other professional organizations to support education for the courts as well as for the development of individual court employees (e.g., an AA Degree in Judicial Administration at San Jose City College, a Masters Certificate in Judicial Administration at California State University Sacramento, and a Masters of Public Administration with a concentration in Judicial Administration at Golden Gate University).

Manages and operates a video and audio resource center where staff duplicates audio and video presentations and responds to requests for educational videos from judges and court training coordinators.

Responds to internal and external customer calls and e-mails and coordinates and tracks shipment of CJER publications produced by CEB, Thomson/Reuters, or Lexis to bench officers and courts. Program attorneys frequently assist presiding judges and other judicial officers in locating education resources to meet the specific needs of the court or an individual.

Provides staff support to coordinate and schedule appropriate meeting space for all meetings and conferences taking place within the Ronald M. George State office complex. Staff manages catering contractors, maintains and updates forms related to meetings, provides AV technical support for meetings, and oversees renewal of the Milton Marks Conference Center Memorandum of Understanding with the Department of General Services which delineates oversight and day-to-day management of the Milton Marks Conference Center to CJER.

Facilitates solicitation activity as it pertains to securing cost-effective, flexible, high-quality travel agency services. Works cross functionally with the Fiscal Services Office on fielding travel related questions regarding policy and procedures, and manages the Travel Agency services contract.

Provides support to the satellite downlink infrastructure which includes oversight of equipment and systems statewide (i.e., equipment installation, maintenance and service support, and Broadcast Transmission Engineering).

Develops business and technical analysis of needs for satellite downlink, videoconference, and audio/video streaming service needs allowing CJER to provide statewide education via broadcast to the trial courts.

Provides support services for CJER and all AOC offices by providing hotel solicitations, site selection, and assistance with public contracting for meeting sites; program registration for faculty and participants; AV technical support on site in shared meeting rooms and off site; occasional video production consulting; and outsourcing assistance for requests for proposals and contracts and consulting in the use of WebEx and other distance education products.

Provides support of Supreme Court Outreach, Oral Arguments; COJA Hearings through AV and video technical expertise and support to the Supreme Court and the California Channel, as needed.

Provides media production recording and editing for Office of Communications projects in support of the Council and Supreme Court on a broad array of topics.

Provides support to Judicial Council meetings and other meetings through AV Technical support, video production, hotel solicitation and contracting, meeting registration, live audio streaming for branch audiences or the general public, and transportation support for meetings in the Conference Centers.

Provides strategic asset management for CJER and conference center AV systems and equipment by maintaining an inventory of all AOC AV equipment; receiving, testing, and implementing new equipment; tracking assets; and providing effective repurposing and retirement of obsolete and broken equipment.

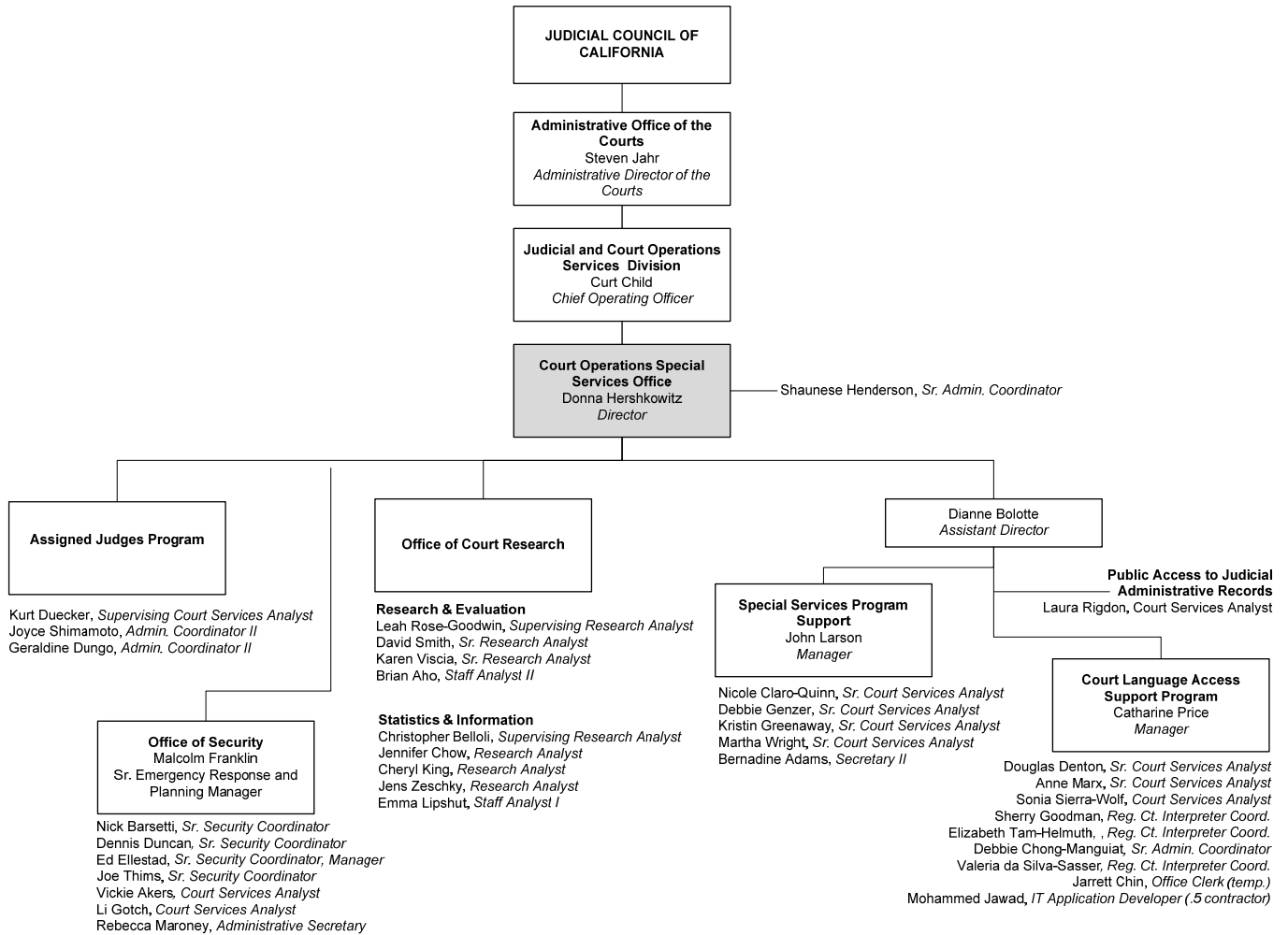
In a joint project with ITSO, develops and enhances Trial Court Facilities network video standards for the use of video over the emerging statewide judicial branch technical infrastructure. This project includes developing recommended business standards, policy, technical architecture, and organizational support.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Develops training courses customized to meet the specific educational needs of judicial branch administrative audiences (e.g., trial court and appellate courts, the AOC, and the HCRC). Staff develops unique courses in various areas including leadership, supervision, and management, and customer service.

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Court Operations Special Services Office



OFFICE NAME: COURT OPERATIONS SPECIAL SERVICES OFFICE

Programs, Projects, and Activities

***Total Workforce: 38.70**
37.20 filled authorized positions
1 employment agency temporary workers
0.5 contractors

PROGRAM NAME: *Strategic and Operational Planning*

Assists the Chief of Staff and Judicial Council Support Services as needed in providing staff support to the Judicial Council to create new Judicial Branch Strategic and Operational Plans, including:

- Researching and developing information and materials relevant in the development of a multi-year plan.
- Organizing and developing comprehensive plan(s) from material generated during the council's planning sessions.
- Developing survey instruments that seek information from key stakeholders.
- Analyzing and assessing data for presentation to the council and leadership.

UNIT NAME: *Public Access to Judicial Administrative Records (PAJAR)*

Implements and administers California Rules of Court, rule 10.500, and Administrative Office of the Courts (AOC) Policy 2.8 (Responding to Requests for Judicial Administrative Records and Information), including: intake and management and troubleshooting of requests, coordination and drafting of responses, management of payments, responding to the public, and policy and procedure development.

UNIT NAME: *Assigned Judges Program*

Administers daily judicial assignments to the Courts of Appeal and superior courts, including: fielding courts' assignment requests, researching and contacting potential judges to fill the assignments, and preparation and dissemination of assignment orders for signature by the Chief Justice of California.

Reviews and facilitates retired judge applications, renewals, and re-admissions to the program.

Allocates judicial assignments to the courts to ensure equitable and responsible use of appropriated funds.

Resolves case management issues relating to judicial assignment in the courts.

*Total workforce numbers were gathered from the AOC HR Metrics by Office spreadsheet as of April 30, 2014. The number includes filled authorized positions, AOC temporary employees, employment agency temporary workers, and contractors. This report is updated regularly and posted here: <http://www.courts.ca.gov/policyadmin-aoc.htm>.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Develops policies related to assigned judge travel and compensation, and provides monitoring and payment processing of claims for travel and judicial compensation.

Prepares and administers appellate division orders in the superior courts.

Prepares and administers annual reciprocal assignment orders.

Implements and administers change of venue process and judicial assignment.

Manages activities relating to annual presiding judge performance evaluations of assigned judges and litigant complaints regarding assigned judges, including making recommendations to the Chief Justice for appropriate action up to and including removal of an assigned judge from the program.

Administers special masters assignments for the Commission on Judicial Performance.

Plans and executes the Assigned Judges Program (AJP) Educational Conference, AJP Orientation, and Court Contact Training.

Administers and develops continuing education for retired assigned judges, including the Mentoring Program, tracking of continuing education compliance, and reporting to the Chief Justice.

Maintains an Assignment Tracking System, the Assigned Judges website portion of Serranus, and the Assigned Judges listserve.

Develops and issues the Assigned Judges Program Newsletter.

Reviews all prefiling orders declaring individuals to be vexatious litigants, maintains the statewide Vexatious Litigant List and database to ensure a person's status as a vexatious litigant is published to all courts, and responds to inquiries from courts and the public regarding vexatious litigant issues.

UNIT NAME: *Court Language Access Support Program*

Certified and Registered Interpreters Testing Process and Procedures

- Oversees all court interpreter test administration, development, and maintenance and develops and manages contracts with outside test administrators.
- Works closely with the National Center for State Courts in carrying out its responsibilities as national certification exam holder for the purpose of ensuring appropriate test administration, development, and maintenance.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

- Develops print and web communication materials that assist candidates with certification and registration testing.
- Monitors and assesses certification processes for American Sign Language (ASL) interpreters, and evaluates the Registry of Interpreters for the Deaf certification entity.
- Manages the relationship with California Federation of Interpreters regarding testing issues.

Recruitment and Outreach

Conducts court interpreter outreach and recruitment activities, including: support to courts with recruitment materials and presentations, media and interpreter association and conference advertising, maintenance of Recruitment Website campaign materials, and development of an internship/mentoring pilot for newly certified interpreters.

Certified and Registered Court Interpreter Compliance Activities

Manages the professional qualification process and compliance for active interpreters, including annual fees management and continuing education requirements monitoring.

Cross Assignments of Court Interpreters

Administers regional cross assignment of court interpreters in compliance with the four regional memorandums of understanding (MOU), including day-to-day coordination with courts to fill critical needs for interpreters in one court with interpreters working in other courts.

Education and Training Workshops/Materials/Trainers

Develops, coordinates, supports, and facilitates trainings, workshops, and materials for a variety of interpreter-related training, including ethics, test preparation, skills workshops for new interpreters, and curriculum for judges and court personnel on the use of interpreters.

Mandated studies and related analysis

- Conducts the 5-Year Language Use and Interpreter Need Study.
- Implements a statewide grant to enhance services for court users with limited English proficiency.
- Researches various topics related to language accessibility as identified via rule of court, legislation, or other leadership directives.
- Conducts gap analysis research related to language accessibility to be incorporated into a statewide language access plan.

Court Interpreter Database Collection System (CIDCS)

- Manages the Judicial Branch Certified and Registers Master List of Court Interpreters.
- Manages, updates, and generates reports from CIDCS.

Administers Improvement and Modernization Funds allocated for court interpreter services and translations in domestic violence, family law, and elder abuse cases.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Note: This activity was moved from the Family Violence Programs unit in the Center for Families, Children & the Courts.

Advisory Committees and Working Groups

- Provides lead staff support to the Ad Hoc Joint Working Group to address Interpreter Issues, the Court Interpreter Advisory Panel (CIAP), the Professional Standards and Conduct subcommittee of the CIAP; and the Joint Working Group for California’s Language Access Plan.

Special Court Projects

- Manages and oversees the ASL Video Remote Interpreting (VRI) pilot, including support to courts and stakeholders on VRI technology, use, guidelines, and all other issues.
- Manages efforts focused on scheduling efficiencies related to calendaring/batching practices.

UNIT NAME: *Office of Court Research*

Provides lead responsibility and management of the Judicial Branch Statistical Information System (JBSIS), including:

- Technical assistance and training for courts related to data reporting, data mapping, data definitions, and use of technology interface with statewide JBSIS data warehouse to ensure accurate and complete data.
- Managing a multi-stage data quality control program for JBSIS data before it is published in the annual Court Statistics Report.
- WebEx trainings for courts on using the data quality control reports and specific training sessions with individual courts to review and discuss JBSIS data.
- Writing programming code, developing report templates, and specifically tailored data quality reports and other ad-hoc JBSIS reports for court leadership and AOC management on request.
- Monitoring of JBSIS report submissions.
- Identifying, implementing, and communicating changes to reporting and data mapping in response to statutory and rule of court changes that affects JBSIS data definitions and reporting.
- Testing and validating network upgrades and hardware/software changes on JBSIS reporting.
- Managing JBSIS website and data query interface with statewide JBSIS data warehouse and documentation and updating other reference materials on the website.
- Responding to questions about JBSIS data from the public, courts, AOC staff, and staff from justice system partners and the Legislative and Executive branch.
- Representing the AOC in key stakeholder meetings on JBSIS data published in the Court Statistics Report and making presentations to branch leadership and criminal justice partners on JBSIS data.
- Querying JBSIS database and other internal and external data sources to produce reports in response to ad hoc queries from the Legislature, Governor's office, and US Department of Justice.
- Extracting, transforming, and loading appellate court data to provide quarterly data reports for the appellate courts.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

- Conducting data quality review procedures of appellate court data, communicating data anomalies, and confirming amended or corrected data.

Serves as lead staff to the Workload Assessment Advisory Committee. Under the direction of the advisory committee:

- Conducts studies, researches, and assembles data related to judge and staff workload measures, trial court workload, and measures of performance.
- Updates data on authorized and filled judgeships.
- Updates trial court staff workload estimates for Resource Assessment Study model budget allocation analysis annually.
- Validates the data used in the Workload-based Allocation Funding Methodology (WAFM) including the accuracy of the data (from the Trial Court Funding Workgroup and Funding Methodology Subcommittee combined list of recommendations).
- Demonstrates how future funding affects access for litigants, how the number of judges correlates to the ability of litigants to have their cases heard, and identifies other indicia that demonstrate effective and accountable use of resources.
- Provides research and support to the future development of performance indicators or other metrics that can be used to measure trial court activity and provide decision makers with information about the use of resources and the impact those factors have on outcomes (from the Trial Court Funding Workgroup and Funding Methodology Subcommittee combined list of recommendations).

Provides support to the Trial Court Budget Advisory Committee (TCBAC) in the following areas:

- Assists with the review, updates, and modification of WAFM every three years to address changes in workload and/or other cost drivers (from the Trial Court Funding Workgroup and Funding Methodology Subcommittee combined list of recommendations).
- Addresses WAFM-related issues including evaluating the impact of the new funding methodology on California's smallest courts and refining the process for estimating employee benefits.
- Evaluates self-help funding.
- Addresses unique factors in the WAFM and whether local revenues should be considered as part of the allocation process.
- Provides research support in modeling resource allocation, developing and evaluating cost-of-labor indices, developing and modifying reports, and presenting findings and evaluating options for the advisory committee.

Provides support to the Trial Court Presiding Judges Advisory Committee/Court Executives Advisory Committee in reviewing the remaining vestiges from the pre-unification period (from the Trial Court Funding Workgroup and Funding Methodology Subcommittee combined list of recommendations).

Provides support to the Executive and Planning Committee (E&P) in evaluating the impact of AOC provided services (in conjunction with TCBAC) (from the Trial Court Funding Workgroup and Funding Methodology Subcommittee combined list of recommendations).

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Prepares legislatively mandated reports/studies on *Demographics of the Bench*, *Sentencing of Criminal Defendants by Race and Ethnicity*, *The Need for Judgeships in the Superior Courts*, and *Standards and Measures of Judicial Administration*.

Coordinates and responds to public requests for data.

Serves as first point of contact with trial courts to convert Subordinate Judicial Officer (SJO) positions to judgeships, provides recommendations related to SJO conversions, and serves as liaison between trial courts and E&P.

Writes programming code, creates data extraction routines, and establishes protocols for ongoing production of regular, mandated reports.

Develops and publishes the Court Statistics Report, the primary source for reporting on the business of the California courts as required under the California Constitution.

Provides trial court leadership with a series of data management reports to help monitor caseload trends, assess case-processing practices, and ensure efficient allocation of resources.

Provides research assistance to the AOC Executive Office and other AOC offices, Judicial Council advisory committees, task forces, and working groups.

UNIT NAME: *Special Services Program Support*

JusticeCorps

- Provides grant administration and overall management of \$1.8 million annual JusticeCorps program budget in partnership with 5 Superior Courts covering 28 self-help centers.
 - Performs data collection and reporting on program performance, monitors grant compliance, and develops policies and procedures.
 - Maintains JusticeCorps Web presence.
 - Acts as main point of contact for the program funder, California Volunteers.
 - Coordinates JusticeCorps alumni outreach efforts.
 - Manages all program partners in California and nationally, as well as exploring potential program expansion to new service sites both in California and nationally.
-

Jury Improvement Program

- Works directly with the courts to promote improvements in the administration and management of jurors, and supports the work of advisory groups charged with providing policy recommendations for improving the state’s jury system.
- Prepares annual Jury Data Report.
- Evaluates jury-related rules of court and practices, as well as newly enacted legislation.
- Acts as point of contact for all trial courts on jury questions.
- Collaborates with other AOC offices on jury-related issues, including:
 - Improving electronic jury management systems and jury websites in the trial courts.
 - Interpretation of court rules related to jury service.
 - Forecasting jury funding needs.
 - Evaluating newly enacted legislation and providing jury statistics.
- Develops and maintains Jury Website content.
- Develops, distributes, and promotes jury-related educational tools and resources.
- Distributes materials to courts for use during Juror Appreciation Week.

Civics Education Initiatives

- Provides staff support to efforts that encourage improved civics education with an emphasis on the state judicial branch through partnerships and advocacy at the express direction of the Chief Justice.
- Provides lead staff support to both the K-12 Civic Learning Task Force and the Power of Democracy Steering Committee.
- Provides lead staff support to Chief Justice’s Civic Learning Awards program, which includes coordinating with award winning schools on presentation events across the state.
- Provides web resources cataloguing civic education and public outreach programs statewide.
- Manages a collaborative MOU with the Constitutional Rights Foundation to promote the AOC-created Courts in the Classroom educational resources website and related First Amendment Cartoon Art Contest.
- Leverages resources developed by previously funded California On My Honor program including developing school resources for the Supreme Court to further leverage their annual Special Sessions.

Fund/Grants Development

- Provides critical training and technical assistance to grant seekers in the judicial branch.
- Administers and provides oversight of the competitive grant-seeking process.
- Conducts regular reviews of a variety of resources to identify new grant opportunities and vets, summarizes, and distributes high value opportunities to courts and AOC.
- Monitors federal legislation likely to impact grant programs ultimately available to state courts.
- Provides technical assistance to AOC and court staff on grant applications.
- Processes mandated AOC letters of support and mandatory forms for court grant applications, liaises with the Legal Services Office and Fiscal Services Office on complex assurances and certifications, and troubleshoots submissions through online systems.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

- Provides training on Grant Seeking, Grant Writing, and Grant Award Management to AOC and court staff.
- Cultivates relationships between judicial branch and public and private funders.
- Researches and summarizes grant activity, develops reports, and archives data on AOC and branch wide grants.
- Drafts grant proposals to support office- and unit-specific projects.

UNIT NAME: *Office of Security*

Judicial Privacy Protection Program

Operates and administers the online Judicial Privacy Protection Program that serves approximately 2,000 judicial officers to reduce the ease with which a litigant or other person can locate their home addresses and telephones.

Threat and incident coordination, home assessment, and consultation service

Provides assistance, primarily to smaller trial courts, in managing threats and incidents, completing threat assessments, and advising on reporting requirements if threats are received, liaising with judicial officers, court staff, court security providers, and local law enforcement, and inspecting court facilities and homes for protectees as needed.

Physical security consultation, assessment, site survey, risk analysis service for trial courts

- Assist the courts and the Office of Real Estate and Facilities Management with important security services through security surveys, risk assessments, and consultation on facility related modifications and upgrades—as well as providing mediation assistance to court/sheriff on MOU for court security services.
- Provides advice and expertise to courts on security incidents and concerns, including bomb threats, mitigation of risks, equipment issues, etc.

Security, emergency, and continuity plan tools, templates, and review

Assists the courts with security plan requirements; performs security briefings and trainings on emergency preparedness, earthquake preparedness, shelter in place, and active-shooter trainings; prepares and delivers templates and trainings for emergency and continuity of operations planning (COOP); and maintains an online planning system that provides safe offsite storage of COOP information.

Project plan assessment, design consultation, and court/vendor liaison

Advises courts and Office of Real Estate and Facilities Management on modification and construction projects, providing consultation on facility related modifications and security upgrades and liaising with courts and vendors as needed.

Project review, and 30- and 60-day and 12-month follow up

Conducts walk-throughs with contractors and other stakeholders to verify all security measures have been properly installed in correct locations; attends commissioning of security systems equipment to identify and address any deficiencies; and conducts 30-day, 60-day, and 12-month review of all security systems to ensure proper operation is continuing.

Capital Programs

- Provides security design expertise on all new capital buildings, from land acquisition to building commissioning.
- Works with courts, security providers, and the design and construction teams to build a facility that protects and separates inmates, the public, staff, and bench officers in a secure and safe environment.
- Provides project plan assessment, design consultation, and court/vendor liaison service to Judicial Branch Capital Program Office project management, architects, and construction managers on all aspects of the Security Criteria.
- Conducts walk-through with contractors and other stakeholders to verify all security measures have been properly installed in correct locations; attends commissioning of security systems equipment to identify and address any deficiencies; and conducts 30-day, 60-day, and 12-month review of all security systems to ensure proper operation is continuing.

Screening Equipment Replacement Program

Manages statewide reimbursement program that maintains and replaces x-ray machines and magnetometers in trial court facilities and provides subject matter expertise and assistance to courts on the mandatory requirements of California Code of Regulations, Title 17, relating to the registration of x-ray machines and radiation protection programs.

Trial Court Security Grant Program

Administers security grant program (funded through the Improvement and Modernization Fund) to install duress alarm systems, access control systems, video surveillance systems, secure parking enclosures, clerks’ office protection, and a myriad of other security related enhancements not generally available through normal building modification or maintenance programs.

Equipment tracking, monitoring, and repair facilitation “after sales” service

Maintains records and data on equipment and systems, monitors and approves time and materials service requests, and tracks repair progress.

Court/vendor/AOC Customer Service Center “system liaison”

Acts as liaison between court staff, equipment vendors, and the AOC’s Customer Service Center to resolve issues with security systems overseen by the Office of Security.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Master agreement/vendor liaison

Administers security related statewide master agreements for the AOC, trial courts, Supreme Court, and Courts of Appeal and monitors agreements and aspects of vendor compliance.

AOC Badge and Access Program

Administers AOC badge and building access program for over 1,200 individuals, including Judicial Council members, Presiding Judges, AOC employees, temporary staff, and consultants to provide them with identification cards (aka badges) that double as access cards for AOC facilities.

AOC Contractor Clearance Program

Administers contractor clearance program currently involving about 1,800 contractors for AOC compliance with mandated California Law Enforcement Telecommunications System (CLETS) background check requirements (per authority granted to Department of Justice by Gov. Code, §§ 15150–15167) and related stipulations in existing master agreements and joint occupancy agreements.

AOC Emergency Equipment/Automated External Defibrillators (AED) Program

Administers and oversees the AOC emergency equipment/AED program for AOC employees, temporary staff, and consultants for five facilities across three cities—as well as Judicial Council members and court/public visitors.

AOC Emergency Operations Center and emergency planning/response service

Provides services to assist with ensuring the safety of staff and visitors in AOC facilities, manages the Emergency Operations Center as needed, manages Emergency Response Team, assists in emergency planning including COOP, and coordinates emergency response as needed.

AOC emergency alert, information line, and notification system service

Provides Office of Security communications and alerts by e-mail, Emergency Information Line (EIL), and Emergency Notification System (ENS) and coordinates response, information, and instructions during situations that affect the safety of AOC staff and visitors.

Specialized security contact, equipment, and certification management

Maintains specialized communications systems, Office of Security vehicles and supplies, etc.; manages related training and certification of staff; attends law enforcement and security related trainings; and shares information relating to the security of the branch.

Federal/state agency, law enforcement, executive, and finance liaison

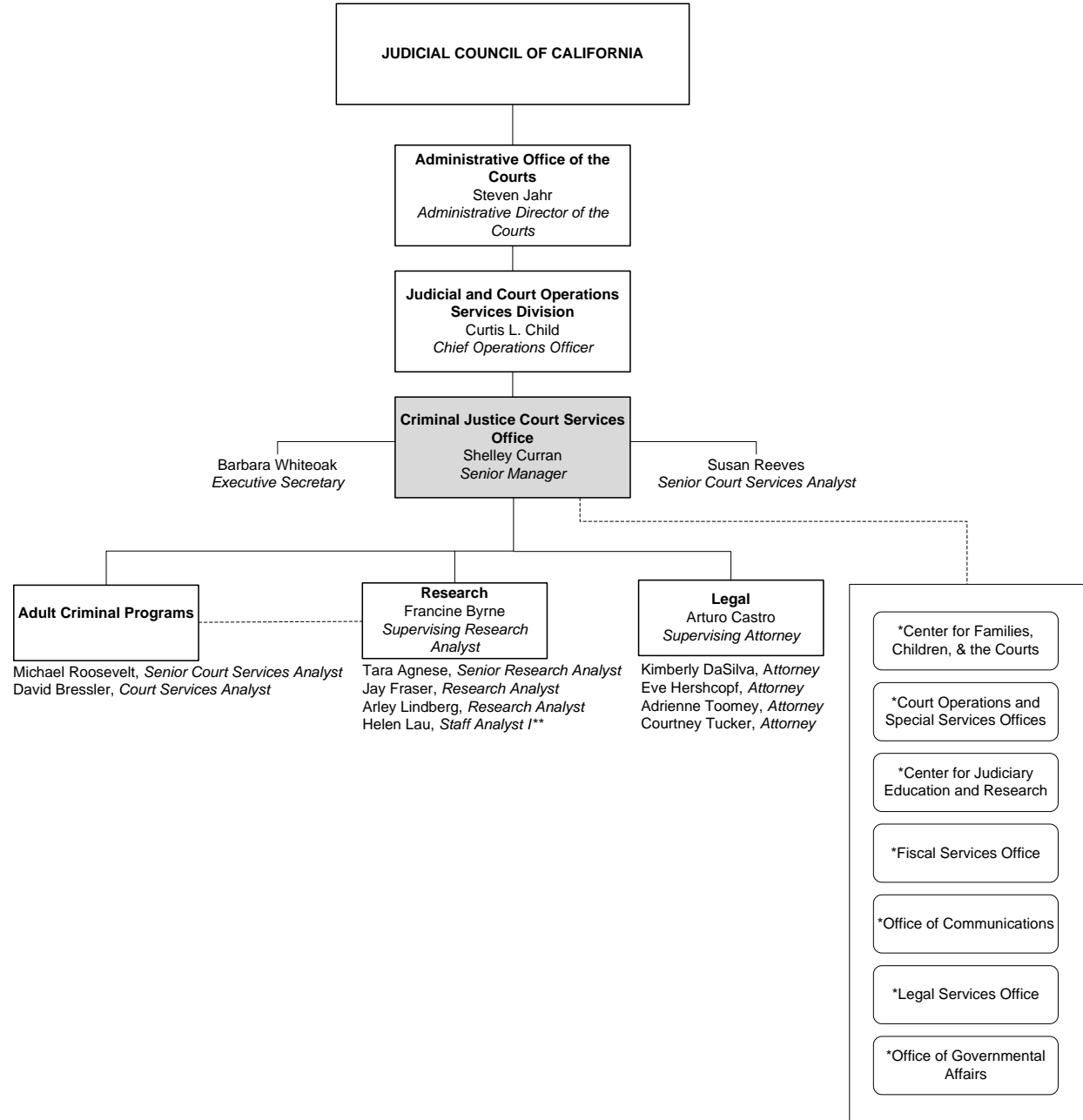
Liaises with various agencies to gather and share information, collaborates on security-related initiatives, provides advice and expertise and security-related services as appropriate (e.g., assistance to Judicial Council and AOC, assistance with employee investigations and terminations, liaison with building management and California Highway Patrol).

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Analysis and administration

Performs a wide range of research, analysis, writing, and editing; provides lead and staff support to Judicial Council advisory groups; manages webcontent, e-911, and key control projects.

Criminal Justice Court Services Office



* The Criminal Justice Court Services Office (CJCSO) oversees and coordinates the AOC's efforts related to criminal justice, including the 2011 Criminal Justice Realignment and community corrections, in order to improve efficiencies and assistance to the courts, justice partners, and the public. The CJCSO provides legal, program, and research assistance.

**Temporary agency employee

OFFICE NAME: CRIMINAL JUSTICE COURT SERVICES OFFICE

Programs, Projects, and Activities

***Total Workforce: 14.18
13.18 filled authorized positions
1 employment agency temporary worker**

Provides lead staff support and legal services to the Criminal Law Advisory Committee, Collaborative Justice Courts Advisory Committee (in conjunction with Center for Families, Children & the Courts), Traffic Advisory Committee, and the Accountability and Efficiency Advisory Committee. This includes the development of rules, forms, and legislative proposals.

Provides advice and legal services related to criminal and traffic law and procedure to trial courts, advisory committees, Judicial Council, and the Administrative Office of the Courts (AOC).

Serves as liaison to other branches of government, justice system partners, and the public on court-related criminal justice matters.

Researches and develops expertise as needed on emerging issues in criminal law and procedure.

Works with the Center for Judiciary Education and Research and judges to provide subject matter expertise in the development of curriculum and resource development for materials related to criminal law and procedure, realignment, and evidence-based practices.

Responds to inquiries and provides technical assistance on Criminal Justice Realignment matters as requested by the courts, justice partners, and other stakeholders.

Serves as a resource and liaison to outside partners in government (in collaboration with the AOC Office of Governmental Affairs), including the California Department of Justice, Department of Finance, Governor's Office, Legislature, the California Department of Corrections and Rehabilitation, and representatives of local government on criminal justice realignment implementation issues, traffic, and other criminal law and procedure matters.

Works with the Board of State and Community Corrections (Board), the Chief Probation Officers of California, and the California State Sheriffs Association to define outcome-based measures for the Board's reports on implementation of local realignment plans, as required by statute.

*Total workforce numbers were gathered from the AOC HR Metrics by Office spreadsheet as of April 30, 2014. The number includes filled authorized positions, AOC temporary employees, employment agency temporary workers, and contractors. This report is updated regularly and posted here: <http://www.courts.ca.gov/policyadmin-aoc.htm>.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Consults with the Board to develop the first phase baseline data collection tool and refine ongoing data collection instruments to reflect the local impact of realignment with a focus on felony offenders and those on mandatory supervision and post-release community supervision.

Works with trial courts on all aspects of criminal justice realignment data collection and analysis and provides the data to the Board, the Joint Legislative Budget Committee, and the Department of Finance, as required by statute (Penal Code §13155).

Monitors and provides feedback on realignment-related legislation that impacts the courts in coordination with the AOC Office of Governmental Affairs and Legal Services Office.

Assists the AOC Fiscal Services Office in developing recommendations to the Trial Court Budget Advisory Committee for realignment-related trial court allocations.

Collects and reviews data from probation departments and provides research-specific technical assistance on probation revocations to state prison and local jail as required in the California Community Corrections Performance Incentive Act (SB 678).

Submits quarterly reports to the Department of Finance on probation data working with justice partners and Department of Finance to ensure the accuracy and reliability of the data used to determine the funding for county probation departments.

Conducts annual assessments of probation department's use of evidence-based supervision practices and assesses changes in use of evidence-based practices over time.

Develops and executes program evaluation, training, and research-specific technical assistance to participating reentry courts in the Parolee Reentry Court Pilot Program (Pen. Code, § 3015) and prepares council reports on program outcomes for the Legislature.

Provides staff support to the California Risk Assessment Pilot Project (CalRaPP), including: training for judges and other justice system partners; curriculum development and facilitation of trainings and workshop on evidence-based practices; quality assurance to support fidelity of risk assessment data, pre-trial release determinations, and evidence-based responses to violations of supervision; and program evaluation.

Provides program assistance and direct funding for collaborative justice projects in local courts.

Note: Activities relating to adult offenders in collaborative and mental health courts were moved here from the Center for Families, Children & the Courts. The Center for Families, Children & the Courts and the Criminal Justice Court Services Office continue to work together on these issues, as needed.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Conducts research and analysis for local collaborative justice and mental health projects in the courts to: identify cost effective practices, provide local court practitioners with data and tools to make sound programmatic and financially viable decisions, and support applications for funding.

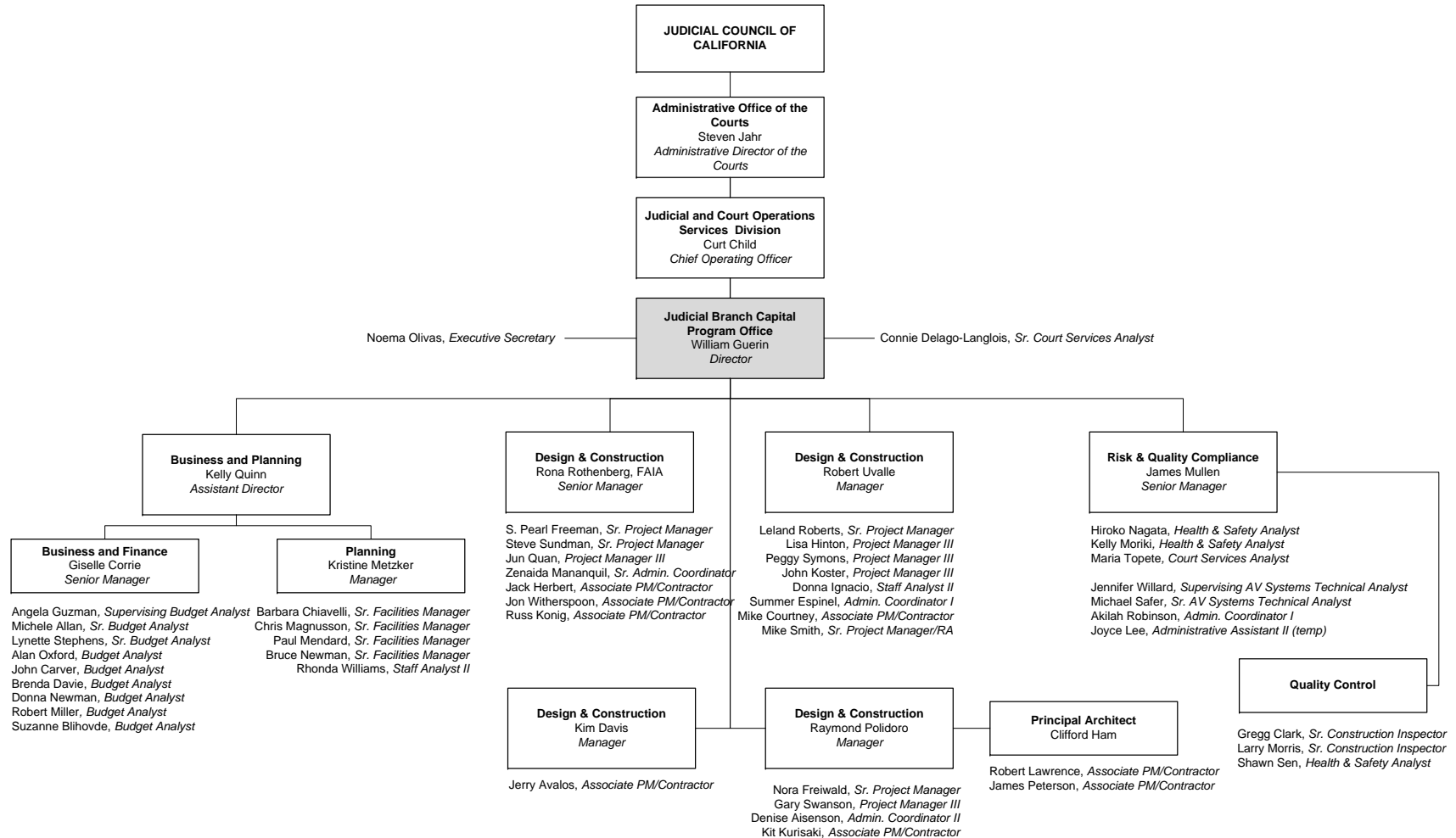
Note: Activities relating to adult offenders in collaborative and mental health courts were moved here from the Center for Families, Children & the Courts. The Center for Families, Children & the Courts and the Criminal Justice Court Services Office continue to work together on these issues, as needed.

Conducts externally funded evaluations including cost benefit studies of collaborative courts to assist in funding for local courts, based on Drug Court Cost Model.

Note: Activities relating to adult offenders in collaborative and mental health courts were moved here from the Center for Families, Children & the Courts. The Center for Families, Children & the Courts and the Criminal Justice Court Services Office continue to work together on these issues, as needed.

Maintains a website and listserv that provides realignment-related information and best practices for the courts, justice system partners, and the public.

Judicial Branch Capital Program Office



OFFICE NAME: JUDICIAL BRANCH CAPITAL PROGRAM OFFICE

Programs, Projects, and Activities

***Total Workforce: 56
45 filled authorized positions
1 employment agency temporary worker
9 contractors**

UNIT NAME: *Business and Finance*

Provides fiscal management, oversight, and accountability functions for the Judicial Branch Capital Program Office, including: maintenance of all financial information and preparation of budget allocation and forecasts; coordination of contract and financial issues; submissions of lease revenue bond sales data to State Public Works Board (SPWB); annual disclosure requirements on court construction lease revenue bonds; review and preparation of financial coding; invoice payments; budget change proposal (BCP) preparation; and fiscal and data and support for the Court Facilities Advisory Committee.

Provides fiscal management, oversight, and accountability functions for the Office of Real Estate and Facilities Management (OREFM), including: operations and maintenance of trial court facilities and facility modifications for existing court facilities; preparation of budget allocations and forecasting of costs for OREFM and the Court Facilities Trust Fund at the facility level; review and preparation of financial coding for facility modification requests; invoice payments for utilities, insurance, maintenance services, etc.; preparation of Accounts Receivable backup documentation, County Facility Payment notifications and annual Shared Cost Estimates statements; and BCP preparation.

Prepares detailed cash flow projections for State Court Facilities Construction Fund (SB 1732 Funds), Immediate and Critical Needs Account (SB 1407 Funds), and Court Facilities Trust Fund (SB 1732 Funds) used to manage and monitor resources for trial court facilities and support funding augmentation requests and loans to trial courts.

Monitors cash transferred to and expended from the Court Facilities Architectural Revolving Fund, and bond funds allocated to the capital program.

Provides support for the preparation of fiscal data included in the Five Year Infrastructure Plan and fiscal documents for Capital Outlay funding requests, including: analyses of project budgets and expenditures; updates to project budgets and schedules for next phase funding requests; finalization of BCP narratives; preparation of fiscal impact worksheets, California Construction Cost index updates, and requests for scope changes and augmentations; provision of fiscal data for requests and submissions to SPWB and State Treasurer's Office; and project cost tracking and information scheduling.

*Total workforce numbers were gathered from the AOC HR Metrics by Office spreadsheet as of April 30, 2014. The number includes filled authorized positions, AOC temporary employees, employment agency temporary workers, and contractors. This report is updated regularly and posted here: <http://www.courts.ca.gov/policyadmin-aoc.htm>.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Provides analysis, guidance, and recommendations on fiscal policy and proposed legislation related to the Judicial Branch Facilities Program.

Functions as lead agency liaison to the State Department of Finance, the Legislative Analyst's Office, and Legislative staff on capital outlay issues.

Monitors Local Courthouse Construction Fund (CCF) reporting, including: follow up with counties to ensure outstanding CCF balances are transferred to the State Court Construction Fund; collection and review of reports regarding revenues and expenditures from local CCFs; notification and collection of annual updated reports from counties with outstanding bond indebtedness; and preparation of annual legislative report for council approval.

UNIT NAME: *Planning and Policy*

Provides support to Court Facilities Advisory Committee in their development of policies for recommendation to the Judicial Council.

Lead staff to the Court Facilities Advisory Committee's Courthouse Cost Reduction Subcommittee, supporting its efforts to reduce project and program costs.

Leads the preparation of the Judicial Council-directed annual update to the Judicial Branch AB 1473 Five-Year Infrastructure Plan, and funding requests documents for capital projects to support the multi-year process of securing funding for active projects.

Leads the programming effort for each capital project and participates in the design phase, including developing and presenting the project planning parameters at the Court Facilities Advisory Committee's Construction Cost Reduction Subcommittee Pre-Design Project Review Meetings.

Prepares special reports required by legislation or requested by the Judicial Council on the facilities program.

Provides data analysis, space planning, options analysis, and other general planning services to the Administrative Office of the Courts (AOC) and trial and appellate courts at their request.

Develops future updates to the courts facility master plans, including approach, scope, and schedule in collaboration with the courts and under the guidance of the Court Facilities Advisory Committee.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

UNIT NAME: *Design and Construction*

Manages and delivers the major capital outlay building design and construction program for the branch for superior courts and Courts of Appeal including the Supreme Court and for the AOC's headquarters in San Francisco, Sacramento, and Burbank and in a special field office established in Fresno to serve the lower Central Valley.

Manages and delivers major, complex facility modifications statewide and special projects including court-funded and new judgeship-related construction projects, including:

- Establishing and facilitating advisory and working groups.
- Maintaining documentation for approved projects.
- Managing procurement and selection of architectural and engineering design teams, special consultants, and construction contractors for individual and program-wide capital projects, and on-call indefinite delivery-indefinite quantity basis for specific assignments.
- Planning, organizing, and managing all meetings with the design architects and their designated space programming consultants and the courts.
- Managing and administering all phases of capital project development including acquisition, design, and design approvals internally and with the Executive Branch, and directing and managing all phases of the projects.
- Maintaining project financial and contract records for program and project reporting.
- Managing project contract completion, transition to ownership, project commissioning, and occupancy activities.
- Preparing documentation and data required by the SPWB.
- Managing and coordinating all project and architectural activities required for the pre-design/acquisition phase of a project.
- Managing, participating in, and facilitating meetings with authorities having jurisdiction over the project.
- Negotiating design and construction contracts and developing documentation for review by financial, accounting, planning, and business teams.
- Reviewing, approving, and submitting design and construction contract invoices.
- Managing project completion, project close-out, and transition activities, including facility management, network integration, security, building automation, fire and life safety and related activities as a prerequisite to completion, and administration of the terms of project warranty.
- Maintaining and presenting technical documentation, materials, and resources.
- Representing branch programs and projects with other courts, nationally and statewide.

Supports Court Facilities Advisory Committee and its subcommittees in their development of policies for recommendation to the Judicial Council including: performing lead staff functions to subcommittee in

support of committee goals; planning, structuring, screening, refining, and leading all presentations on the scope, budget, and schedule of projects related to site acquisition and design.

Manages non-capital outlay assignments, including: major facility modifications and other special assignments, projects in leased buildings, construction for new judgeships and other related work. Services include: selecting design teams, special consultants, and construction contractors and developing a scope of services; negotiating and administering contracts; managing the work through all phases (i.e., development, design, project execution, and completion); managing and monitoring quality of work products and approving invoices; managing planning, design, bid, award, construction, and related activities; validating and verifying the scope of work, cost, schedule, regulatory and other requirements; reporting and seeking approval of variances between initial and actual scope and schedule criteria; managing and administering terms of the contracts for the construction projects; managing and/or facilitating phased and other moves; and managing and completing facilities transition, project close out, and warranty provisions.

UNIT NAME: *Risk Management/Quality/Compliance*

Manages construction inspection services program for the capital, facility modification, and facility management programs and provides subject matter technical assistance in building code interpretation and application, seismic design peer review, required state agency coordination, and building material laboratory testing.

Provides risk management services to the Judicial Branch Capital Program Office, OREFM, and other AOC divisions and judicial branch entities, including: reviewing contracts to ensure limited risk exposure; establishing policies, procedures, and guidelines to receive, analyze, and act on issues that create risk to the AOC and judicial branch entities; and providing specific health- and safety-related services to the AOC and judicial branch entities.

Manages the development and day-to-day operations of the AOC Injury and Illness prevention, as required by law.

Negotiates the cost and coverage provided by property insurance contracts covering insurance for court facilities as required by transfer agreements, indenture agreements, or contracts, and administers those insurance contracts, including the submission and negotiation of claims, according to the terms and conditions of the contract.

Negotiates the cost and coverage provided by property and commercial crime insurance contracts covering insurance for trial and appellate court furniture, fixtures, equipment, records, money, and securities, and assists the participating judicial branch entities in administering those insurance contracts, including the submission and negotiation of claims, according to the terms and conditions of the contract.

Ensures that the payments of fees associated with the inspection of conveyances are paid in a timely manner so that permitted conveyances, such as elevators, continue in operation pursuant to California Labor Code including: receiving, reviewing, and processing payment; inspecting cost invoices from CalOSHA; receiving, reviewing, and distributing permits; and ensuring inspections that occur working through AOC Facility Management Unit and the California Department of Industrial Relations (DIR).

Develops and implements an owner-controlled insurance/risk management program for all capital projects, including: developing risk management related terms and conditions for design professional and construction contractor contracts; developing policies, procedures, and guidelines to manage design professional and construction contractor requirements; and developing and implementing construction site safety and insurance requirements.

Provides subject matter technical assistance to ensure court facilities are constructed and maintained in compliance with the California Fire Code and local jurisdictions having authority for fire prevention, including: establishing policies, procedures, and guidelines to ensure fire and smoke prevention and control systems are installed and maintained in all trial and appellate court facilities; providing consultation and guidance on any matter that interfaces with fire and smoke prevention, detection, and control; and acting as the day-to-day liaison with the State Fire Marshall.

Leads the efforts on prevailing wage compliance for all bond funded construction projects, including: working with the DIR to develop and implement construction site labor compliance programs and specific requirements, and receiving, reviewing, and processing to completion DIR complaints concerning wage and labor compliance issues.

Provides subject matter technical assistance to ensure court facilities are constructed and maintained in compliance with the California Trial Court Facilities Standards Audio Visual (AV) requirements and industry best practices, including: participation in capital courthouse construction programming and schematic design phases; participation in design and construction review and input on the AV systems being specified for courthouse construction projects; review of project/construction schedules and onsite AV systems installation; installation of AOC-TV satellite downlink equipment and input on punch list items; participation in courthouse bid and submittal review and input on the AV bidders proposing to construct the AV systems for courthouse projects.

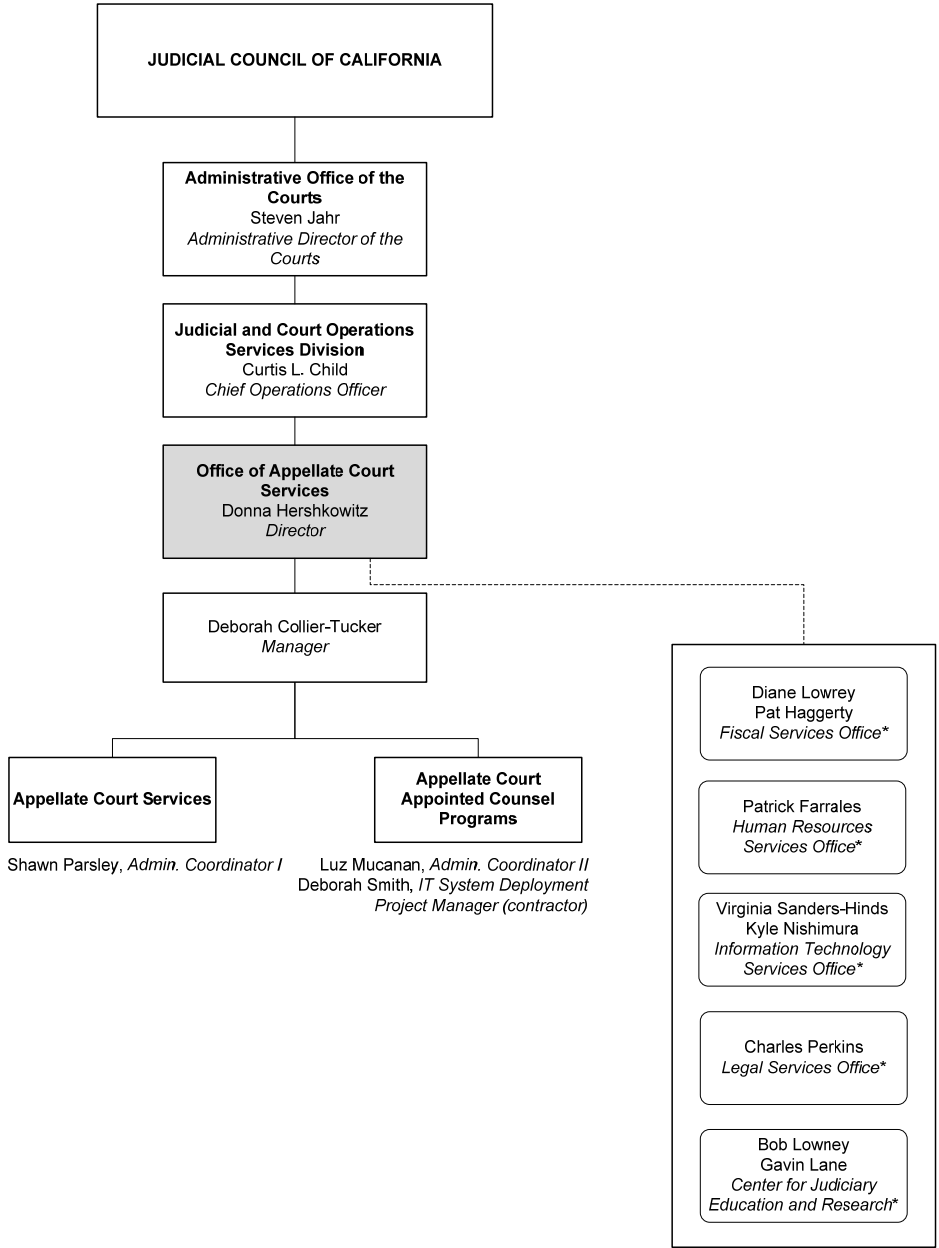
The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Consults with Capital Programs Office, other AOC offices, and the appellate courts for new or renovated courthouse facilities including: user needs assessment, cost estimation, scope of work development, review of AV bidder for qualifications, and limited project management during the construction and installation of AV systems.

Develops and implements AV standards and best practices for use by the California Judicial Branch in areas of design and construction, audio and videoconferencing, use of video over the technical infrastructure, remote video arraignment, and training and conference rooms.

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Office of Appellate Court Services



*AOC directors from these office have designated principal staff member(s) to handle appellate court requests. These designees coordinate their offices' services to the appellate courts through the Office of Appellate Court Services.

OFFICE NAME: OFFICE OF APPELLATE COURT SERVICES

Programs, Projects, and Activities

***Total Workforce: 4**
3 filled authorized positions
1 contractor

UNIT NAME: *Appellate Court Services*

Courts of Appeal Court-Appointed Counsel (CAC) Program

- Assists in monthly review, analysis, and monitoring of program's budget and expenditures.
- Provides staff support and prepares quarterly analytical reports for the Appellate Indigent Defense Oversight Advisory Committee and its subcommittees.
- Serves as the lead Administrative Office of the Courts (AOC) liaison to the six Appellate Projects (includes Supreme Court) and California Appellate Defense Counsel, including handling all communications and attending meetings as required.
- Performs daily review, analysis, and tracking of CAC compensation claims for non-capital appeals and troubleshoots CAC system issues that impact the processing and payment of CAC claims.
- Negotiates program policy and legal service agreements with six non-profit organizations ("Appellate Projects"), including Supreme Court Project.
- Communicates daily with appellate projects and appointed counsel to resolve issues, respond to inquiries, and provide relevant program information.
- Performs monthly review, analysis, and tracking of project invoices and compensation by service categories and total contract hours completed.
- Manages the development, design, and implementation of the new CAC case processing and payment system for the Appointed Counsel Program for the Courts of Appeal.

Appellate Court Services

- Provides analytical and administrative support to appellate court justices and staff through various venues and works closely with appellate court leadership to respond to inquiries, resolve concerns, and advocate on behalf of the appellate courts for their needs.
- Manages appellate court funds earmarked for appellate court continuing education.
- Provides assistance with planning and implementation of training and educational programs for justices and staff of the Courts of Appeal and the Supreme Court.
- Serves as the AOC's central point of communication and coordination between appellate court leadership and all AOC offices that service the appellate courts to ensure the delivery of quality and timely services.
- Supports the Administrative Presiding Justices Advisory Committee, including planning and executing quarterly and ad hoc meetings.
- Staffs quarterly and ad hoc meetings of California Appellate Court Clerks Association.

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- Processes travel claims (in-state and out-of-state) and training requests for the appellate court justices and staff.
 - Serves as staff to the Appellate Court Security Committee and the Appellate Court Legacy Project Committee.
 - Serves as the AOC staff liaison to the Habeas Corpus Resource Center.
 - Facilitates the arrangements of appellate court meetings as requested.
-

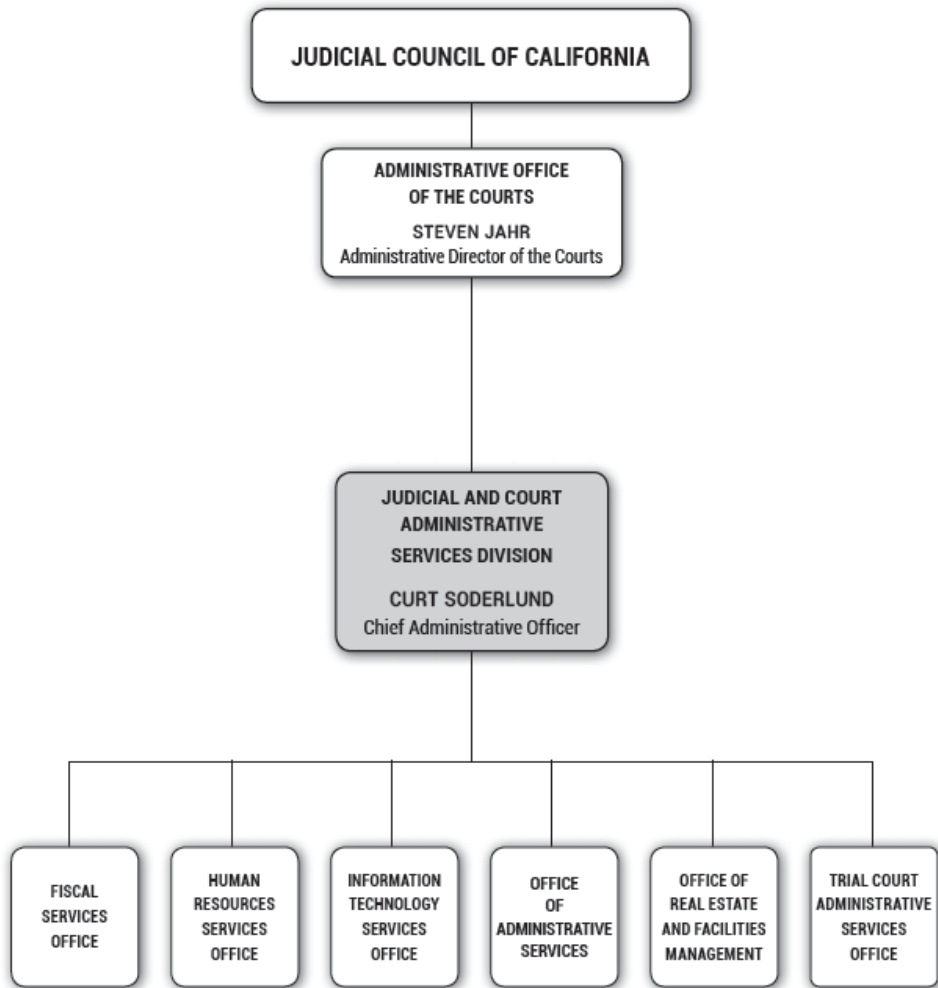
Civil Case Coordination Program

- Provides administrative support and processes incoming Petitions for Coordination, including petitions for coordination of add-on cases.
 - Reviews, analyzes, and processes reimbursement claims from trial courts.
-

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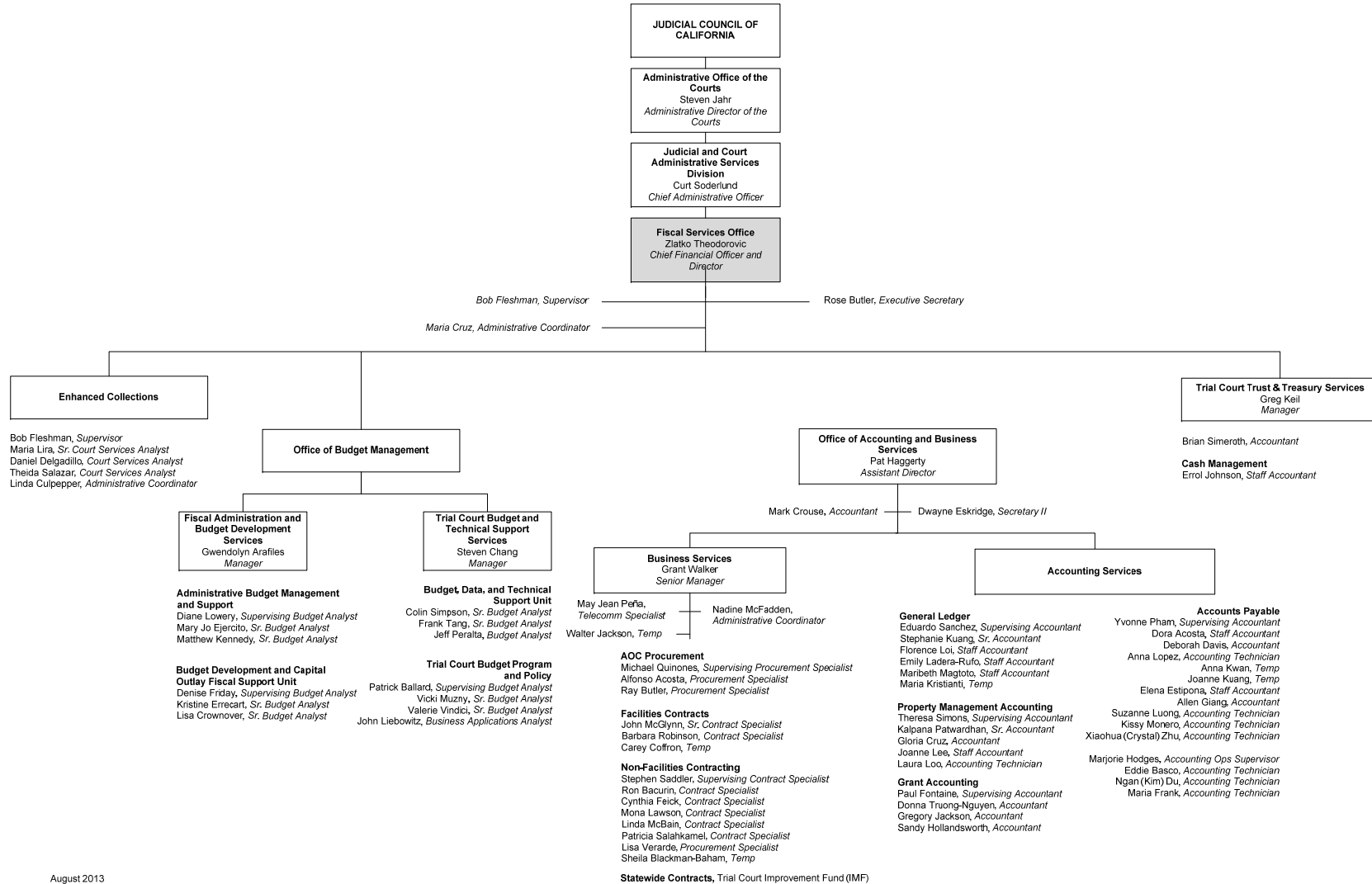
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JUDICIAL AND COURT ADMINISTRATIVE SERVICES DIVISION



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Fiscal Services Office



August 2013

OFFICE NAME: FISCAL SERVICES OFFICE
Programs, Projects, and Activities

***Total Workforce: 73**
68 filled authorized positions
5 employment agency temporary workers

UNIT NAME: *Fiscal Services Office Director's Office and Administration*

Provides oversight, budget development, and management support to the \$3.1 billion branch budget.

Works with the Judicial Council, Chief Justice, Administrative Director, and appellate and trial court leadership to develop and submit budget priorities to the Governor and the Legislature.

Oversees the daily investment activities of over half a billion dollars in trial court funds through conservative investment vehicles approved by the council.

Provides accounting and business services (i.e., contracting, procurement, and telecom support) to the appellate system and Judicial Council/Administrative Office of the Courts (AOC).

Works with the trial courts to review operational and fiscal issues, review and monitor financial documents, remedy deficiencies, resolve fiscal issues, and share best practices.

Reviews and revises the Trial Court Financial Policies and Procedures Manual to meet the needs of the trial courts and develops financial policies and procedures as directed by the Judicial Council, Administrative Director of the Courts, or as mandated by federal or state laws.

Represents the judiciary to internal and external customers including other branches of state government on issues pertaining to branch fiscal issues.

Testifies at legislative hearings and meets with legislative staff, as needed, to promote judicial branch needs and priorities.

Co-chairs the Trial Court Budget Advisory Committee (TCBAC), which advises the council on trial court funding matters.

Assists trial courts in meeting the requirements established in Governmental Accounting Standards Board statements 43 and 45, requiring government entities to disclose accrued liability for other post-employment benefits and related information at least once every other year.

Utilizes a comprehensive process of programmatic and fiscal analysis to ensure that all costs, benefits, and alternatives are considered before decisions are made on whether to proceed with proposals for the judicial branch.

Coordinates and provides annual revenue distribution training in conjunction with the State Controller's Office (SCO) and trial court subject matter experts.

*Total workforce numbers were gathered from the AOC HR Metrics by Office spreadsheet as of April 30, 2014. The number includes filled authorized positions, AOC temporary employees, employment agency temporary workers, and contractors. This report is updated regularly and posted here: <http://www.courts.ca.gov/policyadmin-aoc.htm>.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

UNIT NAME: *Accounting and Business Services - Administration*

Acts as financial advisor to the Appellate Security Committee, the Statewide Workers Compensation Working Group, and the Appellate Indigent Defense Advisory Committee.

Reviews and signs warrants and claim schedules processed by the AOC Accounting Services.

Processes assigned vehicle taxable portions and taxable travel to SCO for inclusion in taxable earnings.

Reviews year-end financial statements prepared by Accounting Services for all funds, and prepares and signs letter of representation for same.

Manages procurement files for original contract documents, purchase orders, and related correspondence and documents (except for leases, facility transfer documents, and facility joint occupancy agreements).

Acts as financial project manager for statewide California Highway Patrol (appellate dignitary protection) and statewide appellate unarmed security contracts.

Prepares 1099s for vendor payments initiated by AOC Accounting Services.

Maintains Oracle vendor master database that serves all users.

Liaises with SCO, Habeas Corpus Resource Center (HCRC), Commission on Judicial Performance (CJP), appellate courts, and AOC divisions on fiscal issues.

Acts as a disbursement monitor/reporter for all superior courts' grants/memorandums of understanding/intra branch agreements on monthly basis for Trial Court Administrative Services Office (TCAS).

Verifies tax identification numbers and Social Security numbers for accounts payable vendors with questionable tax identification.

Processes assessments of Use Tax for California Board of Equalization, e-file returns, and payment for AOC, SCO, HCRC, CJP, and the appellate courts.

UNIT NAME: *Accounting Services – Accounts Payable*

Processes: compensation and travel reimbursement claims of assigned judges accepting judicial assignments to the appellate and superior courts; special master assignments and travel reimbursement claims for the CJP; payment of appellate indigent defense panel attorney compensation claims; and payment of attorneys appointed by the superior courts participating in the Dependency, Representation, Administration, Funding & Training (DRAFT) program.

Administers direct deposit program and electronic claim schedule submission to the SCO for payments for the Assigned Judges, Appellate Court Appointed Counsel, leases, and utility programs.

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Performs audit review and payment of vendor invoices and travel expense claims and ensures that invoices comply with contract, purchase order, inter-branch agreement, etc.

Maintains invoices, claim schedules, and payment records.

Researches and proposes solutions for taxable and financial implication issues.

Reviews and prepares year-end accruals.

Provides recommended payment process guidelines and data collection information for new programs.

Supports appellate courts, HCRC, CJP, and AOC staff by answering day-to-day questions on business meals, travel, SCO-rejected payments, timing of payments, contract deliverable questions, etc.

Enters or uploads data for all payments for the appellate courts, HCRC, CJP, and AOC (all funds including grants and facilities) and reconciles accounts payable ledgers to SCO records.

Works with appellate courts, HCRC, CJP, and AOC staff to ensure three years of encumbrance balances are accurate.

Processes claim schedules to SCO claims audit section and works with SCO claims audit to resolve payment issues.

UNIT NAME: *Accounting Services – Property Management Accounting*

Reviews and monitors facility related transactions for the Judicial Council/AOC, appellate courts, and HCRC.

Coordinates information and activities with the Judicial Branch Facility Program along with FSO staff and management to ensure those activities are in accordance with funding, recorded appropriately, and reported accurately.

Maintains the fixed asset system to record, track, and report all capital assets owned by all divisions of the AOC, appellate courts, HCRC and CJP.

Maintains capital projects sub-system and construction in progress sub-ledgers to record, track, and report capital projects by phase and facility work as it relates to the improvement of existing facilities.

Assists with recording, tracking, and reporting of facility-related expenditures; verifies and tracks encumbrances; reviews invoicing for correct funding identification; and processes corrections.

Maintains accounts receivable sub-system to record, track, and report monies due to the AOC including facility rent, shared costs for counties, and facility modification costs.

UNIT NAME: *Accounting Services – General Ledger*

Maintains the Automated Fiscal System, the Chart of Accounts and its structure to conform to State of California requirements, internal controls, checks, and balances, and general ledger and other financial

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records for all funds.

Maintains and monitors bank accounts (Revolving Fund).

Ensures financial transactions are reviewed and recorded in accordance with proper use and disbursements of funds.

Analyzes and monitors all funds and appropriation balances and analyzes financial records and reconciles all funds/entities financial records with the SCO records.

Maintains bond cash management.

Processes year-end financial statement preparation for all funds.

Develops, maintains, and provides financial reports to internal and external entities.

Reviews and approves contract transmittal forms and contracts for proper funding information and usage.

Provides accounting advice to appellate courts, HCRC, CJP, and other AOC offices.

Monitors federal grant cash flow.

Manages employee transit subsidy program for appellate courts, HCRC, CJP and AOC.

Provides fiscal system usage and training to internal customers.

Develops semi-annual report on payments to vendors as required by Public Contract Code for all entities subject to the code.

Records appellate court fee revenue, abatements, etc. and remits cash receipts to SCO monthly.

Distributes staff and justice payroll warrants from SCO on a monthly basis.

Closes financial records monthly.

UNIT NAME: *Accounting Services – Grant Accounting*

Provides oversight, budget, forecasting, financial reporting and monitoring for judicial branch grants.

Provides supporting documentation on branch grants for the Judicial Council to make decisions on grant fund applications and allocations to trial courts.

Manages and ensure compliance with cost allocation methodologies and approvals both within the judicial branch and also with respective governmental agencies.

Develops grant standards consistent with grantor requirements.

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Manages federally mandated grant accounting tracking system and reconciles reimbursement accounts for or all expenditures, capital, match funding relating to grant funds.

Ensures compliance with California State judicial branch spending authority relating to grant funds received by judicial branch.

Provides grantee training on grantor requirements, changes, and limitations and court grant personnel training on financial practices related to grants.

Provides primary interface with Judicial Council and external state, local, and federal governmental agencies and grantee entities regarding grant financial compliance and reporting deliverables.

Provides grantor mandated deliverables per state and federal grant regulations.

Provides day-to-day support to court grant personnel on billing requirements and allowable charges.

Updates payment terms and conditions of grant contracts consistent with changing grant requirements for reporting forms, timesheets, summary sheets, tracking forms, and other related forms.

Obtains approval from respective governmental agencies for grant budget changes.

Assists AOC offices in analyzing and evaluating grant-related legislation and new grant opportunities and develops financial payment and tracking methodologies to accomplish funder goals.

UNIT NAME: *Business Services – AOC Procurement*

Develops AOC solicitation documents and assists in facilitation of solicitations (e.g., requests for proposal (RFP), invitations for bids (IFB), requests for qualifications (RFQ)) including issuance of subsequent purchase order documents and assists appellate courts and HCRC in solicitations upon request.

Manages encumbrances in the Oracle Financial systems to meet payment obligations for each contract and enters/releases all purchase order encumbrances in Oracle for AOC, appellate courts, HCRC, and CJP.

Reviews and provides input on the Judicial Branch Contracting Manual (JBCM) and provides training and guidance for superior and appellate courts as well as HCRC procurement staff on the intent and implementation of the JBCM.

Maintains equipment replacement schedules and coordinates disposal of equipment purchased by AOC through Executive Branch Property Reutilization.

Administers the CAL-Card program for the AOC, appellate courts, HCRC, and CJP.

Solicits and maintains statewide pricing with furniture manufacturers.

UNIT NAME: *Business Services – Facilities and Non-Facilities Contracting*

Develops AOC solicitation documents and facilitates solicitations (e.g., RFPs, IFBs, RFQs, etc.) including the drafting, negotiating, and execution of subsequent contract documents.

Drafts contract amendment documents including execution of those amendments.

Manages encumbrances in the Oracle Financial systems to meet payment obligations for each contract.

Provides input and trains AOC staff on the JBCM and Judicial Branch Contracting Law (JBCL), and collaborates with the Legal Services Office on developing new contract document templates for procurement.

Assists in the development of construction procurement and project management procedures and maintains the AOC's policy for the procurement of goods and services for procurements related to the construction of trial court facilities.

UNIT NAME: *Business Services – Statewide Procurement*

Develops branch wide solicitation documents and facilitates those solicitations (i.e., RFPs including drafting and execution of subsequent master agreements/leveraged purchasing agreements).

Drafts amendment documents for master agreements/leveraged purchasing agreements including execution of those amendments.

Performs court surveys and cost benefit analyses for assistance in determining priority of statewide master agreements.

UNIT NAME: *Business Services – Telecom*

Manages and maintains voice over internet protocol (VoIP) phone system for the AOC (all locations), the Supreme Court, 1 District Courts of Appeal (DCA), 2DCA (Ventura), 3DCA (Sacramento), 4DCA (Riverside), 4DCA (Santa Ana), 4DCA (San Diego) and 5DCA (Fresno).

In conjunction with Information Technology Services Office, leads resolution of outside issues affecting phone system.

Procures installations and provides escalations for facilities court telecommunications transfers, DSL, and analog lines which provide service for fire and safety lines (e.g., elevator lines) and Building Automation Systems.

Reviews and corrects phone bills for AOC-managed systems as necessary.

UNIT NAME: *Fiscal Administration and Budget Development Services – Administrative: Budget Management and Support*

Provides technical support/assistance to: assigned AOC offices in developing and managing organizational budgets; and FSO management and AOC Executive management on budget development, budget administration, expenditure forecasting, and position control.

Identifies, evaluates, and analyzes fiscal impacts of AOC personnel action requests.

Provides branch and AOC fiscal information and specialized fiscal research, analysis, reporting, and responses to the AOC Executive leadership and various Judicial Council committees (i.e., Advisory Committee on Financial Accountability & Efficiency for the Judicial Branch (A&E), TCBCAC), as requested.

Provides fiscal training and assistance and performs ongoing review and updates to fiscal reports (forecast, personal services reports, etc.) utilized by AOC offices, appellate courts, and the HCRC to monitor fiscal status.

UNIT NAME: *Fiscal Administration and Budget Development Services – Budget Development and Capital Outlay Fiscal Support*

Provides technical support/assistance to: several AOC divisions, the Supreme Court, the Courts of Appeal, and the HCRC in developing and managing their organizational budgets; and FSO management and AOC Executive management on budget development, budget administration, expenditure forecasting, and position control.

Provides assistance in the appellate courts' budget development, month-to-month review, and budget change proposals.

Assists in preparation, review, and submittal and various technical budget documents for inclusion in the annual state budget and acts as liaison to Department of Finance regarding technical budget issues.

Provides revenue projections for the State Court Facilities Construction Fund, Court Facilities Trust Fund, and the Immediate and Critical Needs Account.

Identifies, evaluates, and analyzes fiscal impact of AOC personnel action requests.

Provides branch and AOC fiscal information to the AOC Executive leadership and various Judicial Council committees (e.g., A&E,) as requested.

UNIT NAME: *Trial Court Budget and Technical Support Services*

Provides staff support to the Judicial Branch Workers' Compensation Program Oversight Committee, the TCBCAC and its subcommittees, and the SB 56 Working Group.

Provides briefings and presentations on trial court funding for unions, court management and staff, legislative staff, AOC management, the Judicial Council, and others.

Maintains and updates the Workload-Based Allocation and Funding Methodology in collaboration with the Office of Court Research.

Coordinates and prepares trial court related information requests from the Legislative Analyst's Office, Department of Finance, the public, and others.

UNIT NAME: *Budget, Data, and Technical Support*

Processes monthly Trial Court Trust Fund (TCTF) distributions to the trial courts and tracks allocations.

Develops special funds budget allocation recommendation report(s) to the Judicial Council.

Provides ad hoc trial court statewide special funds and trial court financial information upon request of the courts, other divisions, and external agencies.

Provides 10R Revenue projections to the Department of Finance.

Revises the trial courts' TC-145 schedule and produces the trial courts' quarterly Report of Revenue schedule assisting with revision, collection, tracking, and data analysis.

Develops mandated Judicial Council reports to the Legislature (e.g., : civil court reporter-related revenue and expenditure; trial court allocations; and special funds expenditures).

Provides year-end financial statement revenue and expenditure accrual information and maintains fund condition statements and multi-year estimates for TCTF and Improvement and Modernization Fund (IMF).

UNIT NAME: *Trial Court Budget Program and Policy*

Submits trial court retirement and health benefits cost changes to the Department of Finance for inclusion in the Governor's budget annually.

Reviews and prepares monthly reimbursement of: court interpreter expenditures for trial courts pursuant to Budget Act and Judicial Council policy; monthly reimbursement of jury trials expenditures for criminal and non-reimbursed civil trials for trial courts; quarterly reimbursement of eligible prisoner hearing costs for trial courts in counties with prisons, state hospitals, or youth authority facilities; eligible elder abuse filings; and eligible service of process costs by law enforcement for trial courts.

Reviews and prepares reimbursement of eligible costs related to redevelopment agency writ cases for trial courts.

Prepares and submits semi-annual report to the legislature and Judicial Council on purchase or lease of electronic recording equipment; and annual trial court financial information report to the Legislature as required in Government Code.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Prepares trial court related information requests from the Legislative Analyst’s Office and Department of Finance.

Provides support to the TCBC and subcommittees, including preparing issue papers for discussion as required.

Reviews and prepares trial court security budget change proposals and responds to inquiries related issues to non-sheriff and sheriff related costs.

Provides budget support to the Criminal Justice Court Services Office including drafting surveys on revocation costs, and preparing Judicial Council reports on allocations.

Processes the trial courts’ Quarterly Financial Statement, Quarterly Change in Authorized Positions, annual Schedule 7A, Constraints on Funds Balance, and annual Schedule 1, including schedule revisions, collections, tracking, and data analysis.

Prepares Judicial Council reports on 2 percent TCTF state-level reserve funding requests from trial courts for council business meetings from October to February and develops the annual 2 percent TCTF state-level reserve report to the Legislature.

Reviews and makes staff recommendations for all extraordinary homicide reimbursement claims, submitted by trial courts as required by Penal Code and Judicial Council guidelines.

Reviews the recommendations of 58 trial court Indirect Cost Rate Proposals required for courts to charge overhead costs to grants on an annual basis.

Reviews and makes staff recommendations for all trial courts’ court facility requests submitted for new and renewed leases and other facilities non-capital projects.

Reviews cash flow advance requests from trial courts per Judicial Council policy.

Provides budget support to the Judicial Council Technology Task Force Funding Track subcommittee.

Provides trial court budget technical assistance on a daily basis as financial liaison between trial courts and the FSO on issues related to the budget, including allocations.

UNIT NAME: *Enhanced Collections*

Identifies and expands access to methodologies and tools to enhance efforts to collect delinquent court ordered debt.

Manages guidelines, best practices, and performance measures adopted by the Judicial Council that must be met by the court’s and/or county’s comprehensive collections programs.

Establishes and maintains standard agreements for collections services.

Provides mediation services with the California State Association of Counties in the event that a court and county are unwilling or unable to enter a cooperative plan to provide collection services.

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Develops the annual *Statewide Collection of Court-Ordered Debt* report for the Judicial Council to the Legislature providing information on court-ordered debt and collections at the court and county level.

Develops and manages cost recovery guidelines to provide county collection programs with consistent principles on a statewide basis.

Provides consulting services regarding the collection of fines, fees, penalty assessments, and other court ordered debt to courts, counties, and entities such as the Franchise Tax Board, Department of Finance, and others.

UNIT NAME: *Treasury Services*

Bank Accounts and Bank Account Services

- Manages the bank relationship, and all banking fees and banking services for all Bank of America Master Banking Agreement (“BOAM”) bank accounts in use by all of the trial courts.
- Supplies financial information from the banking and investment service providers for TCAS to perform its daily financial cash accounting and reporting within Phoenix.
- Monitors the trial courts’ daily and monthly cash flow reporting to manage the trial courts’ cash and investments.
- Provides treasury and banking service advice to the trial courts and the AOC.

Investments

- Invests all trial court funds held in bank accounts established under the BOAM on behalf of the trial courts and prepares trial court investment programs’ quarterly investment report for presentation to the Judicial Council.
- Summarizes and monitors all trial courts’ individual actual daily and monthly cash flow reporting supplied by Phoenix to manage the investment program and evaluate the best investment options available to the trial courts.
- Manages the investment service provider contracts and relationships.

Uniform Civil Fee (UCF) Collection and Distribution

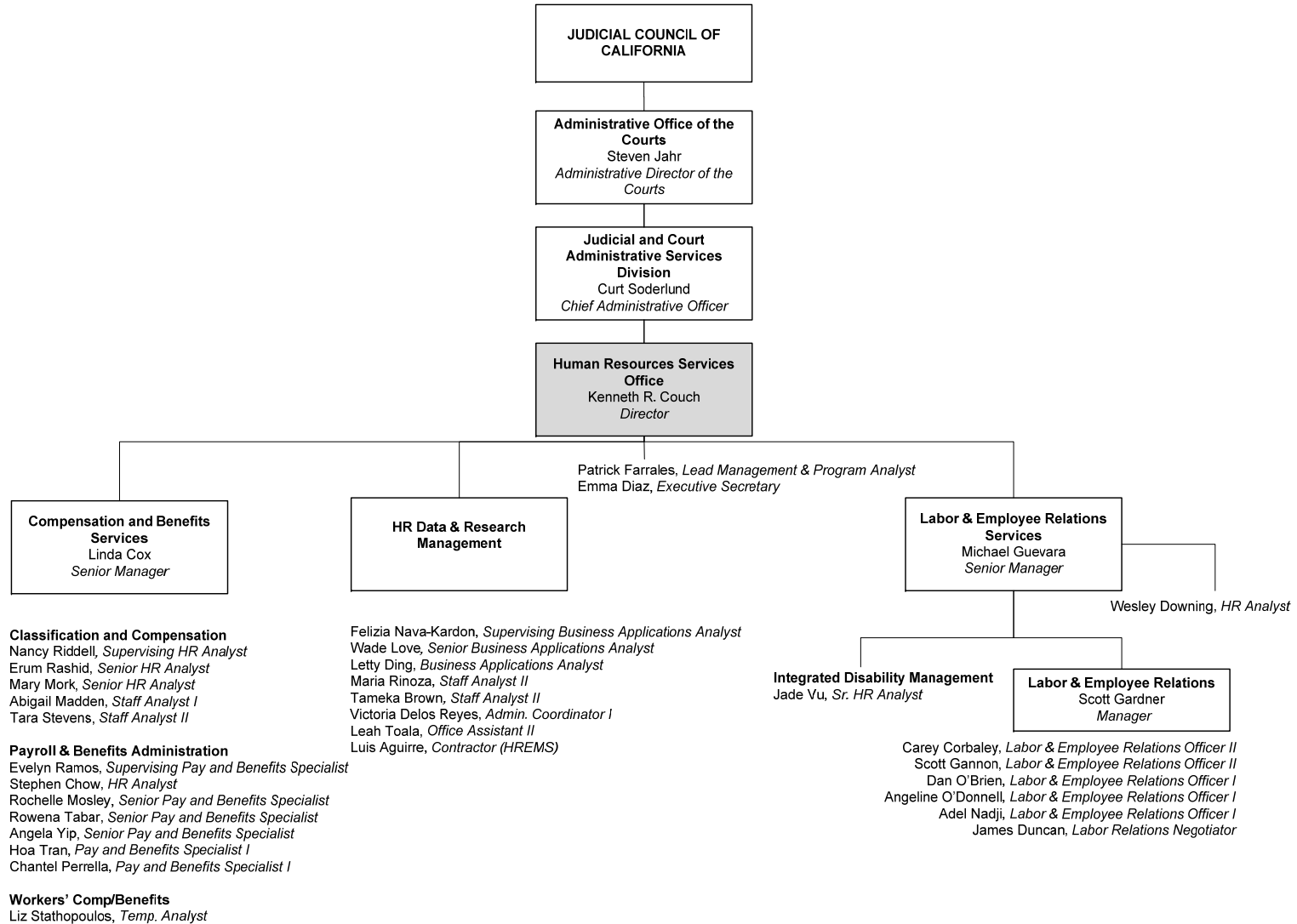
- Manages the system of bank accounts, reporting, accounting, and remittance to the state and local agencies of Uniform Civil Fee collections for all of the trial courts.

Merchant Card Acceptance

Manages credit card acceptance for 32 trial court participants under the BOAM merchant card agreement.

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Human Resources Services Office



OFFICE NAME: HUMAN RESOURCES SERVICES OFFICE

Programs, Projects, and Activities

***Total Workforce: 35
32 authorized filled positions
1 AOC temporary employee
1 employment agency temporary workers
1 contractor**

UNIT NAME: *Human Resources (HR) Director's Unit*

Guides the strategic goals of other office units to support policies of the Executive Office, the Chief Justice, and the Judicial Council related to branch-wide HR policies and programs.

Provides executive-level guidance and oversight to the Administrative Office of the Courts (AOC) Personnel Action Request (PAR) process (personnel transactions such as reclassifications, hiring, demotions, and promotions).

Drafts office communications, including all website content, reports, surveys, and other HR publications.

Provides advice/recommendations/guidance to Executive Office regarding high-level personnel matters and programs.

Develops and distributes legally required communications (e.g., communications regarding tax information, open enrollment benefit periods, etc.).

Manages and updates all HR-related information to state judicial branch websites.

UNIT NAME: *Classification and Compensation*

Salary Administration Program: develops compensation structure and compensation reviews for the judiciary, recommends salary ranges; assists in ensuring that positions are properly compensated based on duties performed.

Ensures compliance with Fair Labor Standards Act and the Equal Pay Act.

*Total workforce numbers were gathered from the AOC HR Metrics by Office spreadsheet as of April 30, 2014. The number includes filled authorized positions, AOC temporary employees, employment agency temporary workers, and contractors. This report is updated regularly and posted here: <http://www.courts.ca.gov/policyadmin-aoc.htm>.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Surveys the trial courts, on a biennial basis, for updates to the *Trial Court Uniform Model Classification Plan* and updates the plan as needed.

Assists in preparing job descriptions that are appropriate for positions and within the scope of the assigned classification; develops new and updates existing classification specifications to accommodate changing job duties.

Reviews and recommends action on requests for reclassification or promotion for judiciary employees.

Advises staff and management and provides guidance regarding the application of classification-and-compensation-related policies.

Assists an outside vendor with conducting a comprehensive review of the AOC classification system to identify and correct misclassified positions, particularly in managerial classes, and on achieving efficiencies by consolidating and reducing the number of classifications.

Reviews all compensation-related policies and procedures, including those contained in the AOC Personnel Policies and Procedures Manual.

UNIT NAME: *Pay and Benefits*

Manages and administers payroll and benefits for judicial officers and employees of the Supreme Court, the Courts of Appeal, the California Judicial Center Library, the AOC, the Habeas Corpus Resource Center (HCRC), and the Commission on Judicial Performance (CJP); provides retirement estimates and liaises with the Judges' Retirement System, CalPERS, State Controller's Office, and California Department of Human Resources to ensure the effective handling of judicial officers' and employees' payroll, benefits, and retirement.

Manages the Judicial Officers' Assistance Program and Employee Assistance Program.

Note: The Judicial Officers' Assistance Program will be discontinued in fiscal year 2014-15.

UNIT NAME: *Workers' Compensation Administration*

Supports the Judicial Branch Workers' Compensation Program.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Serves as subject matter experts on ergonomic issues, and provides evaluations and trainings, upon request.

UNIT NAME: *Labor and Employee Relations*

Resolves complex labor matters.

Resolves employee relations issues and conflicts.

Assists trial court management within each of the four court interpreter regions in bargaining interpreter Memorandums of Understanding; works with AOC Court Operations Special Services Office, Court Language Access Support Program to respond to labor inquiries and participate on conference calls.

Provides input to the Office of Governmental Affairs and the Legal Services Office on proposed labor and employment legislation affecting the judicial branch.

Provides subject matter expertise in the development and delivery of trainings for the judicial branch in all areas of human resources.

Sponsors, coordinates, and facilitates logistical support for the annual Labor Relations Academies and Forum.

Oversees the telecommute and ad hoc telecommute programs, including the collection and reporting of data to the Executive Office.

UNIT NAME: *Policy Development*

Develops/maintains policies and practices, and ensures compliance with Personnel Policy and Procedure Development Program.

Ensures adherence to Federal and State Labor Law Posting Requirements.

Administers and coordinates AOC non-monetary Awards and Recognition Program (AOC Service Awards).

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Develops, implements, and supervises the AOC Performance Management Program.

UNIT NAME: *Integrated Disability Management*

Supports integrated disability management programs for the judicial branch, including reasonable accommodations and interactive process.

Ensures compliance with multiple state and federal laws covering medical and disability leave.

Provides safe working conditions including an ergonomic evaluation program to promote ergonomically correct workstations and in-house ergonomic evaluations for the judicial branch.

Serves as chair and provides staff support to the Illness and Injury Prevention working group.

UNIT NAME: *HR Data & Research Management*

Provides required Equal Employment Opportunity reporting for the AOC, Supreme Courts, Courts of Appeal, the California Judicial Center Library, the HCRC, and the CJP; assists trial courts with their reporting requirements upon request.

Provides strategic technology systems support and management of the state judiciary's Human Resources Information System for the AOC, Supreme Court, Courts of Appeal, the California Judicial Center Library, the HCRC, and the CJP.

Develops standardized reports used across courts or business units, including AOC agency-wide staffing metrics; responds to complex reporting needs; develops and executes reporting standards; provides ad-hoc reports as necessary.

Provides contract administration for the Automatic Data Processing master agreement for trial courts including negotiations and assistance in resolving contract issues between the vendor and trial courts.

Manages and employs all HR updates to judicial branch websites.

Maintains and administers the HR Network (the HR Listserv).

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Maintains the online PAR form used to make changes to employees and positions and an online Performance Management tracking system.

Note: This is currently provided only to the AOC.

UNIT NAME: *Recruitment*

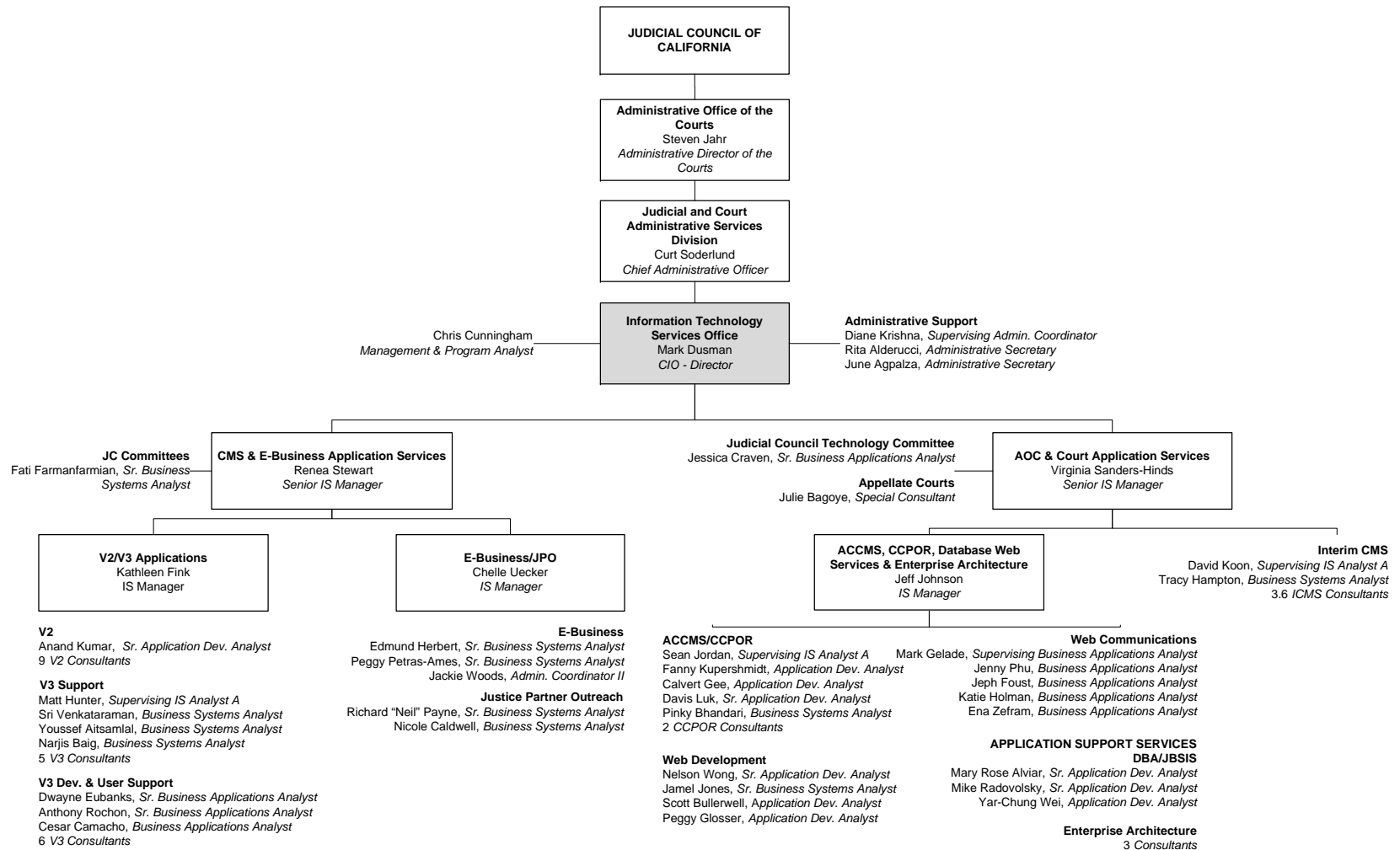
Develops and implements effective recruitment strategies for job openings, ensuring nondiscriminatory hiring practices in compliance with Equal Employment Opportunity and applicable immigration law.

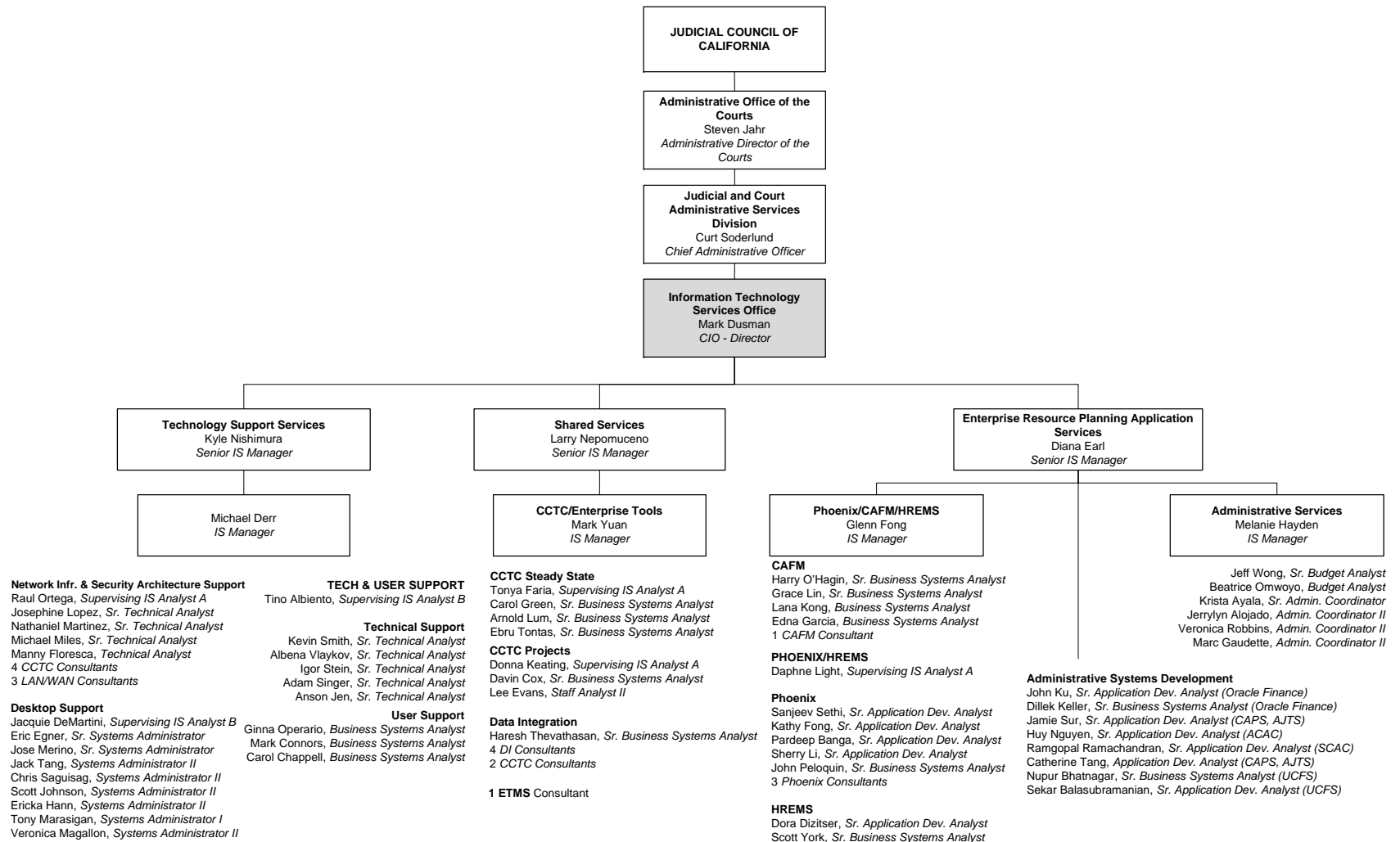
Provides support and guidance regarding designing job postings and corresponding screening techniques; employs sophisticated selection techniques, including web-based advertising strategies and tools.

Manages a centralized employment agency temporary assistance program to meet contingency staffing needs while ensuring that the employment of temporary or other staff to circumvent a hiring freeze is not permitted.

Reports to the Judicial Council vacant authorized positions that have remained unfilled for six months.

Information Technology Services Office





OFFICE NAME: INFORMATION TECHNOLOGY SERVICES OFFICE

Programs, Projects, and Activities

***Total Workforce: 154.88**
109.88 filled authorized positions
45 contractors

PROGRAM NAME: *Executive*

- Defines Information Technology Services Office (ITSO) strategy.
- Makes tactical and enterprise technical decisions to meet the goals of the Judicial Council.
- Directs ITSO to provide selected computer-based applications services, technology infrastructure support, and technical expertise.
- Collaborates with business partner stakeholders and third-party vendors to identify future strategy for infrastructure and application development, maintenance, deployment, and support.
- Provides full technology life cycle services.
- Protects technology assets through timely, cost-effective technological enhancements and solutions.
- Consults with courts and other government entities regarding program policy and service agreements.
- Represents the judiciary to internal and external customers, including other branches of government, on issues pertaining to the office's functional areas.
- Defines, publishes, trains, and supports enterprise technology standards for the judicial branch.
- Collaborates with the Administrative Office of the Courts (AOC) Business Services unit and Legal Services Office to identify, negotiate, and procure statewide technology vendor agreements.

PROGRAM NAME: *AOC & Court Application Services*

Program: Appellate Court Case Management System

Provides maintenance, operations, and user support for the system used by the appellate courts to track and manage case information, court calendars, and document filings including daily troubleshooting, enhancements, defect fixes and infrastructure maintenance. The program also supports the appellate court website which enables the public to conduct online case searches and allows courts to submit documents electronically.

Program: California Courts Protective Order Registry

Provides maintenance and operations support to the statewide repository for restraining and protective orders that contains both data and scanned images of orders for access by judges, court staff, and law enforcement including enhancements, defect fixes, legislative changes, and modifications required by the Department of Justice.

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Program: Database Administration

Provides system maintenance and monitoring, operations support, and core database support services for all application environments hosted at the AOC, the appellate court case management systems, and the branch websites to ensure application stability.

Program: Web Services

Provides maintenance, operations support, and site design and consulting with the courts and AOC staff to develop content best suited for the branch’s public website court extranet and the AOC intranet.

Program: Court Interpreter Data Collection System and Court Interpreters Program

Provides maintenance and operations support to the system that aggregates court interpreter usage data received from the California trial courts, provides statistical reports for planning and identifying needed court interpreter coverage, and tracks available interpreters and their compliance.

Program: Judicial Review and Technical Assistance

Provides maintenance and operations support for system that enables tracking for compliance with federally mandated procedures and documentation requirements in juvenile dependency and delinquency cases.

Program: Interim Case Management Systems (Sustain)

Provides maintenance, operations support, and project management support and oversight for court requested enhancements, legislative and uniform bails schedule updates, defect resolution, and infrastructure upgrades. Collaborates with courts on vendor contracts and technical assessments for courts seeking funding for case management system replacements.

Program: Jury Program

Provides maintenance, operations support, coordination, and monitoring of court data regarding grant funding distributions and requirements; processes reimbursement requests; assesses all applications for grant funding; and presents proposed projects to executive management and the Judicial Council Technology Committee for approval of funds distribution.

Program: Judicial Branch Statistical Information System (JBSIS)

Provides maintenance and operations support to the system that collects, validates, transforms, and publishes aggregate statistical data from the courts on a monthly basis. Collaborates with the Office of Court Research on data exports for the Court Statistics Report. Ongoing support also includes troubleshooting; data submission issues; and project support for migrations-warehouse, judicial positions, and file transfers.

Program: Enterprise Architecture Program

Provides maintenance and operations support to guide the development and implementation of key branch wide systems and ensure compatibility across infrastructure, communications, and security

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protocols including the development of strategic and tactical plans for technical solutions that promote standards and optimize utilization of technology, the assessment of new technologies, and alternatives for software and hardware standards.

Program: Judicial Council Technology Committee

Provides maintenance and operations support and staff support to the Judicial Council Technology Committee, the Judicial Branch Technology Initiatives Working Group and Technology Planning Task Force including analysis related to strategic planning, project management and technical analysis necessary to support committee activities.

PROGRAM NAME: *Enterprise Resource Planning*

Program: Phoenix – Trial Court Financials and Human Resources (HR)/Payroll (SAP)

Provides day-to-day maintenance and operations support for trial courts financial, procurement, and HR/Payroll systems, including: developing enhancement requests; providing project management; supporting and executing enterprise policies, procedures, and initiatives; providing support to budget, contracts, and vendor system modules; supporting data exports; implementing upgrades; developing, supporting, and deploying interfaces; and refreshing hardware and migrations.

Program: Computer Aided Facilities Management System (CAFM)

Provides day-to-day maintenance and operations support for the single source of facilities information for the judicial branch facilities real estate portfolio, including: troubleshooting, analyzing, and resolving issues; developing and supporting user enhancement requests; providing project management; supporting and executing enterprise policies, procedures, and initiatives; providing support to budget, contracts, and vendor system modules; providing support to the Court Delegation projects; providing server hardware refresh and migration; and implementing upgrades.

Program: Uniform Civil Fee System

Provides maintenance, operations, and application support to the program that centrally distributes and provides mandated reporting of uniform civil fees collected by superior courts, including: daily troubleshooting, enhancements, defect fixes, infrastructure maintenance, hardware and software upgrades, and management of program budgets and contracts.

Program: Contacts and Positions System (CAPS)

Provides maintenance, operations, and application support to the judicial branch’s contact information repository, including: daily troubleshooting, enhancements, defect fixes, infrastructure maintenance, hardware and software upgrades, and management of program budgets and contracts.

Program: Assigned Judges Tracking System

Provides maintenance, operations, and application support for a program that facilitates matching, assignment, tracking, and payment of active judges assigned to courts when the court has a critical need

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for assistance, including: daily troubleshooting, enhancements, defect fixes, infrastructure maintenance, hardware and software upgrades, and management of program budgets and contracts.

Program: Nominations System

Provides maintenance, operations, and application support for a program that assists AOC staff to process and track nominations for the Judicial Council Committees and Education/Center for Judiciary Education and Research (CJER) committees, including: daily troubleshooting, enhancements, defect fixes, infrastructure maintenance, hardware and software upgrades, and management of program budgets and contracts.

Program: Audio/Visual System Program

Provides maintenance, operations, and application support for a program that assists AOC staff to track educational material produced by Education/CJER, including: daily troubleshooting, enhancements, defect fixes, infrastructure maintenance, hardware and software upgrades, and management of program budgets and contracts.

Program: Faculty System

Provides maintenance, operations, and application support to the centralized repository of trainers available statewide, including: daily troubleshooting, enhancements, defect fixes, infrastructure maintenance, hardware and software upgrades, and management of program budgets and contracts.

Program: Supreme Court Appointed Counsel System

Provides maintenance, operations, and application support to system used to process payments from Supreme Court Appointed Counsel, including: daily troubleshooting, enhancements, defect fixes, infrastructure maintenance, hardware and software upgrades, and management of program budgets and contracts.

Program: Review Granted application

Provides maintenance, operations, and application support to process payment requests from appointed counsel for appeal cases sent to the Supreme Court for review, including: daily troubleshooting, enhancements, defect fixes, infrastructure maintenance, hardware and software upgrades, and management of program budgets and contracts.

Program: ITSO District Courts of Appeal – Court Appointed Counsel System (DCACS)

Provides maintenance, operations, and application support to the system used to review, approve, and process payment requests from counsel appointed by the courts to represent indigent parties making an appeal, including: daily troubleshooting, enhancements, defect fixes, infrastructure maintenance, hardware and software upgrades, and management of program budgets and contracts.

Program: ITSO AOC Oracle Financials

Provides maintenance, operations, and application support to the program for: financial accounting and procurement for budget, accounting, internal audit, procurement, contracts, court facility recording,

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invoice processing, revenue accounting; processing of statewide Supreme Court and Courts of Appeal court appointed counsel claims; processing of assigned judges payroll and travel; court interpreter payments; and administration of grant funds from multiple sources. Additionally, the application provides electronic payment request files to the State Controller’s Office. This support includes: daily troubleshooting, enhancements, defect fixes, infrastructure maintenance, hardware and software upgrades, and management of program budgets and contracts.

Program: AOC Human Resources and Education Management System (HREMS)

Provides day-to-day maintenance and operations support to HREMS for the AOC, Supreme Court, appellate courts, Habeas Corpus Resource Center, and Commission on Judicial Performance including: production, daily processing, and user administration support; troubleshooting and resolution of issues; implementing and testing system upgrades; providing ad hoc queries and reports; developing HREMS for automated Personnel Action Request/Exemption process; and adjusting HREMS training module.

Program: ITSO Administrative Support

Provides maintenance, operations, and administrative support to ITSO through the coordination and administration of the ITSO annual five-year budget development process and monitoring of program budgets; administration of software and hardware maintenance agreements; administration of reimbursement costs for technology services to the trial courts; review, monitoring and tracking of procurement activities; processing of invoices; and ad-hoc reporting.

PROGRAM NAME: *Shared Services*

Program: Shared Services – California Courts Technology Center (CCTC)

Provides maintenance and operations support for this statewide centralized technology infrastructure and technical support services for the AOC, appellate and trial courts, as well as supporting connectivity to external justice partner applications.

Program: Data Integration Program/Integrated Services Backbone (TIBCO)

Provides services, maintenance, and operations support to enable exchange of information between the courts and integration partners, including: analyses related to DMV access methods, consolidation of server and database environments, enhancements to Sacramento Employment Development Department interface, TIBCO upgrades, and hardware refreshes.

Program: Enterprise Methodology and Process/Community of Practice

Provides maintenance and operations support, including: the development, maintenance, and support of standard project artifacts; the creation of centralized information repository; and support and training for project portfolio management tool.

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Program: Enterprise Test Management Suite

Provides maintenance and operations support in quality assurance methods and tools for large-scale software development projects.

PROGRAM NAME: *Technology Support Services*

Program: Technical Infrastructure Services for the AOC and Appellate Court

Provides maintenance and operations support, including: network design, security, implementation and tracking; network monitoring; building, site and office relocations; e-mail and messaging including Virus and Spam Monitoring; AOC Data Center server Management including back-up and off-site storage; Web Site Hosting; VPN/Remote Access; operating systems; and file and print Server management.

Program: Desktop Services for the AOC

Provides AOC desktop services maintenance and operations support, including: user account management; hardware and software product evaluation, procurement, and deployment; and asset management, monitoring, and metrics.

Program: Telecommunications LAN/WAN Technology Refresh, Equipment Trade-in, Training and Ad-Hoc Support for the AOC and Superior Courts of California

Provides maintenance and operations support, including: refreshing court network technology approaching end-of-life status from the manufacturers; providing a technology roadmap, standards, and guidelines for trial courts building new courthouses and remodeling existing facilities with smart building technologies; an avenue for disposal of out-of-date network infrastructure; network training classes for court IT staff; network engineering expertise; and options for courts to deploy a centrally managed network system.

Program: Managed Network Security Services – Statewide

Provides maintenance and operations support for optional trial court services, Managed Intrusion Detection System, Vulnerability Scanning Services, and Web Security Services.

Program: Cisco Network Maintenance Lease Agreement

Provides maintenance and operations support, including: providing a standard level of network maintenance for all participating LAN/WAN trial courts; providing Cisco support for ongoing network operations and project deployments; and providing access to advanced network optimization services.

PROGRAM NAME: *Case Management System & E-Business Services*

Program: V2 Case Management System

Provides production support and full-lifecycle development for all required changes to the V2 Criminal and Traffic case management system, interfaces to DMV, Fresno Sheriff’s Office and Official Payments,

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used by the Superior Court of Fresno County, including: fulfilling services requests and data fixes, legislative updates, defect remediation, and testing, and software upgrade releases.

Program: V3 Case Management System (Civil and Small Claims, Probate and Mental Health)

Provides production support, architecture, and development for all required changes and provides maintenance and operations support including: legislative updates; defect remediation; software stack upgrades; testing of infrastructure changes required by the CCTC data center; and the implementation of system upgrades, updates, refreshes, and maintenance.

Program: California Law Enforcement Telecommunications System (CLETS) Program

Provides maintenance and operations support including: support to court audits and increased database needs; hardware and software upgrades; and analysis and support to the completion of a self-assessment regarding compliance with the California Department of Justice.

Program: Justice Partner Outreach/E-Services Initiatives

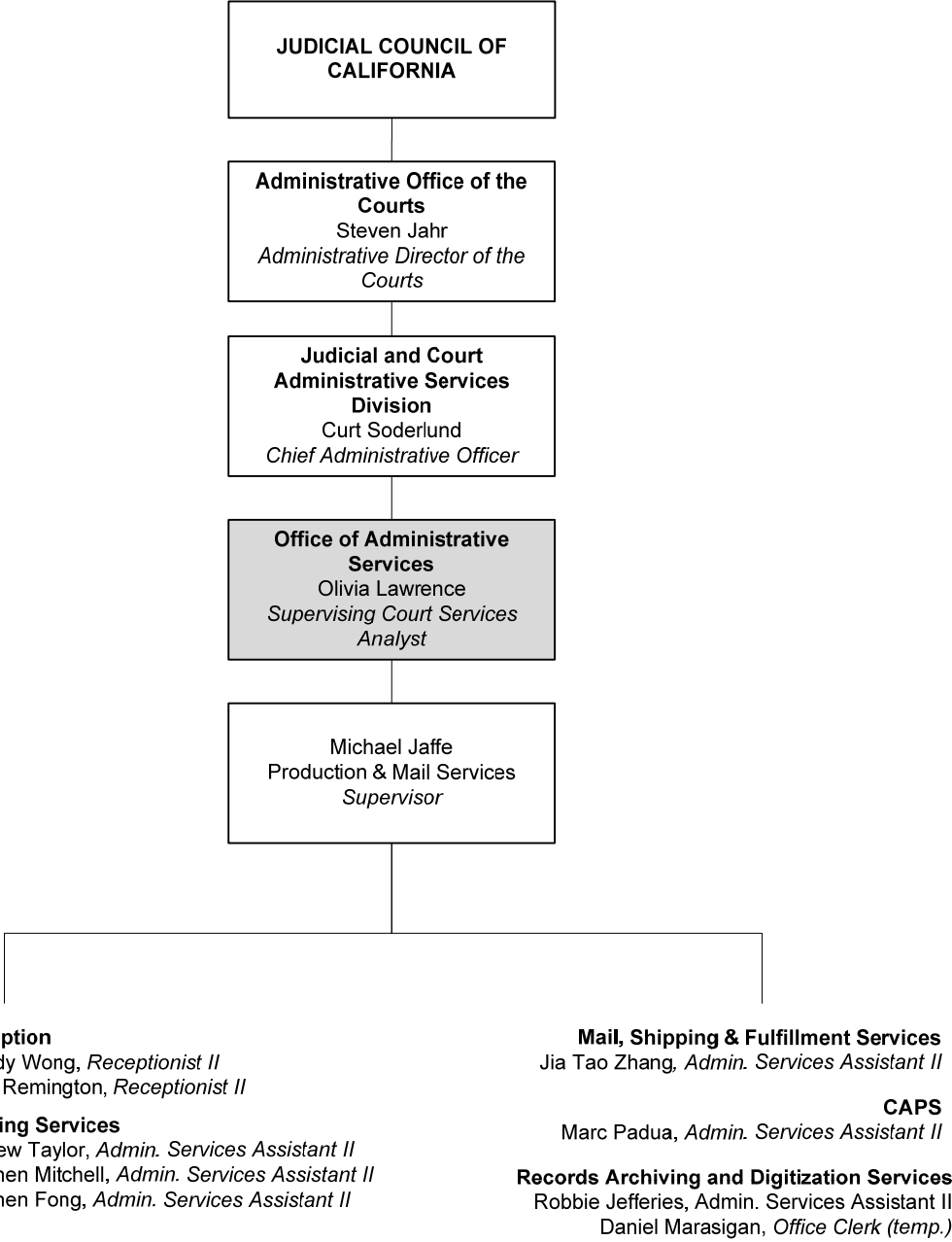
Provides communication and outreach efforts regarding e-filing requirements, the implementation of e-filing and other e-business services, strategic roadmaps, and branch wide initiatives.

Program: Judicial Council Committees Court Technology Advisory Committee and Technology Planning Task Force, Advisory Committees, Taskforces and Workgroups

Provides primary staff support.

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Office of Administrative Services



OFFICE NAME: OFFICE OF ADMINISTRATIVE SERVICES

Programs, Projects, and Activities

***Total Workforce:10
9 filled authorized positions
1 employment agency temporary worker**

Provides organization-wide infrastructural services to all Administrative Office of the Courts (AOC), Judicial Council programs, Supreme Court, and the First District Court of Appeals.

Prints, assembles, and mails information, reports, and other printed materials for the Judicial Council, the branch, the agency, the legislature, and the public in support of all offices, divisions, and locations of the AOC and the courts.

Prints and mails nominations forms, local rules, Judicial Council committee, and task force materials.

Prints materials for the Center for Judiciary Education and Research office and for educational programs sponsored by other offices such as the Labor Academy (HRO), Assigned Judges Training (ATCJS), AB1058 (and other Center for Families, Children, & the Courts conferences), California Courts Protective Order Registry Training (Information Technology Services Office), Phoenix Training (Trial Court Administrative Services Office), and Computer Aided Facilities Management Training (Judicial Branch Capital Program Office).

Supports the First District Court of Appeal’s e-Filing Pilot Program; prints and delivers briefs using the Appellate Court Case Management System.

Scans and prints architectural drawings for the Judicial Branch Office of Capital Projects and Office of Real Estate and Facilities Management.

Picks up and delivers internal mail throughout the AOC on a daily basis.

Sorts and delivers all incoming USPS mail, as well as posts outgoing mail.

Ships packages and other materials via overnight courier services, as well as processes AOC fulfillment requests.

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Fulfills requests made by customers for materials (generally publications).

Reviews, audits, and reconciles all shipping bills for the entire AOC, ensuring appropriate and accurate chargeback to each office.

Receives shipments (such as computers, packages, and other items) and distributes them throughout the AOC.

Manages and administers the Contacts and Positions System which contains the official record of judicial experience/history/and judge's locations and is used to produce reports, maintain confidential rosters, and issue e-mails.

Serves as the records manager for the AOC managing and storing AOC records including coordinating pickup, retention schedules, labeling, inventory, data-entry, and storage and disposal of all AOC hardcopy records.

Manages reception services for the AOC on the fifth and sixth floors of the AOC San Francisco office.

Provides digitization services which include scanning hardcopy documents and creating searchable PDFs for all offices.

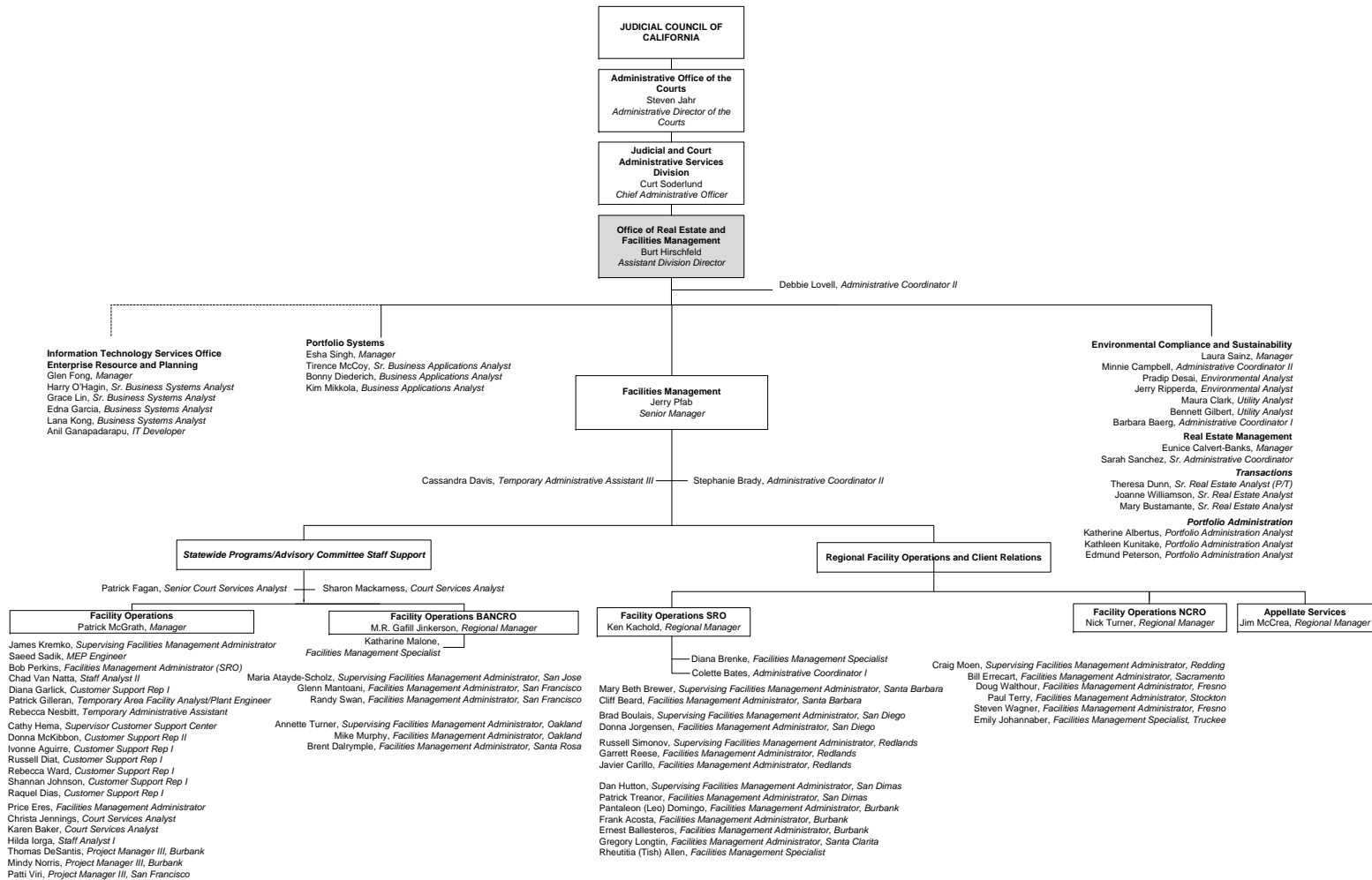
Coordinates a statewide judicial identification program for California judicial officers (justices, judges, commissioners, and referees).

Provides subject matter expertise and consulting for judicial branch customers on principles of print production, records management, and scanning; industry trends; cost-effective solutions; and updates on agency policies and procedures.

Provides manpower for the AOC for a variety of activities including: pickup and movement of materials throughout the AOC; assistance with conference activities; delivery of paper throughout the agency; driving cars to service appointments; and coordination of access to five storeroom locations for the AOC.

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Office of Real Estate and Facilities Management



OFFICE NAME: OFFICE OF REAL ESTATE AND FACILITIES MANAGEMENT

Programs, Projects, and Activities

***Total Workforce: 79.60**
78.60 authorized filled positions
1 employment agency temporary workers

UNIT NAME: *Real Estate Management*

Negotiates real estate transactions and administers the judicial branch's portfolio of owned and leased facilities in support of the Appellate and trial courts, Habeas Corpus Resource Center, Commission on Judicial Performance, Judicial Council, and AOC. The judiciary's real estate portfolio consists of approximately 400 owned facilities, 130 expense leases, and 235 revenue licenses.

Responsible for site selection, capital and lease acquisitions, title transfers, joint occupancy agreements, intra-branch agreements, rent roll, contract compliance, and operating expense reviews. In addition to the negotiation of lease renewals and terminations, manages site selection and acquisitions for the capital construction program; disposes of surplus facilities through sale and out-lease transactions; and negotiates new court-funded leases, new judgeship projects, and space relocations. Due-diligence responsibilities are supported through the administration of appraisal, title, and survey contracts.

Capital Project Acquisitions

- Supports Judicial Branch Capital Program by providing real estate-related budget information (projected land and due diligence costs).
- Obtains current real estate market surveys based on new courthouse site criteria (location, acreage, etc.)
- Tours prospective courthouse sites, provides short list of sites, assists in determining which sites to present to project-specific advisory groups, and leads development of criteria site rankings.
- Orders, reviews, and analyzes due diligence on preferred and alternate sites, including appraisals, title reports, and surveys.
- Negotiates and prepares property acquisition agreements, lease back agreements, and easements with property owners and their attorneys for review and/or revision by the Legal Services Office.
- Prepares site selection and site acquisition submittals for approval by the State Public Works Board (SPWB).
- Manages the disposition program for facilities no longer needed for court operations due to replacement of old facilities by new capital project construction, and facilities permanently and temporarily closed by courts due to fiscal constraints.

*Total workforce numbers were gathered from the AOC HR Metrics by Office spreadsheet as of April 30, 2014. The number includes filled authorized positions, AOC temporary employees, employment agency temporary workers, and contractors. This report is updated regularly and posted here: <http://www.courts.ca.gov/policyadmin-aoc.htm>.

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Utilizes existing judicial branch facilities to generate revenue to support portfolio operational costs by: negotiating licenses and leases with third parties for unused space in court facilities and telecommunications companies for rooftop space, and coordinating with Facilities Management on review and implementation of parking service contracts in Los Angeles County.

Generates rent savings for leased judicial branch facilities through research of local real estate markets to determine market rental rates; analyzes existing leases for rent reduction opportunities; and renegotiates existing leases, early lease extensions, and space contractions.

Manages the event licensing program for third-party use of trial court facilities.

Develops council-adopted policies regarding real estate-related activities (e.g., site selection, acquisition, third-party use of court facilities, and relocation compensation).

UNIT NAME: *Facilities Management*

Operates and maintains court facilities by managing performance in compliance with contractual deliverables for county, landlord, AOC, and delegated court services providers that provide physical, financial, and contractual management and delivery of routine operations and maintenance services.

- Conducts regular court visits and inspections to discuss customer satisfaction, completion of work, and contractor responsiveness.
 - Develops and maintains annual AOC-court communication plans defining necessary communication paths, frequency, and escalation protocols between Facilities Management and the court customer.
 - Supports facility work requirements in court, county, and delegated court space.
 - Releases, reviews, and takes corrective action as appropriate on quarterly service work order surveys.
 - Develops and delivers monthly, quarterly, and semi-annual performance reports.
 - Performs audits of service work orders and financial records to validate contract compliance.
-

Administers facility modifications, deferred maintenance, and functional improvements, including: development, estimation, planning, and management of projects; management, oversight, and review of facility plans; coordination of state and county inspections; management of construction contracts/contractors for the Facility Modification Program; and auditing of service work orders and financial records.

Provides staff support to the Trial Court Facilities Modification Advisory Committee, including report development and budget administration.

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Manages a 24/7 call center which serves as primary point of AOC contact for court, county, and landlords for the maintenance of branch facilities.

Facility Plant Engineering

Develops, implements, and manages the performance of the preventive maintenance program for assets within AOC-managed facilities, including: the release of preventive maintenance work orders; the development, release, and governmental acceptance of facility plans; program compliance with codes and standards; review and input on capital construction plans; development of equipment and infrastructure hardware and performance standards implementation; and on-demand expertise for mechanical, electrical, and plumbing infrastructure systems across the portfolio.

Maintains parking operations, including contract compliance and evaluation studies, using a fee-share contract to support court operations through revenue generation.

Manages a pilot program that provides delegated authority for maintenance to four courts with activities that include: the development and support of program guidelines, coordination of program standards and performance, training and support of courts, reviewing of reports and other documents for program compliance, and support of work in excess of existing program thresholds.

Maintains assessment database containing pending infrastructure and system renewals for long-term capital system renewal planning.

Americans with Disabilities Act (ADA) accessibility management

- Monitors existing identified but unfunded ADA-related projects.
- Creates ADA-related facility modification projects as new requirements are identified.
- Receives, investigates, and (as appropriate) resolves ADA-related complaints.
- Corrects ADA deficiencies as identified during the design phase of facility modification projects.
- Executes dedicated ADA projects as approved by the Advisory Committee.

Develops council-adopted policies regarding facility modification processes, funding, and governance.

UNIT NAME: *Environmental Compliance and Sustainability*

Property Due Diligence

Participates in the acquisition phase of capital projects, including: review of potential sites for possible hazardous waste issues, environmental site assessments, remediation activities on potential property,

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coordination of findings with regulatory agencies, and analysis and explanation of potential environmental issues.

Hazardous Waste Resolution

Participates in the construction phase of capital projects, including: identification of hazardous waste issues (e.g., asbestos and lead-based paint abatement and removal of underground storage tanks); remediation activities; emergency on-site resolution of unexpected hazardous waste issues; and management and coordination of the removal of hazardous waste in coordination with the Environmental Protection Agency.

California Environmental Quality Act (CEQA) Compliance

- Provides support relating to CEQA compliance, including: analysis and feedback on potential environmental impacts and mitigations; environmental analysis to ensure compliance with CEQA for construction and operational phases (e.g., traffic, air, noise, and green house gas analysis, cultural resources, hydrology, water quality, and parking reviews); oversight of community/public review process; review of mitigations and their impact on project budget and/or schedule; CEQA certification and filing with the state clearinghouse and SPWB, and Mitigation Monitoring Plans.
- Provides advice on potential budget/schedule impacts related to historic resource impacts and historic resource evaluation and guidance during pre-construction activities.

Operational Compliance

Ensures ongoing compliance with federal, state, and local environmental regulations at all AOC-managed/owned facilities, including: air quality permits, courthouse facilities’ Hazardous Material Business Plans (HMBP), underground/above storage tank (U/AST) inspections and maintenance, and refrigerant management compliance requirements.

Training

- Capital Program
 - Develops and maintains documentation and inventory for compliance with State Historic Preservation Office and Storm Water Pollution Prevention Plans (SWPPP).
 - Provides training for capital program staff on SWPPP requirements and other topics.
- Existing Portfolio
 - Develops and delivers training related to: refrigerant management, U/ASTs compliance, boiler and generator testing and inspections, responding to a Notice of Violation, preparing for on-site inspections, and maintaining on-site compliance logs and permits.
 - Develops templates and provides training for on-site service providers and court staff (as appropriate) for contractual deliverables in coordination with Facilities Management.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Energy Conservation and Sustainability Program

- Provides energy conservation-related support and services to Capital Projects, including: ensuring facilities are designed as energy efficiently as possible, providing advice and review of renewable energy (solar and wind) options, managing rebate program, and coordinating utility hook-ups for capital projects.
- Provides energy-conservation support and services for existing facilities, including: developing and training on the use of a web-based application to evaluate potential energy efficiency projects, reviewing utility bills to identify major usage issues and addressing emergencies/repairs, managing utility issues that arise at AOC-managed facilities, identifying opportunities to increase energy efficiency, and identifying funding/financing options for energy efficiency projects.
- Provides lead staff support to the Governor’s Sustainability Task Force, the state-wide Energy Policy Advisory Committee.
- Coordinates energy efficiency efforts with the Governor’s Office/Office of Planning and Research and Department of General Services.

UNIT NAME: *Portfolio Systems*

Collects operational requirements of the courts and AOC, and develops technology solutions to support their business processes.

Selects, designs, implements, and maintains business applications and information systems to provide direct services to courts and work management tools for real estate, facilities management, and environmental court services. In addition to the Computer-Aided Facilities Management (CAFM) application, Portfolio Systems administers programs to assess deferred maintenance and facility conditions, calculate base-cost estimates to competitively bid projects, and generate management and customer reports.

CAFM Program Management/Work Management

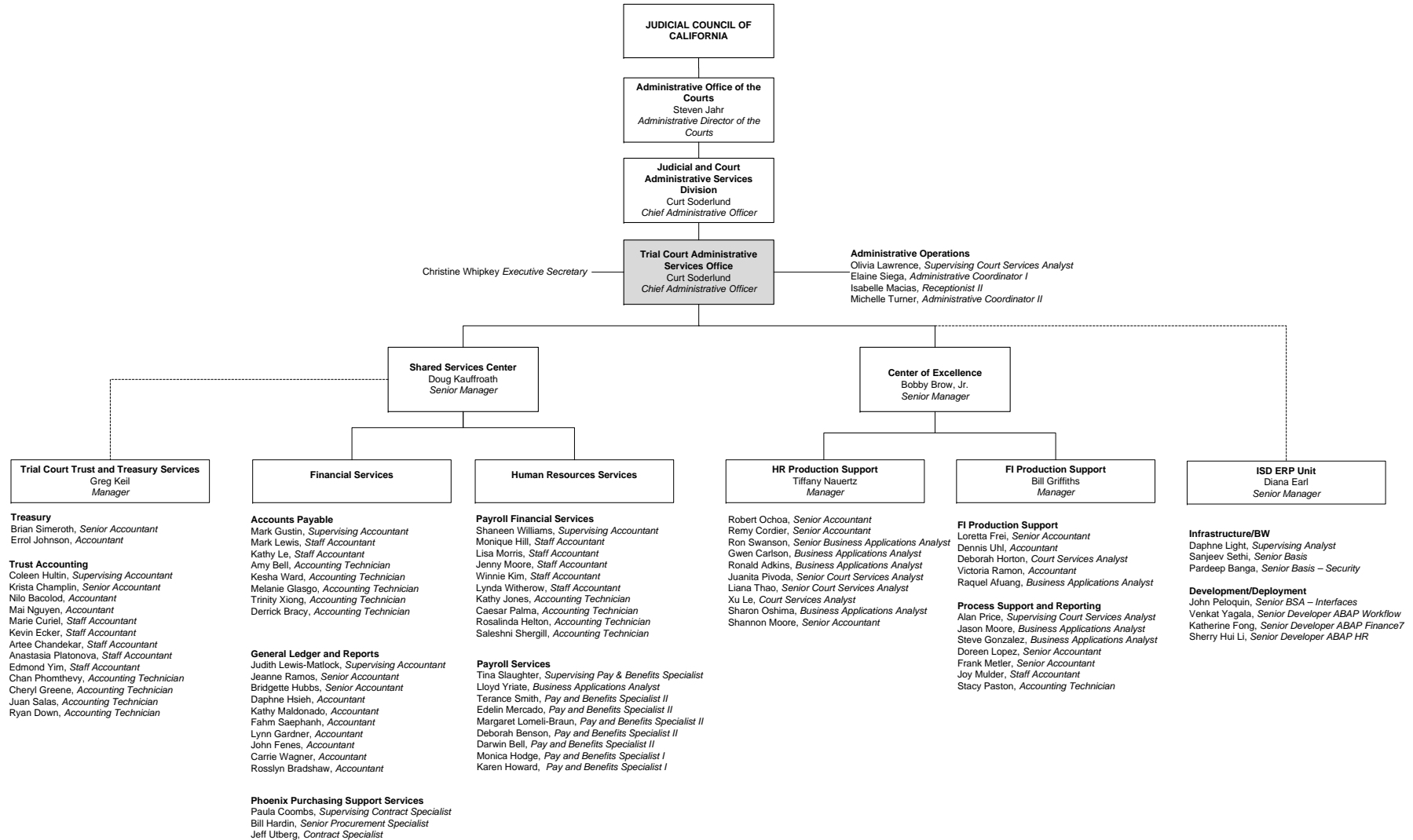
- Designs and implements portals for the courts to request, monitor, and evaluate facility services.
- Develops, stages, tests, and implements new functionalities, enhancements, and reports, and manages application and platform upgrades.
- Manages contracted systems integrators and program developer, and administers user registration, login credentials, permissions, and security groups.
- Receives and dispatches facility service requests.
- Authorizes payment and receipt of annual rent from leases and licenses.
- Supports administration of permit schedules and regulatory compliance.
- Issues critical date notifications for time-sensitive rent adjustments, lease options, and term expirations.

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- Provides ongoing application user training and support to court, facility services contractors, counties, and AOC staff.
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Trial Court Administrative Services Office



OFFICE NAME: TRIAL COURT ADMINISTRATIVE SERVICES OFFICE

Programs, Projects, and Activities

***Total Workforce:
83.88 filled authorized positions**

UNIT NAME: *Phoenix Administrative Operations Unit and Director's Office*

Works with the Information Technology Services Office to analyze current systems used branch-wide to support enterprise resource planning for finance, human resources (HR), and education functional areas.

Develops and administers policies for the Phoenix Program; and assists with activities of TCAS working units.

Provides lead staff support to the Court-Ordered Debt Task Force.

UNIT NAME: *Shared Services Center – Trust Accounting*

Conducts daily, weekly, and monthly trust audits and reconciliations; writes policies, procedures, and best practices; writes and presents training materials; completes annual required reporting and year-end activities; conducts special projects; provides consulting to courts on the use of the Phoenix System; completes requests for research and provides recommendations; and provides system testing, support, and issue resolution.

Completes daily review and manual adjustments (when necessary) of the Cash Report and corresponding accounts for each court.

Reviews, parks, posts, and confirms court deposits to court bank accounts; clears self-initiated deposits from cash-in-transit account to cash account for Administrative Office of the Courts (AOC)-managed bank accounts (Operations, Uniform Civil Fees, and Trust & Distribution); and processes all vendor abatements.

Enters all deposits and trust disbursements, calculates interest earned on trust disbursements, ensures that 1099-INT forms are correct, and processes and prepares 1099-INT Forms.

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UNIT NAME: *Shared Services Center – Phoenix Purchasing Support*

Acts as a "virtual buyer" for courts providing services executing the entire end-to-end procurement process (i.e., researches vendors and develops solicitation documents and contracts through processing requisitions).

Provides purchasing support by assisting courts with purchasing activities, including product research and creating purchase orders.

Acts as first-line Phoenix Procurement System support for end-user system inquiries, performing testing of system changes as required, and providing review and technical system "approval" of purchase orders and special projects as requested by courts.

Maintains vendor master data records to ensure database accuracy.

UNIT NAME: *Shared Services Center – General Ledger and Reports*

Provides General Ledger services including: regular audits and review of accounts in the Phoenix General Ledger; preparation of bank reconciliations and clearance of reconciliation items and bank accounts; review and recording of budget modifications in the Phoenix Financial Systems as requested; and monthly review, analysis, and monitoring of fund balances.

Completes original and adjusting journal entries submitted by courts, and processes AOC monthly allocations.

Provides instructions and worksheets for courts to use in preparing reports as identified each fiscal year in the Comprehensive Annual Financial Report (CAFR) instructions, and compiles reporting data from the Phoenix Financial System to prepare the CAFR for submission to the State Controller's Office.

UNIT NAME: *Shared Services Center – Accounts Payable*

Processes files in the Phoenix Financial System to generate checks or electronic/automated clearing house (ACH) payments to vendors, prepares and remits the Employment Development Department Independent Contractor Report (DE542), conducts research on returned checks, and completes void/reissue process.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Inputs and posts invoices to the Phoenix Financial System.

Processes withholding or garnishments from vendors based on a court order or tax levy.

Generates, prints, reconciles, and files Form 1099 - Misc for payments to vendors required to be reported to the IRS.

Uploads jury data into the system, generates the payment file, and prints and mails the jury checks.

UNIT NAME: *Shared Services Center – Payroll Financial Services*

Prints and distributes payroll checks or direct deposit advice notices to courts on the Phoenix HR/Payroll System.

In regard to payroll posting and reconciliation: reviews Bank of America records to ensure that payments from the Phoenix HR/Payroll System are received and processed by the bank correctly, reviews and reconciles payroll details that are processed in the Phoenix HR/Payroll System and posted to Phoenix Financials, and reviews and records payroll summaries for non-Phoenix HR courts in the Phoenix Financial System.

Conducts regular reviews of employee earnings, deductions, imputed income, and tax withholdings processed in the Phoenix HR/Payroll System to ensure appropriate reporting in tax tables. Also adjusts or changes W-2 information and issues and replaces lost W-2 forms as necessary.

UNIT NAME: *Shared Services Center – Phoenix Human Resources/Payroll Services*

Processes payroll files to generate paychecks, direct deposit transactions, and associated payroll benefit payments; reconciles taxes withheld and makes payroll tax deposits for each Phoenix HR court (includes monthly, semi-monthly, and bi-weekly payroll cycles); and compiles the Equal Employment Opportunity Reports biennially.

Processes the retirement file for each Phoenix HR court including reviewing the retirement file for earnings, pay, special compensation, employee years and service, etc., and sends the file to the appropriate agency for payment.

Reconciles deferred compensation payments (both 401 and 457 plans).

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

Processes withholding or garnishments from employees based on a court order or tax levy.

Maintains organizational management by creating new positions, reclassifying existing positions, and abolishing positions; reorganizes organizational units (e.g., based on cost and/or profit centers, etc.).

Maintains time master data by establishing, changing, and/or deactivating work schedules.

Maintains payroll master data by processing pay scale changes (e.g., cost of living adjustments (COLAs)).

In regard to benefits support: sets up new benefit plans or changes plans in the system, assists courts with questions regarding benefit plans and enrollment workbench, changes rates on an annual basis, sets up and tests benefit master data, works with interface files on demographics to track changes to benefit plans.

UNIT NAME: *Center of Excellence – Process Support and Reporting*

Organizational Change Management unit promotes the Phoenix Program and business process understanding through various publications, instructor-led and web-based training, and an extensive online library of end-user documentation; also maintains and reviews Business Process Procedures (an ongoing improvement effort to completely realize and document the Phoenix system for the benefit of the trial courts) that support user procedures, and identifies opportunities for efficiency.

Process Support unit ensures compliance with standards set by SAP certification as well as those created by TCAS Phoenix Program management by providing review and coordination of the development and application of system changes, support of testing processes, and administration of process management tools such as SAP Solution Manager and the uPerform document library.

Provides summary reporting of the Phoenix System for court and AOC management consumption through Business Intelligence (Reporting).

Receives, logs, and monitors customer calls and TCAS-generated help desk tickets through the Phoenix Help Desk using the Phoenix Solution Manager database, and liaises with the California Court Technology Center for application of technical system changes.

Maintains Phoenix security services by adding and deleting end-user accounts in the Phoenix System and advising and ensuring compliance with acceptable Segregation of Duties risk.

The activities noted are a product of a multi-phased project and are subject to change during the life of the project. As such, this should not be considered a final document.

UNIT NAME: *Center of Excellence – Human Resources Production Support*

Provides support of the HR/Payroll system and its integration into the Payroll/Finance module including monitoring, initiating, and ensuring that all technical and functional processes work as required.

Evaluates, tests, and applies changes to the Phoenix Finance and HR/Payroll systems.

Provides subject matter expertise about SAP functionality, Finance and HR/Payroll business rules, and SAP-related technologies to Phoenix and non-Phoenix HR courts as well as other public agencies.

UNIT NAME: *Center of Excellence – Financial Production Support*

Provides support of the Phoenix Financial System which includes Materials Management, Accounts Payable, Trust and Treasury, and General Ledger modules, including monitoring, initiating, and ensuring that all technical and functional processes work as required.

Evaluates, tests, and applies changes to the Phoenix Finance and HR/Payroll systems.

Provides subject matter expertise about SAP functionality, finance- and SAP-related technologies to all 58 courts as well as other public agencies.

Mandates and Directives for Services Provided by the Administrative Office of the Courts

As will be reflected in the attached documents, there are many mandates and directives for the services listed in the *Services Provided by the AOC* table. The following two references provide overarching authority for the AOC to carry out the duties of the Judicial Council and its chair under the constitution, and the council's authority to appoint and employ staff necessary for the performance of its duties.

- California Rules of Court 10.81
(b) Duties: The Administrative Office of the Courts assists the council and its chair in carrying out their duties under the Constitution and laws of the state.
- Government Code Section 68500:
The Judicial Council may appoint and employ during its pleasure such officers, assistants, and other employees as it deems necessary for the performance of the duties and exercise of the powers conferred by law upon it and its members. It may determine the duties and fix and provide for the compensation of all such officers, assistants, and other employees.

Documents Provided

The following documents were developed to provide the specific supporting references for each service:

- *Index of Services Provided by the AOC*:
 1. Identifies the "Service Code" assigned to each service to assist with cross-referencing with the *References for Services Provided by the AOC*.
 2. Identifies changes made to the March 2014 version of the *Services Provided by the AOC* table including reference to the AOC offices that made the changes.
- *References for Services Provided by the AOC* – a listing of the services in the *Services Provided by the AOC* table with an indication of whether the service is discretionary, mandatory, and/or required as reported by the AOC office(s) that provide(s) the service.
 - For services identified as mandatory, the related rules of court, statutes, and/or regulations are noted.
 - For services identified as required, the entities that require the service are identified along with related policies, reports, or other documentation. Related documentation is also provided as attachments for some services (see Attachment Index below).
- *Attachment Index* – an index for each supporting document that was identified as an attachment in the *References for Services Provided by the AOC*. The attachments are organized by service category. The index provides the attachment number (corresponds with the file name of the electronic attachments) and the title/name of the document. The

index also provides the page numbers in which each attachment is listed in *References for Services Provided by the AOC*.

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
	ACCESS SERVICES						
AC.01	Self-Help legal, training, program, education support		●	●		●	
AC.02	Sargent Shriver Civil Counsel Pilot Program.		●			●	
AC.03	Self-Help Center, Family Law Information Centers, Model Self-Projects Funding.		●			●	
AC.04	Equal Access Funds.		●			●	
AC.05	Judicial Branch Self-Help Website and resources.		●	●	●	●	
AC.06	On-line Document Assembly/Forms Completion Programs.		●			●	
AC.07	American with Disabilities Act subject matter expertise and training.		●	●	●	●	
AC.08	Administration and management of the JusticeCorps volunteer program.		●			●	
AC.09	Plain language forms and instructions.		●	●	●	●	
AC.10	Support to Civics Education program to improve civic learning and public understanding of the judicial branch including the California Task Force on k-12 Civics Learning.		●	●	●	●	

¹ It should be noted that the AOC also provides limited services to the Commission on Judicial Performance and the Habeas Corpus Resource Center in areas such as human resources and fiscal matters (i.e., budgets, payroll, accounting, etc.).

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
	AUDIT SERVICES						
AU.01	Regular financial, operational, and compliance audits		●	●	●		
AU.02	Special investigations concerning misappropriation of funds, potential losses, etc.		●	●	●		
AU.03	Non-audit consultative reviews		●	●	●		
AU.04	Technical advice regarding audit, accounting compliance, and operational requirements.		●	●	●		
AU.05	Whistleblower Hotline responsibility.	● Added by IAS	●	●	●	●	
	CAPITAL PROJECTS AND FACILITIES SERVICES						
	Capital Construction						
CP.01	Fiscal management, oversight, and accountability functions for the judicial branch capital outlay program including cash flow projections for various construction funds.		●	●	●		
CP.02	Delivery of professional project management and related services for capital projects, including: <ul style="list-style-type: none"> • Architectural and engineering design services • Site and environmental analysis • Construction inspection services program for capital projects, facility modification, and facility management programs. • Functional and space planning and programming • Approval by authorities having jurisdiction • Sustainable design and design approval • Construction execution delivery including commissioning services • Completion and occupancy and transition planning • Preparation for and administration of all internal and external State (Judicial, Executive, and Legislative) and other approvals. 		●	●	●		

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
CP.03	Site selection, due diligence, and negotiation of acquisition agreements for capital projects and staff services to Project Advisory Groups comprised of court and justice partner stakeholders.		●	●	●	●	
CP.04	Management of California Environmental Quality Act responsibilities to comply with regulatory statute, including community hearings on capital project impacts. (Wording modified by OREFM).		●	●	●	●	
CP.05	Establishment and implementation of policies for the judicial branch capital program, including: Program Management; Prioritization Methodology; Trial Court Facilities Standards; Site Selection and Acquisition; Contracting; Seismic Analysis of Leased Facilities ; Relocation Services; and creation, management, and implementation of related procedures reflecting best practices for new courthouse design and construction. (Wording modified by OREFM).		●	●	●	●	
CP.06	Preparation of fiscal data for Five Year Infrastructure Plan and fiscal documents.		●	●	●		
CP.07	Selection of capital building systems and equipment based on life-cycle analysis of long-term costs.		●	●			
CP.08	Development and implementation of risk management for capital projects and court facilities.		●	●	●		
CP.09	Development and implementation of property and commercial insurance programs for judicial branch entities and, as requested, assistance with their property and liability insurance needs.		●	●	●		
CP.10	Development, implementation, and oversight of audio-visual systems and low voltage technologies program and statewide standards development for use of video over the technical infrastructure.		●	●	●		
CP.11	Subject matter expertise on health and safety issues and technical assistance relating to fire prevention.		●	●	●		

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
CP.24-New	Fleet administration. (Service added by OREFM).						●
	Facilities						
CP.12	Operations and maintenance of court facilities which includes physical, financial, and contractual management and delivery of routine operations and maintenance services, and provision of utilities and insurance.		●	●	●	●	
CP.13	Management of 24/7 call center for maintenance of branch facilities.		●	●	●	●	
CP.14	Monitoring of ongoing Management of compliance with state and local environmental regulations. (Wording modified by OREFM).		●	●	●	●	
CP.15	Site selection, negotiation, ongoing and administration, and renewal of AOC and court-funded leases, licenses, and other occupancy agreements; lease renegotiation for rent and space reductions, subleasing, early terminations. and renegotiation of leases to generate space reduction and rent savings. (Wording modified by OREFM).		●	●	●		● Added by OREFM
CP.16	Management of disposition for facilities no longer needed for court operations and facilities permanently and temporarily closed by court due to fiscal constraints.		●	●	●		
CP.17	Provision of deferred maintenance and functional improvements.		●				
CP.18	Development, implementation, and management of the preventive maintenance program for assets.		●	●		●	
CP.19	Management of 22 parking facilities across the state for court, jury, and public parking spaces. (Wording modified by OREFM).		●			●	
CP.20	Management of Facilities Event Licensing for third party use of court facilities.		●			●	
CP.21	Administration of the delegated authority pilot project in which four courts are performing their own facilities maintenance.		●				

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
CP.22	Maintenance and administration of the Computer Aided Facility Management (CAFM) System to dispatch Service Work Order requests and authorize lease payments.		●	●	●		● Added by OREFM
CP.23	Sustainability program to manage utility resource demands, implementing energy conservation modifications to reduce long-term energy costs.		●	●			
	COLLABORATIVE COURT SERVICES						
CC.01	Legal, training, and program assistance to support branch wide family, juvenile, and adult collaborative courts (Community Courts; Dependency and Juvenile Drug Courts; DUI Courts; Adult and Juvenile Justice Drug Courts; Elder Courts; Homeless Courts; Mental Health Courts: Adults and Dependency and Juvenile Justice; Reentry Courts for parolees and realigned populations; Unified Courts for Families; Veterans Courts and Military Families; Youth/Peer Courts).		●			●	
CC.02	Substance Abuse Focus Grants funding.		●			●	
CC.03	Research and analysis assistance.		●			●	
CC.04	Cost benefit studies of collaborative courts.		●			●	
	COMMUNICATIONS SERVICES						
CS.01	Communications support to the Chief Justice in her Supreme Court, Judicial Council, Judicial Branch, and Commission on Judicial Appointments roles.	●	●	●	●	●	
CS.02	Support to the California Supreme Court with their operations relating to web publishing, media relations, outreach activities, and the work of Supreme Court Committees.				●	●	
CS.03	Coordination of Judicial Council Meeting communications activities, including: the drafting and dissemination of pre- and post-meeting summaries to the judicial branch; drafting of leadership remarks, coordination of photography, video, and audio requirements; and web updates and Tweets to promote the	●	●	●	●	●	

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	meeting.						
CS.04	Research, drafting, and distribution of the weekly e-mail briefing (Court News Update) on judicial administration and related topics, and urgent updates and briefings as requested (Court News Alerts, Court News Briefs) to the judicial branch.	●	●	●	●		
CS.05	Drafts speeches, remarks, talking points, briefing sheets, or backgrounders to support the Chief Justice’s engagement calendar.	●	●	●	●	●	
CS.06	Communications strategy, consulting, and implementation to Judicial Branch Capital Program and the Office of Real Estate and Facilities Management Program and their Judicial Council oversight committees—the Court Facilities Advisory Committee and the Trial Court Facility Modification Advisory Committee.	●	●	●		●	
CS.07	Management and content updates on the California Courts, Serranus, and AOC Intranet websites for programs, projects, and initiatives.		●	●	●	●	
CS.08	Consultation and counsel on media strategies for programs, projects, and initiatives.	●	●	●	●		
CS.09	Research and response to inquiries from the courts, media, and the public, as well as tracking and reporting on interactions.	●	●	●	●	●	
CS.10	Input on strategy for news releases, drafting and dissemination and monitoring and reporting on coverage.	●	●	●	●	●	
CS.11	Management of content strategy, publishing, and metrics evaluation for social media channels including YouTube and Twitter and consultation with other judicial branch entities on their programs.		●		●	●	
CS.12	Photography support for judicial council and judicial branch programs, projects, and initiatives.	●	●	●	●	●	
CS.13	Coordinates Executive Leadership Communications and operational communications within the AOC.	●					

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
CS.14	Management of the copyright request and permissions process and guidance on preserving the intellectual property rights of the judicial branch.				●	●	
	CRIMINAL JUSTICE SERVICES						
CJ.01	Technical assistance, training, legal advice, and subject matter expertise on criminal justice realignment including data collection, analysis, and information dissemination.	● Added by CJCSO	●			●	
CJ.02	Written and oral legal advice on a wide array of criminal law and procedure issues, including new statutory requirements and responsibilities.		●	● Deleted by CJCSO			
CJ.03	Resource identification and liaison activities with outside justice partners on criminal justice realignment implementation.		●			●	
CJ.04	Defining outcome based criminal justice related metrics in collaboration with justice partners.		●			●	
CJ.05	Data collection and reporting on probation revocations, sentencing outcomes, and other criminal law related issues (California Corrections Performance Incentive Act and criminal justice realignment).		●			●	
CJ.06	Subject matter expertise, legal advice, and technical assistance with issues relating to traffic related matters.	● Added by CJCSO	●				
CJ.07	Evaluation, identification of evidence based and promising practices, technical assistance, and training related to Reentry Courts and other adult collaborative courts.		●			●	
CJ.08	Technical and program assistance and training as part of the California Risk Assessment Pilot Project (CaIRAPP).		●			●	
CJ.09	Legal advice and technical assistance with emerging issues related to criminal law and procedures (e.g., implementation of pretrial programs, Affordable Care Act, and prohibited and armed persons with mental illness reporting requirements).		●			●	

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
CJ.10	Fulfillment of mandates related to the evaluation of certain criminal justice programs.		●			●	
	EDUCATION AND TRAINING SERVICES²						
ET.01	Statewide training for new Judicial Officers: <ul style="list-style-type: none"> • New Judge Orientation; • Primary Assignment Orientations (civil, criminal, probate, dependency, delinquency, family, traffic); • B.E. Witkin Judicial College. • New Appellate Justice Orientation (Wording modified by CJER) 		●	●			
ET.02	Statewide education for experienced Judicial Officers and Judicial Attorneys: <ul style="list-style-type: none"> • Appellate Justices Institute • Criminal Assignment Courses • Qualifying Ethics Training (same as ET.03 below) • Complex Civil and Advanced Civil • California Environmental Quality Act (CEQA) • Domestic Violence courses • Institutes (in civil, criminal, juvenile, family, probate, and rural courts) • Institutes for Appellate and Trial Court Attorneys (Wording modified by CJER)		●	●	●		
ET.03	Judicial ethics training as required for participants in the Commission on Judicial Performance Insurance Program.		●	●	●		
ET.04	Statewide Education for Judicial Leaders: <ul style="list-style-type: none"> • PJ/CEO Court Management Program • Supervising Judges Institute 		●				
ET.05	Institute for Court Management Programs.		●	●	●		● Added by CJER

² For Education and Training Services, the Center for Judiciary Education and Research also provides training services to the Habeas Corpus Resource Center.

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
ET.06	Court Clerk Training Institute.		●	●	●		
ET.07	Court manager and supervisor training.		●	●	●		
ET.08	ADA Annual Statewide Training and consulting.		●	●	●	●	
ET.09	Statewide broadcasts for Trial and Appellate Court judicial officers, CEOs, and court staff.		●	●	●		
ET.10	Statewide and regional education (e.g., Beyond the Bench).		●	●	●		
ET.11	Development of customized training for the courts (e.g., judicial education, management training, cultural competency training).		●	●	●		
ET.12	Collaborative statewide, regional, and distance education and multi-disciplinary programs with state and national partners.		●	●	●		
ET.13	Training on use of the Computer Aided Facility Management (CAFM) application for requesting, monitoring, and evaluating building services.		●	●	●		● Added by OREFM
ET.14	Development of online educational resources for Judges, court staff, supervisors, and managers.		●	●	●		
ET.15	Technical support and video production for Supreme Court outreach and oral argument, Commission on Judicial Appointments hearings, Chief Justice or Judicial Council communications, and provision of AV signals to rooms for the public and media.	●	●	●	●	●	
ET.16	Technical support of Videoconferencing on the AOC and Appellate Court network for education, technical support of satellite broadcast networks in over 300 viewing locations throughout the state and which enable training for the trial courts. (Wording modified by CJER)		● Added by CJER	●	●		
ET.17	Judicial publications: Benchguides, Bench Handbooks, Benchbooks, Civil Proceedings Benchbooks.		●	●	●		
ET.18	Development of online benchtools for judges to use, including scripts, flow charts, and checklists		●	●	●		
ET.19	Development of public guides for children in court, victims' services, and court proceedings for families.		●			●	
ET.20	Job Aids for court staff, supervisors, and managers.		●	●	●		

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
ET.21	Web Ex programmatic instructional support.		●	●	●		
ET.22	Faculty development program, webinars, and online resources to prepare and support statewide and local court faculty.		●	●	●		
ET.23	Meeting planning, registration, and conference services for all education programs, Judicial Council meetings, and other AOC meetings.	●	●	●			
ET.24	Audiovisual support for education and meetings in conference centers, off-site education and outreach, including audio for public broadcast of Judicial Council.	●	●	●	●		
ET.25	Jury education materials in support of successful jury participation.	●	●			●	
ET.26-New	Sexual Harrassment Prevention Training. (Service added by CJER)		●	●	●		
ET.27-New	Conflict of Interest Training (also known as Form 700) (Service added by CJER)	●	●	●	●		●
ET.28-New	Temporary Judge training and resources. (Service added by CJER)		●				
ET.29-New	Education for AOC staff, including videoconferences, online courses, management training, compliance courses, and professional development. (Service added by CJER)						●
ET.30-New	Development of education and training for court investigators, probate attorneys, and probate examiners. (Service added by CJER)		●			●	
ET.31-New	Subject matter expertise and technical assistance for faculty in developing programs including: access and fairness, appellate practice and procedure, civil and small claims, family and juvenile law, criminal law, Judicial administration, judicial ethics, probate, and mental health. (Service added by CJER)		●	●	●		
ET.32-New	Training on mandatory and optional environmental compliance issues, including underground/above storage tanks (U/ASTs), Hazardous Material Business Plans (HMBPs), Storm Water Pollution Prevention Program, hazardous waste disposal, utility rebates, and air quality issues.						●

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
	(Service added by OREFM)						
	FAMILY SERVICES						
FA.01	AB 1058 Legal, Program Support and Funding and Administration for Child Support Commissioners and Family Law Facilitators.		●			●	
FA.02	Access to Visitation Program.		●			●	
FA.03	Information and technical assistance to Family courts.		●			●	
FA.04	Family and Juvenile court judicial and staff workload study and needs assessment.		●				
FA.05	Family Law websites (including Families Change and Parent Orientation video) content, maintenance, and administration.		●			●	
FA.06	Family Dispute Resolution support, technical assistance, and education.		●			●	
FA.07	Domestic Violence Courts.		●			●	
FA.08	Domestic Violence Safety Planning Partnership Project. (Wording modified by CFCC)		●			●	
FA.09	Violence Against Women Education Program.		●			●	
FA.10	California Courts Protective Orders Registry.		●			●	
	FISCAL SERVICES						
FI.01	Budgeting.		●	●	●		
FI.02	Centralized Treasury.	● Added by FSO	●				
FI.03	Payroll and controller services.		●	●	●		
FI.04	Master contracts/procurement assistance. Solicitation and award of agreements and purchase orders. (Wording modified by FSO)		●	●	●		● Added by FSO
FI.05	Financial Management - accounting and reporting.		●	●	●		● Added by FSO

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
FI.06	Accounts Payable support.		●	●	●	●	● Added by FSO
FI.07	Trust Accounting support.		●				
FI.08	Financial policies and procedures.		●	●	●		
FI.09	Fiscal training and assistance, <i>as required.</i> <i>(Wording modified by FSO)</i>		●	●	●		● Added by FSO
FI.10	Grants Administration.	● Added by FSO	●	● Added by FSO	● Added by FSO	● Added by FSO	
FI.11	Enhanced Collections guidelines and assistance for courts and counties. Provide technical advice and support to improve the performance of court and county collections programs statewide. <i>(Wording modified by FSO)</i>		●				
FI.12	Maintenance of fixed asset system.			●	●		● Added by FSO
FI.13	Provision and maintenance of financial information available through the judicial branch website.		●	●	●	●	
FI.14-New	Centralized Uniform Civil Fee collection and distribution <i>(Service added by FSO)</i>		●				
	HUMAN RESOURCES SERVICES						
HR.01	Labor relations and collective bargaining services.		●				
HR.02	Employee relations/investigations/ progressive discipline/leave management.		●	●	●		● Added by HRSO
HR.03	Human resources management system.			●	●	●	
HR.04	Judicial payroll and benefits.		●	●	●		
HR.05	Pay and benefits management and administration for employees.		●	●	●		● Added by HRSO
HR.06	Trial court payroll services through Phoenix or ADP.		●				

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
HR.07	Recruitment, classification, and compensation assistance.		●	●	●	●	● Added by HRSO
HR.08	Judicial Branch Workers' Compensation program oversight and administration.		●	●	●	●	● Added by HRSO
HR.09	Integrated Disability Management.		●	●	●		● Added by HRSO
	INFORMATION TECHNOLOGY SERVICES						
	Maintenance and operations support for the following systems:						
IT.01	<ul style="list-style-type: none"> California Courts Protective Order Registry (CCPOR). 		●			●	
IT.02	<ul style="list-style-type: none"> Judicial Branch Statistical Information System (JBSIS). 	● Added by ITSO	●			● Added by ITSO	
IT.03	<ul style="list-style-type: none"> Court Interpreter Data Collection System (CIDCS). 		●			● Added by ITSO	
IT.04	<ul style="list-style-type: none"> Phoenix Financial, procurement, and HR/Payroll System. 		●	●	●	●	
IT.05	<ul style="list-style-type: none"> Computer-Aided Facilities Management (CAFM) System. 		●	●	●	●	
IT.06	<ul style="list-style-type: none"> Uniform Civil Fees System (UCFS). 		●				
IT.07	<ul style="list-style-type: none"> Appellate Court Case Management System (ACCMS). 		●	●	●	●	
IT.08	<ul style="list-style-type: none"> Court Appointed Counsel Program (Supreme Court and District Courts of Appeal – Court Appointed Counsel Systems). 		● Deleted by ITSO	●	●	●	
IT.09	<ul style="list-style-type: none"> California Courts Technology Center (CCTC) including disaster and security services and data integration services. 		●	●	●	●	
IT.10	<ul style="list-style-type: none"> Network hosting, security, and support. (Bulleated by ITSO) 		●	●	●	●	
IT.11	<ul style="list-style-type: none"> Technology hardware updates program/technical support for Help Desk network and security. (Wording modified by ITSO.) 		●	●	● Added by ITSO	●	

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
IT.12	Case management systems support: Sustain, V2, V3.		●			●	
IT.13	Support to California Law Enforcement Telecommunications System (CLETS).		●			●	
IT.14	Development and maintenance of the judicial branch public website, Serranus, and other judicial branch websites.		●	●	●	●	
IT.15	Justice Partners Outreach/E-Services.		●	●	● Added by ITSO	●	
IT.16	Programmatic , Technical and logistical support for WebEx programs. (Wording modified by ITSO.)		●	●	●	●	
IT.17	Administration and management of network and servers for internet-based telephones (Voice-over Internet Protocol (VOIP)).			●	●	● Added by ITSO	
	JUDICIAL COUNCIL ADVISORY COMMITTEE SUPPORT SERVICES						
JA.01	Subject matter expertise and legal support to council advisory groups: ³						
	<ul style="list-style-type: none"> Assistance to the Committee Chair with annual agenda development, agenda setting for regular meetings, and presentation of committee recommendations to the council. 	●					
	<ul style="list-style-type: none"> Legal and policy analysis and assistance with drafting of rules of court, judicial administration standards, forms, and legislation. 	●					
	<ul style="list-style-type: none"> Analysis and drafting of briefs on policies and other areas of interest to committees and review and analysis of council pilot projects and other programs 	●					
	<ul style="list-style-type: none"> Development of council reports setting forth committee recommendations. 	●					
	<ul style="list-style-type: none"> Surveys/questionnaires development, response compilation, and analysis of results. 	●					

³ Support provided by AOC staff for Judicial Council advisory groups (see attachment for listing of advisory groups).

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
JA.02	Administrative services - coordination, organization, and support to council advisory groups:						
	<ul style="list-style-type: none"> Meeting Planning and Coordination including scheduling, logistics, materials, and travel. 	●					
	<ul style="list-style-type: none"> General committee support including preparation of meeting minutes, processing of travel claims and related bills, maintenance of committee roster and website information, coordination of committee nomination process. 	●					
	JUDICIAL COUNCIL SUPPORT SERVICES						
JC.01	Staff support for the Judicial Council's policymaking process including: coordinating the publication of meeting agendas and materials, supporting the council's implementation and review of its governance policies, and staffing the Judicial Council's public comment process for council business meetings. Staffing the nominations process for Judicial Council and council advisory committee positions. Editing Judicial Council documents and meeting materials. (Wording modified by JCSS)	●				●	
JC.02	Production and staff support for Judicial Council meetings and Executive and Planning Committee meetings.	●					
JC.03	Production and archiving of the public records of Judicial Council meetings and decisions.	●				●	
JC.04	Project management and reporting on implementation status of Judicial Council restructuring directives.	●					
JC.05	Support to Judicial Council for Strategic and Operational Plans.	●					
JC.06	Support to Judicial Council with AOC organizational and essential services review.	●					
JC.07-New	Subject matter expertise and legal support to council advisory groups: Development and revisions of guidelines and training on CRC 10.75; meetings of advisory bodies.	●				●	

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
	(Service added by TCLO)						
JC.08-New	Conduct compliance review and analysis of advisory bodies adherence to CRC 10.75; meetings of advisory bodies. (Service added by TCLO)	●				●	
JC.09-New	Project management of Remote Access Workgroup which will study and recommend ways to improve the public's remote access to the bodies that the AOC supports (i.e., Supreme Court, Judicial Council, Advisory Bodies). (Service added by TCLO)	●					● Added by TCLO
JC.10-New	Staffing the annual review of the agenda of advisory committees over which the Executive and Planning Committee has been assigned oversight by the Chief Justice. (Service added by JCSS)	●					
	JUVENILE SERVICES						
JS.01	Court-Appointed Special Advocates (CASA) program administration, funding, and education.		●			●	
JS.02	Local Blue Ribbon Commissions training and technical assistance.		●			●	
JS.03	Court appointed dependency counsel funding, budgeting, and program management.		●			●	
JS.04	Dependency Representation, Administration, Funding, and Training (DRAFT) program.		●			●	
JS.05	Juvenile Dependency Counsel Collections Programs.		●				
JS.06	Psychotropic Medication Orders program.		●				
JS.07	Judicial Resources and Technical Assistance Program for dependency cases.		●				
JS.08	Information and technical assistance to juvenile courts.		●				
JS.09	Technical assistance with juvenile court management system data and analytics.		●				
JS.10	Chief Justice's Keeping Kids in School and Out of Court Initiative.		●			●	
JS.11	California Dependency Online Guide (CalDog).		●				

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
JS.12	Child Welfare County Data Profiles Updates.		●				
	LANGUAGE SERVICES						
LA.01	Court interpreter test administration, development, and maintenance oversight.		●			●	
LA.02	Court interpreter outreach and recruitment.		●			●	
LA.03	Court interpreter education and training.		●			●	
LA.04	Statewide Language Coordination (Service deleted by COSSO.)		●			●	
LA.05	5-Year Language Use and Needs Study.		●			●	
LA.06	Court Interpreter Database Collection System (CIDCS).		●			●	
LA.07	Certified and Registered Master List Maintenance of Court Interpreters.		●			●	
LA.08	Cross-assignment of court interpreter employees.		●			●	
LA.09	Translations of forms, website, signage, and other resources.		●	●		●	
LA.10	Management of technology to assist in the use of American Sign Language and master contract for telephonic interpreting services.		●			●	
	LEGAL SERVICES						
LE.01	Legal support with claims including investigations and responses.	● Deleted by LSO	●	●	●		● Added by LSO
LE.02	Management of labor-related matters (such as Public Employment Relations Board hearings and arbitrations).		●	●	●		
LE.03	Management of affirmative litigation.	●	●	●	●		● Added by LSO
LE.04	Litigation management, including selection and direction of outside counsel to defend courts, judicial officers, court employees, and council members.	●	●	●	●		● Added by LSO

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
LE.05	Legal advice and guidance to courts and education of court staff regarding evolving law affecting employment and labor issues.		●	●	●		● Added by LSO
LE.06	Legal advice and consultation on a broad spectrum of judicial administration matters.	●	●	●	●		● Added by LSO
LE.07	Legal advice and consultation on transactional business issues, including real estate transactions; solicitations, contracting, and the procurement of goods and services; and court/county MOUs.		●	●	●		● Added by LSO
LE.08	Legal assistance and staff support to the Supreme Court Advisory Committee on Code of Judicial Ethics.				●		
LE.09	Legal advice and representation regarding external audits/investigations.	●	●	●	●		● Added by LSO
LE.10	Subject matter expertise and technical assistance with issues including: access and fairness, appellate practice and procedure, Alternative Dispute Resolution, civil and small claims, collaborative courts, complex litigation, family and juvenile law, Judicial administration, judicial ethics, subject matter expertise, jury instructions, probation probate, and mental health. (Wording modified by LSO)	●	●	●	●		● Added by LSO
LE.11	Assistance with responding to subpoenas and disqualification statements.	●	●	●	●		● Added by LSO
LE.12	New and amended local court rules review and assistance with requests for alternative effective dates.	●	●	●			
LE.13	Assistance with evaluation of need for and preparing requests for emergency orders.	●	●	●			
LE.14	Legal advice and assistance with petitions for complex civil case coordination.	●	●				
LE.15	Provision of legal support for acquisition, financing, construction, renovation, operation, and maintenance of court facilities.	●	●	●			● Added by LSO
LE.16	Management of the Commission on Judicial Performance Insurance Program.	●	●	●	●		

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
	LEGISLATIVE AND BUDGET ADVOCACY SERVICES						
LB.01	Advocacy for Judicial Council positions on pending legislation and technical assistance to legislators, staff, and justice partners on court-related legislative issues.	●	●	●	●		
LB.02	Expertise and assistance with strategy, advice, and recommendations on judicial branch budget discussions.	●	●	●	●		
LB.03	Tracking of statutory mandates on the Judicial Council to adopt rules, forms, and reports to the legislature.	●	●	●	●		
LB.04	Liaison and strategic advice assistance on facilities issues, court construction, and maintenance.	●	●	●	●		
LB.05	Coordination of legislative information and investigatory hearings that impact branch programs and projects.	●	●	●	●		
LB.06	Staff support to the Bench-Bar Coalition.		●	●	●		
LB.07-New	Provides fiscal impact statements on various pieces of legislation to the Legislature. (Service added by OGA)	●	●	●	●		
	MANDATED REPORTING						
MR.01	Research, data compilation, and drafting of legislatively mandated reports on behalf of the Judicial Council including but not limited to the following reports:						
	• Access To Visitation Grants Program	●	●				
	• Semi-Annual Report on Contracts for the Judicial Branch	●	●	●	●		
	• Trial Court Interpreters Program Expenditure Report	●	●				
	• Court Reporter Fees Collected & Expenditures for Court Reporter Services in Superior Court Civil Proceedings	●	●				
	• Demographics of the Bench	●	●	●	●		
	• Sentencing of Criminal Defendants by Race and Ethnicity	●	●				
	• Judgeship Needs in the Superior Courts	●	●				

INDEX OF SERVICES PROVIDED BY THE ADMINISTRATIVE OFFICE OF THE COURTS

Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
	• Standards and Measures of Judicial Administration	●	●				
	• Annual Special Funds Expenditure Report	●	●				
	• Annual Trial Court Allocations Report	●	●				
	• Phoenix System Status Update Report	●	●				
	• Purchase and Lease of Electronic Recording Equipment	●	●				
	• Trial Court Revenue, Expenditure, and Fund Balance Constraints	●	●				
	• 2 Percent Trial Court Trust Fund State-Level Reserve Funding Requests	●	●				
	• Statewide Collections of Court-Ordered Debt	●	●				
	• Receipts and Expenditures from Local Courthouse Construction Funds	●	●				
	• Judicial Branch AB 1473 Five-Year Infrastructure Plan	●	●				
	• Special Facilities Program Reports Requested by the Legislature	●	●	●	●		
	• 5-Year Language Use and Needs Study	●	●				
	• Criminal Justice Realignment Data	●	●				
	• California Community Corrections Performance Incentives Act of 2009: Findings from SB 678 Program	●	●				
	• Quarterly & Annual Reports on Facility Modification Budgets, Projects, and Expenditures	●	●			●	
	OPERATIONS SUPPORT SERVICES						
OS.01	Assigned Judges Program.		●	●	●		
OS.02	Appellate Court-Appointed Counsel Program administration and support.		●	●	●	●	
OS.03	Staff support to the Appellate Indigent Defense Oversight Advisory Committee.			●			
OS.04	Preparation and distribution of Oral Argument Calendar, Summary of Cases Accepted, Conference List, and Notice of Forthcoming Filings for Supreme Court.		●	●	●		

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
	(Service Deleted by COSSO.)						
OS.05	Administration of Special Masters assignment.		●	●	●		
OS.06	Civil Case Coordination.		●				
OS.07	Management of petitions for coordination of complex civil cases.		●				
OS.08	Tribal/State court coordination support.		●	●		●	
OS.09	Vexatious Litigants List administration.		●				
OS.10	Jury improvements in support of initiatives that enhance the utilization of jurors and the jury process.		●			●	
OS.11	Federal, state, and private foundation fund development and grant administration.		●	●	●	●	
OS.12	Trial Court Business Processing Reengineering expertise and training.		●				
OS.13	Consultative services, technical and complex analytical assistance for court administration and operational matters.		●				
OS.14	Data gathering and recommendations for court operational and administrative issues.		●	●	●		
OS.15	Assistance to court leaders with addressing internal governance, management, and operational issues.		●	●	●		
OS.16	Information-sharing through meetings of court leaders.		●	●	●		
OS.17	Analytical and administrative support to Administrative Presiding Justices, Presiding Judges, Appellate Court Administrators and Court Executive Officers through the Administrative Presiding Justices Advisory Committee, Trial Court Presiding Judge Advisory Committee, California Court Clerk Association, Appellate Indigent Defense Oversight Advisory Committee (AIDOC), and Court Executives Advisory Committee.		●	●	●		
	RESEARCH AND DATA SERVICES						
RD.01	Annual <i>Court Statistics Report</i> .		●	●	●		
RD.02	Development of regular and ad hoc statistical reports for the courts of appeal.			●			
RD.03	Judicial Branch Statistical Information System technical assistance, maintenance, and reporting.		●	●	●		

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
RD.04	Workload-based Allocation Funding Methodology research support.		●				
RD.05	Assistance with workload analysis used to acquire judicial and court staff resources.			●			
RD.06	Judge and staff workload measures and analysis.		●			●	
RD.07	Authorized and filled judgeships data and reporting.		●			●	
RD.08	Conversion of Subordinate Judicial Officer positions to judgeships.		●				
RD.09	Technical support to evaluate staffing or judicial officer allocations against workload model projections.		●				
RD.10	Responses to requests for branch data from internal users, members of the public, researchers, and law firms.		●	●		●	
RD.11	Data review and reporting.		●	●	●		
RD.12	Production of the annual Jury Data Report.		●				
	SECURITY SERVICES						
SS.01	Judicial Online Privacy Protection Program.		●	● Deleted by COSO	● Deleted by COSO		
SS.02	Threat and incident coordination and consultative services.		●				
SS.03	Emergency planning and preparedness/continuity of operations planning.		●	●	●		
SS.04	Physical security consultation, assessment, site surveys, and risk analysis.		●	● Deleted by COSO	● Deleted by COSO		
SS.05	Screening Equipment Replacement Program.		●			● Added by COSO	
SS.06	Trial Court Security Grant Program.		●			● Added by COSO	
SS.07-New	Judicial I.D. program. Oversees coordination of a statewide	●	●	●	●		

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
	judicial identification program for California judicial officers (justices, Judges, commissioners, and referees). Includes tracking terms of office for replacement as needed. (Service added by OAS)						
SERVICES PROVIDED INTERNALLY TO THE ADMINISTRATIVE OFFICE OF THE COURTS							
IS.01-New	Digital printing, binding and scanning services. Provides logistical support services to all offices of the AOC for the following services (but not limited to): printing, binding, shipping, and scanning of all documents required for the training of participants and faculty, transportation, signage, and reconciliation of any courier invoices. Examples of printed materials include reports to the Legislature and judicial branch operations-related materials. (Service added by OAS)	●		●	●		● Added by OAS
IS.02-New	Internal mail and external mail (USPS) distribution, shipping, and fulfillment services for the AOC, Supreme Court, and 1DCA. Picks up and delivers internal and other mail throughout the AOC and the Supreme Court. Also provides expedited courier service to the US Post Office. (Service added by OAS)			●	●		● Added by OAS
IS.03-New	Contact and Positioning System (CAPS) is the official record of California’s judicial experience. Manages the CAPS database updates and generated reports. Sample activities include: inputting daily updates, creation of rosters and reports, facilitation of mass e-mails to the judiciary, and training of approved staff on how to utilize the system. (Service added by OAS)						● Added by OAS
IS.04-New	Records Management Program for the AOC. Manages 3000 cubic feet of storage space where personnel, business contracts, administrative, and historical documents are housed. Performs the Records Management functions for the AOC administrative records, including the pick-up, labeling, inventory, data-entry, storage, and disposal of hardcopy records of the AOC. (Service added by OAS)						● Added by OAS

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Service Code	AOC Service ¹	Judicial Council	Trial Courts	Appellate Courts	Supreme Court	Public	AOC
IS.05-New	<p>Reception services for the AOC. Provides agency-wide main reception support for the San Francisco office. This includes time and date stamping of all mail for accounting, bid solicitations, check matching and distribution, court interpreter questions, and the coordination of conference calls.</p> <p>(Service added by OAS)</p>						● Added by OAS
IS.-06-New	<p>Consulting services. OAS provides subject matter expertise and consulting for internal and Supreme Court and 1DCA customers on print production, records management, Contact and Positioning System (CAPS) report generation, scanning and digitization, and cost effective solutions for shipping and materials movement.</p> <p>(Service added by OAS)</p>						● Added by OAS
IS.07-New	<p>Shipping/Courier billing reconciliation. Reviews, audits and reconciles the weekly courier invoices for organization wide shipping needs (UPS, FedEx, OnTrac).</p> <p>(Service added by OAS)</p>						● Added by OAS
IS.08-New	<p>Maintains and updates all forms needed for printing, shipping, scanning, records management, retention policies. Updates all request forms, guidelines, policies, and procedures as they pertain to requests for services.</p> <p>(Service added by OAS)</p>						● Added by OAS

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**ATTACHMENT 1: JUDICIAL COUNCIL INTERNAL COMMITTEES, ADVISORY GROUPS AND TASK FORCES
(2013 – 2014)**

Updated April 8, 2014

Committee Name	Authority
Administrative Presiding Justices Advisory Committee	Rule 10.52 (Administrative Presiding Justices Advisory Committee)
Advisory Committee on Financial Accountability and Efficiency for the Judicial Branch	Rule 10.63 (Advisory Committee on Financial Accountability and Efficiency for the Judicial Branch)
Advisory Committee on Providing Access and Fairness	Rule 10.55 (Advisory Committee on Providing Access and Fairness)
Appellate Advisory Committee	Rule 10.40 (Appellate Advisory Committee)
California Blue Ribbon Commission on Children in Foster Care	Resolution and Charge – March 2006 (Chief Justice established)
Center for Judicial Education and Research Governing Committee	Rule 10.50 (Governing Committee of the Center for Judicial Education and Research)
Civil Jury Instructions Advisory Committee	Rule 10.58 (Advisory Committee on Civil Jury Instructions)
Civil and Small Claims Advisory Committee	Rule 10.41 (Civil and Small Claims Advisory Committee)
Collaborative Justice Courts Advisory Committee	Rule 10.56 (Collaborative Justice Courts Advisory Committee)
Court Executives Advisory Committee	Rule 10.48 (Court Executives Advisory Committee)
Court Facilities Advisory Committee	Rule 10.62 (Court Facilities Advisory Committee)
Court Interpreters Advisory Panel	Rule 10.51 (Court Interpreters Advisory Panel)
Court-Ordered Debt Task Force	California Penal Code §1463.02
Court Security Advisory Committee	Rule 10.61 (Court Security Advisory Committee)
Court Technology Advisory Committee	Rule 10.53 (Court Technology Advisory Committee)
Criminal Jury Instructions Advisory Committee	Rule 10.59 (Advisory Committee on Criminal Jury Instructions)
Criminal Law Advisory Committee	Rule 10.42 (Criminal Law Advisory Committee)
Executive and Planning Committee	Rule 10.10 (Judicial Council internal committees) and Rule 10.11 (Executive and Planning Committee)
Family and Juvenile Law Advisory Committee	Rule 10.43 (Family and Juvenile Law Advisory Committee)
Judicial Council Technology Committee	Rule 10.10 (Judicial Council internal committees) and Rule 10.16 (Technology Committee)
Litigation Management Committee	Rule 10.10 (Judicial Council internal committees) and Rule 10.14 (Litigation Management Committee)

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Committee Name	Authority
Mental Health Issues Implementation Task Force ⁴	Judicial Council Meeting April 29, 2011 Item O Council action 2 (Requested that the Chief Justice appoint an implementation working group no later than December 2011)
Policy Coordination and Liaison Committee	Rule 10.10 (Judicial Council internal committees) and Rule 10.12 (Policy Coordination and Liaison Committee)
Probate and Mental Health Advisory Committee	Rule 10.44 (Probate and Mental Health Advisory Committee)
Rules and Project Committee	Rule 10.10 (Judicial Council internal committees) and Rule 10.13 (Rule and Projects Committee)
Shriver Civil Counsel Act Implementation Committee	California Government Code §68651.b.5 (part of Sargent Shriver Civil Counsel Act, AB 590)
Task Force on Trial Court Fiscal Accountability ⁵	Judicial Council Meeting April 26, 2013 Item O, Council Action 2.
Traffic Advisory Committee	Rule 10.54 (Traffic Advisory Committee)
Trial Court Budget Advisory Committee	Rule 10.64 (Trial Court Budget Advisory Committee)
Trial Court Facility Modification Advisory Committee	Judicial Council Meeting April 25, 2013 Item 4 Council Action 1. Pending Rule of Court.
Trial Court Presiding Judges Advisory Committee	Rule 10.46 (Trial Court Presiding Judges Advisory Committee)
Tribal Court-State Court Forum	Rule 10.60 (Tribal Court-State Court Forum)
Workload Assessment Advisory Committee	California Government Code § 69614(c) and § 77001.5 (part of SB 56) Requires Judicial Council to report need for new judgeships and to adopt and report on standards and measures that promote the fair and efficient administration of justice.
Administrative Office of the Courts Staff Support	<p><u>Internal Committees:</u> Rule 10.10, 10.10(d), and Rule 10.11 – Produces and supports E&P meetings (From JCSS)</p> <p><u>Task Forces:</u> Rule 10.11(i) and Rule 10.30(d) – Supports E&P oversight of advisory and task forces (From JCSS)</p> <p><u>Advisory Committees:</u> Rule 10.34 (Duties and responsibilities of advisory committees) Subsection (e) (Role of</p>

⁴ Sunsetting July 1, 2014

⁵ Sunsetting May 1, 2014

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Committee Name	Authority
	Staff). Rule 10.11(i) and Rule 10.30(d) – Supports E&P oversight of advisory and task forces (From JCSS)

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ATTACHMENT 2: JUDICIAL COUNCIL REPORTS MANDATED BY CALIFORNIA CODE

Frequency	Bill no. Topic	Code section	Summary
Fixed period, current	Court Plans for \$60M: (1) individual court plans regarding expenditure of budget allocations; (2) individual court expenditures of budget allocations	2013 Budget Act	<p>Individual court plans regarding expenditure of \$60 million budget augmentation. Provision 12 of Item 0250-101-0932.</p> <p>On or after April 14, 2014, but in no event later than May 14, 2014, the Judicial Council shall file a written report to the appropriate fiscal and policy committees of the Legislature on how funds identified in this provision were or will be expended during the 2013–14 fiscal year.</p>
Ongoing Quarterly	AB 1497; Stats. 2012, Ch. 29 Budget Act of 2012, Trial Court Trust Fund Expenditures for FYxx, Quarter x	Budget Act 2012	<p>The Administrative Office of the Courts shall provide to the Joint Legislative Budget Committee and the Department of Finance a quarterly report, within 30 days of the end of each quarter, detailing:</p> <p>(a) all expenditures made from this item and (b) between July 1, 2012, and January 1, 2013, any and all expenditures or encumbrances of funds from the Trial Court Trust Fund, including expenditures or encumbrances of funds that are not pursuant to an appropriation contained within this act and excluding Schedules (2), (3), and (4) of Item 0250-001-0932 and direct allocations to trial courts.</p>
Ongoing Quarterly	SB 678 (Stats. 2009, Ch. 608) Criminal recidivism; SB 75 (Stats. 2013, Ch.31) Courts budget trailer bill	PEN 1231(d)	<p>The Administrative Office of the Courts shall, in consultation with the chief probation officer of each county and the Department of Corrections and Rehabilitation, provide a quarterly statistical report to the Department of Finance including, but not limited to, the statistical information listed at Pen. Code 1231(d)(1)-(20). Amended by SB 75 (2013), which added 10 more pieces of statistical information to be included in the report.</p>
Ongoing Semiannual Feb. 1 and Aug. 1	SB 78 (Stats. 2011, ch.10); SB 10 (Stats. 2011, Ch. 265) Semiannual Report on Judicial Branch Contracts	PCC 19209	<p>Beginning 2012, requires the Judicial Council to provide information to the Joint Legislative Budget Committee and the State Auditor, on a semiannual basis, related to the procurement of contracts by the branch. Reports shall include a list of all vendors or contractors</p>

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Frequency	Bill no. Topic	Code section	Summary
			receiving payments. The report shall include amount of payment, type of goods or services provided, and the branch entity that procured the goods or services, contract amendments. Reports shall also include a list of all contract amendments, including the identity of contractor, type of service, nature, duration, and cost of the contract amendment.
Ongoing Semiannual - Apr. 1 and Oct. 1	Electronic recording equipment	GOV 69958	Each <u>superior court</u> shall report to the Judicial Council on or before October 1, 2004, and semiannually thereafter, and the <u>Judicial Council</u> shall report to the Legislature on or before Dec 31, 2004, and semiannually thereafter, regarding all purchases and leases of electronic recording equipment that will be used to record superior court proceedings.
Ongoing Annual - Jan. 1	Receipts & Expenditures From Local Courthouse Construction Funds	GOV 70403(d)	The Judicial Council on or before each January 1 (starting Jan 1, 2007) shall submit a report to the Budget and fiscal committees of the Legislature based on information received from counties (per Government Code §70403) including any amounts required to be repaid by counties.
Ongoing Annual - Jan. 1	Allocation of Funding in FYxx for Support of New Judgeships Authorized in FY2007-08	Budget Act of 2007- 08 (Stats 2007, Ch 171)	Requires the Judicial Council to report to the Legislature on January 1, 2008, and each January 1 thereafter, until all judgeships are appointed and new staff hired, on the amount of funds allocated to each trial court to fund new positions.
Ongoing Annual - Jan. 1	Disposition of Crim Cases According to Race & Ethn of Defendant	PEN 1170.45	The Judicial Council shall collect data on criminal cases statewide relating to the disposition of those cases according to the race and ethnicity of the defendant, and report annually thereon to the Legislature beginning no later than January 1, 1999. It is the intent of the Legislature to appropriate funds to the Judicial Council for this purpose.
Ongoing Annual - Jan. 1	Court data	GOV 68513	The Judicial Council shall report to the Legislature on or before January 1, 1998, and annually thereafter on the uniform entry, storage, and retrieval of court data as provided for in this section.
Ongoing Annual - Feb. 1	Court Reporter Fees Collected and Expenditures for Court Reporter Services in	GOV 68086(c)	The Judicial Council shall report on or before February 1 of each year to the Joint Legislative Budget Committee on the total fees collected

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Frequency	Bill no. Topic	Code section	Summary
	Superior Court Civil Proceedings		and the total amount spent for official reporter services in civil proceedings in the prior fiscal year.
Ongoing Annual - Feb. 1	Training of judges	WIC 304.7	The Judicial Council shall submit an annual report to the Legislature on compliance by judges, commissioners and referees with the education and training standards described in subdivisions (a) and (b) [training for dependency court judicial officers].
Ongoing Annual - Mar. 1	AB 1005 (Stats. 2013, Ch. 113) - New judges demographic data	GOV 12011.5(a)(1)(c)	On or before March 1 of each year, the Judicial Council shall report collected demographic data reported by judicial officers. New for 2014: Demographic data relative to disability and veteran status shall be required for judges elected or appointed, or judicial applicants or nominees who apply or are nominated, on or after January 1, 2014. Disability and veteran status demographic data is to be included in March 1 report beginning in 2015.
Ongoing Annual - Mar. 1	Court Interpreters	Budget Act of 2010 (SB 870)	The Judicial Council shall set statewide or regional rates and policies for payment of court interpreters, not to exceed the rate paid to certified interpreters in the federal court system. The Judicial Council shall adopt appropriate rules and procedures for the administration of the funds specified in Schedule 4. The Judicial Council shall report to the Legislature and the Department of Finance annually regarding expenditures from Schedule 4.
Ongoing Annual - Apr. 15	SB 1021 (Stats. 2012, Ch. 41) Allocation of 2% Set-Aside in TC Trust Fund (emergency reserve funds)	GOV 68502.5(c)(2)(C)	The Judicial Council shall, no later than April 15 of each year, report to the Legislature and to the Department of Finance all requests and allocations made pursuant to Gov. Code 68502.5(c)(2)(b).
Ongoing Annual - July 1 (by Rule of Court)	Court security plans	GOV 69925	The Judicial Council shall annually submit to the Senate Judiciary Committee and Assembly Judiciary Committee a report summarizing the court security plans reviewed by the Judicial Council, including, but not limited to, a description of each plan, the cost involved, and whether each plan complies with the rules for the most efficient practices for providing court security services.
Ongoing Annual -	SB 1021 (Stats. 2012, Ch. 41) Criminal justice	PEN 13155	Requires the AOC Administrative Office of the Courts to collect

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Frequency	Bill no. Topic	Code section	Summary
Sept. 1	realignment data collection		information from trial courts at least twice per year regarding the implementation of the 2011 Criminal Justice Realignment Legislation. The AOC shall make this data available to the Department of Finance, the Board of State and Community Corrections, and the Joint Legislative Budget Committee on or before September 1, 2013 and annually thereafter.
Ongoing Annual - Sept. 30	Trial Court Allocations	GOV 77202.5(a)	The Judicial Council shall report all approved allocations and reimbursements to the trial courts in each fiscal year, including funding received for increased programmatic or operational costs resulting from statutory changes, to the chairs of the Senate Committees on Budget and Fiscal Review and Judiciary and the Assembly Committees on Budget and Judiciary on or before September 30 following the close of each fiscal year. The report shall include all of the following: (1) A statement of the intended purpose for which each allocation or reimbursement was made. (2) The policy governing trial court reserves.
Ongoing Annual - Nov. 1	Judicial Administration Standards and Measures That Promote Fair and Efficient Administration of Justice	GOV 77001.5	On or before November 1, 2007, the Judicial Council shall adopt and shall report annually thereafter upon, judicial administration standards and measures that promote the fair and efficient administration of justice, including the following: (1) Equal access to courts and respectful treatment of court participants; (2) Case processing, including the efficient use of judicial resources; (3) General court administration.
Ongoing Annual - Nov. 1	Trial court delay reduction: Court Statistics Report	GOV 68604	The Judicial Council shall collect and maintain statistics, and shall publish them at least on a yearly basis, regarding the compliance of the superior court of each county and of each branch court with the standards of timely disposition adopted pursuant to Section 68603. In collecting and publishing these statistics, the Judicial Council shall measure the time required for the resolution of civil cases from the filing of the first document invoking court jurisdiction, and for the resolution of criminal cases from the date of arrest, including a

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Frequency	Bill no. Topic	Code section	Summary
			<p>separate measurement in felony cases from the first appearance in superior court.</p> <p>The Judicial Council shall report its findings and recommendations to the Legislature in a biennial Report on the State of California's Civil and Criminal Justice Systems.</p>
Ongoing Annual - Dec. 1	Trial Court Funding: Judicial Administration and Efficiency Modernization Fund	Budget Act of 2000	The Judicial Council shall report to Joint Legislative Budget Committee and Legislature's fiscal committees by December 1, 2000 and yearly thereafter on: (1) Allocation of the fund; including the amounts allocated to each trial court and the programs and services the allocations will support; and (2) Judicial Council's proposed expenditures for the fund.
Ongoing Annual - Dec. 1, until project completion	Status of the Phoenix Program	GOV 68511.8	On or before December 1 of each year until project completion, the Judicial Council shall provide an annual status report to the chairperson of the budget committee in each house of the Legislature and the chairperson of the Joint Legislative Budget Committee with regard to the California Case Management System and Court Accounting and Reporting System.
Ongoing Annual - Dec. 31	State Trial Court Trust Fund Expenditures, Allocations [Budget Trailer Bill SB 1021 (2012)]	GOV 68502.5(b); GOV 77202.5(b)	The Judicial Council shall provide to the Legislature on Dec. 31, 2001, and yearly thereafter, budget expenditures data at the program component level for each court. Judicial Council must summarize data by court and report it to chairs of budget committees and judiciary committees, and post information on public Internet web site on or before each December 31.
Ongoing Annual - Dec. 31	Statewide Collection of Court-Ordered Debt	PEN 1463.010(c)	<p>Requires Judicial Council to develop performance measures and benchmarks to review the effectiveness of collection programs. Courts to report to Judicial Council on template by September 1, 2009 and yearly thereafter.</p> <p>Requires the Judicial Council to report on the collection programs to the Legislature by December 31, 2009 and annually thereafter.</p>

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Frequency	Bill no. Topic	Code section	Summary
Ongoing Annual - Dec. 31	Trial Court Allocations	GOV 77202.5(b)	The trial courts shall report to the Judicial Council, on or before September 15 each fiscal year, all court revenues, expenditures, reserves, and fund balances from the prior fiscal year for funding from all fund sources. The report shall specify all expenditures, including those associated with administrative costs, by program, component, and object. The Judicial Council shall summarize this information by court and report it to the chairs of the Senate and Assembly Committees on Budget and the Judiciary and post that information on a public Internet Web site on or before December 31, 2009, and on or before December 31 following the close of each fiscal year thereafter.
Ongoing Annual	Trial Court Improvement and Modernization Fund Expenditures for Fyxx	GOV 77209(i)	The Judicial Council shall present an annual report to the Legislature on the use of the Trial Court Improvement Fund. The report shall include appropriate recommendations.
Ongoing Annual - After the end of each fiscal year	Court Facilities Trust Fund	GOV 70352c	The Judicial Council shall recommend to the Governor and the Legislature each fiscal year the proposed expenditures from the fund and submit a report on actual expenditures after the end of each fiscal year.
Ongoing Annual	AOC: Supplementary Schedule of Operating Expenses & Equipment	Budget Act of 2010 Supplemental Report	The AOC Administrative Office of the Courts shall annually provide to the budget committees of both houses and the LAO Legislative Analyst's Office a supplementary schedule for its operating expenses and equipment.
Ongoing Annual	AB 159 (Stats. 2007, Ch. 722), SJO conversions; Notification of Vacancies & Allocation of Conversion of SJO Positions	GOV 69615	Beginning with vacancies to be filled in FY 2008-09, the Judicial Council shall file notice of vacancies and allocations for converted SJO positions with Sen. Rules Committee, Assembly Speaker, and chairs of the Senate and Assembly Committees on the Judiciary.
18 months after initial receipt of funding and annually thereafter	SB 678 (Stats. 2009, Ch. 608) Criminal recidivism, SB 75 (Stats. 2013, Ch. 31) Courts budget trailer bill. (CA Community Corrections Performance Incentive Act of 2009: Findings from SB 678 Program)	PEN 1232	Commencing no later than 18 months following the initial receipt of funding pursuant to this act and annually thereafter, the AOC Administrative Office of the Courts, in consultation with the Dept. of Corrections and Rehabilitation, the Dept. of Finance, and the Chief Probation Officers of California, shall submit to the Governor and the Legislature a comprehensive report on the implementation of this act.

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Frequency	Bill no. Topic	Code section	Summary
			The report shall contain the information listed in Pen. Code 1232(a)-(e). Amended by SB 75 (2013)
Ongoing Annual	2013 Budget, Supplemental Report, Item number 0250-101-0932, Open Working Groups	not codified	Not later than January 1, 2014, the Judiciary Council shall submit to the Joint Legislative Budget Committee a report on the implementation of an open meetings rule in accordance with the following: (a) The rule shall apply to any committee, subcommittee, advisory group, working group, task force, or similar multimember body that review issues and reports to the Judicial Council. (b) The rule shall provide for telephone access for requesting persons. (c) The rule shall establish public notice requirements for any meeting of a body described above. For each fiscal year beginning with 2014-15, the report shall include the rule for that fiscal year and specific detail on amendments to the rule adopted in the prior fiscal year.
Ongoing Annual as required	California Case Management System	Budget Act of 2008-09 Supplemental Report	The Judicial Council shall report to the Legislature annually, <u>at regular hearings</u> of the Senate and Assembly budget committees, on the deployment of the case management system, including whether deadlines for development and deployment are being met.
Ongoing - Mar. 1 of every even-numbered year	Grant funding: visitation and custody	FAM 3204(d)	The Judicial Council shall, on March 1, 2002, and on the first day of March of each even-numbered year, report to the Legislature on the programs funded pursuant to this chapter and whether and to what extent those programs are achieving the goal of promoting and encouraging healthy parent and child relationships between non-custodial or joint custodial parents and their children while ensuring the health, safety, and welfare of children, and the other goals described in this chapter.
Ongoing - Nov. 1 of every even-numbered year	Trial court judges	GOV 69614	The Judicial Council shall report to the Legislature and the Governor on or before November 1 of every even-numbered year on the factually determined need for new judgeships in each superior court using the uniform criteria for allocation of judgeships described in GC sec 69614(b), as updated and applied to the average of the prior three calendar years' filings. Beginning with the report due to the

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Frequency	Bill no. Topic	Code section	Summary
			Legislature on November 1, 2012, the Judicial Council shall report on the implementation and effect of subparagraph (C) of paragraph (1) of subdivision (c) of GC 69615.
Ongoing - every three years	AB 929 (Stats. 2012, Ch. 678) Debtor Exemptions: bankruptcy	CCP 703.150(e)	Debtor Exemptions: Starting on April 1, 2004 and every three years thereafter, Judicial Council shall publish a list of the current dollar amounts of exemptions provided in Section 703.140(b), and Article 3 commencing with 704.010 utilizing the California Consumer Price Index (CPI) as defined in CCP 703.150(d), together with the date of the next scheduled adjustment. Starting on April 1, 2013 and every three years thereafter, the Judicial Council also shall submit to the Legislature the amount by which the homestead exemption (CCP section 704.730(a)) may be increased if the CPI is applied. Note, however, that the Homestead Exemption only may be increased by action of the Legislature.
Ongoing - Every three years on Apr. 1	AB 2767 Enforcement of Judgments: exemptions: homesteads	CCP 703.150	(d) The Judicial Council shall determine the amount of the adjustment based on the change in the annual California Consumer Price Index for All Urban Consumers, published by the Department of Industrial Relations, Division of Labor Statistics, for the most recent three-year period ending on December 31 preceding the adjustment, with each adjusted amount rounded to the nearest twenty-five dollars (\$25). (e) Beginning April 1, 2004, the Judicial Council shall publish a list of the current dollar amounts of exemptions provided in subdivision (b) of Section 703.140 and in Article 3 (commencing with Section 704.010), together with the date of the next scheduled adjustment. In any year that the Legislature votes to increase the exemptions provided in subdivision (a) of Section 704.730, the Judicial Council shall publish a list of current dollar amounts of exemptions.
Ongoing - At least every 4 years	Child support	FAM 4054	Requires the Judicial Council to periodically review the statewide uniform guideline to recommend to the Legislature appropriate revisions, including economic data on the cost of raising children and analysis of case data, gathered through sampling or other methods,

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			<p>on the actual application of the guideline after the guideline's operative date. The review shall also include an analysis of guidelines and studies from other states, and other research and studies available to or undertaken by the Judicial Council.</p> <p>The initial review by the Judicial Council shall be submitted to the Legislature and to the Department of Child Support Services on or before December 31, 1993, and subsequent reviews shall occur at least every four years thereafter unless federal law requires a different interval.</p>
Ongoing - Every 5 years	AB 227 (Stats. 2013, ch. 581)	H&S 25249.7	<p>On April 1, 2019, and at each five-year interval thereafter, the dollar amount of the civil penalty provided pursuant to this subparagraph shall be adjusted by the Judicial Council based on the change in the annual California Consumer Price Index for All Urban Consumers, published by the Department of Industrial Relations, Division of Labor Statistics, for the most recent five-year period ending on December 31 of the year preceding the year in which the adjustment is made, rounded to the nearest five dollars (\$5). The Judicial Council shall quinquennially publish the dollar amount of the adjusted civil penalty provided pursuant to this subparagraph, together with the date of the next scheduled adjustment.</p>
Ongoing - July 1, every 5 years	Court Interpreters	GOV 68563	<p>The Judicial Council shall conduct a study of language and interpreter use and need in court proceedings, with commentary, and shall report its findings and recommendations to the Governor and to the Legislature not later than July 1, 1995, and every five years thereafter. The study shall serve as a basis for (1) determining the need to establish interpreter programs and certification examinations, and (2) establishing these programs and examinations through the normal budgetary process. The study shall also serve as a basis for (1) determining ways in which the Judicial Council can make available to the public, through public service announcements and otherwise, information relating to opportunities, requirements, testing,</p>

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Frequency	Bill no. Topic	Code section	Summary
			application procedures, and employment opportunities for interpreters, and (2) establishing and evaluating these programs through the normal budgetary process.
Ongoing	SB 78 (Stats. 2011, ch.10); SB 10 (Stats. 2011, Ch. 265) IT Contracts	PCC 19204	Requires all judicial branch entities to provide written notice to the State Auditor within 10 business days of entering a non-IT contract with a total estimated cost of more than \$1 million
Ongoing	AB 590 (Stats. 2009, Ch. 457) Legal Representation in Civil Proceedings for Low-income Persons	GOV 68650	Establishes, from July 1, 2011 to December 31, 2017, a pilot program to provide legal representation to indigent litigants in specified civil case types. Pilot funds would be awarded by the Judicial Council. Courts and legal services agencies would partner to apply for the funds, with legal services taking the lead role in providing representation, and courts making improvements in the handling of the case types to be served by the project. Funding for the pilot would come from recently increased miscellaneous court fees. The Judicial Council would be responsible for administering the funds and submitting an evaluation report on the pilot to the Legislature by March 30, 2016.
Ongoing	AB 590 (Stats. 2009, Ch. 457) Legal Representation in Civil Proceedings for Low-income Persons		(d) Collect information on outcomes
Ongoing - As needed	Supplemental Report: Judicial Branch	Budget Act of 2010 Supplemental Report	The Administrative Office of the Courts shall report to the budget committees of each house any facility modifications that must be completed earlier than originally reported due to an emergency.
Ongoing - As needed	Court Facilities Construction	GOV 70371.5(f)(1)	The Judicial Council shall make recommendations to the State Public Works Board for projects based on its determination that the need for a project is most immediate and critical using the then most recent version of the Council-adopted Prioritization Methodology.
Ongoing - Make available	Court Facilities Construction	GOV 70371.5(e)	Directs the Judicial Council to collect and make available upon request information regarding the moneys deposited in the Immediate and Critical Needs Account resulting from new and increased fees, assessments, and penalties.

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Frequency	Bill no. Topic	Code section	Summary
One time	AB 900 Expedited CEQA process	PRC 21189.2	Establishes judicial review procedures in the Court of Appeal for California Environmental Quality Act cases for specific qualifying projects. Requires the Judicial Council to report to the Legislature on or before January 1, 2015 on the description of the benefits, costs, and detriments of the certification of projects pursuant to these provisions.
One time	Budget Trailer Bill: Court construction	GOV 70371.9(a)-(e)	Requires the Judicial Council to conduct a pilot program assessing impact of requiring subcontractors on SB 1407 projects to cover healthcare benefits for employees and offering quality points to construction managers at risk for providing benefits. Also requires the Judicial Council to issue a report to the Legislature summarizing data and analysis.
One time	SB 75 (Stats. 2013, Ch. 31) Court budget trailer bill	not codified	The Judicial Council shall report to the appropriate budget and policy committees of the Legislature, the Joint Legislative Budget Committee, the Legislative Analyst's Office, and the Department of Finance, on or before June 30, 2014, on an evaluation of the Long Beach court building performance based infrastructure project. The evaluation shall assess the implementation of the project agreement and compare the project to other court construction projects the Judicial Council has pursued using the traditional public sector approach. The evaluation shall address whether the project was a cost-effective approach compared to the Judicial Council's other court construction projects. The evaluation shall include, but not be limited to, all of the elements listed in (a)-(f) of section 27 of the bill.
One time	AB 590 (Stats. 2009, Ch. 457) Legal Representation in Civil Proceedings for Low-income Persons	Gov. Code 68651	Directs the Judicial Council to develop three-year pilot projects in selected courts using a competitive grant process to provide legal services for low-income persons in certain types of civil matters. Requires the Judicial Council to conduct a study to demonstrate the effectiveness and continued need for the pilot program, and to report

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Frequency	Bill no. Topic	Code section	Summary
			its findings and recommendations to the Governor and the Legislature on or before January 31, 2016.
One time	SB X3 18 (Stats. 2009, Ch. 28) Parolee Reentry Court Program	PEN 3015(e)(3)	The Judicial Council, in collaboration with the Dept. of Corrections and Rehabilitation, shall submit a Final report of the Findings from its evaluation of the program to the Legislature and the Governor no later than 3 years after the establishment of a reentry court pursuant to this section.
One time	AB 2073 Orange County electronic filing and service of documents pilot project	CCP 1010.6(d)(2)	Allows Orange County Superior Court to establish a pilot project for parties in specific civil actions to electronically file and serve documents. If the pilot program is implemented, the Judicial Council shall conduct an evaluation of the pilot project and report to the Legislature on the results of the evaluation. The evaluation shall review, among other things, the cost of the program to participants, cost-effectiveness for the court, effect on unrepresented parties and parties with fee waiver, and ease of use for participants.
Fixed period, current	Court Plans for \$60M: (1) individual court plans regarding expenditure of budget allocations; (2) individual court expenditures of budget allocations	2013 Budget Act	Individual court plans regarding expenditure of \$60 million budget augmentation. Provision 12 of Item 0250-101-0932. On or after April 14, 2014, but in no event later than May 14, 2014, the Judicial Council shall file a written report to the appropriate fiscal and policy committees of the Legislature on how funds identified in this provision were or will be expended during the 2013–14 fiscal year.

Services Provided by the Administrative Offices of the Court As the staff agency to the Judicial Council of California

ACCESS SERVICES

Service

AC.01	Self-Help legal, training, program, education support.		
	Provided to: The trial courts, appellate courts, and the public.		
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Required			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Statewide Action Plan for Serving Self-Represented Litigants, 2004</i> (AC - Attachment 5). • <i>Trial Courts: Allocations From the State Trial Court Improvement and Modernization Fund, April 2014, Report to the Judicial Council; Annually reviews Trial Court Budget Advisory Committee recommendations for State Trial Court Improvement and Modernization Funds</i> (AC - Attachment 1). 		<ul style="list-style-type: none"> • AC - Attachment 5 • AC - Attachment 1
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services provides logistical services including but not limited to the following: printing, binding, shipping, and scanning of all documents required for the training participants and faculty transportation, signage, and reconciliation of any courier invoices. 		

Service

AC.02	Sargent Shriver Civil Counsel Pilot Program.		
	Provided to: The trial courts and the public.		
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Assembly Bill 590 (Feuer) (Stats 2009, Ch. 459). • Government Code Section: 68650, et. Seq. 		
Required			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Judicial Council: <i>Allocation of Trial Court Trust Funds for Sargent Shriver Civil Council Pilots, August 2012, Report to the Judicial Council; annually reviews Trial Court Budget Advisory Committee recommendations for statutorily mandated funding through State Trial Court Trust Fund allocation.</i> 		

ACCESS SERVICES

Service

AC.03	Self-Help Center, Family Law Information Centers, Model Self-Projects Funding.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Assembly Bill 2207 (Escutia) (Stats 1998, Ch. 721). • Senate Bill 87 (Stats. 2011, Ch. 33). • Family Code Section: 15000 (established Family Law Information Center pilot projects). • California Rules of Court: 10.960 (requires the dissemination of guidelines and procedures for self-help centers; adopted by the Council in January 2008). • State Budget Act called for the Judicial Council to allocate funding for self-help centers since fiscal year 2005-2006. • The annual budget act has provided funding for 5 model self help programs since 2001 and funding for Family Law Information Centers since 1999. 		
Required			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Family Law Information Centers</i>, February 2003, Report to Judicial Council; approval of report to legislature and reviewed mandated report on Family Law Information Center (FLIC) pilots and directed AOC to develop plan for scaling FLIC programs. • <i>Model Self-Help Center Pilot Program</i>, February 2005, Report to the Judicial Council; reviewed Report to the Legislature evaluating Model Self-Help Programs. • <i>California Courts Self-Help Centers: A Report to the California Legislature</i>, June 2007; reviewed Report to the Legislature describing self-help programs and plans for future collaborations and expansion (AC - Attachment 6). • Approves Trial Court Budget Advisory Committee annual funding allocations. 		<ul style="list-style-type: none"> • AC - Attachment 6

Service

AC.04	Equal Access Funds.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Senate Bill 87 (Stats. 2011, Ch.33). • State Budget: The Equal Access Fund has been included in the State Budget Act since 1999; the Judicial Council approves distribution. 		

ACCESS SERVICES

Service

AC.04	Equal Access Funds.		
Provided to: The trial courts and the public.			
Office Required	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Judicial Council: <i>Trial Courts: Allocations From the State Trial Court Improvement and Modernization Fund</i>, April 2014, Report to the Judicial Council; approves annual allocations, consistent with founding legislation (AC - Attachment 1). 	<ul style="list-style-type: none"> • AC - Attachment 1 	

Service

AC.05	Judicial Branch Self-Help Website and resources.		
Provided to: The trial courts, appellate courts, the Supreme Court, and the public.			
Office Required	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Judicial Council: Approves annual funding recommendations from Trial Court Budget Advisory Committee. 		

Service

AC.06	On-line Document Assembly/Forms Completion Programs.		
Provided to: The trial courts and the public.			
Office Required	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Judicial Council: <i>Trial Courts: Allocations From the State Trial Court Improvement and Modernization Fund</i>, April 2014, Report to the Judicial Council; most recent report regarding allocation of STCIMF to Interactive Software - Self-Represented Electronic forms; approves annual funding recommendations from Trial Court Budget Advisory Committee (AC - Attachment 1). 	<ul style="list-style-type: none"> AC - Attachment 1 	

ACCESS SERVICES

Service

AC.07 American with Disabilities Act subject matter expertise and training.

Provided to: The trial courts, appellate courts, the Supreme Court, and the public.

Office

Justification/Supporting Documentation

Attachments

Mandatory

Center for Families, Children,
and the Courts

- California Rules of Court:
 - 10.469 (requires judicial officers and court staff to regularly participate in access training, including the subject of persons with disabilities).
 - 10.55 (the Judicial Council's Advisory Committee on Providing Access and Fairness must recommend to the Governing Committee of the Center for Judicial Education and Research, proposals for the education and training of judicial officers and court staff).
- Also see service ET.08, Education and Training Services: ADA Annual Statewide Training and Consulting.

Required

Office of Administrative
Services

- California Rules of Court: 10.1(d).
- Office of Administrative Services prints and distributes materials.

ACCESS SERVICES

Service

AC.08 Administration and management of the JusticeCorps volunteer program.

Provided to: The trial courts and the public.

<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
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Required

Court Operations Special Services Office

- Judicial Council:
 - *Trial Courts: Allocations From the State Trial Court Improvement and Modernization Fund*, April 2014, Report to the Judicial Council; Trial Court Budget Advisory Committee recommended allocation of STCIMF funds for FY 2014-2015 (AC - Attachment 1).
 - Additionally, as a state program, AmeriCorps requires a single applicant. The 3 regions that participate could not seek the grant funding without a state level administrator of the grant.
 - The California JusticeCorps program is a partnership of: the California Administrative Office of the Courts (AOC); Los Angeles, Alameda (on behalf of the Bay Area), and San Diego Superior Courts; and 10 University of California (UC) and California State University (CSU) campuses.
 - An AmeriCorps national service program, JusticeCorps recruits, trains, and places about 280 undergraduate and recently graduated students in service in 28 court-based self-help legal access centers in partner courts.
- It could be argued that this is discretionary, but the Judicial Council has directed funding for the JusticeCorps Program, making the activities of AOC staff required.
- California Rules of Court: 10.1(d).
- Office of Administrative Services prints and distributes materials.
- Began in 2004 in partnership with AmeriCorps, the Superior Court of Los Angeles County, various University of California (UC) and California State University (CSU) campuses, and community-based legal aid services providers.
- Since 2004, the Superior Courts of Alameda and San Diego Counties, as well as the Counties of San Francisco, San Mateo, Santa Clara, Placer, Yolo, and Sacramento, have joined the program.

- AC - Attachment 1

Office of Administrative Services

Center for Families, Children, and the Courts

ACCESS SERVICES

Service

AC.09	Plain language forms and instructions.		
Provided to: The trial courts, appellate courts, the Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Required			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Plain Language Domestic Violence Restraining Order Forms</i>, November 2002, Report to the Judicial Council; adopted the first “Plain Language” forms in domestic violence and adoption matters and requested that the Family and Juvenile Law Advisory Committee undertake the same effort for civil harassment forms. • <i>Statewide Action Plan for Serving Self-Represented Litigants</i>, 2004; approved the Statewide Action Plan for Serving Self-Represented Litigants which recommended continued expansion of plain language forms (AC - Attachment 5). • <i>Civil Harrassment Forms: Plain Language Versions</i>, October 2004, Report to the Judicial Council. • <i>Prevention of Elder and Dependent Abuse: Plain Language Forms</i>, October 2006, Report to the Judicial Council; has approved plain language forms for small claims, domestic violence, civil harassment, adoption, fee waivers, and many information sheets at subsequent meetings (AC - Attachment 7). 		<ul style="list-style-type: none"> • AC - Attachment 5 • AC - Attachment 7
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 		

ACCESS SERVICES

Service

AC.10 Support to Civics Education program to improve civic learning and public understanding of the judicial branch including the California Task Force on k-12 Civics Learning.

Provided to: The trial courts, appellate courts, the Supreme Court, and the public.

Office

Required

Court Operations Special Services Office

Justification/Supporting Documentation

- Judicial Council and Chief Justice of California:
 - These efforts grew out of the recommendations of the Commission on Impartial Courts.
 - *Commission for Impartial Courts: Recommendations 37 (a) and (b) and 43 (a), (b), (c), and (g)*; August 2010, Report to the Judicial Council; adopted the recommendations which dealt with the creation of a leadership committee and focused and coordinated Judicial Branch advocacy for improving civics education in K–12 curriculum (AC - Attachment 2).
 - *Judicial Council Meeting Minutes*, August 2010 (AC - Attachment 3).
 - *Your Constitution: The Power of Democracy Steering Committee* (AC - Attachment 4).

Attachments

- AC - Attachment 2
- AC - Attachment 3
- AC - Attachment 4

AUDIT SERVICES

Service

AU.01	Regular financial, operational, and compliance audits.		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Internal Audit Services	<ul style="list-style-type: none"> • Government Code Sections: 77206, 77212, 70391(d), 70392, and 13885. • California Rules of Court: 10.804. 		
Required			
Internal Audit Services	<ul style="list-style-type: none"> • Judicial Council: <i>Judicial Council Meeting Minutes</i>, February 2004 and <i>Internal Audit Services Charter</i>, January, 27, 2004; audit Charter approved in 2004 (AU-Attachment 1 and AU-Attachment 2, respectively). • Legislature: <i>Domestic Violence Audit: Assessment, Collection, and Distribution of Domestic Violence Fees & Fines</i>, March 2004 (Internal Audit Report); domestic violence audit in 2004 at the request of the Joint Legislative Audit Committee (JLAC) member Rebecca Cohn. JLAC in acceptance of the report requested Internal Audit Services to perform domestic violence work as identified in the audit in all superior court audits going forward (AU - Attachment 3). • Audit Services a specific request in 1998 by Presiding Judges and CEOs of Superior Courts. 		<ul style="list-style-type: none"> • AU - Attachment 1 • AU - Attachment 2 • AU - Attachment 3

Service

AU.02	Special investigations concerning misappropriation of funds, potential losses, etc.		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Internal Audit Services	<ul style="list-style-type: none"> • Government Code Sections: 77206, 77212, 70391(d), 70392, and 13885. • California Rules of Court: 10.804. 		
Required			
Internal Audit Services	<ul style="list-style-type: none"> • Judicial Council: <i>Judicial Council Meeting Minutes</i>, February 2004 and <i>Internal Audit Services Charter</i>, January, 27, 2004; audit Charter approved in 2004 (AU-Attachment 1 and AU-Attachment 2, respectively). • Audit Services a specific request in 1998 by Presiding Judges and CEOs of Superior Courts. 		<ul style="list-style-type: none"> • AU - Attachment 1 • AU - Attachment 2

AUDIT SERVICES

Service

AU.03	Non-audit consultative reviews.		
Provided to: The trial courts, appellate courts, and Supreme Court.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Internal Audit Services	<ul style="list-style-type: none"> • Government Code Sections: 77206, 77212, 70391(d), 70392, and 13885. • California Rules of Court: 10.804. 		
Required			
Internal Audit Services	<ul style="list-style-type: none"> • Judicial Council: <i>Judicial Council Meeting Minutes</i>, February 2004 and <i>Internal Audit Services Charter</i>, January, 27, 2004; audit Charter approved in 2004 (AU-Attachment 1 and AU-Attachment 2, respectively). • Audit Services a specific request in 1998 by Presiding Judges and CEOs of Superior Courts. 	<ul style="list-style-type: none"> • AU - Attachment 1 • AU - Attachment 2 	

Service

AU.04	Technical advice regarding audit, accounting compliance, and operational requirements.		
Provided to: The trial courts, appellate courts, and Supreme Court.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Internal Audit Services	<ul style="list-style-type: none"> • Government Code Sections: 77206, 77212, 70391(d), 70392, and 13885. • California Rules of Court: 10.804. 		
Required			
Internal Audit Services	<ul style="list-style-type: none"> • Judicial Council: <i>Judicial Council Meeting Minutes</i>, February 2004 and <i>Internal Audit Services Charter</i>, January, 27, 2004; audit Charter approved in 2004 (AU-Attachment 1 and AU-Attachment 2, respectively). • Audit Services a specific request in 1998 by Presiding Judges and CEO's of Superior Courts. 	<ul style="list-style-type: none"> • AU - Attachment 1 • AU - Attachment 2 	

Service

AU.05	Whistleblower Hotline responsibility.		
Provided to: The Judicial Council, trial courts, appellate courts, the Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Internal Audit Services	<ul style="list-style-type: none"> • Government Code Section: 8547. 		

AUDIT SERVICES

Service

AU.05	Whistleblower Hotline responsibility.		
	Provided to: The Judicial Council, trial courts, appellate courts, the Supreme Court, and the public.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Internal Audit Services	<ul style="list-style-type: none">• Judicial Council: <i>AOC Personnel Policies and Procedures</i>, Policy Number 9.3, Revised June 26, 2013 (AU - Attachment 4).	<ul style="list-style-type: none">• AU - Attachment 4	

CAPITAL PROJECTS AND FACILITIES SERVICES

Service

CP.01 Capital Construction: Fiscal management, oversight, and accountability functions for the judicial branch capital outlay program including cash flow projections for various construction funds.

Provided to: The trial courts, appellate courts, and Supreme Court.

Office

Justification/Supporting Documentation

Attachments

Mandatory

Judicial Branch Capital Program Office

- Government Code Sections: 70311, 70312, 70321, 70325, 70341, 70342, 70352, 70353, 70354, 70355, 70356, 70357, 70359, 70361, 70362, 70363, 70371, 70372, 70374, 70392, 70403, and 76100.

CAPITAL PROJECTS AND FACILITIES SERVICES

Service

CP.02

Capital Construction: Delivery of professional project management and related services for capital projects, including:

- Architectural and engineering design services
- Site and environmental analysis
- Construction inspection services program for capital projects, facility modification, and facility management programs
- Functional and space planning and programming
- Approval by authorities having jurisdiction
- Sustainable design and design approval
- Construction execution delivery including commissioning services
- Completion and occupancy and transition planning
- Preparation for and administration of all internal and external State (Judicial, Executive, and Legislative) and other approvals

Provided to: The trial courts, appellate courts, and Supreme Court.

Office

Justification/Supporting Documentation

Attachments

Mandatory

Judicial Branch Capital Program Office

Office of Real Estate and Facilities Management

- Government Code Sections: 69206, 70371, 70391, and 70392.

Justification/supporting documentation provided for the following specific bullets of Service CP.02: Site and environmental analysis; Construction inspection services; Program for facility modification and facility management programs; Approval by authorities having jurisdictions; Sustainable design and design approval; Transition planning; Preparation for and administration of all internal and external State (Judicial, Executive, and Legislative) and other approvals.

- Government Code Sections: 69202, 69204, 69206, 70312, 70321, 70322, 70371.7, 70371.8, 70391 et seq, 70392, and 7267.8 (California Relocation Assistance Act).
- California Rules of Court: 10.181, 10.182, and 10.184.
- California Code of Regulations:
 - Title 25 Chapter 6 § 6006 (Relocation Assistance and Real Property Acquisition Guidelines).
 - Title 22 § 402 (Clean Water Act).
 - Title 22 Division 4.5 Chapters 11, 12, 13, 18, and 45.
- United States Code: 42 USC Chapter 103 (Comprehensive Environmental Response, Compensation, and Liability Act).

CAPITAL PROJECTS AND FACILITIES SERVICES

Service

CP.02 Capital Construction: Delivery of professional project management and related services for capital projects, including:

- Architectural and engineering design services
- Site and environmental analysis
- Construction inspection services program for capital projects, facility modification, and facility management programs
- Functional and space planning and programming
- Approval by authorities having jurisdiction
- Sustainable design and design approval
- Construction execution delivery including commissioning services
- Completion and occupancy and transition planning
- Preparation for and administration of all internal and external State (Judicial, Executive, and Legislative) and other approvals

Provided to: The trial courts, appellate courts, and Supreme Court.

<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
<p>Required</p> <p>Office of Real Estate and Facilities Management</p>	<p>Justification/supporting documentation provided for the following specific bullets of Service CP.02: Site and environmental analysis; Construction inspection services; Program for facility modification and facility management programs; Approval by authorities having jurisdictions; Sustainable design and design approval; Transition planning; Preparation for and administration of all internal and external State (Judicial, Executive, and Legislative) and other approvals.</p> <ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Site Selection and Acquisition Policy for Judicial Branch Facilities</i>, August 14, 2009 (CP - Attachment 1). • <i>Court Facilities: Location of New Inyo County Courthouse</i>, April 2011 (CP - Attachment 2). • <i>California Trial Court Facilities Standards</i>, March 1, 2010; Adopted by the Judicial Council effective April 21, 2006 (CP - Attachment 3). • Site, environmental, and transition planning services supporting Judicial Branch Capital Program Office. 	<ul style="list-style-type: none"> • CP - Attachment 1 • CP - Attachment 2 • CP - Attachment 3

CAPITAL PROJECTS AND FACILITIES SERVICES

Service

CP.03 Capital Construction: Site selection, due diligence, and negotiation of acquisition agreements for capital projects and staff services to Project Advisory Groups comprised of court and justice partner stakeholders.

Provided to: The trial courts, appellate courts, the Supreme Court, and the public.

Office

Justification/Supporting Documentation

Attachments

Discretionary

Office of Real Estate and Facilities Management

- Support to Judicial Branch Capital Program Office through management of site selection, due diligence, budgeting and negotiation of acquisition agreements; proposal, presentation, and justification to DGS, DOF, and the State Public Works Board for approval of Phase I and II funding.

Mandatory

Office of Real Estate and Facilities Management

- Government Code Sections: 69202, 69204, 69206, 70312, 70321, 70322, 70371.7, 70371.8, 70391 et seq, 70392, and 7267.8 (California Relocation Assistance Act).
- California Rules of Court: 10.181, 10.182, and 10.184.
- California Code of Regulations:
 - Title 25 Chapter 6 § 6006 (Relocation Assistance and Real Property Acquisition Guidelines).
 - Title 22 (Clean Water Act).
 - Title 22 Division 4.5 Chapters 11, 12, 13, 18 and 45.
- Public Resources Code Section: 21000.
- United States Code: 42 US Code Chapter 103 (Comprehensive Environmental Response, Compensation, and Liability Act).
- Government Code Sections: 69202, 69204, 69206, 70312, 70321, 70322, 70371.7, 70371.8, 70391, 70391.7, and 70392.
- California Rules of Court: 10.181 and 10.183.

Judicial Branch Capital Program Office

Required

Office of Real Estate and Facilities Management

- Judicial Council:
 - *Site Selection and Acquisition Policy for Judicial Branch Facilities*, August 14, 2009 (CP - Attachment 1).
 - *Court Facilities: Location of New Inyo County Courthouse*, April 2011 (CP - Attachment 2).
 - *California Trial Court Facilities Standards*, March 1, 2010; Adopted by the Judicial Council effective April 21, 2006 (CP - Attachment 3).

- CP - Attachment 1
- CP - Attachment 2
- CP - Attachment 3

CAPITAL PROJECTS AND FACILITIES SERVICES

Service

CP.04	Capital Construction: Management of California Environmental Quality Act responsibilities to comply with regulatory statute.		
Provided to: The trial courts, appellate courts, the Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Office of Real Estate and Facilities Management	<ul style="list-style-type: none"> • Public Resources Code Section: 21000. • Supports JBCPO capital construction program. 		
Judicial Branch Capital Program Office	<ul style="list-style-type: none"> • Government Code Sections: 69204, 69206, 70374(e)(1), and 70379. • California Rules of Court: 10.180, 10.181, and 10.182. 		

Service

CP.05	Capital Construction: Establishment and implementation of policies for the judicial branch capital program, including: Program Management; Prioritization Methodology; Trial Court Facilities Standards; Site Selection and Acquisition; Contracting; Seismic Analysis of Leased Facilities; Relocation Services; and creation, management, and implementation of related procedures reflecting best practices for new courthouse design and construction.		
Provided to: The trial courts, appellate courts, the Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Office of Real Estate and Facilities Management	<ul style="list-style-type: none"> • Government Code Sections: 69202, 69204, 69206, 70312, 70321, 70322, 70371.7, 70371.8, 70391 et seq, 70392, and 7267.8 (California Relocation Assistance Act). • California Rules of Court: 10.181, 10.182, and 10.184. • California Code of Regulations: Title 25 Chapter 6 § 6006 (Relocation Assistance and Real Property Acquisition Guidelines). 		
Judicial Branch Capital Program Office	<ul style="list-style-type: none"> • Senate Bill 1732 as amended Government Code Section 70371.5. 		

CAPITAL PROJECTS AND FACILITIES SERVICES

Service

CP.05	Capital Construction: Establishment and implementation of policies for the judicial branch capital program, including: Program Management; Prioritization Methodology; Trial Court Facilities Standards; Site Selection and Acquisition; Contracting; Seismic Analysis of Leased Facilities; Relocation Services; and creation, management, and implementation of related procedures reflecting best practices for new courthouse design and construction.		
	Provided to: The trial courts, appellate courts, the Supreme Court, and the public.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Judicial Branch Capital Program Office	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Court Facilities: AOC Judicial Branch Capital Program Office's Capital Program Management Manual</i>, April 2014, Report to the Judicial Council (CP - Attachment 4). • <i>Prioritization Methodology for Trial Court Capital-Outlay Projects</i>, August 25, 2006 (CP - Attachment 5). • <i>California Trial Court Facility Standards</i>, March 1, 2010 (CP - Attachment 3). 	<ul style="list-style-type: none"> • CP - Attachment 4 • CP - Attachment 5 • CP - Attachment 3 	
Office of Real Estate and Facilities Management	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Site Selection and Acquisition Policy for Judicial Branch Facilities</i>, August 14, 2009 (CP- Attachment 1). • <i>Court Facilities: Rules and Regulations for Relocation Payments and Assistance Regarding Real Property Acquisition</i>, December 2014, Report to the Judicial Council (CP - Attachment 6). • <i>Court Facilities Planning: Seismic Safety Policy for Leased Buildings</i>, August 15, 2008 (CP - Attachment 7). 	<ul style="list-style-type: none"> • CP - Attachment 1 • CP - Attachment 6 • CP - Attachment 7 	

Service

CP.06	Capital Construction: Preparation of fiscal data for Five Year Infrastructure Plan and fiscal documents.		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Judicial Branch Capital Program Office	<ul style="list-style-type: none"> • Government Code Sections: 70352, 70353, 70355, 70356, 70362, 70371, 70374, and 70392. 		
Required			
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 		

CAPITAL PROJECTS AND FACILITIES SERVICES

Service

CP.07	Capital Construction: Selection of capital building systems and equipment based on life-cycle analysis of long-term costs.		
Provided to: The trial courts and appellate courts.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Judicial Branch Capital Program Office	<ul style="list-style-type: none"> • Government Code Sections: 69206, 70371, 70391, and 70392. 		
Required			
Office of Real Estate and Facilities Management	<ul style="list-style-type: none"> • Judicial Council: <i>Judicial Council Directive #138, Activity Status Form</i>, April 2014 (CP - Attachment 8). 	<ul style="list-style-type: none"> • CP - Attachment 8 	

Service

CP.08	Capital Construction: Development and implementation of risk management for capital projects and court facilities.		
Provided to: The trial courts, appellate courts, and Supreme Court.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Judicial Branch Capital Program Office	<ul style="list-style-type: none"> • Government Code Sections: 69206, 70341, 70342, 70343, 70358, and 70392. 		

Service

CP.09	Capital Construction: Development and implementation of property and commercial insurance programs for judicial branch entities and, as requested, assistance with their property and liability insurance needs.		
Provided to: The trial courts, appellate courts, and Supreme Court.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Judicial Branch Capital Program Office	<ul style="list-style-type: none"> • Government Code Sections: 69206, 70341, 70342, 70343, 70358, and 70392. 		

CAPITAL PROJECTS AND FACILITIES SERVICES

Service

CP.10	Capital Construction: Development, implementation, and oversight of audio-visual systems and low voltage technologies program and statewide standards development for use of video over the technical infrastructure.		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Judicial Branch Capital Program Office	<ul style="list-style-type: none"> • Government Code Sections: 69206 , 70371, 70391, and 70392. 		

Service

CP.11	Capital Construction: Subject matter expertise on health and safety issues and technical assistance relating to fire prevention.		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Judicial Branch Capital Program Office	<ul style="list-style-type: none"> • Government Code Sections: 69206, 70341, 70342, 70343, and 70358. • California Code of Regulations: Title 8 § 3203. 		

Service

CP.12	Facilities: Operations and maintenance of court facilities which includes physical, financial, and contractual management and delivery of routine operations and maintenance services, and provision of utilities and insurance.		
	Provided to: The trial courts, appellate courts, the Supreme Court, and the public.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Office of Real Estate and Facilities Management	<ul style="list-style-type: none"> • Government Code Sections: 69202, 69204, 69206, 70312, 70321, 70322, 70371.7, 70371.8, 70391 et seq, and 70392. • California Rules of Court: 10.181, 10.182, and 10.184. 		
Required			
Office of Real Estate and Facilities Management	<ul style="list-style-type: none"> • Judicial Council: <i>Court Facilities: Revised Policy for Prioritizing Facility Modifications</i>, July 2012, Report to the Judicial Council (CP - Attachment 9). 	<ul style="list-style-type: none"> • CP - Attachment 9 	

CAPITAL PROJECTS AND FACILITIES SERVICES

Service

CP.13	Facilities: Management of 24/7 call center for maintenance of branch facilities.		
	Provided to: The trial courts, appellate courts, the Supreme Court, and the public.		
Office Required	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Office of Real Estate and Facilities Management Office of Administrative Services	<ul style="list-style-type: none"> • Judicial Council: <i>Court Facilities: Revised Policy for Prioritizing Facility Modifications</i>, July 2012, Report to the Judicial Council (CP - Attachment 9). • California Rules of Court: 10.1(d). • Office of Administrative Services inputs AOC related information into Computer Aided Facility Management (CAFM) System. 	<ul style="list-style-type: none"> • CP - Attachment 9 	

Service

CP.14	Facilities: Management of compliance with state and local environmental regulations.		
	Provided to: The trial courts, appellate courts, the Supreme Court, and the public.		
Office Mandatory	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Office of Real Estate and Facilities Management	<ul style="list-style-type: none"> • California Rules of Court: 10.181 and 10.182. • California Health and Safety Code Sections: 25160, 25404 - 25404.9, 25270-25270.13, 25280 - 25299.8, and 5299.10 - 25299.97. • <u>California Code of Regulations:</u> <ul style="list-style-type: none"> • Title 23 Chapter 16 & 18 • Title 22 Division 4.5 Chapters 11, 12, 13, 18, and 45. • Title 17 • Title 19 • Title 27 • <u>Code of Federal Regulations:</u> <ul style="list-style-type: none"> • 40 CFR part 112, 260, 270, 273, and 279. • 29 CFR part 1910. • Federal Clean Air Act. • Public Resources Code Section: 5024. 		

CAPITAL PROJECTS AND FACILITIES SERVICES

Service

CP.15	Facilities: Site Selection, negotiation, on-going administration, and renewal of AOC and court-funded leases, licenses, and other occupancy agreements; lease renegotiation for rent and space reductions, subleasing, early terminations.		
	Provided to: The trial courts, appellate courts, Supreme Court, and the AOC.		
	<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
	Discretionary		
	Office of Real Estate and Facilities Management	<ul style="list-style-type: none"> • Supports AOC (agency-wide) cost-reduction initiatives, and on-going lease administration and renewal negotiations. 	
	Mandatory		
	Office of Real Estate and Facilities Management	<ul style="list-style-type: none"> • Government Code Sections: 69202, 69204, 69206, 70312, 70321, 70322, 70371.7, 70371.8, 70391 et seq, and 70392. • California Rules of Court: 10.181, 10.182, and 10.184. 	
	Required		
	Office of Real Estate and Facilities Management	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Court Facilities Planning: Seismic Safety Policy for Leased Buildings</i>, August 15, 2008 (CP - Attachment 7). • <i>Interim Policy: Third Party Use of Trial Court Facilities</i>, August 2010 (CP - Attachment 10). 	<ul style="list-style-type: none"> • CP - Attachment 7 • CP - Attachment 10

Service

CP.16	Facilities: Management of disposition for facilities no longer needed for court operations and facilities permanently and temporarily closed by court due to fiscal constraints.		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
	<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
	Mandatory		
	Office of Real Estate and Facilities Management	<ul style="list-style-type: none"> • Government Code Sections: 70312 and 70391. • California Rules of Court: 10.183. 	

CAPITAL PROJECTS AND FACILITIES SERVICES

Service

CP.17	Facilities: Provision of deferred maintenance and functional improvements.		
Provided to: The trial courts.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Office of Real Estate and Facilities Management	<ul style="list-style-type: none"> • Government Code Sections: 69202, 69204, 69206, 70312, 70321, 70322, 70371.7, 70371.8, 70391 et seq, and 70392. • California Rules of Court: 10.181, 10.182, and 10.184. 		

Service

CP.18	Facilities: Development, implementation, and management of the preventive maintenance program for assets.		
Provided to: The trial courts, appellate courts, and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Office of Real Estate and Facilities Management	<ul style="list-style-type: none"> • Government Code Sections: 69202, 69204, 69206, 70312, 70321, 70322, 70371.7, 70371.8, 70391 et seq, and 70392. • California Rules of Court: 10.181, 10.182, and 10.184. 		

Service

CP.19	Facilities: Management of parking facilities across the state for court, jury, and public parking spaces.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Office of Real Estate and Facilities Management	<ul style="list-style-type: none"> • Judicial Council: <i>Judicial Council Directive #138, Activity Status Form</i>, April 2014 (CP - Attachment 8). • Generates revenue stream to assist in funding increased costs for maintenance of court facilities. 	<ul style="list-style-type: none"> • CP - Attachment 8 	

CAPITAL PROJECTS AND FACILITIES SERVICES

Service

CP.20	Facilities: Management of Facilities Event Licensing for third party use of court facilities.		
Provided to: The trial courts and the public.			
Office Required	Justification/Supporting Documentation	Attachments	
Office of Real Estate and Facilities Management	<ul style="list-style-type: none"> Judicial Council: <i>Interim Policy: Third Party Use of Trial Court Facilities</i>, August 2010 (CP - Attachment 10). 	<ul style="list-style-type: none"> CP - Attachment 10 	

Service

CP.21	Facilities: Administration of the delegated authority pilot project in which four courts are performing their own facilities maintenance.		
Provided to: The trial courts.			
Office Required	Justification/Supporting Documentation	Attachments	
Office of Real Estate and Facilities Management	<ul style="list-style-type: none"> Judicial Council: <i>Judicial Council Directive #136, Activity Status Form</i>, April 2014 (CP - Attachment 11). California Rules of Court: 10.182. 	<ul style="list-style-type: none"> CP - Attachment 11 	

Service

CP.22	Facilities: Maintenance and administration of the Computer Aided Facility Management (CAFM) System to dispatch Service Work Order requests and authorize lease payments.		
Provided to: The trial courts, appellate courts, Supreme Court, and the AOC.			
Office Required	Justification/Supporting Documentation	Attachments	
Office of Real Estate and Facilities Management	<ul style="list-style-type: none"> Supports AOC (agency-wide) by ensuring fulfillment of landlord service obligations at 13 AOC-leased office facilities (9 dedicated court-support satellite offices). Supports Fiscal Services Office through authorizing monthly rent payments based on negotiated, contractual obligations. California Rules of Court: CRC 10.1(d). Office of Administrative Services inputs to Computer Aided Facility Management (CAFM) System at AOC- SF. 		
Office of Administrative Services			

CAPITAL PROJECTS AND FACILITIES SERVICES

Service

CP.23 **Facilities: Sustainability program to manage utility resource demands, implementing energy conservation modifications to reduce long-term energy costs.**

Provided to: The trial courts and appellate courts.

<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
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Mandatory

Office of Real Estate and Facilities Management

- California Rules of Court: 10.182.

Required

Office of Real Estate and Facilities Management

- Judicial Council: *Court Facilities: Revised Policy for Prioritizing Facility Modifications*, July 2012, Report to the Judicial Council (CP - Attachment 9).

- CP - Attachment 9

Service

**CP.24-
New** **Capital Construction: Fleet administration.**

Provided to: The AOC.

<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
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Discretionary

Office of Real Estate and Facilities Management

- Negotiation and administration for Judicial Branch Capital Programs Office fleet vehicles.

COLLABORATIVE COURT SERVICES

Service

CC.01 Legal, training, and program assistance to support branch wide family, juvenile, and adult collaborative courts (Community Courts; Dependency and Juvenile Drug Courts; DUI Courts; Adult and Juvenile Justice Drug Courts; Elder Courts; Homeless Courts; Mental Health Courts: Adults and Dependency and Juvenile Justice; Reentry Courts for parolees and realigned populations; Unified Courts for Families; Veterans Courts and Military Families; Youth/Peer Courts).

Provided to: The trial courts and the public.

<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
Mandatory		
Criminal Justice Court Services Office	<ul style="list-style-type: none"> • California Rules of Court: 10.56. 	
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • <u>Health and Safety Code Sections:</u> <ul style="list-style-type: none"> • 11972 (The Comprehensive Drug Court Implementation Act of 1999). • 11975 (The Drug Court Partnership Act of 2002). • 11970.5 (Drug Court Programs Act) • Senate Bill X3-18: Established the Reentry Court Pilot Program that included funding and evaluation requirements for reentry courts. • California Rules of Court: 10.56 (charge to the Collaborative Courts Advisory Committee; charge to Mental Health Issues Implementation Task Force). 	
Required		
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Judicial Council: <ul style="list-style-type: none"> • <i>Mental Health Implementation Task Force Annual Agenda, 2013</i>; approved by Judicial Council (CC - Attachment 1). • <i>Collaborative Justice Courts Advisory Committee Annual Agenda, 2013</i>; approved by Judicial Council (CC - Attachment 2). 	<ul style="list-style-type: none"> • CC - Attachment 1 • CC - Attachment 2
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 	

COLLABORATIVE COURT SERVICES

Service

CC.02	Substance Abuse Focus Grants funding.		
Provided to: The trial courts and the public.			
Office	Justification/Supporting Documentation		Attachments
Mandatory			
Criminal Justice Court Services Office	<ul style="list-style-type: none"> • California Rules of Court: 10.56. • The Rule of Court for the Collaborative Justice Courts Advisory Committee specifically charges the group to: “Make recommendations regarding grant funding programs that are administered by the Administrative Office of the Courts for drug courts and other treatment courts.” 		
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • <u>Budget Act:</u> <ul style="list-style-type: none"> • California Collaborative and Drug Court Projects as referenced in the Budget Act since FY2001-2002 (Stats. 2011, ch. 33; § 45.55.020, item 0250-101-0001). • When it was established by the Legislature, provides annual funding for the Substance Abuse Focus Grants, to be distributed by the Judicial Council. 		

Service

CC.03	Research and analysis assistance.		
Provided to: The trial courts and the public.			
Office	Justification/Supporting Documentation		Attachments
Mandatory			
Criminal Justice Court Services Office	<ul style="list-style-type: none"> • California Rules of Court: 10.56. • The Rule of Court for the Collaborative Justice Courts Advisory Committee specifically charges the group to: “Assess and measure the success and effectiveness of local collaborative justice courts.” 		
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • California Rules of Court: 10.56 (charge to the Collaborative Courts Advisory Committee; charge to the Mental Health Issues Implementation Task Force). 		
Required			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Mental Health Implementation Task Force Annual Agenda, 2013</i>; approved by Judicial Council (CC - Attachment 1). • <i>Collaborative Justice Courts Advisory Committee Annual Agenda, 2013</i>; approved by Judicial Council (CC - Attachment 2). 		<ul style="list-style-type: none"> • CC - Attachment 1 • CC - Attachment 2

COLLABORATIVE COURT SERVICES

Service

CC.04	Cost benefit studies of collaborative courts.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Criminal Justice Court Services Office	<ul style="list-style-type: none"> • California Rules of Court: 10.56. • The Rule of Court for the Collaborative Justice Courts Advisory Committee specifically charges the group to: “Assess and measure the success and effectiveness of local collaborative justice courts.” 		
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Health and Safety Code: <ul style="list-style-type: none"> • 11970.5 (Drug Court Programs Act). • 11972 (The Comprehensive Drug Court Implementation Act of 1999). • 11973 • California Rules of Court: 10.56 (charge to the Collaborative Justice Courts Advisory Committee). 		
Required			
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 		
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Judicial Council: <i>Collaborative Justice Courts Advisory Committee Annual Agenda, 2013</i>; approved by Judicial Council (CC - Attachment 2). 	<ul style="list-style-type: none"> • CC - Attachment 2 	

COMMUNICATIONS SERVICES

Service

CS.01	Communications support to the Chief Justice in her Supreme Court, Judicial Council, Judicial Branch, and Commission on Judicial Appointments roles.		
Provided to: The Judicial Council, trial courts, appellate courts, Supreme Court, and the public.			
Office Required	Justification/Supporting Documentation	Attachments	
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services distributes the Contacts and Positioning System (CAPS) e-mails for the Communications Office. 		
Office of Communications	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Strategic Plan:</i> II.B.5 & 7 and III.A.2 (page 5 of CS - Attachment 1). • <i>Operational Plan:</i> II.B.3.a & b and III.A.2.f (page 5 of CS - Attachment 1). • <i>Governance Policies:</i> I.B.1.j, I.A.5, I.B.2.c, and 1.B.3.a (page 1-2 of CS - Attachment 1). • Branchwide Communications Workgroup: <i>California Courts Connected</i> 1.0, 1.1, 2.1, 2.6, 2.7, 2.9, 3.3 e & g (page 4 of CS - Attachment 1). • Commission on Judicial Appointments: <i>Guidelines for the Commission on Judicial Appointments</i> 4(a), 5(f) & (g), and 8 (a) & (b) (page 9 of CS - Attachment 1). 	<ul style="list-style-type: none"> • CS - Attachment 1 	

Service

CS.02	Support to the California Supreme Court with their operations relating to web publishing, media relations, outreach activities, and the work of Supreme Court Committees.		
Provided to: The Supreme Court and the public.			
Office Required	Justification/Supporting Documentation	Attachments	
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 		
Office of Communications	<ul style="list-style-type: none"> • Supreme Court: <i>Public Information Officer Classification</i>, May 2001 (CS - Attachment 2). • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Strategic Plan:</i> III.A.2 (page 5 of CS - Attachment 1). • <i>Operational Plan:</i> III.A.2.f (page 5 of CS - Attachment 1). 	<ul style="list-style-type: none"> • CS - Attachment 2 • CS - Attachment 1 	

COMMUNICATIONS SERVICES

Service

CS.03	Coordination of Judicial Council Meeting communications activities, including: the drafting and dissemination of pre- and post-meeting summaries to the judicial branch; drafting of leadership remarks; coordination of photography, video, and audio requirements; and web updates and Tweets to promote the meeting.		
Provided to: The Judicial Council, trial courts, appellate courts, Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Office of Communications	<ul style="list-style-type: none"> • California Rules of Court: 10.5(c) and 10.5(e). 		
Required			
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 		
Office of Communications	<ul style="list-style-type: none"> • Judicial Council: <i>Governance Policies</i> I.B.1.j (page 1 of CS - Attachment 1). 	<ul style="list-style-type: none"> • CS - Attachment 1 	

Service

CS.04	Research, drafting, and distribution of the weekly e-mail briefing (Court News Update) on judicial administration and related topics, and urgent updates and briefings as requested (Court News Alerts, Court News Briefs) to the judicial branch.		
Provided to: The Judicial Council, trial courts, appellate courts, and Supreme Court.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Office of Communications	<ul style="list-style-type: none"> • Judicial Council: <i>Governance Policies</i> I.B.1.j (page 1 of CS - Attachment 1). • Branchwide Communications Workgroup: <i>California Courts Connected</i> 2.1, 3.3 (e) (page 4 of CS - Attachment 1). 	<ul style="list-style-type: none"> • CS - Attachment 1 	

Service

CS.05	Drafts speeches, remarks, talking points, briefing sheets, or backgrounders to support the Chief Justice’s engagement calendar.		
Provided to: The Judicial Council, trial courts, appellate courts, Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Office of Communications	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Strategic Plan</i>: II.B.7 (page 5 of CS - Attachment 1). • <i>Operational Plan</i>: II.B.3.a & b (page 5 of CS - Attachment 1). • <i>Governance Policies</i>: I.B.1.j and I.A.5 (page 1 of CS - Attachment 1). 	<ul style="list-style-type: none"> • CS - Attachment 1 	

COMMUNICATIONS SERVICES

Service

CS.06	Communications strategy, consulting, and implementation to Judicial Branch Capital Program and the Office of Real Estate and Facilities Management Program and their Judicial Council oversight committees—the Court Facilities Advisory Committee and the Trial Court Facility Modification Advisory Committee.		
Provided to: The Judicial Council, trial courts, appellate courts, and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Required			
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services e-mails these communications via the Contacts and Positioning System (CAPS) database. 		
Office of Communications	<ul style="list-style-type: none"> • Judicial Council: <i>Governance Policies</i> I.B.1.j (page 1 of CS - Attachment 1). 		<ul style="list-style-type: none"> • CS - Attachment 1

Service

CS.07	Management and content updates on the California Courts, Serranus, and AOC Intranet websites for programs, projects, and initiatives.		
Provided to: The trial courts, appellate courts, the Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Required			
Office of Communications	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Strategic Plan</i>: II.B.5 & 7 (page 5 of CS - Attachment 1). • <i>Operational Plan</i>: II.B.3.a & b (page 5 of CS - Attachment 1). • <i>Governance Policies</i>: I.B.1.j (page 1 of CS - Attachment 1). • Branchwide Communications Workgroup: <i>California Courts Connected</i> 2.6 (page 4 of CS - Attachment 1). 		<ul style="list-style-type: none"> • CS - Attachment 1
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Communication Services provides management and content updates on the California Courts, Serranus, and AOC Intranet websites for programs, projects, and initiatives. The Office of Administrative Services creates the following content (inputs the data, runs the report, formats the report, creates the pdf) for a variety of materials that are posted on the intranet, Serranus and, through web content, posted on the public internet. The reports that OAS create and post include the 8011 (vacancy report), court rosters, public and internal committee and task force rosters (two different versions), the printable AOC phone list, and the AOC subject matter list. OAS manages and updates the content on the AOC intranet while all other information is sent to web content as a pdf for them to upload. Information on Serranus is pulled over on a nightly basis from the Contacts and Positioning System (CAPS), which OAS updates on a daily basis. 		

COMMUNICATIONS SERVICES

Service

CS.08	Consultation and counsel on media strategies for programs, projects, and initiatives.		
	Provided to: The Judicial Council, trial courts, appellate courts, and Supreme Court.		
	<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
	Required		
	Office of Communications	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Strategic Plan:</i> II.B.5, II.B.7, and III.A.2 (page 5 of CS - Attachment 1). • <i>Operational Plan:</i> II.B.3.a, II.B.3.b, and III.A.2.f (page 5 of CS - Attachment 1). • <i>Governance Policies:</i> I.B.1.j (page 1 of attachment). • Administrative Office of the Courts: <i>AOC Policy 2.7</i> (page 8 of CS - Attachment 1). • Presiding Judges: In support of their duties under Rule of Court 10.603(c)(8)(B) • Court Executive Officers: In support of their duties under Rule of Court 10.610(c)(10). 	<ul style="list-style-type: none"> • CS - Attachment 1

Service

CS.09	Research and response to inquiries from the courts, media, and the public, as well as tracking and reporting on interactions.		
	Provided to: The Judicial Council, trial courts, appellate courts, Supreme Court, and the public.		
	<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
	Discretionary		
	Office of Communications	<ul style="list-style-type: none"> • "Tracking and reporting" is discretionary, but a communication best practice. 	
	Mandatory		
	Office of Communications	<ul style="list-style-type: none"> • California Rules of Court: 10.500. 	
	Court Operations Special Services Office	<ul style="list-style-type: none"> • California Rules of Court: 10.500, as required by Government Code 68102.2(g), added by Senate Bill X4 13 (Stats. 2009-10, 4th Ex. Sess. Ch. 22). 	
	Required		
	Office of Communications	<ul style="list-style-type: none"> • Administrative Office of the Courts: <i>AOC Policy 2.7</i> (page 8 of CS - Attachment 1). 	<ul style="list-style-type: none"> • CS - Attachment 1

COMMUNICATIONS SERVICES

Service

CS.10	Input on strategy for news releases, drafting and dissemination and monitoring and reporting on coverage.		
Provided to: The Judicial Council, trial courts, appellate courts, Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Office of Communications	<ul style="list-style-type: none"> • Judicial Council: <i>Governance Policies</i> I.B.1.j (page 1 of CS - Attachment 1). • Administrative Office of the Courts: <i>AOC Policy</i> 2.7 (page 8 of CS - Attachment 1). 	<ul style="list-style-type: none"> • CS - Attachment 1 	

Service

CS.11	Management of content strategy, publishing, and metrics evaluation for social media channels including YouTube and Twitter and consultation with other judicial branch entities on their programs.		
Provided to: The trial courts, Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Office of Communications	<ul style="list-style-type: none"> • Judicial Council: <i>Governance Policies</i> I.B.1.j (page 1 of CS - Attachment 1). • Branchwide Communications Workgroup: <i>California Courts Connected</i> 1.0, 1.1, 2.6, 2.7, 2.9 (page 4 of CS - Attachment 1). 	<ul style="list-style-type: none"> • CS - Attachment 1 	

Service

CS.12	Photography support for Judicial Council and judicial branch programs, projects, and initiatives.		
Provided to: The Judicial Council, trial courts, appellate courts, Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Discretionary			
Office of Communications	<ul style="list-style-type: none"> • Photography is a communication tool choice. 		
Required			
Office of Communications	<ul style="list-style-type: none"> • Judicial Council: <i>Governance Policies</i> I.B.1.j (page 1 of CS - Attachment 1). 	<ul style="list-style-type: none"> • CS - Attachment 1 	

COMMUNICATIONS SERVICES

Service

CS.13	Coordinates Executive Leadership Communications and operational communications within the AOC.		
Provided to: The Judicial Council.			
Office Required	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Office of Communications	<ul style="list-style-type: none"> • Administrative Director of the Courts: <i>Internal Communication Plan</i>, May 13, 2014 (CS - Attachment 3). 	<ul style="list-style-type: none"> • CS - Attachment 3 	

Service

CS.14	Management of the copyright request and permissions process and guidance on preserving the intellectual property rights of the judicial branch.		
Provided to: The Supreme Court and the public.			
Office Required	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Office of Communications	<ul style="list-style-type: none"> • Administrative Office of the Courts: <i>AOC Policy 2.12</i> (page 6-7 of CS - Attachment 1). 	<ul style="list-style-type: none"> • CS - Attachment 1 	

CRIMINAL JUSTICE SERVICES

Service

CJ.01 Technical assistance, training, legal advice, and subject matter expertise on criminal justice realignment including data collection, analysis, and information dissemination.

Provided to: The Judicial Council, trial courts and the public.

Office

Justification/Supporting Documentation

Attachments

Mandatory

Criminal Justice Court Services Office

- Penal Code Sections:
 - 13155 (Realignment data collection and reporting mandate).
 - 3000.08 (Mandate to Judicial Council to adopt rules and forms to establish uniform statewide procedures for parole revocation proceedings).
 - 3455 (Mandate to Judicial Council to adopt rules and forms to establish uniform statewide procedures for proceedings to revoke postrelease community supervision).
 - 3015 (AOC mandate to establish and operate and evaluate parolee reentry courts).

Required

Office of Administrative Services

- California Rules of Court: 10.1(d).
- Office of Administrative Services prints and distributes materials.

Service

CJ.02 Written and oral legal advice on a wide array of criminal law and procedure issues, including new statutory requirements and responsibilities.

Provided to: The trial courts.

Office

Justification/Supporting Documentation

Attachments

Required

Criminal Justice Court Services Office

- Judicial Council: *Judicial Council Meeting Minutes*, February 2003 (CJ - Attachment 1).

- CJ - Attachment 1

CRIMINAL JUSTICE SERVICES

Service

CJ.03	Resource identification and liaison activities with outside justice partners on criminal justice realignment implementation.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Criminal Justice Court Services Office	<ul style="list-style-type: none"> • Penal Code Section: 6027(b)12 ("...in consultation with the Administrative Office of the Courts, the California State Association of Counties, the California State Sheriffs' Association, and the Chief Probation Officers of California, shall support the development and implementation of first phase baseline and ongoing data collection instruments to reflect the local impact of Chapter 15 of the Statutes of 2011, specifically related to dispositions for felony offenders and post-release community supervision."). • Budget Act: Fiscal Year 2013-2014 Budget Bill, 5225-008-0001. 		
Required			
Criminal Justice Court Services Office	<ul style="list-style-type: none"> • Federal Bureau of Justice Assistance: AOC provides grant management activities and reporting services to reentry courts in the amount of \$4.3 mil. 		

Service

CJ.04	Defining outcome based criminal justice related metrics in collaboration with justice partners.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Criminal Justice Court Services Office	<ul style="list-style-type: none"> • <u>Penal Code Sections:</u> <ul style="list-style-type: none"> • 1232 (b) (The Administrative Office of the Courts, in consultation with the Chief Probation Officers of California, shall specify and define minimum required outcome-based measures. • 6027 (b) 3 (G) ("Develop definitions of key terms, including, but not limited to, "recidivism," "average daily population," "treatment program completion rates," and any other terms deemed relevant in order to facilitate consistency in local data collection, evaluation, and implementation of evidence-based practices, promising evidence-based practices, and evidence-based programs."). • 6027 (b)11 ("Commencing January 1, 2013, and annually thereafter, the board shall collect and analyze available data regarding the implementation of the local plans and other outcome-based measures, as defined by the board in consultation with the Administrative Office of the Courts, the Chief Probation Officers of California, and the California State Sheriffs' Association."). 		

CRIMINAL JUSTICE SERVICES

Service

CJ.05 Data collection and reporting on probation revocations, sentencing outcomes, and other criminal law related issues (California Corrections Performance Incentive Act and criminal justice realignment).

Provided to: The trial courts and the public.

Office

Justification/Supporting Documentation

Attachments

Mandatory

Criminal Justice Court Services
Office

- Penal Code Sections:
 - 13155 (Realignment data collection and reporting mandate).
 - 1232 (California Community Corrections data collection mandate).

CRIMINAL JUSTICE SERVICES

Service

CJ.06 **Subject matter expertise, legal advice, and technical assistance with issues relating to traffic related matters.**

Provided to: The Judicial Council and the trial courts.

<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
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Mandatory

Criminal Justice Court Services Office

- Vehicle Code Sections:
 - 40310 (Uniform Bail and Penalty Schedule).
 - 14601.2(h), 14601.4(e), 14601.5(i) (Ignition interlock installation form).
 - 40901 (Traffic infraction trial by remote video proceedings).
 - 40902 (Trial by written declaration).
 - 42007 (Traffic violator school).
 - 42008, 42008.5, and 42008.7 (Traffic bail/fine amnesty).
- Penal Code Sections:
 - 1463.010 (Collection of court-ordered debt).
 - 1463.02 (Task force on court-ordered debt).
 - 1463.28 (Increase of bail amounts set by JC).
 - 1465.8 (Administration of court operations assessment).
 - 1466-1468 (Infraction appeals).
 - 853.9(b) (Notice to appear forms).
 - 1269b(c) (Uniform Bail and Penalty Schedule).
- California Rules of Court:
 - 4.102 (Uniform Bail and Penalty Schedule).
 - 4.103 (Notice to appear forms).
 - 4.325 (Ignition interlock installation form).
 - 8.900 - 8.929 (Infraction appeals).
 - 4.220 (Traffic infraction trial by remote video proceedings).
 - 4.210 (Trial by written declaration).

Required

Criminal Justice Court Services Office

- Judicial Council: *Judicial Council Meeting Minutes*, February 2003; mandate that the AOC “provide comprehensive legal services for the courts, with the intent that all courts will eventually obtain their legal services solely through the AOC” (CJ - Attachment 1).

- CJ - Attachment 1

CRIMINAL JUSTICE SERVICES

Service

CJ.07 Evaluation, identification of evidence based and promising practices, technical assistance, and training related to Reentry Courts and other adult collaborative courts.

Provided to: The trial courts and the public.

Office

Justification/Supporting Documentation

Attachments

Mandatory

Criminal Justice Court Services Office

- Penal Code Section: 3015 (Reentry Court).
- California Rules of Court: 10.56 (The Rule of Court for the Collaborative Justice Courts Advisory Committee specifically charges the group to: “Assess and measure the success and effectiveness of local collaborative justice courts.”).
- Senate Bill 678 (“The Judicial Council shall consider the adoption of appropriate modifications to the Criminal Rules of Court, and of other judicial branch policies, procedures, and programs, affecting felony probation services that would support implementation of the evidence-based probation supervision practices described in this chapter.”).

Service

CJ.08 Technical and program assistance and training as part of the California Risk Assessment Pilot Project (CalRAPP).

Provided to: The trial courts and the public.

Office

Justification/Supporting Documentation

Attachments

Required

Criminal Justice Court Services Office

- State Justice Institute: Grant award notification letters (CJ - Attachment 2).

- CJ - Attachment 2

Office of Administrative Services

- California Rules of Court: 10.1(d).
- Office of Administrative Services prints and distributes materials.

CRIMINAL JUSTICE SERVICES

Service

CJ.09 Legal advice and technical assistance with emerging issues related to criminal law and procedures (e.g., implementation of pretrial programs, Affordable Care Act, and prohibited and armed persons with mental illness reporting requirements).

Provided to: The trial courts and the public.

Office

Justification/Supporting Documentation

Attachments

Mandatory

Criminal Justice Court Services Office

- Joint Legislative Audit Committee
- Penal Code Sections:
 - 1203.9 (Requires JC to adopt rules for intercounty transfers; see also rule 4.530).
 - 1170.3 (Requires JC to adopt rules to govern sentencing choices).
 - 136.2 (Mandate to create/maintain protective order forms).
 - 190.6 et al (Requires forms and procedures for certain capital case proceedings).
 - 1191.2 (Requires JC to prepare victim restitution information).
 - 1202.4 (Requires JC to adopt forms to facilitate restitution procedures).
 - 1037.1 (Change of venue policies and procedure).
- Code of Civil Procedures: 2033.720 (form interrogatories).
- The list of various statutory mandates listed here is not exhaustive; the list represents a sample of the various mandates that require the JC to adopt measures to facilitate court implementation of criminal proceedings.
- California State Auditor, *Armed Persons with Mental Illness: Insufficient Outreach From the Department of Justice and Poor Reporting From Superior Courts Limit the Identification of Armed Persons With Mental Illness*, Report 2013-103, October 2013 (CJ - Attachment 3).

- CJ - Attachment 3

Service

CJ.10 Fulfillment of mandates related to the evaluation of certain criminal justice programs.

Provided to: The trial courts and the public.

Office

Justification/Supporting Documentation

Attachments

Mandatory

Criminal Justice Court Services Office

- Penal Code Sections:
 - 3015 (reentry court).
 - 1232 (California Community Corrections Performance Incentive Act data collection mandate).
- California Rules of Court: 10.56.

EDUCATION AND TRAINING SERVICES

Service

ET.01 Statewide training for new Judicial Officers:
 - New Judge Orientation.
 - Primary Assignment Orientations (civil, criminal, probate, dependency, delinquency, family, traffic).
 - B.E. Witkin Judicial College.
 - New Appellate Justice Orientation.

Provided to: The trial courts and appellate courts.

Office

Justification/Supporting Documentation

Attachments

Mandatory

Center for Judiciary Education and Research

- California Rules of Court: 10.461(b), 10.462(c)(1)(A), 10.462(c)(1)(B), 10.462(c)(1)(c), and 10.562(c)(4) (for returning judges (expected) and subordinate judicial officers (required)).
- Welfare and Institution Code: 304.7 (dependency Primary Assignment Orientation) requires that “The Judicial Council shall submit an annual report to the Legislature on compliance by judges, commissioners and referees with the education and training standards described in subdivisions (a) and (b) (training for dependency court judicial officers).”
- Mandates vary in that some rules require the Center for Judiciary Education and Research (CJER) to provide certain program or content, and some rules mandate that participants attend a certain program or type of training. In those instances, CJER provides sufficient training so judges or court personnel can fulfill their requirements, mandates, or expectations.

Required

Center for Judiciary Education and Research

- Center for Judiciary Education and Research (CJER) Governing Committee: *Biennial Education Plan* (ET - Attachment 1).

- ET - Attachment 1

Office of Administrative Services

- California Rules of Court: 10.1(d).
- Office of Administrative Services prints and distributes material and takes pictures for Judicial IDs.

EDUCATION AND TRAINING SERVICES

Service

ET.02

Statewide education for experienced Judicial Officers and Judicial Attorneys:

- Appellate Justices Institute
- Criminal Assignment Courses
- Complex Civil and Advanced Civil
- California Environmental Quality Act (CEQA)
- Domestic Violence courses
- Institutes (in civil, criminal, juvenile, family, probate, and rural courts)
- Institutes for Appellate and Trial Court Attorneys

Provided to: The trial courts, appellate courts, and Supreme Court.

Office

Justification/Supporting Documentation

Attachments

Mandatory

Center for Families, Children, and the Courts

Justification/supporting documentation provided for the following specific bullets of Service ET.02: Domestic Violence courses, Institutes (in civil, criminal, juvenile, family, probate, and rural courts), and Institutes for Appellate and Trial Court Attorneys.

- California Rules of Court: 10.464.

Center for Judiciary Education and Research

- Penal Code Section: 1170.5 (sentencing).
- Government Code Sections: 68553, 68555 (family and domestic violence training), and 68551.
- California Rules of Court: 10.1464 (domestic violence), 10.468 (probate), 10.469, 10.463, and 10.469(d).

Required

Center for Families, Children, and the Courts

Justification/supporting documentation provided for the following specific bullets of Service ET.02: Domestic Violence courses, Institutes (in civil, criminal, juvenile, family, probate, and rural courts), and Institutes for Appellate and Trial Court Attorneys.

- Judicial Council: The Judicial Council is the sole source recipient of federal grant funds allocated to courts from the federal Violence Against Women Act. The Administrative Office of the Courts does not apply competitively for the funds and the amount allocated is pursuant to a federal formula.

Center for Judiciary Education and Research

- Center for Judiciary Education and Research (CJER) Governing Committee.
- People v Heard (2003) 31 Cal. 4th 946 (outlines education provided by CJER as instructive in jury voir dire for capital cases).

Office of Administrative Services

- California Rules of Court: 10.1(d).
- Office of Administrative Services prints and distributes materials.

EDUCATION AND TRAINING SERVICES

Service

ET.03	Judicial ethics training as required for participants in the Commission on Judicial Performance Insurance Program.		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
	Office	Justification/Supporting Documentation	Attachments
	Required		
	Center for Judiciary Education and Research	<ul style="list-style-type: none"> Center for Judiciary Education and Research (CJER) Governing Committee: <i>Biennial Education Plan</i> (ET - Attachment 1). Legal Services Office: <i>Memorandum</i>, January 15, 2013; Justices and judges who sign up for the Commission on Judicial Performance Insurance Defense Program are required to complete Qualifying Ethics (ET - Attachment 3). 	<ul style="list-style-type: none"> ET - Attachment 1 ET - Attachment 3
	Office of Administrative Services	<ul style="list-style-type: none"> California Rules of Court: 10.1(d). Office of Administrative Services prints and distributes materials. 	

Service

ET.04	Statewide Education for Judicial Leaders:		
	- PJ/CEO Court Management Program		
	- Supervising Judges Institute		
	Provided to: The trial courts.		
	Office	Justification/Supporting Documentation	Attachments
	Mandatory		
	Center for Judiciary Education and Research	<ul style="list-style-type: none"> California Rules of Court: 10.462(c)(2), 10.462(c)(3), 10.473(b), and 10.473(c)(1). 	
	Required		
	Center for Judiciary Education and Research	<ul style="list-style-type: none"> Center for Judiciary Education and Research (CJER) Governing Committee: <i>Biennial Education Plan</i> (ET - Attachment 1). Throughout the year, there are additional education programs and products developed for court leaders including WebEx programs and video productions, including ethics training. 	<ul style="list-style-type: none"> ET - Attachment 1
	Office of Administrative Services	<ul style="list-style-type: none"> California Rules of Court: 10.1(d). Office of Administrative Services prints and distributes materials. 	

EDUCATION AND TRAINING SERVICES

Service

ET.05	Institute for Court Management Programs.		
Provided to: The trial courts, appellate courts, Supreme Court and the AOC.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Center for Judiciary Education and Research	<ul style="list-style-type: none"> • California Rules of Court: 10.474. 		
Required			
Center for Judiciary Education and Research	<ul style="list-style-type: none"> • Center for Judiciary Education and Research (CJER) Governing Committee: <i>Biennial Education Plan</i> (ET - Attachment 1). • Consists of 12 multi-day courses in the series. • AOC employees have also attended these courses. 		<ul style="list-style-type: none"> • ET - Attachment 1
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 		

Service

ET.06	Court Clerk Training Institute.		
Provided to: The trial courts, appellate courts, and Supreme Court.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Center for Judiciary Education and Research	<ul style="list-style-type: none"> • California Rules of Court: 10.474. 		
Required			
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 		

EDUCATION AND TRAINING SERVICES

Service

ET.07	Court manager and supervisor training.		
Provided to: The trial courts, appellate courts, and Supreme Court.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Center for Judiciary Education and Research	<ul style="list-style-type: none"> • California Rules of Court: 10.474. 		
Required			
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 		
Center for Judiciary Education and Research	<ul style="list-style-type: none"> • Center for Judiciary Education and Research (CJER) Governing Committee: <i>Biennial Education Plan</i> (ET - Attachment 1). 		<ul style="list-style-type: none"> • ET - Attachment 1

Service

ET.08	ADA Annual Statewide Training and consulting.		
Provided to: The trial courts, appellate courts, the Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Center for Judiciary Education and Research	<ul style="list-style-type: none"> • California Rules of Court: 10.479(c). • Code of Federal Regulations: 28 CFR § 35.107. 		
Required			
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 		
Center for Judiciary Education and Research	<ul style="list-style-type: none"> • Center for Judiciary Education and Research (CJER) Governing Committee: <i>Biennial Education Plan</i> (ET - Attachment 1). 		<ul style="list-style-type: none"> • ET - Attachment 1

EDUCATION AND TRAINING SERVICES

Service

ET.09	Statewide broadcasts for Trial and Appellate Court judicial officers, CEOs, and court staff.		
Provided to: The trial courts, appellate courts, and Supreme Court.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Center for Judiciary Education and Research	<ul style="list-style-type: none"> • California Rules of Court: 10.474. 		
Required			
Center for Judiciary Education and Research	<ul style="list-style-type: none"> • Center for Judiciary Education and Research (CJER) Governing Committee: <i>Biennial Education Plan</i> (ET - Attachment 1). 		<ul style="list-style-type: none"> • ET - Attachment 1

Service

ET.10	Statewide and regional education (e.g., Beyond the Bench).		
Provided to: The trial courts, appellate courts, and Supreme Court.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Center for Judiciary Education and Research	<ul style="list-style-type: none"> • California Rules of Court: 10.474. 		
Required			
Center for Judiciary Education and Research	<ul style="list-style-type: none"> • Center for Judiciary Education and Research (CJER) Governing Committee: <i>Biennial Education Plan</i> (ET - Attachment 1). 		<ul style="list-style-type: none"> • ET - Attachment 1
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 		

EDUCATION AND TRAINING SERVICES

Service

ET.11	Development of customized training for the courts (e.g., judicial education, management training, cultural competency training).		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Center for Judiciary Education and Research	<ul style="list-style-type: none"> • At the request of specific trial and appellate courts. 		
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 		

Service

ET.12	Collaborative statewide, regional, and distance education and multi-disciplinary programs with state and national partners.		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Center for Judiciary Education and Research	<ul style="list-style-type: none"> • At the request of the Chief Justice or the Administrative Director of the Courts. 		

Service

ET.13	Training on use of the Computer Aided Facility Management (CAFM) application for requesting, monitoring, and evaluating building services.		
	Provided to: The trial courts, appellate courts, Supreme Court, and the AOC.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Discretionary			
Office of Real Estate and Facilities Management	<ul style="list-style-type: none"> • Supports all registered CAFM users, including court and AOC staff (Judicial Branch Capital Programs Office, Fiscal Services Office, and Internal Audit Services). 		
Required			
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 		

EDUCATION AND TRAINING SERVICES

Service

ET.14	Development of online educational resources for Judges, court staff, supervisors, and managers.		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Center for Judiciary Education and Research	<ul style="list-style-type: none"> • California Rules of Court: 10.451 - 10.478. 		
Required			
Center for Judiciary Education and Research	<ul style="list-style-type: none"> • Center for Judiciary Education and Research (CJER) Governing Committee: <i>Biennial Education Plan</i> (ET - Attachment 1). 	<ul style="list-style-type: none"> • ET - Attachment 1 	

Service

ET.15	Technical support and video production for Supreme Court outreach and oral argument, Commission on Judicial Appointments hearings, Chief Justice or Judicial Council communications, and provision of AV signals to rooms for the public and media.		
	Provided to: The Judicial Council, trial courts, appellate courts, Supreme Court, and the public.		
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Required			
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints materials for these activities for the courts. 		
Center for Judiciary Education and Research	<ul style="list-style-type: none"> • Requested by Chief Justice, Judicial Council, and/or Supreme Court. 		

Service

ET.16	Technical support of Videoconferencing on the AOC and Appellate Court network for education, technical support of satellite broadcast networks in over 300 viewing locations throughout the state and which enable training for the trial courts.		
	Provided to: The trial courts, appellate courts and Supreme Court.		
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Center for Judiciary Education and Research	<ul style="list-style-type: none"> • California Rules of Court: 10.479, 10.472, and 10.474. 		

EDUCATION AND TRAINING SERVICES

Service

ET.17	Judicial publications: Benchguides, Bench Handbooks, Benchbooks, Civil Proceedings Benchbooks.		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
	<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
	Mandatory		
	Center for Judiciary Education and Research	<ul style="list-style-type: none"> • Government Code Sections: 68552. 	
	Required		
	Center for Judiciary Education and Research	<ul style="list-style-type: none"> • Center for Judiciary Education and Research (CJER) Governing Committee: <i>Biennial Education Plan</i> (ET - Attachment 1). 	<ul style="list-style-type: none"> • ET - Attachment 1
	Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 	

Service

ET.18	Development of online benchtools for judges to use, including scripts, flow charts, and checklists.		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
	<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
	Required		
	Center for Judiciary Education and Research	<ul style="list-style-type: none"> • Center for Judiciary Education and Research (CJER) Governing Committee: <i>Biennial Education Plan</i> (ET - Attachment 1). 	<ul style="list-style-type: none"> • ET - Attachment 1

Service

ET.19	Development of public guides for children in court, victims' services, and court proceedings for families.		
	Provided to: The trial courts and the public.		
	<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
	Required		
	Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 	

EDUCATION AND TRAINING SERVICES

Service

ET.20	Job Aids for court staff, supervisors, and managers.		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Required			
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 		
Center for Judiciary Education and Research	<ul style="list-style-type: none"> • Center for Judiciary Education and Research (CJER) Governing Committee: <i>Biennial Education Plan</i> (ET - Attachment 1). 		<ul style="list-style-type: none"> • ET - Attachment 1

Service

ET.21	Web Ex programmatic instructional support.		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Discretionary			
Center for Judiciary Education and Research	<ul style="list-style-type: none"> • Provides support for delivering education using WebEx. 		

Service

ET.22	Faculty development program, webinars, and online resources to prepare and support statewide and local court faculty.		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Required			
Center for Judiciary Education and Research	<ul style="list-style-type: none"> • Faculty who teach request assistance from CJER staff. 		

EDUCATION AND TRAINING SERVICES

Service

ET.23	Meeting planning, registration, and conference services for all education programs, Judicial Council meetings, and other AOC meetings.		
Provided to: The Judicial Council, trial courts, and appellate courts.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Center for Judiciary Education and Research	<ul style="list-style-type: none"> Center for Judiciary Education and Research (CJER) Governing Committee: <i>Biennial Education Plan</i> (ET - Attachment 1). As requested by council, advisory body. 	<ul style="list-style-type: none"> ET - Attachment 1 	

Service

ET.24	Audiovisual support for education and meetings in conference centers, off-site education and outreach, including audio for public broadcast of Judicial Council.		
Provided to: The Judicial Council, trial courts, appellate courts, and Supreme Court.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Center for Judiciary Education and Research	<ul style="list-style-type: none"> At request of Chief Justice, Judicial Council, and other advisory bodies. 		

Service

ET.25	Jury education materials in support of successful jury participation.		
Provided to: The Judicial Council, trial courts, and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Court Operations Special Services Office	<ul style="list-style-type: none"> Judicial Council: <i>Fact Sheet: Jury Improvement Program</i>, May 2011; fact sheet on the formation and responsibilities of the Jury Improvement Program adopted by the Judicial Council in 1995 (ET - Attachment 2). 	<ul style="list-style-type: none"> ET - Attachment 2 	
Office of Administrative Services	<ul style="list-style-type: none"> California Rules of Court: 10.1(d). Office of Administrative Services prints and distributes materials. 		

EDUCATION AND TRAINING SERVICES

Service

**ET.26-
New** **Sexual Harrassment Prevention Training.**

Provided to: The trial courts, appellate courts, and Supreme Court.

<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
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Mandatory

Center for Judiciary Education and Research

- Government Code Section: 12950.1.

Required

Center for Judiciary Education and Research

- Center for Judiciary Education and Research (CJER) Governing Committee: *Biennial Education Plan*.

- ET - Attachment 1

Service

**ET.27-
New** **Conflict of Interest Training (also known as Form 700).**

Provided to: The Judicial Council, trial courts, appellate courts, Supreme Court, and the AOC.

<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
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Mandatory

Center for Judiciary Education and Research

- California Rules of Court: 10.455.
- Government Code Section: 11146.
- Also provided to designated AOC employees.

Service

**ET.28-
New** **Temporary Judge training and resources.**

Provided to: The trial courts.

<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
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Mandatory

Center for Judiciary Education and Research

- California Rules of Court: 2.812(c).

EDUCATION AND TRAINING SERVICES

Service

**ET.29-
New** Education for AOC staff, including videoconferences, online courses, management training, compliance courses, and professional development.

Provided to: AOC staff.

<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
Discretionary Center for Judiciary Education and Research	<ul style="list-style-type: none"> At the direction of the Administrative Director of the Courts. 	
Mandatory Center for Judiciary Education and Research	<ul style="list-style-type: none"> California Rules of Court: 10.491. Government Code Section: 12950.1. 	

Service

**ET.30-
New** Development of education and training for court investigators, probate attorneys, and probate examiners.

Provided to: The trial courts and the public.

<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
Mandatory Center for Judiciary Education and Research	<ul style="list-style-type: none"> California Rules of Court: 10.478 and 10.468. 	
Required Center for Judiciary Education and Research	<ul style="list-style-type: none"> Center for Judiciary Education and Research (CJER) Governing Committee: <i>Biennial Education Plan</i>. 	<ul style="list-style-type: none"> ET - Attachment 1

Service

**ET.31-
New** Subject matter expertise and technical assistance for faculty in developing programs including: access and fairness, appellate practice and procedure, civil and small claims, family and juvenile law, criminal law, Judicial administration, judicial ethics, probate, and mental health.

Provided to: The trial courts, appellate courts, and Supreme Court.

<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
Required Center for Judiciary Education and Research	<ul style="list-style-type: none"> Faculty who teach request assistance from CJER staff. 	

EDUCATION AND TRAINING SERVICES

Service

ET.32- New	Training on mandatory and optional environmental compliance issues, including underground/above storage tanks (U/ASTs), Hazardous Material Business Plans (HMBPs), Storm Water Pollution Prevention Program, hazardous waste disposal, utility rebates, and air quality issues.
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Provided to: The AOC.

Office

Discretionary

Office of Real Estate and
Facilities Management

Justification/Supporting Documentation

- Training for Judicial Branch Capital Program Office (JBCPO) in support of compliance with environmental statute and regulations.

Attachments

FAMILY SERVICES

Service

FA.01 AB 1058 Legal, Program Support and Funding and Administration for Child Support Commissioners and Family Law Facilitators.

Provided to: The trial courts and the public.

Office

Justification/Supporting Documentation

Attachments

Mandatory

Center for Families, Children,
and the Courts

- Unites States Code:
 - 42 USC § 666(a) (2) (requires state to establish expedited administrative or judicial process to establish and enforce support).
 - 42 USC § 654(7) (require cooperative agreements between Title IV-D child support agency and the courts).
- Code of Federal Regulations:
 - 45 CFR § 304.21(b)(2) (states that federal funding available only for court commissioners or administrative law judges to hear Title IV-D child support cases).
 - 45 CFR § 303.34 (require cooperative agreements between Title IV-D child support agency and the courts).
- Assembly Bill 1058 (Stats. 1996, Ch. 957).
- Family Code Sections: 4250- 4252, 10000 - 10015, 3830, 4054, and 4067.
- California Rules of Court:
 - 5.300 – 5.375 (rules for child support commissioner proceedings).
 - 5.430 (minimum standards for the Office of family Law Facilitator).

Required

Center for Families, Children,
and the Courts

- Judicial Council:
 - *Fact Sheet: Child Support Commissioner and Family Law Facilitator Program*, July 2013; approves funding distribution for child support commissioners and family law facilitators to the courts each year (FA - Attachment 1).
 - *Child Support Midyear Funding Reallocation for Fiscal Year 2013-2014 and Base Funding Allocation for Fiscal Year 2014-2015 for the Child Support Commissioner and Family Law Facilitator Program*, April 2014, Report to the Judicial Council; approves funding distribution for child support commissioners and family law facilitators to the courts each year (FA - Attachment 2).

- FA - Attachment 1
- FA - Attachment 2

Office of Administrative
Services

- California Rules of Court: 10.1(d).
- Office of Administrative Services prints and distributes materials.

FAMILY SERVICES

Service

FA.02	Access to Visitation Program.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • United States Code: 42 USC 669B. • Grant terms and conditions. • Family Code Sections: 3200–3204. 		
Required			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • Approves allocation methodology and allocations to specific programs. • <i>Access to Visitation: Program Funding Allocation for Grant Fiscal Year 2014-2015</i>, February 2014, Report to the Judicial Council (FA - Attachment 3). • <i>Access to Visitation Grant Program: New Funding Methodology</i>, April 2014, Report to the Judicial Council (FA - Attachment 4). 		<ul style="list-style-type: none"> • FA - Attachment 3 • FA - Attachment 4
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 		

Service

FA.03	Information and technical assistance to Family courts.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Family Code Section: 211 (“the Judicial Council may provide by rule for the practice and procedure in proceedings under this code”). 		

Service

FA.04	Family and Juvenile court judicial and staff workload study and needs assessment.		
Provided to: The trial courts.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Government Code Section: 69614. 		

FAMILY SERVICES

Service

FA.05	Family Law websites (including Families Change and Parent Orientation video) content, maintenance, and administration.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Required			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • Approved funding recommendation by Trial Court Budget Advisory Committee. • <i>Special Funds: Allocations for Fiscal Year 2011-2012</i>, July 2011, Report to the Judicial Council; Self-Represented Litigants Statewide Support (page 8 of FA - Attachment 5). • <i>Memorandum: Report on Activities of the Administrative Office of the Courts</i>, June 25, 2013; Web Resources (page 10 of FA - Attachment 6). 		<ul style="list-style-type: none"> • FA - Attachment 5 • FA - Attachment 6

Service

FA.06	Family Dispute Resolution support, technical assistance, and education.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Family Code Section: 1850 (Requires Judicial Council to assist the courts with child custody mediation and conciliation services, implement a uniform statistical reporting system on custody dispositions, administer training of court personnel , and conduct research.). • <u>California Rules of Court:</u> <ul style="list-style-type: none"> • 5.210 (Court Connected Mediation). • 5.215 (Domestic Violence Protocols for Family Court Services). • 5.220 (Child Custody Evaluations). • 5.225 (Appointment of Child Custody Evaluators). • 5.230 (Domestic Violence Training). • 5.235 (Ex parte communication). • 10.464. 		
Required			
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 		

FAMILY SERVICES

Service

FA.07	Domestic Violence Courts.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • California Rules of Court: 10.56 (charge to the Collaborative Justice Courts Advisory Committee). 		
Required			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Judicial Council: Approves the annual agenda for the Collaborative Justice Courts Advisory Committee. 		
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 		

Service

FA.08	Domestic Violence Safety Partnership Project.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • California Rules of Court: 10.464 (requires education on domestic violence). • With funding from the California Governor’s Office of Emergency Services (Cal OES) with resources from the federal Office on Violence Against Women (OVW), Domestic Violence Safety Partnership Project (DVSP) distributes a self-assessment tool to courts that enumerates required procedures and recommended practices; provides targeted, local technical assistance to applicant courts that have an identified need for training. 		

FAMILY SERVICES

Service

FA.09	Violence Against Women Education Program.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Government Code Section: 68555 (requires the Judicial Council to establish domestic violence training programs for judges and other court personnel). • <u>California Rules of Court:</u> <ul style="list-style-type: none"> • 10.464 (Jdges, referees, commissioners, in certain assignments expected to take domestic violence courses). • 5.230 (Domestic violence training standards for court-appointed child custody investigators and evaluators). 		
Required			
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 		

Service

FA.10	California Courts Protective Orders Registry.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 		
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Judicial Council: <i>Recommended Guidelines and Practices for Improving the Administration of Justice in Domestic Violence Cases: Final Report of the Domestic Violence Practice and Procedure Task Force</i>, January 2008; approved a recommendation from the Domestic Violence Practice and Procedure Task Force (FA - Attachment 7). 	<ul style="list-style-type: none"> • FA - Attachment 7 	

FISCAL SERVICES

Service

FI.01	Budgeting.		
Provided to: The trial courts, appellate courts, and Supreme Court.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Trial Court Administrative Services Office	<ul style="list-style-type: none"> • Assembly Bill 233 (The Lockyer-Isenberg Trial Court Funding Act of 1997). • Government Code Section: 68085. 		
Fiscal Services Office	<ul style="list-style-type: none"> • California Rules of Court: 10.101. • Government Code Sections: 68933 and 13337. <p>Related to trial court budget-related services:</p> <ul style="list-style-type: none"> • Government Code Sections: 68085(a)(2)(A), 68502.5, 68511.6, 77202, 77202.5, 77205, 77206, and 77207. 		
Required			
Fiscal Services Office	<ul style="list-style-type: none"> • Department of Finance: Various Budget Letters. 		
Trial Court Administrative Services Office	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Tactical Plan for Court Technology</i>, January 26, 2000 (FI - Attachment 1). • <i>Judicial Council Meeting Minutes</i>, February 2001 (FI - Attachment 2). • <i>Summary: Funding the Phoenix Program</i>, January 5, 2011 (FI - Attachment 3). 	<ul style="list-style-type: none"> • FI - Attachment 1 • FI - Attachment 2 • FI - Attachment 3 	

Service

FI.02	Centralized Treasury.		
Provided to: The Judicial Council and the trial courts.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Fiscal Services Office	<ul style="list-style-type: none"> • Government Code Sections: 77009(a) and (b) (Authorization), 68505, and 77206. • California Rules of Court: 10.820. 		

FISCAL SERVICES

Service

FI.02	Centralized Treasury.		
Provided to: The Judicial Council and the trial courts.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Required			
Fiscal Services Office	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Judicial Council Meeting Minutes</i>, April 2002; approved "Delegation of Authority to Establish Bank Accounts Separate from the County Treasury" (FI - Attachment 8). • <i>Trial Court Financial Policies and Procedures Manual</i>, FIN, 13.01, Banking Services, 7 Ed., September 1, 2010 (FI - Attachment 4). • <i>Statement of Investment Policy for the Trial Courts</i>, November 9, 2004 (FI - Attachment 5). • <i>Judicial Council Meeting Minutes</i>, February 2004; approval of Statement of Investment Policy for the Trial Courts (FI - Attachment 10). • Trial Courts • AOC's Trial Court Administrative Services Office 		<ul style="list-style-type: none"> • FI - Attachment 8 • FI - Attachment 4 • FI - Attachment 5 • FI - Attachment 9

Service

FI.03	Payroll and controller services.		
Provided to: The trial courts, appellate courts, and Supreme Court.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Trial Court Administrative Services Office	<ul style="list-style-type: none"> • Assembly Bill 233 (The Lockyer-Isenberg Trial Court Funding Act of 1997). • Government Code Section: 68085. 		
Required			
Trial Court Administrative Services Office	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Tactical Plan for Court Technology</i>, January 26, 2000 (FI - Attachment 1). • <i>Judicial Council Meeting Minutes</i>, February 2001 (FI - Attachment 2). • <i>Summary: Funding the Phoenix Program</i>, January 5, 2011 (FI - Attachment 3). 		<ul style="list-style-type: none"> • FI - Attachment 1 • FI - Attachment 2 • FI - Attachment 3
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services assists by performing check matching tasks and distributing checks to employees. 		

FISCAL SERVICES

Service

FI.04	Solicitation and award of agreements and purchase orders.		
Provided to: The trial courts, appellate courts, Supreme Court, and the AOC.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Fiscal Services Office	<ul style="list-style-type: none"> • Public Contract Code Sections: 19201-10. • Government Code Sections: 69204 and 70391. • California Rules of Court: 10.181 and 10.184. 		
Trial Court Administrative Services Office	<ul style="list-style-type: none"> • Assembly Bill 233 (The Lockyer-Isenberg Trial Court Funding Act of 1997). • Government Code Section: 68085. 		
Required			
Trial Court Administrative Services Office	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Tactical Plan for Court Technology</i>, January 26, 2000 (FI - Attachment 1). • <i>Judicial Council Meeting Minutes</i>, February 2001 (FI - Attachment 2). • <i>Summary: Funding the Phoenix Program</i>, January 5, 2011 (FI - Attachment 3). 	<ul style="list-style-type: none"> • FI - Attachment 1 • FI - Attachment 2 • FI - Attachment 3 	
Fiscal Services Office	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Procurement of Goods and Services</i>, AOC Policy Number 7.2.1, December 1, 2002 (FI - Attachment 6). • <i>Policy Regarding Legal Review of Procurement Matters</i>, Effective December 1, 2002 (FI - Attachment 7). • Public Contract Code (PCC) 19206 of the Judicial Branch Contract Law (JBCL) requires the Judicial Council to adopt and publish a Judicial Branch Contracting Manual (JBCM) incorporating procurement and contracting policies and procedures that these judicial branch entities must follow. On August 26, 2011, the Judicial Council adopted the <i>Judicial Branch Contracting Manual</i> to comply with PCC 19206. The AOC policies listed above are set forth in the JBCM on page 7 or 9 in the Introduction section of JBCM, which presumably makes compliance mandatory: "In addition, this Manual supersedes (a) the AOC "Policy Regarding Legal Review of Procurement Matters," and (b) the AOC policy "7.2.1, Procurement of Goods and Services," for all procurement and contracting purposes <i>except</i> as those policies apply to planning, design, construction, rehabilitation, renovation, replacement, lease, or acquisition of trial court facilities." 	<ul style="list-style-type: none"> • FI - Attachment 6 • FI - Attachment 7 	

FISCAL SERVICES

Service

FI.05	Financial Management - accounting and reporting.		
Provided to: The trial courts, appellate courts, Supreme Court, and the AOC.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Fiscal Services Office	<ul style="list-style-type: none"> • Government Code Sections: 13300, 13344, 13403, and 16400. 		
Trial Court Administrative Services Office	<ul style="list-style-type: none"> • Assembly Bill 233 (The Lockyer-Isenberg Trial Court Funding Act of 1997). • Government Code Section: 68085. 		
Required			
Fiscal Services Office	<ul style="list-style-type: none"> • Department of Finance: <i>State Administrative Manual</i> (online at http://sam.dgs.ca.gov/). 		
Trial Court Administrative Services Office	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Tactical Plan for Court Technology</i>, January 26, 2000 (FI - Attachment 1). • <i>Judicial Council Meeting Minutes</i>, February 2001 (FI - Attachment 2). • <i>Summary: Funding the Phoenix Program</i>, January 5, 2011 (FI - Attachment 3). 		<ul style="list-style-type: none"> • FI - Attachment 1 • FI - Attachment 2 • FI - Attachment 3

Service

FI.06	Accounts Payable support.		
Provided to: The trial courts, appellate courts, the Supreme Court, the public, and the AOC.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Fiscal Services Office	<ul style="list-style-type: none"> • Government Code Sections: 68543.5, 68543.7, and 13344. • United States Constitution's 6th Amendment. • California Penal Code Section: 1241. • Welfare and Institution Code Section: 317. • California Rules of Court: 10.810. 		
Trial Court Administrative Services Office	<ul style="list-style-type: none"> • Assembly Bill 233 (The Lockyer-Isenberg Trial Court Funding Act of 1997). • Government Code Section: 68085. 		

FISCAL SERVICES

Service

FI.06	Accounts Payable support.		
Provided to: The trial courts, appellate courts, the Supreme Court, the public, and the AOC.			
Office	Justification/Supporting Documentation	Attachments	
Required			
Fiscal Services Office	<ul style="list-style-type: none"> • Department of Finance: <i>State Administrative Manual</i> Sections 700, 6400, 7900, 8400, and 8442.202. 		
Trial Court Administrative Services Office	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Tactical Plan for Court Technology</i>, January 26, 2000 (FI - Attachment 1). • <i>Judicial Council Meeting Minutes</i>, February 2001 (FI - Attachment 2). • <i>Summary: Funding the Phoenix Program</i>, January 5, 2011 (FI - Attachment 3). 	<ul style="list-style-type: none"> • FI - Attachment 1 • FI - Attachment 2 • FI - Attachment 3 	

Service

FI.07	Trust Accounting support.		
Provided to: The trial courts.			
Office	Justification/Supporting Documentation	Attachments	
Mandatory			
Trial Court Administrative Services Office	<ul style="list-style-type: none"> • Assembly Bill 233 (The Lockyer-Isenberg Trial Court Funding Act of 1997). • Government Code Section: 68085. 		
Required			
Trial Court Administrative Services Office	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Tactical Plan for Court Technology</i>, January 26, 2000 (FI - Attachment 1). • <i>Judicial Council Meeting Minutes</i>, February 2001 (FI - Attachment 2). • <i>Summary: Funding the Phoenix Program</i>, January 5, 2011 (FI - Attachment 3). 	<ul style="list-style-type: none"> • FI - Attachment 1 • FI - Attachment 2 • FI - Attachment 3 	

Service

FI.08	Financial policies and procedures.		
Provided to: The trial courts, appellate courts, and Supreme Court.			
Office	Justification/Supporting Documentation	Attachments	
Discretionary			
Trial Court Administrative Services Office	<ul style="list-style-type: none"> • Phoenix does not set policy, but does assist the trial courts with procedure implementation. 		

FISCAL SERVICES

Service

FI.08	Financial policies and procedures.		
Provided to: The trial courts, appellate courts, and Supreme Court.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Fiscal Services Office	<ul style="list-style-type: none"> • California Rules of Court: 10.101 (e), 10.804, and 10.810 (b). • Government Code Section: 13300. 		

Service

FI.09	Fiscal training and assistance, as required.		
Provided to: The trial courts, appellate courts, Supreme Court, and the AOC.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Fiscal Services Office	<ul style="list-style-type: none"> • California Rules of Court: 10.101 (e), 10.804, and 10.810 (b). • Penal Code Section: 1463.010. • Training and Assistance covers a broad range of fiscal related activities. 		
Trial Court Administrative Services Office	<ul style="list-style-type: none"> • Assembly Bill 233 (The Lockyer-Isenberg Trial Court Funding Act of 1997). • Government Code Section: 68085. 		
Required			
Trial Court Administrative Services Office	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Tactical Plan for Court Technology</i>, January 26, 2000 (FI - Attachment 1). • <i>Judicial Council Meeting Minutes</i>, February 2001 (FI - Attachment 2). • <i>Summary: Funding the Phoenix Program</i>, January 5, 2011 (FI - Attachment 3). 	<ul style="list-style-type: none"> • FI - Attachment 1 • FI - Attachment 2 • FI - Attachment 3 	

FISCAL SERVICES

Service

FI.10	Grants Administration.		
Provided to: The Judicial Council, trial courts, appellate courts, Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Fiscal Services Office	<p>Conditions of Grant Fund Acceptance:</p> <ul style="list-style-type: none"> • Department of Finance: <i>California Accounting Manual</i>. • California State Controller's Office and Department of Finance Mandates. • Federal Office of Management and Budget (OBM) Circular A-87, Cost Principles for State, Local and Indian Tribal Governments. • Code of Federal Regulations Sections: <ul style="list-style-type: none"> • 2 CFR § 225. • 45 CFR §§ 16, 76, 80, 81, 84, 86, 87, 91-93, 95, and 100. • 45 CFR. • 30 CFR. • Government Accounting Standards Board: <i>Standards</i> • California Emergency Management Agency: <i>Recipient Handbook</i>. • Supports all accounting issues for AOC/JC Grants, budgeting, tracking, reimbursement processing, compliance, etc. • Funds management coordination with State Controller's Office, Department of Finance, and Grantors. 		
Required			
Fiscal Services Office	<ul style="list-style-type: none"> • Judicial Council: <i>Trial Court Financial Policies and Procedures Manual</i>, FIN, 13.01, Banking Services, 7 Ed., September 1, 2010 (FI - Attachment 4). 	<ul style="list-style-type: none"> • FI - Attachment 4 	

Service

FI.11	Provide technical advice and support to improve the performance of court and county collections programs statewide.		
Provided to: The trial courts.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Fiscal Services Office	<ul style="list-style-type: none"> • Penal Code Section: 1463.010. 		

FISCAL SERVICES

Service

FI.12	Maintenance of fixed asset system.		
	Provided to: The appellate courts, Supreme Court, and the AOC.		
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Fiscal Services Office	<ul style="list-style-type: none"> • Generally Accepted Accounting Principles and California Legal Basis Accounting. 		

Service

FI.13	Provision and maintenance of financial information available through the judicial branch website.		
	Provided to: The trial courts, appellate courts, the Supreme Court, and the public.		
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Fiscal Services Office	<ul style="list-style-type: none"> • California Rules of Court: 10.804; 10.810 (b), and 10.800(b). • Government Code Sections: 77202.5 and 77206. 		

Service

FI.14- New	Centralized Uniform Civil Fee collection and distribution		
	Provided to: The trial courts.		
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Fiscal Services Office	<ul style="list-style-type: none"> • Government Code Sections: 68085.1(b) and (c)(1), 68085.7, 68085.3, and 68085.4. • Per statute the collection and distribution of Uniform Civil Fees must be performed by the AOC on a centralized basis, which is done monthly by the Treasury Services Unit. 		
Required			
Fiscal Services Office	<ul style="list-style-type: none"> • Judicial Council: <i>Trial Court Financial Policies and Procedures Manual</i>, FIN, 13.01, Banking Services, 7 Ed., September 1, 2010 (FI - Attachment 4). • Trial courts. • AOC's Trial Court Administrative Services. • AOC's Budget Office. 		<ul style="list-style-type: none"> • FI - Attachment 4

HUMAN RESOURCES SERVICES

Service

HR.01 **Labor relations and collective bargaining services.**

Provided to: The trial courts.

<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
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Mandatory

Human Resources Services Office

- California Rules of Court: 10.761(b), (e), and 10.762(d).
- In addition to the mandated activities of the Human Resources Services Office (HRSO), it also is mandatory that the office comply with the following laws and regulations: Fair Labor Standards Act, Equal Pay/Compensation Discrimination, Americans with Disabilities Act, various Federal and State Discrimination Laws, and Family and Medical Leave Act. These regulations and mandates influence almost every aspect of service.
- HRSO makes staff available to each of four Regional Interpreter Employment Committees to assist with negotiating the terms and conditions of employment of court interpreters.

Service

HR.02 **Employee relations/investigations/progressive discipline/leave management.**

Provided to: The trial courts, appellate courts, Supreme Court, and the AOC.

<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
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Mandatory

Human Resources Services Office

- California Rules of Court: 10.660, 10.500, 10.670(e), 10.761(b) and (e), 10.762(d), and 10.803.
- Government Code Sections: 15150 et seq., 71639.5, 71600 et seq., and 71800 et seq.
- Various federal and state laws related to paid/unpaid leaves; discrimination and harassment; criminal background checks (CLETS, Cal. Lab §432.7); and access to personnel records (Cal. Lab §§ 432, 1198.5)
- In addition to the mandated activities of the Human Resources Services Office (HRSO), it also is mandatory that the office comply with the following laws and regulations: Fair Labor Standards Act, Equal Pay/Compensation Discrimination, Americans with Disabilities Act, various Federal and State Discrimination Laws, and Family and Medical Leave Act. These regulations and mandates influence almost every aspect of service provided by the HRSO.
- HRSO provides negotiation services to the courts upon request, effectively leveling the playing field for the smaller courts who may not have access to such services due to limited resources.

HUMAN RESOURCES SERVICES

Service

HR.02	Employee relations/investigations/progressive discipline/leave management.		
Provided to: The trial courts, appellate courts, Supreme Court, and the AOC.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Human Resources Services Office	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Judicial Council Directive #27, Activity Status Form, April 2014</i> (HR - Attachment 1) • <i>Judicial Council Directive #29, Activity Status Form, April 2014</i> (HR - Attachment 2) • See directives tied to Performance Management, Performance Improvement Plans, and maintenance of the AOC Policies and Procedures Manual. 	<ul style="list-style-type: none"> • HR - Attachment 1 • HR - Attachment 2 	

Service

HR.03	Human resources management system.		
Provided to: The appellate courts, Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Human Resources Services Office	<ul style="list-style-type: none"> • United States Code: 42 USC § 2000e-8(c). • Code of Federal Regulations: 29 CFR §1602.30 et seq., 28 CFR § 42.301 et seq. • AOC uses the Human Resources and Education Management System (HREMS) to provide EEO-4 reporting for the state judicial branch and trial courts upon request; necessary for business operations. • In addition to the mandated activities of the Human Resources Services Office (HRSO), it also is mandatory that the office comply with the following laws and regulations: Fair Labor Standards Act, Equal Pay/Compensation Discrimination, Americans with Disabilities Act, various Federal and State Discrimination Laws, and Family and Medical Leave Act. These regulations and mandates influence almost every aspect of service provided by the HRSO. • The human resources management system is the primary reporting tool for all personnel data within the state judicial branch. It is used to provide Equal Employment Opportunity reporting for the Supreme Court, Courts of Appeal, AOC, and HCRC; HRSO also offers reporting services on behalf of the trial courts and assists the trial courts with their EEO reporting requirements upon request. 		

HUMAN RESOURCES SERVICES

Service

HR.04	Judicial payroll and benefits.		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
Office	Justification/Supporting Documentation	Attachments	
Mandatory			
Human Resources Services Office	<ul style="list-style-type: none"> • Government Code Sections: 68200-68222, 75592, and 68554. • California Rules of Court: 10.502(c) and (d). • In addition to the mandated activities of the Human Resources Services Office (HRSO), it also is mandatory that the office comply with the following laws and regulations: Fair Labor Standards Act, Equal Pay/Compensation Discrimination, Americans with Disabilities Act, various Federal and State Discrimination Laws, and Family and Medical Leave Act. These regulations and mandates influence almost every aspect of service provided by the HRSO. 		

Service

HR.05	Pay and benefits management and administration for employees.		
	Provided to: The trial courts, appellate courts, Supreme Court, and the AOC.		
Office	Justification/Supporting Documentation	Attachments	
Mandatory			
Human Resources Services Office	<ul style="list-style-type: none"> • Federal Public Law: 111-148 111th Congress (Patient Protection & Affordable Care Act). • Internal Revenue Code: 415(b) (26 USC § 415(b)). • Government Code Sections: 1153, 1170-1176, 12470-12479, 18003, 19838, 19878-19885, 22750, 22830-22843, 22950-22959.1, 20280-20285, and 7522. • California Unemployment Insurance Sections: 2781-2783. • Code of Civil Procedure Sections: 706.030, 706.072, and 706.125. • California Revenue & Tax Code Sections: 10878, and 19280. • Family Code Sections: 150, 5200, and 17450. • State Administrative Manual: 6527, 8512, 8531, 8533, 8580.2, 8593-8593.3, 8790.1, and 8790.5. • United States Code: 26 USC §§ 3402(a)(f)(i), 6109, 83-591, 1401, 3101, 3111, 6051, 125, 1161-1169, and 1320d-6. • California Labor Code Sections: 201, 202, 204 – 204(b)(2)(3), 207, 226(a)-226(b)(c), and 227.3. • In addition to the mandated activities of the Human Resources Services Office (HRSO), it also is mandatory that the office comply with the following laws and regulations: Fair Labor Standards Act, Equal Pay/Compensation Discrimination, Americans with Disabilities Act, various Federal and State Discrimination Laws, and Family and Medical Leave Act. These regulations and mandates influence almost every aspect of service provided by the HRSO. 		

HUMAN RESOURCES SERVICES

Service

HR.06 Trial court payroll services through Phoenix or ADP.

Provided to: The trial courts.

<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
Mandatory		
Trial Court Administrative Services Office	<ul style="list-style-type: none"> • Assembly Bill 233 (The Lockyer-Isenberg Trial Court Funding Act of 1997). • Government Code Section: 68085 (a). 	
Required		
Trial Court Administrative Services Office	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Tactical Plan for Court Technology</i>, January 26, 2000 (HR - Attachment 3). • <i>Judicial Council Meeting Minutes</i>, February 2001 (HR - Attachment 4). • <i>Summary: Funding the Phoenix Program</i>, January 5, 2011 (HR - Attachment 5) 	<ul style="list-style-type: none"> • HR - Attachment 3 • HR - Attachment 4 • HR - Attachment 5
Human Resources Services Office	<ul style="list-style-type: none"> • The Trial Court Employment Protection and Governance Act (SB 2140), required that counties continue to provide payroll services to the courts during a transition phase ending January 1, 2003. After this date a county is not obligated to provide payroll services. Either the court or the county may discontinue the county-provided service per the notice requirements in the statute. • The trial courts, as new employers, are responsible for providing payroll services for their employees. Due to the uncertainty of continuing county payroll services and at the request of some courts, the Human Resources Services Office (HRSO) negotiated a master contract with Automatic Data Processing, Inc (ADP). • This master agreement ensured fair and consistent services and rates for the trial courts that choose to contract with ADP for their payroll services. 	

HUMAN RESOURCES SERVICES

Service

HR.07 Recruitment, classification, and compensation assistance.

Provided to: The trial courts, appellate courts, the Supreme Court, the public, and the AOC.

<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
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Mandatory

Human Resources Services Office

- Government Code Sections: 19825 and 77605 (Trial Court Funding and Improvement Act of 1997).
- For recruitments, hiring practices are compliant with Equal Employment Opportunity and applicable immigration laws; recruitment and AOC class/comp services are necessary for business operations.
- Human Resources Services Office (HRSO) is also responsible for maintaining the Uniform Model Classification Plan for the trial courts.
- In addition to the mandated activities of the HRSO, it also is mandatory that the office comply with the following laws and regulations: Fair Labor Standards Act, Equal Pay/Compensation Discrimination, Americans with Disabilities Act, various Federal and State Discrimination Laws, and Family and Medical Leave Act. These regulations and mandates influence almost every aspect of service provided by the HRSO.

Required

Human Resources Services Office

- Judicial Council:
 - *Judicial Council Directive #47, Activity Status Form, June 2013* (HR - Attachment 6).
 - *Judicial Council Directive #140, Activity Status Form, June 2013* (HR - Attachment 7).
 - *Judicial Council Directive #14, 15, 16, 17, 18, 19, 20, 52, 81, 90, and 111. (Activity Status Form for JC Directive # 14, April 2014 provided as an example; HR - Attachment 8)*
 - See directives tied to the AOC-wide classification and compensation study and management of the AOC temporary worker program.

- HR - Attachment 6
- HR - Attachment 7
- HR - Attachment 8

HUMAN RESOURCES SERVICES

Service

HR.08	Judicial Branch Workers' Compensation program oversight and administration.	
Provided to: The trial courts, appellate courts, the Supreme Court, the public, and the AOC.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
Mandatory		
Human Resources Services Office	<ul style="list-style-type: none"> • Government Code Sections: 68114.10 and 71623.5. • California Rules of Court: 10.350(b) and 10350. • California Labor Section: 3200 et seq. • California Code of Regulations: Title 8 § 5110 (Includes the provision of ergonomics evaluations). • In addition to the mandated activities of the Human Resources Services Office (HRSO), it also is mandatory that the office comply with the following laws and regulations: Fair Labor Standards Act, Equal Pay/Compensation Discrimination, Americans with Disabilities Act, various Federal and State Discrimination Laws, and Family and Medical Leave Act. These regulations and mandates influence almost every aspect of service provided by the HRSO. 	

Service

HR.09	Integrated Disability Management.	
Provided to: The trial courts, appellate courts, Supreme Court, and the AOC.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
Mandatory		
Human Resources Services Office	<ul style="list-style-type: none"> • United States Code: 42 USC § 12112 and 28 USC § 2601 et seq. • Government Code Sections: 12940 (m) and (n), and 12945. • California Code of Regulations: Title 8 §§ 1509, 3203. • Includes support to the Illness and Injury Prevention Program. • In addition to the mandated activities of the Human Resources Services Office (HRSO), it also is mandatory that the office comply with the following laws and regulations: Fair Labor Standards Act, Equal Pay/Compensation Discrimination, Americans with Disabilities Act, various Federal and State Discrimination Laws, and Family and Medical Leave Act. These regulations and mandates influence almost every aspect of service provided by the HRSO. 	

INFORMATION TECHNOLOGY SERVICES

Service

IT.01	Maintenance and operations support for the California Courts Protective Order Registry (CCPOR).		
Provided to: The trial courts and the public.			
Office	Justification/Supporting Documentation	Attachments	
Required			
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints the four-part carbonless paper forms used in CCPOR and prints the training materials for CCPOR. 		
Information Technology Services Office	<ul style="list-style-type: none"> • Penal Code Sections: 136.2, 136.3, 646.91, and 646.91a. • Government Code Sections: 77209(b), (f), (g) and (j). • Family Code Sections: 6380 and 6404. 		

Service

IT.02	Maintenance and operations support for the Judicial Branch Statistical Information System (JBSIS).		
Provided to: The Judicial Council, trial courts, and the public.			
Office	Justification/Supporting Documentation	Attachments	
Mandatory			
Information Technology Services Office	<ul style="list-style-type: none"> • California Rules of Court: 3.710, and 10.400. • Government Code Sections: 68603, 68604, 6816, and 6819. • <i>Standards of Judicial Administration</i>: 2 §§ 2.1 and 2.2. 		

Service

IT.03	Maintenance and operations support for the Court Interpreter Data Collection System (CIDCS).		
Provided to: The trial courts and the public.			
Office	Justification/Supporting Documentation	Attachments	
Discretionary			
Court Operations Special Services Office	<ul style="list-style-type: none"> • Although the particular data collection system may be discretionary, Government Code 68563 requires the Judicial Council to report to the Legislature every 5 years on interpreter use and language need in California’s trial courts. CIDCS is an important tool to compile the data we are required to report to the Legislature. 		
Mandatory			
Information Technology Services Office	<ul style="list-style-type: none"> • Government Code Sections: 68560-68566 and 71810(b). • California Rules of Court: 2.891-2.894, 10.51, 10.761(b) and (e), and 10.762(d). 		

INFORMATION TECHNOLOGY SERVICES

Service

IT.04	Maintenance and operations support for the Phoenix Financial, procurement, and HR/Payroll System.		
	Provided to: The trial courts, appellate courts, the Supreme Court, and the public.		
	<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
	Mandatory		
	Information Technology Services Office	<ul style="list-style-type: none"> • Assembly Bill 233 (Lockyer-Isenberg Trial Court Funding Act of 1997). • Penal Code Sections: 1463.02. 	
	Trial Court Administrative Services Office	<ul style="list-style-type: none"> • Assembly Bill 233 (The Lockyer-Isenberg Trial Court Funding Act of 1997). 	
	Required		
	Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes Phoenix training materials as needed. 	
	Trial Court Administrative Services Office	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Tactical Plan for Court Technology</i>, January 26, 2000; result of the AB 233 implementation to provide infrastructure support to the trial courts (IT - Attachment 3). • <i>Judicial Council Meeting Minutes</i>, February 2001; confirm the council's support to accept and approve the plan's proposal (IT - Attachment 4). • <i>Summary: Funding the Phoenix Program</i>, January 5, 2011; summarizes the events leading up to the creation of the Trial Court Administrative Services (TCAS) Office and the Phoenix system (IT - Attachment 5). 	<ul style="list-style-type: none"> • IT - Attachment 3 • IT - Attachment 4 • IT - Attachment 5

Service

IT.05	Maintenance and operations support for the Computer-Aided Facilities Management (CAFM) System.		
	Provided to: The trial courts, appellate courts, the Supreme Court, and the public.		
	<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
	Mandatory		
	Information Technology Services Office	<ul style="list-style-type: none"> • Government Code Sections: 70301-70404 (Trial Court Facilities Act of 2002). 	

INFORMATION TECHNOLOGY SERVICES

Service

IT.06	Maintenance and operations support for the Uniform Civil Fees System (UCFS).		
Provided to: The trial courts.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Information Technology Services Office	<ul style="list-style-type: none"> • Government Code Sections: 68085.1(b) and 8085.7. 		

Service

IT.07	Maintenance and operations support for the Appellate Court Case Management System (ACCMS).		
Provided to: The trial courts, appellate courts, the Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Information Technology Services Office	<ul style="list-style-type: none"> • California Rules of Court: 3.710. • Government Code Sections: 68603, 68604, 68616, and 68619. • <i>Standards of Judicial Administration</i>: 2 §§ 2.1 and 2.2. 		
Required			
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints the briefs filed using the e-filing system for 1DCA. 		

Service

IT.08	Maintenance and operations support for the Court Appointed Counsel Program (Supreme Court and District Courts of Appeal – Court Appointed Counsel Systems).		
Provided to: The appellate courts, the Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Information Technology Services Office	<ul style="list-style-type: none"> • Welfare and Institution Code Sections: 317 and 395 (Assembly Bill 2480). 		

INFORMATION TECHNOLOGY SERVICES

Service

IT.09	Maintenance and operations support for the California Courts Technology Center (CCTC) including disaster and security services and data integration services.		
Provided to: The trial courts, appellate courts, the Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Required			
Information Technology Services Office	<ul style="list-style-type: none"> • Judicial Council: <i>Judicial Branch Strategic Plan (2006-2012)</i>; Goal VI, Branchwide infrastructure for service excellence. 		

Service

IT.10	Maintenance and operations support for network hosting, security, and support.		
Provided to: The trial courts, appellate courts, the Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Required			
Information Technology Services Office	<ul style="list-style-type: none"> • Judicial Branch: <i>Strategic Plan (2006-2012)</i>; Goal VI, Branchwide infrastructure for service excellence. 		

Service

IT.11	Technology hardware updates program/technical support for HelpDesk network and security.		
Provided to: The trial courts, appellate courts, Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Required			
Information Technology Services Office	<ul style="list-style-type: none"> • Judicial Branch: <i>Strategic Plan (2006-2012)</i>; Goal VI, Branchwide infrastructure for service excellence. 		

INFORMATION TECHNOLOGY SERVICES

Service

IT.12	Case management systems support: Sustain, V2, V3.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Information Technology Services Office	<ul style="list-style-type: none"> • Judicial Branch: <i>Strategic Plan</i> (2006-2012). <ul style="list-style-type: none"> • Goal I, Access, fairness and diversity. • Goal III, Management of modernization and administration. • Goal IV, Quality of justice and service to the public. • Goal VI, Branchwide infrastructure for service excellence. 		
Trial Court Liason Office	<p>Provide project monitoring for Judicial Council funded case management system deployment.</p> <ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Judicial Council Meeting Minutes</i>, February 2013 (IT - Attachment 1). • <i>Judicial Council Meeting Minutes</i>, August 2013 (IT - Attachment 2). 	<ul style="list-style-type: none"> • IT - Attachment 1 • IT - Attachment 2 	

Service

IT.13	Support to California Law Enforcement Telecommunications System (CLETS).		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Information Technology Services Office	<ul style="list-style-type: none"> • Judicial Branch: <i>Strategic Plan</i> (2006-2012). <ul style="list-style-type: none"> • Goal III, Management of modernization and administration. • Goal VI, Branchwide infrastructure for service excellence. 		

Service

IT.14	Development and maintenance of the judicial branch public website, Serranus, and other judicial branch websites.		
Provided to: The trial courts, appellate courts, the Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Information Technology Services Office	<ul style="list-style-type: none"> • California Rules of Court: 10.5(c) and (e), 10.6(d) and (e), 10.10, 2.1050(c) and (d), and 10.800(b). 		

INFORMATION TECHNOLOGY SERVICES

Service

IT.15	Justice Partners Outreach/E-Services.		
Provided to: The trial courts, appellate courts, Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Information Technology Services Office	<ul style="list-style-type: none"> • Judicial Branch: <i>Strategic Plan</i> (2006-2012). <ul style="list-style-type: none"> • Goal I, Access, fairness and diversity. • Goal IV, Quality of justice and service to the public. • Goal VI, Branch-wide infrastructure for service excellence. 		

Service

IT.16	Technical and logistical support for WebEx programs.		
Provided to: The trial courts, appellate courts, the Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Information Technology Services Office	<ul style="list-style-type: none"> • Judicial Branch: <i>Strategic Plan</i> (2006-2012). <ul style="list-style-type: none"> • Goal V, Education for branchwide professional excellence. • Goal VI, Branchwide infrastructure for service excellence. 		

Service

IT.17	Administration and management of network and servers for internet-based telephones (Voice-over Internet Protocol (VOIP)).		
Provided to: The appellate courts, Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Information Technology Services Office	<ul style="list-style-type: none"> • Judicial Branch: <i>Strategic Plan</i> (2006-2012); Goal VI, Branchwide infrastructure for service excellence. 		

JUDICIAL COUNCIL ADVISORY COMMITTEE SUPPORT SERVICES

Service

JA.01 Subject matter expertise and legal support to council advisory groups:

- Assistance to the Committee Chair with annual agenda development, agenda setting for regular meetings, and presentation of committee recommendations to the council.
- Legal and policy analysis and assistance with drafting of rules of court, judicial administration standards, forms, and legislation.
- Analysis and drafting of briefs on policies and other areas of interest to committees and review and analysis of council pilot projects and other programs.
- Development of council reports setting forth committee recommendations.
- Surveys/questionnaires development, response compilation, and analysis of results.

Provided to: The Judicial Council.

Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
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Mandatory

Refer to Index of Services Provided by the Administrative Office of the Courts, Attachment 1: Judicial Council Internal Committees, Advisory Groups, and Task Forces (2013-2014).

Service

JA.02 Administrative services - coordination, organization, and support to council advisory groups:

- Meeting Planning and Coordination including scheduling, logistics, materials, and travel.
- General committee support including preparation of meeting minutes, processing of travel claims and related bills, maintenance of committee roster and website information, coordination of committee nomination process.

Provided to: The Judicial Council.

Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
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Mandatory

Refer to Index of Services Provided by the Administrative Office of the Courts, Attachment 1: Judicial Council Internal Committees, Advisory Groups, and Task Forces (2013-2014).

JUDICIAL COUNCIL SUPPORT SERVICES

Service

JC.01 Staff support for the Judicial Council’s policymaking process including: coordinating the publication of meeting agendas and materials, supporting the council’s implementation and review of its governance policies, and staffing the Judicial Council’s public comment process for council business meetings. Staffing the nominations process for Judicial Council and council advisory committee positions. Editing Judicial Council documents and meeting materials.

Provided to: The Judicial Council and the public.

<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
Mandatory		
Judicial Council Support Services	<ul style="list-style-type: none"> • California Rules of Court: 10.5, 10.6, and 10.11. 	
Required		
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 	
Judicial Council Support Services	<ul style="list-style-type: none"> • Judicial Council: <i>Judicial Council Governance Policies</i> (B.1), June 2008 (JC - Attachment 2) 	<ul style="list-style-type: none"> • JC - Attachment 2

Service

JC.02 Production and staff support for Judicial Council meetings and Executive and Planning Committee meetings.

Provided to: The Judicial Council.

<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
Mandatory		
Judicial Council Support Services	<ul style="list-style-type: none"> • California Rules of Court: 10.5 (g)1. 	
Required		
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services prints and distributes materials. 	
Judicial Council Support Services	<ul style="list-style-type: none"> • Judicial Council: <i>Judicial Council Governance Policies</i> (B.1(d) (e)), June 2008 (JC - Attachment 2). • Judicial Council and Executive and Planning Committee. 	<ul style="list-style-type: none"> • JC - Attachment 2

JUDICIAL COUNCIL SUPPORT SERVICES

Service

JC.03	Production and archiving of the public records of Judicial Council meetings and decisions.		
	Provided to: The Judicial Council and the public.		
Office Required	Justification/Supporting Documentation	Attachments	
Judicial Council Support Services	<ul style="list-style-type: none"> • Judicial Council: <i>Governance Policies</i> (B.1(d) (e)), June 2008 (JC - Attachment 2). • Judicial Council and Executive and Planning Committee. 	<ul style="list-style-type: none"> • JC - Attachment 2 	

Service

JC.04	Project management and reporting on implementation status of Judicial Council restructuring directives.		
	Provided to: The Judicial Council.		
Office Required	Justification/Supporting Documentation	Attachments	
Special Projects Office	<p>Judicial Council AOC Restructuring Directives Project Management and Administration</p> <ul style="list-style-type: none"> • Judicial Council: Directive 1.0 - The Administrative Director of the Courts operates subject to the oversight of the Judicial Council. Executive and Planning Committee recommends that the Judicial Council direct the Administrative Director of the Courts to report to Executive and Planning Committee before each Judicial Council meeting on each item on this chart approved by the Judicial Council. 		
Judicial Council Support Services	<ul style="list-style-type: none"> • Judicial Council: <i>Governance Policies</i> (B.1(j)), June 2008 (JC - Attachment 2). • Judicial Council and Executive and Planning Committee. 	<ul style="list-style-type: none"> • JC - Attachment 2 	

Service

JC.05	Support to Judicial Council for Strategic and Operational Plans.		
	Provided to: The Judicial Council.		
Office Mandatory	Justification/Supporting Documentation	Attachments	
Court Operations Special Services Office	<ul style="list-style-type: none"> • California Rules of Court: 10.1 (c) and (d). 		
Judicial Council Support Services	<ul style="list-style-type: none"> • California Rules of Court: 10.11 (b). 		

JUDICIAL COUNCIL SUPPORT SERVICES

Service

JC.06	Support to Judicial Council with AOC organizational and essential services review.		
	Provided to: The Judicial Council.		
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Judicial Council Support Services	<ul style="list-style-type: none"> • California Rules of Court: 10.10 (b). 		
Required			
Special Projects Office	Services Provided by the AOC (formerly Essential Services Review) <ul style="list-style-type: none"> • Executive and Planning Committee directive. 		

Service

JC.07- New	Subject matter expertise and legal support to council advisory groups: Development and revisions of guidelines and training on CRC 10.75; meetings of advisory bodies.		
	Provided to: The Judicial Council and the public.		
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Required			
Trial Court Liason Office	<ul style="list-style-type: none"> • Judicial Council: <i>Judicial Branch Administration: Rule for Public Access to Meetings of Judicial Council Advisory Bodies</i>, April 24, 2014, Report to the Judicial Council (page 19 of JC - Attachment 1). 		<ul style="list-style-type: none"> • JC - Attachment 1

Service

JC.08- New	Conduct compliance review and analysis of advisory bodies adherence to CRC 10.75; meetings of advisory bodies.		
	Provided to: The Judicial Council and the public.		
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Trial Court Liason Office	<ul style="list-style-type: none"> • California Rules of Court: 10.75(p) effective July 1, 2014. 		

JUDICIAL COUNCIL SUPPORT SERVICES

Service

**JC.09-
New** **Project management of Remote Access Workgroup which will study and recommend ways to improve the public's remote access to the bodies that the AOC supports (i.e., Supreme Court, Judicial Council, Advisory Bodies).**

Provided to: The Judicial Council and the AOC.

Office

Justification/Supporting Documentation

Attachments

Required

Trial Court Liason Office

- At the direction of the Chief Justice and Administrative Director of the Courts.

Service

**JC.10-
New** **Staffing the annual review of the agenda of advisory committees over which the Executive and Planning Committee has been assigned oversight by the Chief Justice.**

Provided to: The Judicial Council.

Office

Justification/Supporting Documentation

Attachments

Mandatory

Judicial Council Support
Services

- California Rules of Court: 10.11 (i).

JUVENILE SERVICES

Service

JS.01	Court-Appointed Special Advocates (CASA) program administration, funding, and education.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Welfare and Institution Code Section: 100-110 (requires that the Judicial Council administer and distribute funding to the Court Appointed Special Advocates (CASA) programs). • California Rules of Court: 5.655 (specifies that CASA programs serve at the discretion of the court, and contains CASA program requirements). 		
Required			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • Approves funding methodology and annual funding allocations to local Court Appointed Special Advocates programs. • <i>Juvenile Dependency: Court Appointed Special Advocate Program Funding Methodology</i>, August 2013, Report to the Judicial Council. • <i>Judicial Dependency: Proposed Allocation for Fiscal Year 2013-2014 for Court Appointed Special Advocate Local Assistance</i>, October 2013, Report to the Judicial Council. 		

Service

JS.02	Local Blue Ribbon Commissions training and technical assistance.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Judicial Council: <i>Children in Foster Care: Final Recommendations of the California Blue Ribbon Commission on Children in Foster Care to Improve the Juvenile Dependency Courts and Foster Care System in California</i>, August 2008, Report to the Judicial Council; accepted the recommendations of the Blue Ribbon Commission (BRC) on Children in Foster Care and directed the commission to work on implementing the recommendations, including support of local commissions. BRC presents periodic progress reports to Council. 		

JUVENILE SERVICES

Service

JS.03	Court appointed dependency counsel funding, budgeting, and program management.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Government Code Section: 77003(4) (Court appointed counsel is a court operation and court cost). • Welfare and Institution Code Sections: 317 and 326.5 (requires Council to establish caseload standards for attorneys who practice in juvenile dependency court). • California Rules of Court: 5.534(g) and (h), 5.660 (attorneys for parties), and 5.662. 		
Required			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Draft Pilot Program and Court Appointed Counsel, October 2007, Report to the Judicial Council</i>; established caseload standards for dependency court appointed counsel (JS - Attachment 3). • <i>Trial Courts: Allocations from the State Trial Court Improvement and Modernization Fund and Trial Court Trust Fund for Court-Related Projects and Programs, August 2013, Report to the Judicial Council</i>; approves funding methodology and allocations annually (JS - Attachment 1). 		<ul style="list-style-type: none"> • JS - Attachment 1 • JS - Attachment 3

Service

JS.04	Dependency Representation, Administration, Funding, and Training (DRAFT) program.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Required			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Court Appointed Counsel: Caseload Standards, Service Delivery Models, and Contract Administration, June 2004, Report to the Judicial Council</i>; established the pilot DRAFT program and directed staff to begin a phased-in implementation of these caseload standards on a pilot basis as part of the DRAFT program. • <i>DRAFT Pilot Program and Court-Appointed Counsel, October 2007, Report to the Judicial Council</i>; expanded the program to 20 volunteer counties on a permanent basis (JS - Attachment 3). 		<ul style="list-style-type: none"> • JS - Attachment 3

JUVENILE SERVICES

Service

JS.05 **Juvenile Dependency Counsel Collections Programs.**

Provided to: The trial courts.

Office

Justification/Supporting Documentation

Attachments

Mandatory

Center for Families, Children, and the Courts

- Assembly Bills (AB):
 - AB 131 (Evans, 2009).
 - AB 1229 (Evans, 2010).
- Welfare and Institution Code Section: 903.47 (“The JC shall establish a program to collect reimbursements from the person liable for the costs of counsel appointed to represent parents or minors pursuant to § 903.1 in dependency proceedings.”).

Required

Center for Families, Children, and the Courts

- Judicial Council:
 - In June 2010, adopted the Juvenile Dependency Counsel Collections Program Guidelines.
 - *Juvenile Dependency: Counsel Collections Program Guidelines*, August 2013, Report to the Judicial Council; approved methodology for allocation collections revenue and annually approves the allocation (JS - Attachment 2).
 - *Trial Courts: Allocations from the State Trial Court Improvement and Modernization Fund and Trial Court Trust Fund for Court-Related Projects and Programs*, August 2013, Report to the Judicial Council; approved funding for staff recommended by the Trial Court Budget Advisory Committee (JS - Attachment 1).

- JS - Attachment 2
- JS - Attachment 1

JUVENILE SERVICES

Service

JS.06	Psychotropic Medication Orders program.		
Provided to: The trial courts.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Children in Foster Care: Final Recommendations of the California Blue Ribbon Commission on Children in Foster Care to Improve the Juvenile Dependency Courts and Foster Care System in California</i>, August 2008, Report to the Judicial Council; accepted the recommendations of the Blue Ribbon Commission on Children in Foster Care and directed the commission to work on implementing the recommendations including support of local commissions. • Assistance to judicial officers in area of a psychiatrist review of psychotropic medication orders was identified as an area of focus by local commission. 		

Service

JS.07	Judicial Resources and Technical Assistance Program for dependency cases.		
Provided to: The trial courts.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Social Security Act Title IV Part E • United States Code: 42 USC 670 et seq; 45. • Code of Federal Regulations: 45 CFR §§ 1355-1357. • Welfare and Institution Code: The federal IV-E requirements have been codified in various statutes in the W&I Code, including §§ 319, 361, 361.5, 366, 366.21, 366.22, 366.3, 11401, and 11404.1. • Since 1995, the State Department of Social Services has provided funding to support compliance with Title IV-E, thereby ensuring over \$51 million in Title IV-E funding for foster care and child welfare services. 		
Required			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Judicial Council: <i>Judicial Council Directive #62, Activity Status Form</i>, June 2013; reviewed implementation of directive, streamlining program implementation and adopting measures to minimize program impact on court resources (JS - Attachment 4). 	<ul style="list-style-type: none"> • JS - Attachment 4 	

JUVENILE SERVICES

Service

JS.08	Information and technical assistance to juvenile courts.		
Provided to: The trial courts.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • United States Code: 42 USC § 629h (Federal Administration on Children, Youth and Families (ACYF) Program Instruction 06-05). • Funded since 1197 by the Federal Court Improvement Program (CIP) - United States Department of Health and Human Services (HHS). 		
Required			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Court Improvement Project: Final Report</i>, May 1997, Report to the Judicial Council; approved participation in the Court Improvement Program. • <i>Court Improvement Project Implementation Plan</i>, October 1997, Report to the Judicial Council. 		

Service

JS.09	Technical assistance with juvenile court management system data and analytics.		
Provided to: The trial courts.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • United States Code: 42 USC 629h (Federal Administration on Children, Youth and Families (ACYF) Program Instruction 06-05). • Welfare and Institution Code Sections: 16540-16545 (The Child Welfare Leadership and Accountability Act of 2006 mandated the development of court based dependency outcome measures by the Council). • California Rule of Court: 5.505 (specifies dependency outcome measures and how they are analyzed and produced from court data). 		

JUVENILE SERVICES

Service

JS.10	Chief Justice's Keeping Kids in School and Out of Court Initiative.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Judicial Council: <i>Children in Foster Care: Report From the California Blue Ribbon Commission on Children in Foster Care</i>, August 2013, Report to the Judicial Council; the Judicial Council directed AOC staff to seek outside funding, including private foundation funding, for a statewide summit on truancy and school discipline issues facing California, with an emphasis on those issues as they affect children and youth in the juvenile court system. 		

Service

JS.11	California Dependency Online Guide (CalDog).		
Provided to: The trial courts.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • California Rules of Court: 5.660(d) (competent counsel in juvenile dependency cases). 		
Required			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Trial Courts: Allocations from the State Trial Court Improvement and Modernization Fund and Trial Court Trust Fund for Court-Related Projects and Programs</i>, August 2013, Report to the Judicial Council; annually reviews Trial Court Budget Advisory Committee recommendations for CalDOG funding (JS - Attachment 1). • <i>Judicial Council Directive #56, Activity Status Form</i>, February 2013; received implementation of directive making CalDOG the primary information outlet for dependency court professionals (JS - Attachment 5) • Print publications are available rarely and only by prior management approval. 	<ul style="list-style-type: none"> • JS - Attachment 1 • JS - Attachment 5 	

JUVENILE SERVICES

Service

JS.12	Child Welfare County Data Profiles Updates.		
Provided to: The trial courts.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Welfare and Institution Code Section: 16545 (JC required to adopt performance measures for Juvenile dependency court). • California Rules of Court: 5.505 (AOC is required to assist courts in implementing Juvenile Dependency court performance measures). • Funding from Federal Court Improvement Program (CIP) – United States Department of Health and Human Services (HHS). 		
Required			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Judicial Council: <i>Judicial Council Meeting Minutes</i>, October 2013; accepted a resolution from its Blue Ribbon Commission on Children in Foster Care to develop electronic exchanges of information between courts and child welfare agencies (JS - Attachment 6). 		<ul style="list-style-type: none"> • JS - Attachment 6

LANGUAGE SERVICES

Service

LA.01	Court interpreter test administration, development, and maintenance oversight.		
	Provided to: The trial courts and the public.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Court Operations Special Services Office	<ul style="list-style-type: none"> • Government Code Sections: 68561 and 68562. • For all services in this category, see <i>Trial Courts: Allocations From the State Trial Court Improvement and Modernization Fund</i>, April 24, 2007 (LA - Attachment 1); providing the following: <ul style="list-style-type: none"> • At the requested level of funding, the Court Language Access Support Program (CLASP) will be able to sustain and develop the court interpreter pool and promote quality interpretation by providing for the testing, continuing education requirements, and increased recruitment efforts of new interpreters and interpreter candidates, as well as continue to provide programmatic support to the roughly 1800 certified and registered California court interpreters used throughout the courts statewide. The Court Language Access Support Program would be able to provide, at a minimum, all 58 courts with qualified court interpreters by continuing to provide the following: <ul style="list-style-type: none"> • Statewide administration of testing by a Judicial Council-approved testing entity, which ensures consistency in the standards for test administration, test content, test scoring, and reporting not only statewide, but nationally. • Targeted outreach and recruitment activities resulting in a growing number of qualified individuals entering the court interpreter profession. • Infrastructure supporting the use of Video Remote Interpreting (VRI) for ASL. • Sponsoring ethics workshops necessary to comply with Rule of Court 2.890. 	<ul style="list-style-type: none"> • LA - Attachment 1 	

Service

LA.02	Court interpreter outreach and recruitment.		
	Provided to: The trial courts and the public.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Court Operations Special Services Office	<ul style="list-style-type: none"> • Government Code Section: 68562(e). 		

LANGUAGE SERVICES

Service

LA.03	Court interpreter education and training.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Court Operations Special Services Office	<ul style="list-style-type: none"> • Government Code Section: 68562(d). 		

Service

LA.05	5-Year Language Use and Needs Study.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Court Operations Special Services Office	<ul style="list-style-type: none"> • Government Code Section: 68563. 		

Service

LA.06	Court Interpreter Database Collection System (CIDCS).		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Discretionary			
Court Operations Special Services Office	<ul style="list-style-type: none"> • Although the particular data collection system may be discretionary, Government Code 68563 requires the Judicial Council to report to the Legislature every 5 years on interpreter use and language need in California’s trial courts. CIDCS is an important tool to compile the data we are required to report to the Legislature. 		

Service

LA.07	Certified and Registered Master List Maintenance of Court Interpreters.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Court Operations Special Services Office	<ul style="list-style-type: none"> • Government Code Section: 68562. 		

LANGUAGE SERVICES

Service

LA.08	Cross-assignment of court interpreter employees.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Court Operations Special Services Office	<ul style="list-style-type: none"> • Government Code Section: 71810. 		

Service

LA.09	Translations of forms, website, signage, and other resources.		
Provided to: The trial courts, appellate courts, and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Required			
Court Operations Special Services Office	<ul style="list-style-type: none"> • Judicial Council: <i>Trial Courts: Allocations From the State Trial Court Improvement and Modernization Fund</i>, April 24, 2014; report to the Judicial Council from the Trial Court Budget Advisory Committee recommending allocation of STCIMF funds for FY 2014-2015 (LA - Attachment 1). 		<ul style="list-style-type: none"> • LA - Attachment 1
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • Judicial Council: <i>Trial Courts: Allocations from the State Trial Court Improvement and Modernization Fund and Trial Court Trust Fund for Court-Related Projects and Programs</i>, August 2013, Report to the Judicial Council; approves funding recommendation from Trial Court Budget Advisory Committee (LA - Attachment 2). 		<ul style="list-style-type: none"> • LA - Attachment 2

LANGUAGE SERVICES

Service

LA.10 Management of technology to assist in the use of American Sign Language and master contract for telephonic interpreting services.

Provided to: The trial courts and the public.

Office **Attachments**

Discretionary

Court Operations Special
Services Office

Justification/Supporting Documentation

- This is discretionary; however, this activity supports the requirements of Evidence Code section 754 which provides that: In any civil or criminal action, including, but not limited to, any action involving a traffic or other infraction, any small claims court proceeding, any juvenile court proceeding, any family court proceeding or service, or any proceeding to determine the mental competency of a person, in any court-ordered or court-provided alternative dispute resolution, including mediation and arbitration, or any administrative hearing, where a party or witness is an individual who is deaf or hearing impaired and the individual who is deaf or hearing impaired is present and participating, the proceedings shall be interpreted in a language that the individual who is deaf or hearing impaired understands by a qualified interpreter appointed by the court or other appointing authority, or as agreed upon.

LEGAL SERVICES

Service

LE.01	Legal support with claims including investigations and responses.		
	Provided to: The trial courts, appellate courts, Supreme Court, and the AOC.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Legal Services Office	<ul style="list-style-type: none"> • Government Code Section: 811.9. • California Rules of Court: 10.201 and 10.202. 		

Service

LE.02	Management of labor-related matters (such as Public Employment Relations Board hearings and arbitrations).		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Legal Services Office	<ul style="list-style-type: none"> • Judicial Council: <i>Judicial Council Meeting Minutes</i>, February, 2003; mandate that AOC “provide comprehensive legal services for the courts, with the intent that all courts will eventually obtain their legal services solely through the AOC” (page 20 of LE - Attachment 1). 	<ul style="list-style-type: none"> • LE - Attachment 1 	

Service

LE.03	Management of affirmative litigation.		
	Provided to: The Judicial Council, trial courts, appellate courts, Supreme Court, and the AOC.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Legal Services Office	<ul style="list-style-type: none"> • Judicial Council: <i>Judicial Council Meeting Minutes</i>, February, 2003; mandate that AOC “provide comprehensive legal services for the courts, with the intent that all courts will eventually obtain their legal services solely through the AOC” (page 20 of LE - Attachment 1). 	<ul style="list-style-type: none"> • LE - Attachment 1 	

LEGAL SERVICES

Service

LE.04	Litigation management, including selection and direction of outside counsel to defend courts, judicial officers, court employees, and council members.		
Provided to: The Judicial Council, trial courts, appellate courts, Supreme Court, and the AOC.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Legal Services Office	<ul style="list-style-type: none"> • Government Code Section: 811.9. • California Rules of Court: 10.201 and 10.202. 		

Service

LE.05	Legal advice and guidance to courts and education of court staff regarding evolving law affecting employment and labor issues.		
Provided to: The trial courts, appellate courts, Supreme Court, and the AOC.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Legal Services Office	<ul style="list-style-type: none"> • California Rules of Court: 10.451, 10.481, and 10.452-10.491. • The California Rules of Court designate the AOC as approved content provider, but does not specify that Legal Services Office (LSO) is to provide content on behalf of AOC; however, the Labor Employment Unit (LEU) provides such services. 		

Service

LE.06	Legal advice and consultation on a broad spectrum of judicial administration matters.		
Provided to: The Judicial Council, trial courts, appellate courts, Supreme Court, and the AOC.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Legal Services Office	<ul style="list-style-type: none"> • Judicial Council: <i>Judicial Council Meeting Minutes</i>, February, 2003; mandate that AOC “provide comprehensive legal services for the courts, with the intent that all courts will eventually obtain their legal services solely through the AOC” (page 20 of LE - Attachment 1). 	<ul style="list-style-type: none"> • LE - Attachment 1 	

LEGAL SERVICES

Service

LE.07	Legal advice and consultation on transactional business issues, including real estate transactions; solicitations, contracting, and the procurement of goods and services; and court/county MOUs.		
	Provided to: The trial courts, appellate courts, Supreme Court, and the AOC.		
	<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
	Mandatory		
	Legal Services Office	<ul style="list-style-type: none"> • Government Code Sections: 70301–70404 (Trial Court Facilities Act of 2002), 69204, and 69206. • Public Contract Code Sections: 19201–19210. • California Rules of Court: 10.182 and 10.184. 	
	Required		
	Legal Services Office	<ul style="list-style-type: none"> • Judicial Council: <i>Judicial Council Meeting Minutes</i>, February 2003; mandate that AOC “provide comprehensive legal services for the courts, with the intent that all courts will eventually obtain their legal services solely through the AOC” (page 20 of LE - Attachment 1). 	<ul style="list-style-type: none"> • LE - Attachment 1

Service

LE.08	Legal assistance and staff support to the Supreme Court Advisory Committee on Code of Judicial Ethics.		
	Provided to: The Supreme Court.		
	<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
	Mandatory		
	Legal Services Office	<ul style="list-style-type: none"> • Cal. Const., art. VI, §18(m) (“The Supreme Court shall make rules for the conduct of judges, both on and off the bench, and for judicial candidates in the conduct of their campaigns. These rules shall be referred to as the Code of Judicial Ethics.”) • Legal Services Office (LSO) provides this assistance to the Supreme Court at the request of the Chief Justice. 	

Service

LE.09	Legal advice and representation regarding external audits/investigations.		
	Provided to: The Judicial Council, trial courts, appellate courts, Supreme Court, and the AOC.		
	<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
	Required		
	Legal Services Office	<ul style="list-style-type: none"> • Judicial Council: <i>Judicial Council Meeting Minutes</i>, February 2003; mandate that AOC “provide comprehensive legal services for the courts, with the intent that all courts will eventually obtain their legal services solely through the AOC” (page 20 of LE - Attachment 1). 	<ul style="list-style-type: none"> • LE - Attachment 1

LEGAL SERVICES

Service

LE.10	Subject matter expertise and technical assistance with issues including: access and fairness, appellate practice and procedure, Alternative Dispute Resolution, civil and small claims, collaborative courts, complex litigation, family and juvenile law, Judicial administration, judicial ethics, subject matter expertise, jury instructions, probate, and mental health.		
	Provided to: The Judicial Council, trial courts, appellate courts, Supreme Court, and the AOC.		
	<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
	Mandatory		
	Center for Families, Children, and the Courts	<p>Justification/supporting documentation provided for the following bullets of service LE.10: Access and fairness; Family and juvenile law.</p> <ul style="list-style-type: none"> • <u>California Rules of Court:</u> <ul style="list-style-type: none"> • 10.55 (charge to the Advisory Committee on Providing Access and Fairness). • 10.56 (charge to the Collaborative Justice Courts Advisory Committee). • 10.43 (charge to the Family and Juvenile Law Advisory Committee). 	
	Required		
	Legal Services Office	<ul style="list-style-type: none"> • Judicial Council: <i>Judicial Council Meeting Minutes</i>, February 2003; mandate that AOC “provide comprehensive legal services for the courts, with the intent that all courts will eventually obtain their legal services solely through the AOC” (page 20 of LE - Attachment 1). 	<ul style="list-style-type: none"> • LE - Attachment 1
	Center for Families, Children, and the Courts	<p>Justification/supporting documentation provided for the following bullets of service LE.10: Access and fairness; Family and juvenile law.</p> <ul style="list-style-type: none"> • Judicial Council: Approved annual agendas for the Advisory Committee on Providing Access and Fairness, the Collaborative Justice Courts Advisory Committee, and the Family and Juvenile Law Advisory Committee. 	

Service

LE.11	Assistance with responding to subpoenas and disqualification statements.		
	Provided to: The Judicial Council, trial courts, appellate courts, Supreme Court, and the AOC.		
	<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
	Required		
	Legal Services Office	<ul style="list-style-type: none"> • Judicial Council: <i>Judicial Council Meeting Minutes</i>, February 2003; mandate that AOC “provide comprehensive legal services for the courts, with the intent that all courts will eventually obtain their legal services solely through the AOC” (page 20 of LE - Attachment 1). 	<ul style="list-style-type: none"> • LE - Attachment 1

LEGAL SERVICES

Service

LE.12	New and amended local court rules review and assistance with requests for alternative effective dates.		
	Provided to: The Judicial Council, trial courts, and appellate courts.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Legal Services Office	<ul style="list-style-type: none"> • California Rules of Court: 10.613. 		

Service

LE.13	Assistance with evaluation of need for and preparing requests for emergency orders.		
	Provided to: The Judicial Council, trial courts, and appellate courts.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Legal Services Office	<ul style="list-style-type: none"> • Government Code Sections: 68115 (trial courts). • California Rules of Court: 8.66 (appellate courts). • Chief Justice: <i>Memorandum</i>, April 25, 2014; authorized the Legal Services Office to receive and process emergency order requests submitted for consideration (LE - Attachment 2). 	<ul style="list-style-type: none"> • LE - Attachment 2 	

Service

LE.14	Legal advice and assistance with petitions for complex civil case coordination.		
	Provided to: The Judicial Council and trial courts.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Legal Services Office	<ul style="list-style-type: none"> • <u>California Rules of Court:</u> <ul style="list-style-type: none"> • 3.550(a) (necessary administrative functions for complex civil litigation coordination performed at the direction of the Chair of the JC by a coordination attorney in the AOC). • 3.550(b), (c) (coordination attorney duties include assigning case titles and proceeding numbers, and maintaining specified records). 		

LEGAL SERVICES

Service

LE.15	Provision of legal support for acquisition, financing, construction, renovation, operation, and maintenance of court facilities.		
	Provided to: The Judicial Council, trial courts, appellate courts, and the AOC.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Legal Services Office	<ul style="list-style-type: none"> • Government Code Sections: 70301–70404 (Trial Court Facilities Act of 2002), 69204, and 69206. • California Rules of Court: 10.182 and 10.184. 		

Service

LE.16	Management of the Commission on Judicial Performance Insurance Program.		
	Provided to: The Judicial Council, trial courts, appellate courts, and Supreme Court.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Legal Services Office	<ul style="list-style-type: none"> • Judicial Council: <i>Judicial Council Meeting Minutes</i>, July 1999; Judicial Council authorized the Commission on Judicial Performance (CJP) insurance program, directed ADOC to negotiate for insurance coverage, and “direct the AOC to administer the insurance program and a system for ensuring compliance with the educational requirement for those who elect to receive coverage under the insurance policy” (LE - Attachment 3). 	<ul style="list-style-type: none"> • LE - Attachment 3 	

LEGISLATIVE AND BUDGET ADVOCACY SERVICES

Service

LB.01 Advocacy for Judicial Council positions on pending legislation and technical assistance to legislators, staff, and justice partners on court-related legislative issues.

Provided to: The Judicial Council, trial courts, appellate courts, and Supreme Court.

Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
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Mandatory

Office of Governmental Affairs	<ul style="list-style-type: none"> • California Rules of Court: 10.12(a), rev. August 14, 2009. • Cal. Const., art. VI, § 6.
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Service

LB.02 Expertise and assistance with strategy, advice, and recommendations on judicial branch budget discussions.

Provided to: The Judicial Council, trial courts, appellate courts, and Supreme Court.

Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
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Mandatory

Office of Governmental Affairs	<ul style="list-style-type: none"> • Cal. Const., art. VI, § 6.
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Service

LB.03 Tracking of statutory mandates on the Judicial Council to adopt rules, forms, and reports to the legislature.

Provided to: The Judicial Council, trial courts, appellate courts, and Supreme Court.

Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
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Mandatory

Office of Governmental Affairs	<ul style="list-style-type: none"> • Various statutes (LB - Attachment 1). 	<ul style="list-style-type: none"> • LB - Attachment 1
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Service

LB.04 Liaison and strategic advice assistance on facilities issues, court construction, and maintenance.

Provided to: The Judicial Council, trial courts, appellate courts, and Supreme Court.

Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
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Mandatory

Office of Governmental Affairs	California Rules of Court: 10.12 (b), rev. August 14, 2009.
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LEGISLATIVE AND BUDGET ADVOCACY SERVICES

Service

LB.05	Coordination of legislative information and investigatory hearings that impact branch programs and projects.	
Provided to: The Judicial Council, trial courts, appellate courts, and Supreme Court.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
Mandatory		
Office of Governmental Affairs	<ul style="list-style-type: none">• California Rules of Court: 10.12(c), rev. August 14, 2009.• Cal. Const., art. VI, § 6.	

Service

LB.06	Staff support to the Bench-Bar Coalition.	
Provided to: The trial courts, appellate courts, and Supreme Court.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
Discretionary		
Office of Governmental Affairs		

Service

LB.07- New	Provides fiscal impact statements on various pieces of legislation to the Legislature.	
Provided to: The Judicial Council, trial courts, appellate courts, and the Supreme Court.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
Mandatory		
Office of Governmental Affairs	<ul style="list-style-type: none">• Assembly Bill 233 (Ch. 850 Stats of 1997; Trial Court Funding Act).	

MANDATED REPORTING

Service

MR.01	Research, data compilation, and drafting of legislatively mandated reports on behalf of the Judicial Council including but not limited to the following reports: <ul style="list-style-type: none">- Access To Visitation Grants Program- Semi-Annual Report on Contracts for the Judicial Branch- Trial Court Interpreters Program Expenditure Report- Court Reporter Fees Collected & Expenditures for Court Reporter Services in Superior Court Civil Proceedings- Demographics of the Bench- Sentencing of Criminal Defendants by Race and Ethnicity- Judgeship Needs in the Superior Courts- Standards and Measures of Judicial Administration- Annual Special Funds Expenditure Report- Annual Trial Court Allocations Report- Purchase and Lease of Electronic Recording Equipment- Trial Court Revenue, Expenditure, and Fund Balance Constraints- 2 Percent Trial Court Trust Fund State-Level Reserve Funding Requests- Statewide Collections of Court-Ordered Debt- Receipts and Expenditures from Local Courthouse Construction Funds- Judicial Branch AB 1473 Five-Year Infrastructure Plan- Special Facilities Program Reports Requested by the Legislature- 5-Year Language Use and Needs Study- Criminal Justice Realignment Data- California Community Corrections Performance Incentives Act of 2009: Findings from SB 678 Program- Quarterly & Annual Reports on Facility Modification Budgets, Projects, and Expenditures
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Provided to:

Office

Justification/Supporting Documentation

Attachments

Mandatory

- Refer to *Index of Services Provided by the Administrative Office of the Courts, Attachment 2: Judicial Council Reports Mandated by California Code.*

OPERATIONS SUPPORT SERVICES

Service

OS.01	Assigned Judges Program.		
Provided to: The trial courts, appellate courts, and Supreme Court.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Court Operations Special Services Office	<ul style="list-style-type: none"> • Cal. Const., art. 6, § 6. • Government Code Sections: 68543.5, 68543.7, 68544, and 68547. • Genesis of the program lies in the California Constitution: Article 6 section 6 gives the Chief Justice authority to determine eligibility and assign retired judges back to the courts as deemed necessary. • The Government Code sections cited describe requirements for payment of compensation and travel, as defining what constitutes a day of service on assignment. 		
Required			
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services mails out assignment orders. 		

Service

OS.02	Appellate Court-Appointed Counsel Program administration and support.		
Provided to: The trial courts, appellate courts, the Supreme Court, and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Required			
Office of Appellate Court Services	<ul style="list-style-type: none"> • The Court-Appointed Counsel (CAC) Program fulfills the constitutional mandate of providing adequate representation for indigent appellants in the Courts of Appeal on noncapital cases. The Administrative Office of the Courts staff works with nonprofit organizations ("projects") that recommend to the Courts of Appeal the appointment of private attorneys to represent indigent appellants. 		

OPERATIONS SUPPORT SERVICES

Service

OS.03	Staff support to the Appellate Indigent Defense Oversight Advisory Committee.		
Provided to: The appellate courts.			
Office	Justification/Supporting Documentation	Attachments	
Required			
Office of Appellate Court Services	<ul style="list-style-type: none"> • Chief Justice. • The Appellate Indigent Defense Oversight Advisory Committee (AIDOAC) provides the Chief Justice and administrative presiding justices with policy recommendations related to the Court-Appointed Counsel (CAC) program; audits CAC claims; and provides ongoing review of compensation guidelines. AIDOAC was appointed as a special committee of the Chief Justice in late 1990s. 		

Service

OS.05	Administration of Special Masters assignment.		
Provided to: The trial courts, appellate courts, and Supreme Court.			
Office	Justification/Supporting Documentation	Attachments	
Mandatory			
Court Operations Special Services Office	<ul style="list-style-type: none"> • Commission on Judicial Performance rule 121(b). This relates to assignment of special masters for the Commission on Judicial Performance. 		

Service

OS.06	Civil Case Coordination.		
Provided to: The trial courts.			
Office	Justification/Supporting Documentation	Attachments	
Mandatory			
Office of Appellate Court Services	<ul style="list-style-type: none"> • Code of Civil Procedure Sections: 404, 404.3, and 404.8. • California Rules of Court: 3.500, 3.511, 3.524, and 3.550. 		
Required			
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services files materials as they arrive. 		

OPERATIONS SUPPORT SERVICES

Service

OS.07	Management of petitions for coordination of complex civil cases.		
Provided to: The trial courts.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Office of Appellate Court Services	<ul style="list-style-type: none"> • Code of Civil Procedure Sections: 404, 404.3, and 404.8. • California Rules of Court: 3.500, 3.511, 3.524, and 3.550. 		

Service

OS.08	Tribal/State court coordination support.		
Provided to: The trial courts, appellate courts, and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Center for Families, Children, and the Courts	<ul style="list-style-type: none"> • California Rules of Court: 10.60 • This work is now part of the charge to a Judicial Council’s Advisory Committee: The Tribal Court-State Court Forum. 		

Service

OS.09	Vexatious Litigants List administration.		
Provided to: The trial courts.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Mandatory			
Court Operations Special Services Office	<ul style="list-style-type: none"> • Code of Civil Procedure: 391.7 (f) and 391.8 (c). 		

Service

OS.10	Jury improvements in support of initiatives that enhance the utilization of jurors and the jury process.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Court Operations Special Services Office	<ul style="list-style-type: none"> • Judicial Council: <i>Fact Sheet: Jury Improvement Program</i>, May 2011; fact sheet on the formation and responsibilities of the Jury Improvement Program, adopted by the Judicial Council in 1995 (OS - Attachment 1). 	<ul style="list-style-type: none"> • OS - Attachment 1 	

OPERATIONS SUPPORT SERVICES

Service

OS.11	Federal, state, and private foundation fund development and grant administration.		
	Provided to: The trial courts, appellate courts, Supreme Court, and the public.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Discretionary			
Court Operations Special Services Office			

Service

OS.12	Trial Court Business Processing Reengineering expertise and training.		
	Provided to: The trial courts.		
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Special Projects Office	<p>TCBPR Training and Educational Materials</p> <ul style="list-style-type: none"> • Chief Justice: <i>Trial Courts: Trial Court Business Process Reengineering Services</i>, February 2012; activities of Joint Trial Court Presiding Judges Advisory Committee (CPJAC)/Court Executive Advisory Committee (CEAC) Working Group on Trial Court Business Process Reengineering (OS - Attachment 3). 	<ul style="list-style-type: none"> • OS - Attachment 3 	
Special Projects Office	<p>Trial Court Business Process Reengineering (BPR)</p> <ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Annual Report of Special Funds Expenditures for Fiscal Year 2007-2008</i>, December 3, 2008; Special Projects Office creation (formerly Reengineering Unit) (OS - Attachment 2). • Strategic Plan requirements for providing Business Process Reengineering (BPR) expertise for the branch. Strategic Plan Language: <ul style="list-style-type: none"> Goal III: Modernization of Management and Administration; Objective 2. Evaluate and improve management techniques, allocation of funds, internal operations, and services; support the sharing of effective management practices branchwide. Goal IV: Quality of Justice and Service to the Public; Objective 1. Foster excellence in public service to ensure that all court users receive satisfactory services and outcomes. 	<ul style="list-style-type: none"> • OS - Attachment 2 	

OPERATIONS SUPPORT SERVICES

Service

OS.13	Consultative services, technical and complex analytical assistance for court administration and operational matters.		
	Provided to: The trial courts.		
Office Required	Justification/Supporting Documentation	Attachments	
Trial Court Liason Office	<ul style="list-style-type: none"> • Department of Finance: <i>Budget Change Proposal</i>, FY 2001-2002 May Revise; regional offices were established through a 2001-02 Budget Change Proposal (MR AOC 31) to allow the AOC to be more responsive and accessible to the trial courts (OS - Attachment 4). • Under AOC restructuring in October 2012, the Regional Offices were consolidated and became the Trial Court Liason Office (TCLO). • The TCLO provides the same services and activities that the Regional Offices previously provided the trial courts. 	<ul style="list-style-type: none"> • OS - Attachment 4 	

Service

OS.14	Data gathering and recommendations for court operational and administrative issues.		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
Office Required	Justification/Supporting Documentation	Attachments	
Trial Court Liason Office	<ul style="list-style-type: none"> • Department of Finance: see information provided for OS.13. 	<ul style="list-style-type: none"> • OS - Attachment 4 	

Service

OS.15	Assistance to court leaders with addressing internal governance, management, and operational issues.		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
Office Required	Justification/Supporting Documentation	Attachments	
Trial Court Liason Office	<ul style="list-style-type: none"> • Department of Finance: see information provided for OS.13. 	<ul style="list-style-type: none"> • OS - Attachment 4 	

Service

OS.16	Information-sharing through meetings of court leaders.		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
Office Required	Justification/Supporting Documentation	Attachments	
Trial Court Liason Office	<ul style="list-style-type: none"> • Department of Finance: see information provided for OS.13. 	<ul style="list-style-type: none"> • OS - Attachment 4 	

OPERATIONS SUPPORT SERVICES

Service

OS.17 Analytical and administrative support to Administrative Presiding Justices, Presiding Judges, Appellate Court Administrators and Court Executive Officers through the Administrative Presiding Justices Advisory Committee, Trial Court Presiding Judge Advisory Committee, California Court Clerk Association, Appellate Indigent Defense Oversight Advisory Committee (AIDOC), and Court Executives Advisory Committee.

Provided to: The trial courts, appellate courts, and Supreme Court.

Office

Justification/Supporting Documentation

Attachments

Mandatory

Trial Court Liason Office

- California Rules of Court: 10.34(e).

Required

Special Projects Office

Lead staff to Task Force on Trial Court Fiscal Accountability (TFTCFA) comprised of current and immediate-past-presiding judges and court executive officers.

- Judicial Council: *Judicial Council Meeting Minutes*, April 2013; basis for TFTCFA (OS - Attachment 5).

- OS - Attachment 5

RESEARCH AND DATA SERVICES

Service

RD.01	Annual Court Statistics Report.		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
	Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
	Mandatory		
	Court Operations Special Services Office	<ul style="list-style-type: none"> • Cal. Const., art. VI, § 6 (requires the Chief Justice to survey the courts and make recommendations on the business of the courts). • The Court Statistic Report has become the primary vehicle for this annual reporting. 	

Service

RD.02	Development of regular and ad hoc statistical reports for the courts of appeal.		
	Provided to: The appellate courts.		
	Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
	Discretionary		
	Office of Appellate Court Services		

Service

RD.03	Judicial Branch Statistical Information System technical assistance, maintenance, and reporting.		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
	Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
	Mandatory		
	Court Operations Special Services Office	<ul style="list-style-type: none"> • California Rules of Court: 10.400. 	

RESEARCH AND DATA SERVICES

Service

RD.04	Workload-based Allocation Funding Methodology research support.		
Provided to: The trial courts.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Required			
Court Operations Special Services Office	<ul style="list-style-type: none"> • Judicial Council: <i>Trial Court Budget Working Group: Recommendation of New Budget Development and Allocation Methodology</i>, April 2013, Report to Judicial Council (RD - Attachment 1). • Workload-based Allocation Funding Methodology (WAFM) is heavily based on the staff Resource Assessment (RAS) model performed by the Office of Court Research. As noted in the report to the council, The Trial Court Budget Working Group has adopted the updated Resource Assessment (RAS) model as the basis for the trial court budget development and allocation process that is the subject of this recommendation. The Trial Court Budget Advisory Committee continues to refine WAFM and is directed by the council to report back annually on updates to WAFM. 		<ul style="list-style-type: none"> • RD - Attachment 1

Service

RD.05	Assistance with workload analysis used to acquire judicial and court staff resources.		
Provided to: The appellate courts.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Discretionary			
Office of Appellate Court Services			

Service

RD.06	Judge and staff workload measures and analysis.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Court Operations Special Services Office	<ul style="list-style-type: none"> • Government Code Sections: 69614(b) and (c)(1). • Statute provides that the Judicial Council shall report to the Legislature and the Governor on or before November 1 of every even-numbered year on the factually determined need for new judgeships in each superior court. 		

RESEARCH AND DATA SERVICES

Service

RD.06	Judge and staff workload measures and analysis.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Required			
Court Operations Special Services Office	<ul style="list-style-type: none"> • Judicial Council - <i>Trial Court Budget Working Group: Recommendation of New Budget Development and Allocation Methodology</i>, April 2013, Report to Judicial Council; Staff Workload analysis is required by the Judicial Council's adoption of the WAFM (RD - Attachment 1). • The WAFM is based on the RAS, the staff workload model. 		<ul style="list-style-type: none"> • RD - Attachment 1

Service

RD.07	Authorized and filled judgeships data and reporting.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Court Operations Special Services Office	<ul style="list-style-type: none"> • Government Code Section: 69614(c)(1). • See also Government Code 12011.5(n) re: data reporting on judicial diversity. • The Judicial Council shall report to the Legislature and the Governor on or before November 1 of every even-numbered year on the factually determined need for new judgeships in each superior court using the uniform criteria for allocation of judgeships described in subdivision (b), as updated and applied to the average of the prior three years' filings. 		
Required			
Office of Administrative Services	<ul style="list-style-type: none"> • California Rules of Court: 10.1(d). • Office of Administrative Services manages and updates the Contacts and Positioning System (CAPS) Judicial Database which tracks this information. 		

RESEARCH AND DATA SERVICES

Service

RD.08 Conversion of Subordinate Judicial Officer positions to judgeships.

Provided to: The trial courts.

<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
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Mandatory

Court Operations Special Services Office

- Government Code Sections: 69615 – 69617 and 69614(c)(3).
- This work is in support of Government Code section 69615-69617 which provides for the conversion of subornidate judicial officers (SJOs) to judgeships. The Office of Court Research is the point of contact with the courts when they have an eligible vacancy, prepares a report to the Executive and Planning Committee informing them of the vacancy and the court’s eligibility for conversion.

Required

Office of Administrative Services

- California Rules of Court: 10.1(d).
- Office of Administrative Services updates the Contacts and Positioning System (CAPS) database to reflect conversions.

Service

RD.09 Technical support to evaluate staffing or judicial officer allocations against workload model projections.

Provided to: The trial courts.

<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
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Mandatory

Court Operations Special Services Office

- Government Code Sections: 69614(b) and (c)(1).
- Statute provides that the Judicial Council shall report to the Legislature and the Governor on or before November 1 of every even-numbered year on the factually determined need for new judgeships in each superior court.

RESEARCH AND DATA SERVICES

Service

RD.10	Responses to requests for branch data from internal users, members of the public, researchers, and law firms.		
	Provided to: The trial courts, appellate courts, and the public.		
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Discretionary			
Criminal Justice Court Services Office	<ul style="list-style-type: none"> • The Criminal Justice Court Services Office (CJCSO) oversees and coordinates the AOC's efforts in order to improve efficiencies and assistance to the courts, justice partners, and the public. The criminal justice office provides legal, program, and research assistance. 		
Court Operations Special Services Office	<ul style="list-style-type: none"> • Data is also routinely prepared in response to requests from the Legislature. 		
Mandatory			
Court Operations Special Services Office	<ul style="list-style-type: none"> • California Rules of Court: 10.500. 		

Service

RD.11	Data review and reporting.		
	Provided to: The trial courts, appellate courts, and Supreme Court.		
Office	<u>Justification/Supporting Documentation</u>		<u>Attachments</u>
Mandatory			
Criminal Justice Court Services Office	<ul style="list-style-type: none"> • Penal Code Sections: 3015 and 1232. 		

RESEARCH AND DATA SERVICES

Service

RD.12	Production of the annual Jury Data Report.
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Provided to: The trial courts.

<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
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Discretionary		
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Court Operations Special Services Office		
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| | <ul style="list-style-type: none">• The Jury Data Report works to standardize, collect, and analyze fundamental measures of jury operations in the trial courts and to provide this information to court administrators, the public, legislators, and the Judicial Council. By gathering consistent and timely data for each court, the Jury Data Report supports the ongoing evaluation and improvement of the jury management system at both the local and state levels. | |
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SECURITY SERVICES

Service

SS.01	Judicial Online Privacy Protection Program.	
	Provided to: The trial courts.	
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
Discretionary		
Court Operations Special Services Office	<ul style="list-style-type: none">• Government Code Sections: 6254.21 (c)(1)(A) provides: No person, business, or association shall publicly post or publicly display on the Internet the home address or telephone number of any elected or appointed official if that official has made a written demand of that person, business, or association to not disclose his or her home address or telephone number.(c)(3) provides: An elected or appointed official may designate in writing the official's employer, a related governmental entity, or any voluntary professional association of similar officials to act, on behalf of that official, as that official's agent with regard to making a written demand pursuant to this section. A written demand made by an agent pursuant to this paragraph shall include a statement describing a threat or fear for the safety of that official or of any person residing at the official's home address. This program is operated to implement these provisions.	

Service

SS.02	Threat and incident coordination and consultative services.	
	Provided to: The trial courts.	
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
Discretionary		
Court Operations Special Services Office		

SECURITY SERVICES

Service

SS.03	Emergency planning and preparedness/continuity of operations planning.		
Provided to: The trial courts, appellate courts, and Supreme Court.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Court Operations Special Services Office	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>The Operational Plan for California's Judicial Branch, 2008-2011</i> (SS - Attachment 1). • Objective 3 of Goal III provides: <ul style="list-style-type: none"> Improve safety, security—including disaster preparedness—at all court locations for all court users, judicial officers, and staff; with the desired outcome of: Emergency preparedness and continuity of operations plans and programs in all courts. 	<ul style="list-style-type: none"> • SS - Attachment 1 	

Service

SS.04	Physical security consultation, assessment, site surveys, and risk analysis.		
Provided to: The trial courts.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Discretionary			
Court Operations Special Services Office			

Service

SS.05	Screening Equipment Replacement Program.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Court Operations Special Services Office	<ul style="list-style-type: none"> • <u>Judicial Council:</u> <ul style="list-style-type: none"> • <i>Judicial Branch Administration: Judicial Council Delegations to the Administrative Director of the Courts, October 2013, Report to the Judicial Council</i> (item 81 of chart in SS - Attachment 2). • The Judicial Council approved funding for replacement of screening equipment. The report shows the continuing approval of funds specifically for these purposes. 	<ul style="list-style-type: none"> • SS - Attachment 2 	

SECURITY SERVICES

Service

SS.06	Trial Court Security Grant Program.		
Provided to: The trial courts and the public.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Court Operations Special Services Office	<ul style="list-style-type: none"> Judicial Council: <i>Trial Courts: Allocations From the State Trial Court Improvement and Modernization Fund</i>, April 2014, Report to the Judicial Council; The Judicial Council annually approves \$1.2 million in State Trial Court Improvement and Modernization Fund (SCTIMF) funds for this security grant program (SS - Attachment 3). 	<ul style="list-style-type: none"> SS - Attachment 3 	

Service

SS.07- New	Judicial I.D. program. Oversees coordination of a statewide judicial identification program for California judicial officers (justices, Judges, commissioners, and referees). Includes tracking terms of office for replacement as needed.		
Provided to: The Judicial Council, trial courts, appellate courts, and the Supreme Court.			
Office	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>	
Required			
Office of Administrative Services	<ul style="list-style-type: none"> OAS provides this ancillary service at the request of other AOC Offices in support of their mandated, required, and/or discretionary services. 		

SERVICES PROVIDED INTERNALLY TO THE AOC

Service

**IS.01-
New** Digital printing, binding and scanning services. Provides logistical support services to all offices of the AOC for the following services (but not limited to): printing, binding, shipping, and scanning of all documents required for the training of participants and faculty, transportation, signage, and reconciliation of any courier invoices. Examples of printed materials include reports to the Legislature and judicial branch operations-related materials.

Provided to: The Judicial Council, appellate courts, Supreme Court, and the AOC.

<u>Office</u> Required	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
Office of Administrative Services	<ul style="list-style-type: none"> OAS provides this ancillary service at the request of other AOC offices in support of their mandated, required, and/or discretionary services. 	

Service

**IS.02-
New** Internal mail and external mail (USPS) distribution, shipping, and fulfillment services for the AOC, Supreme Court, and 1DCA. Picks up and delivers internal and other mail throughout the AOC and the Supreme Court. Also provides expedited courier service to the US Post Office.

Provided to: The appellate courts, Supreme Court, and the AOC.

<u>Office</u> Required	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
Office of Administrative Services	<ul style="list-style-type: none"> OAS provides this ancillary service at the request of other AOC offices in support of their mandated, required, and/or discretionary services. 	

Service

**IS.03-
New** Contact and Positioning System (CAPS) is the official record of California’s judicial experience. Manages the CAPS database updates and generated reports. Sample activities include: inputting daily updates, creation of rosters and reports, facilitation of mass e-mails to the judiciary, and training of approved staff on how to utilize the system.

Provided to: The AOC.

<u>Office</u> Required	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
Office of Administrative Services	<ul style="list-style-type: none"> OAS provides this ancillary service at the request of other AOC offices in support of their mandated, required, and/or discretionary services. The CAPS database is utilized by a variety of offices including JCSS for the operation/completion of their responsibilities. However, without OAS input, these activities cannot be accomplished. 	

SERVICES PROVIDED INTERNALLY TO THE AOC

Service

IS.04- New	Records Management Program for the AOC. Manages 3000 cubic feet of storage space where personnel, business contracts, administrative, and historical documents are housed. Performs the Records Management functions for the AOC administrative records, including the pick-up, labeling, inventory, data-entry, storage, and disposal of hardcopy records of the AOC.		
	Provided to: The AOC.		
	<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
	Mandatory		
	Office of Administrative Services	<ul style="list-style-type: none"> • Government Code Sections: 14740-14775 (State Records Management Act). • California Rules of Court: 10.5. 	

Service

IS.05- New	Reception services for the AOC. Provides agency-wide main reception support for the San Francisco office. This includes time and date stamping of all mail for accounting, bid solicitations, check matching and distribution, court interpreter questions, and the coordination of conference calls.		
	Provided to: The AOC.		
	<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
	Required		
	Office of Administrative Services	<ul style="list-style-type: none"> • OAS provides this ancillary service at the request of other AOC offices in support of their mandated, required, and/or discretionary services. 	

Service

IS.06- New	Consulting services. Provides subject matter expertise and consulting for internal and Supreme Court and 1DCA customers on print production, records management, Contact and Positioning System (CAPS) report generation, scanning and digitization, and cost effective solutions for shipping and materials movement.		
	Provided to: The AOC.		
	<u>Office</u>	<u>Justification/Supporting Documentation</u>	<u>Attachments</u>
	Required		
	Office of Administrative Services	<ul style="list-style-type: none"> • OAS provides this ancillary service at the request of other AOC offices in support of their mandated, required, and/or discretionary services. 	

SERVICES PROVIDED INTERNALLY TO THE AOC

Service

**IS.07-
New** Shipping/Courier billing reconciliation. Reviews, audits and reconciles the weekly courier invoices for organization wide shipping needs (UPS, FedEx, OnTrac).

Provided to: The AOC.

Office

Justification/Supporting Documentation

Attachments

Required

Office of Administrative Services

- OAS provides this ancillary service at the request of other AOC offices in support of their mandated, required, and/or discretionary services.

Service

**IS.08-
New** Maintains and updates all forms needed for printing, shipping, scanning, records management, retention policies. Updates all request forms, guidelines, policies, and procedures as they pertain to requests for services.

Provided to: The AOC.

Office

Justification/Supporting Documentation

Attachments

Required

Office of Administrative Services

- OAS provides this ancillary service at the request of other AOC offices in support of their mandated, required, and/or discretionary services.

**AOC Services
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Attachment #	Title/Name	Report Page(s)
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AC - Attachment 1	<i>Trial Courts: Allocations From the State Trial Court Improvement and Modernization Fund, April 2014, Report to the Judicial Council.</i>	1, 3, & 5
AC - Attachment 2	<i>Commission for Impartial Courts: Recommendations 37 (a) and (b) and 43 (a), (b), (c), and (g), August 2010, Report to the Judicial Council.</i>	7
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AC - Attachment 4	<i>Your Constitution: The Power of Democracy Steering Committee .</i>	7
AC – Attachment 5	<i>Statewide Action Plan for Serving Self-Represented Litigants, 2004.</i>	1 & 6
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AC – Attachment 7	<i>Prevention of Elder and Dependent Abuse: Plain Language Forms, October 2006, Report to the Judicial Council.</i>	6
Audit Services		
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Capital Projects and Facilities Services		
CP – Attachment 1	<i>Site Selection and Acquisition Policy for Judicial Branch Facilities, August 14, 2009.</i>	13, 14, & 16
CP – Attachment 2	<i>Court Facilities: Location of New Inyo County Courthouse, April 2011.</i>	13 & 14
CP – Attachment 3	<i>California Trial Court Facilities Standards, March 1, 2010.</i>	13, 14, & 16
CP - Attachment 4	<i>Court Facilities: AOC Judicial Branch Capital Program Office's Capital Program Management Manual, April 2014, Report to the Judicial Council.</i>	16
CP – Attachment 5	<i>Prioritization Methodology for Trial Court</i>	16

Attachment #	Title/Name	Report Page(s)
	<i>Capital-Outlay Projects, August 25, 2006.</i>	
CP – Attachment 6	<i>Court Facilities: Rules and Regulations for Relocation Payments and Assistance Regarding Real Property Acquisition, December 2014, Report to the Judicial Council.</i>	16
CP – Attachment 7	<i>Court Facilities Planning: Seismic Safety Policy for Leased Buildings, August 15, 2008.</i>	16 & 20
CP – Attachment 8	<i>Judicial Council Directive #138, Activity Status Form, April 2014.</i>	17 & 21
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