

OREGON JUDICIAL DEPARTMENT



Chief Justice's Recommended Budget

2017-19 Biennium

Submitted to the
79th Legislative Assembly
by The Honorable Thomas A. Balmer
Chief Justice, Oregon Supreme Court

OREGON JUDICIAL DEPARTMENT

Chief Justice's Recommended Budget

2017-19 Biennium

Prepared by:

John Fagan, Budget Manager

David T. Moon, Director, Business and Fiscal Services Division

Kingsley W. Click, State Court Administrator

Mailing Address for Additional Copies or Information

Business and Fiscal Services Division
Office of the State Court Administrator
Supreme Court Building
1163 State Street
Salem, Oregon 97301-2563

Telephone: 503-986-5600
Fax: 503-986-5856
TTY: Oregon Relay Service 711

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THE SUPREME COURT

To the Honorable Senators and Representatives of the 79th Legislative Assembly:

I am pleased to present the Chief Justice's Recommended Budget for the Oregon Judicial Department for the 2017-19 biennium. If passed, this budget will meet Oregon's constitutional requirement to administer justice for Oregonians "completely and without delay." It will provide more of the resources that Oregon's state courts need to provide fair and accessible justice, protect the rights of individuals, preserve community welfare, and sustain public confidence.

My proposed budget maintains current levels of case processing and access to justice for Oregonians but seeks resources to continue to develop and implement improved efficiencies and court access through the now-completed Oregon eCourt system and for courts to make other necessary improvements to their services for the public. This budget includes bonding requests for construction of a new Multnomah County courthouse and funding for several other counties to improve or replace their courthouses.

I present this budget with a full understanding of the difficult choices you will be asked to make in these challenging economic times. The Oregon judicial branch has participated in the deep reductions of the past biennia and still is trying to rebuild through this budget request some of the key infrastructure pieces still missing and critical to our long term mission and effectiveness in providing adequate access to justice services in this state.

Your state courts see the tragic results of people in crisis every day as judges fulfill their constitutional and statutory obligations to ensure that Oregon's children have safe places to live, enforce criminal laws that protect Oregonians from people who would prey on their neighbors, and ensure that the rights of Oregon's businesses and consumers are enforced in economic transactions. Although we cannot control what comes in the courthouse doors, we make every effort to make decisions in these cases in a fair, impartial, and timely manner under the rule of law.

For that reason, my proposed budget also addresses the continuing compensation gap between state judges and Oregon's public-sector lawyers (state and local) – a gap that threatens the judiciary's ability to attract and retain a diverse group of highly skilled judges. The proposal increases the compensation of judges to the regional median level for state court judges.

We in the judicial branch recognize and embrace our interdependence with the executive and legislative branches, and we are committed to working cooperatively to address common issues and concerns on the 2017-19 budget and on substantive matters of

law and policy, including improving services to children and families, reducing costs and improving results in the criminal justice system, and the myriad of other issues the legislature will face that are seen in our state courts every day.

We value the trust and confidence placed in us by the people of Oregon. That trust can be maintained only if the courts have sufficient resources to address the more than one million cases that will be filed during the coming biennium. We ask for your help in fulfilling our responsibilities to all Oregonians, and we look forward to working with you.

Respectfully submitted,

A handwritten signature in black ink, appearing to read "Thomas A. Balmer". The signature is fluid and cursive, with the first name "Thomas" being more legible than the last name "Balmer".

Thomas A. Balmer
Chief Justice, Oregon Supreme Court

OREGON COURTS

OUR ACCOMPLISHMENTS AND STRATEGIC PRIORITIES

Major Accomplishment Highlights: 2015-16 (to date)

- **Completed Implementing Oregon eCourt Program.** Four years after the Yamhill County Circuit Court became the first Oregon eCourt pilot court, the Oregon eCourt system was successfully installed in eight Eastern Oregon courts, completing statewide implementation of the Oregon eCourt system. Final steps are underway to close out Oregon eCourt implementation by the end of 2016, and OJD will move to the operation and maintenance stage.
- **Statewide Electronic Filing and Service of Court Documents.** A key efficiency of Oregon eCourt – for the courts themselves and for lawyers – was achieved with the successful implementation of eFiling and eService in the Odyssey courts. Pleadings can be filed at any time and from any location with internet access. Service of the opposing party also occurs electronically. eFiling is available in all state courts – every circuit court, the Tax Court, and both appellate courts – and attorneys are required to eFile pleadings. A survey of Oregon State Bar members in May 2016 found that two-thirds of respondents said that eFiling increased their access to the courts, more than 60 percent said it increased their productivity, and almost half said it reduced their costs. More than one million eFilings have been received thus far in 2016.
- **Electronic Access to Court Documents.** Court documents in public case types now are available electronically for public- and private-sector subscribers. OJD provides document access at no charge to public safety agencies, other government users, and state-paid indigent defense attorneys, and provides paid access to Oregon State Bar members and news media, title companies, financial institutions, and other businesses that use court information. This electronic access allows access to court case files without going to the courthouse or waiting for paper files to be found, and allows multiple users to view or work on court documents simultaneously.
- **Interview-based Court Forms for Self-Represented Litigants.** OJD is expanding development and availability of OJD iForms – interview-based, intelligent forms for people not represented by attorneys in small claims, landlord-tenant, a variety of family law cases, and many protective orders. These forms improve access to the courts by making it easier to provide to courts the information required by law to adjudicate their cases and expedites resolution of their case because courts have complete and legible information. The forms can be more quickly updated to respond to law changes and also can be eFiled.
- **Continued the Work of the OJD Court Reengineering and Efficiency Workgroup (CREW).** This internal committee conducts ongoing research, study, and identification of efficiencies and innovations that would cut costs, improve productivity, and enhance court services to Oregonians. This biennium showed continued progress on the development and implementation of CREW recommendations including:

1. Approving business processes to promote statewide consistency among trial courts, including consolidating the number and types of court forms and different methods for how courts receive and process information in order to provide better data and to reduce complexity and confusion for litigants.
 2. Deciding how to calculate case aging, so OJD can develop reports that assist presiding judges and trial court administrators manage their courts and caseload, and informs OJD Key Performance Measures.
 3. Continued exploring methods to identify the need for additional judicial resources in the 27 judicial districts and how to utilize Oregon eCourt to allow courts to assist each other meeting short-term and emergency needs.
 4. Initiated an overhaul of OJD’s web pages, to promote consistency, make key information easier to find, and improve access to materials via smartphone and tablets.
 5. Continued its work on the Oregon Docket Management Initiative to improve docket management and timely case disposition in trial courts.
- **Opened New Courthouses in Union and Jefferson Counties.** The first counties to receive state funding assistance to replace unsafe courthouses opened their new facilities in 2016. The new Jefferson County Courthouse is the first courthouse completed using state bond matching funds from the Oregon Courthouse Capital Construction and Improvement Fund.
 - **Continued Outreach Efforts by the Appellate Courts.** The Oregon Supreme Court heard cases at all three Oregon law schools and at Marist High School in Eugene. The Court of Appeals heard cases in Milton-Freewater, Albany, and Portland Community College (Cascade Campus).
 - **Worked to Improve Services to Juveniles.** The Juvenile Justice Mental Health Task Force issued its report calling for a unified, coordinated system of assessment, intervention, and care for Oregon’s youth in schools, foster care, and delinquency systems. In addition, judges were closely involved in groups reviewing Oregon’s foster care system and improving representation of the state and families in child welfare cases.
 - **Continued Participation in Reducing Oregon’s Prison Population.** Judges play crucial roles at the state and local levels to ensure that state Justice Reinvestment Act funds are spent effectively to reduce Oregon’s prison population while protecting public safety.
 - **Expanded Inclusion, Access, and Collaboration Efforts.** Established the Supreme Court Council on Inclusion and Fairness to study and make recommendations to address Oregon’s access and diversity needs, and established a State and Tribal Court Judges Forum to better communicate and collaborate in areas such as the Indian Child Welfare Act and Violence Against Women Act.

2017-19 Priorities

- **Ensure Oregon Courts Have Adequate Resources to Fulfill Their Core Responsibilities.** Oregon’s constitution requires courts to administer justice “without delay,” and many Oregon statutes set specific timelines for court actions. Courts need to

be open to the public to provide protective orders and other time-sensitive actions as well as meeting these legal requirements. Oregon courts need a stable and adequate operating budget.

- **Maintain the Improvements in Oregon eCourt Technology.** This new technology system and court operations environment needs to be maintained to ensure its effective and secure operation. Permanent resources are needed for technology staff, testing system changes and upgrades, improving and expanding eFiling and iForms, training for judges and staff in order to improve court processes and obtain work efficiencies, improve statewide consistency in court processes, expand access to the courts, and improve information for judicial and management decision-making.
- **Provide Appropriate Judicial Compensation.** Oregon’s judicial compensation remains well below the median for comparable states as well as the compensation for Senior Assistant Attorneys General and other high-level public-sector lawyers who appear before state judges. Appropriate compensation recognizes the level of responsibility inherent in judicial positions and will attract and retain the diverse group of highly qualified and experienced judicial candidates necessary to fulfill this important public service.
- **Provide Resources for Population Growth and Caseload Changes.** The budget requests additional judicial resources to meet population growth and address workload needs in juvenile cases, as well as increased violation caseloads in Multnomah County.
- **Expand Assistance for Self-represented Individuals and Family Law Cases.** Thousands of residents involved in domestic relations, child support, child custody and visitation, landlord-tenant, and other proceedings are not represented by lawyers. Without materials and assistance from court personnel to help them prepare for their day in court, their cases create backlogs and delays in these important family and child welfare issues, while creating additional work for judges and court staff. The budget requests restoring facilitator positions and funding to improve county-based conciliation and mediation services in family law cases.
- **Ensure Safe Courthouse Facilities.** Support a long-term state court facility and security improvement plan that prioritizes improvement and replacement projects, involving county courthouses that house circuit court operations and the historic Supreme Court Building in Salem. Just as Oregon needs to maintain the rule of law as the philosophical foundation of our society, we need to provide safe and appropriate physical foundations for court services. Many of Oregon’s court facilities are unsafe or insufficient, and need urgent attention. The budget requests seismic reinforcement for the century-old Supreme Court building, state matching funds to replace three unsafe county courthouses, and funds for capital improvements to other county courthouses.
- **Preserve Statewide Availability of Treatment Court Programs** such as drug courts, DUII courts, veteran’s courts, and mental health courts that demonstrate positive evidence-based outcomes for offenders and the community, and continue other alternative dispute resolution programs that produce effective and more satisfactory long-term results for clients, litigants, and taxpayers.

- **Continue Funding for Court Collections.** OJD pays the Oregon Department of Revenue and private collection firms to collect court-imposed financial obligations and also pays credit-card charges for persons paying fines online. Without sufficient funding, these collections will decrease and reduce revenue to the state.
- **Improve Court Outreach Efforts.** The Supreme Court has established a Council on Inclusion and Fairness to continue work on ensuring fairness in Oregon court procedures and outreach to diverse communities, and also established a Tribal, State, and Federal Courts Forum to promote collaboration and coordination on tribal law issues, including the Indian Child Welfare Act and Violence Against Women Act. The budget requests minimal staffing for these two bodies.
- **Resources for the Oregon Law Commission.** The budget transmits two requests from the Oregon Law Commission for additional resources.



Certification

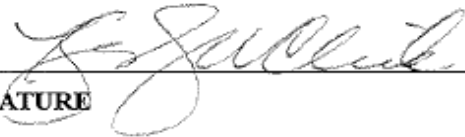
I hereby certify that the accompanying summary and detailed statements are true and correct to the best of my knowledge and belief and that the accuracy of all numerical information has been verified.

Oregon Judicial Department

1163 State Street, Salem, OR 97301-2563

AGENCY NAME

AGENCY ADDRESS


SIGNATURE

State Court Administrator

TITLE


SIGNATURE

Business and Fiscal Services Director

TITLE

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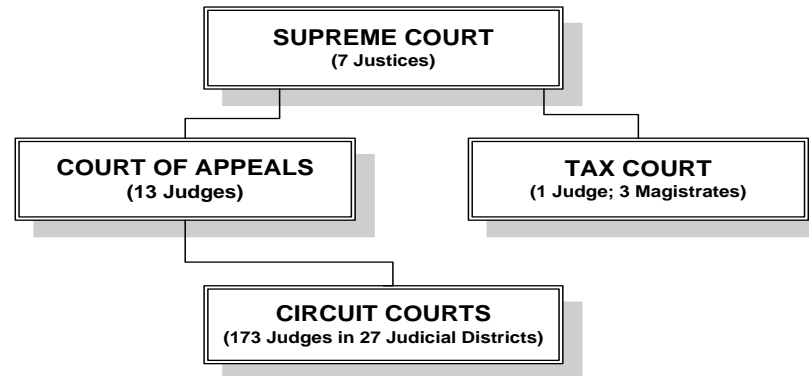
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ORGANIZATION

Organization

OREGON JUDICIAL DEPARTMENT Court Jurisdiction Structure



History and Milestones

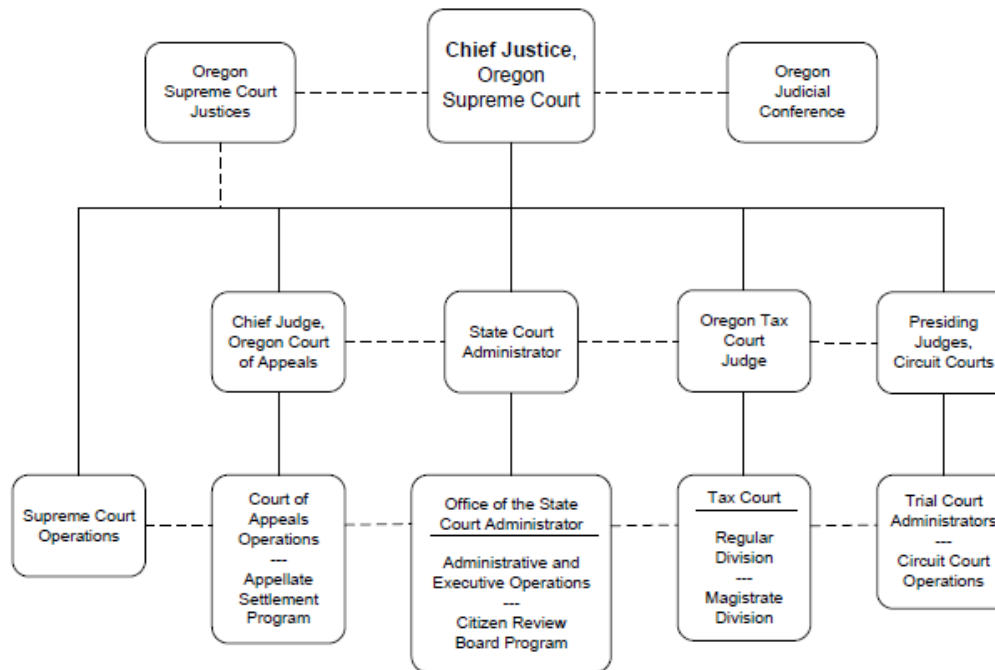
- The 1981 Legislative Assembly consolidated Oregon’s district court, circuit courts, and the appellate courts into a unified, state-funded court system, effective January 1, 1983, known as the Oregon Judicial Department (OJD). Municipal, county, and justice courts continue as limited jurisdiction tribunals outside of the state-funded court system and are not subject to its administrative control and oversight.
- Effective September 1, 1997, the Legislature created a Tax Magistrate Division in the Oregon Tax Court to replace the administrative tax appeals structure formerly in the Department of Revenue. The tax magistrates are appointed by the Tax Court Judge.
- Effective January 15, 1998, the Legislature abolished the district courts and merged their judges and jurisdiction with that of the circuit courts to form a single unified trial court level.
- Effective July 1, 2001, the indigent defense program transferred from OJD to a separate and autonomous Public Defense Services Commission that resides within the judicial branch of government.
- Effective October 1, 2013, the Legislature added a new three-judge panel to the Court of Appeals, bringing the total judicial positions to 13.
- Effective July 1, 2016, the Oregon eCourt (Odyssey) system was implemented in all circuit courts and the tax court, completing a five-year statewide rollout schedule.

ORGANIZATION

General

The judges of the Supreme Court, Court of Appeals, and Tax Court are elected by voters in nonpartisan, statewide elections for six-year terms. The Chief Justice is selected by the judges on the Supreme Court for a six-year term. The judges of the circuit courts are elected by voters in nonpartisan, judicial district elections for six-year terms. There are 27 judicial districts composed of one or more counties. The state courts handle over 1.1 million filings a biennium and employ approximately 1,600 staff at the state and local court levels.

Oregon Judicial Department Administrative Organization January 2017



KWC:jm/Admin Org for OJD 2017-01

ORGANIZATION

Elected Officials Roster

(January 1, 2017)

Supreme Court

(Seniority Order)

Balmer, Thomas A. (Chief Justice)
Kistler, Rives

Walters, Martha L.
Landau, Jack L.

Brewer, David V.
Baldwin, Richard C.

Nakamoto, Lynn R.

Court of Appeals

(Seniority Order)

Hadlock, Erika L. (Chief Judge)
Armstrong, Rex E.
Ortega, Darleen
Sercombe, Timothy J.

Duncan, Rebecca A.
Egan, James C.
De Vore, Joel S.
Lagesen, Erin C.

Tookey, Douglas L.
Garrett, Christopher L.
Flynn, Meagan A.
De Hoog, Roger J.

Shorr, Scott A.

Tax Court

Breithaupt, Henry C.

Circuit Court Judge

(Alphabetical Order)

Abar, Donald
* Adkisson, Marci W.
Adler, A. Michael
* Ahern, Daniel J.
Albrecht, Cheryl A.
Allen, Beth A.
Ambrosini, George W.
Armstrong, Sean E.
Ashby, Wells B.
Avera, Sally L.
Bachart, Sheryl M.
Bagley, Beth M.

* Bailey, D. Charles
* Baker, Lindi L.
Barnack, Timothy
* Barron, Richard L.
* Baxter, Gregory L.
Beaman, Cynthia L.
Bechtold, Paula M.
Bennett, J. Channing
Bergstrom, Eric J.
Bispham, Carol R.
Bloch, Eric J.
Bloom, Benjamin M.

Bottomly, Leslie G.
* Brady, Alta J.
* Branford, Thomas O.
Brauer, Christopher R.
* Brownhill, Paula J.
Broyles, Audrey J.
Bunch, William D.
* Burge, Frances E.
Burton, Claudia M.
Bushong, Stephen
Butterfield, Eric E.
Callahan, Cathleen B.

* Campbell, Monte S.
Carlson, Charles D.
Chanti, Suzanne
Collins, John L.
* Connell, David B.
Conover, R. Curtis
Crain, Patricia
* Cramer, William D., Jr.
Dahlin, Eric L.
Dailey, Kathleen M.
Darling, Deanne L.
Day, Vance D.

ORGANIZATION

Circuit Court Judge *(continued)* (Alphabetical Order)

| | | | |
|-----------------------|--------------------------|--------------------------|-------------------------|
| Delsman, David E. | * Hung, Lung | McKnight, Maureen H. | Sanders, Paulette E. |
| Donohue, Matthew J. | Immergut, Karin J. | Mejia, Lorenzo A. | Silver, Gregory F. |
| * Dretke, Brian C. | Jacquot, Megan L. | Menchaca, Richardo | Simmons, Ann Marie |
| Easterday, Cynthia L. | James, Mary M. | Merten, Maurice K. | Sims, Theodore E. |
| Erwin, Andrew R. | James, Bronson D. | Miller, Eve L. | Skye, Kelly |
| Flint, Bethany P. | Janney, Andrea M. | Miller, Walter R Jr. | Stauffer, Janet L. |
| Forte, Stephen P. | Johnson, Kathleen E. | Mooney, Josephine H. | Steele, Kathie F. |
| Frantz, Julie E. | Jones, Edward J. | * Murphy, Daniel R. | Stone, Martin E. |
| Fun, James L. | Jones, Jeffrey S. | Nelson, Adrienne C. | * Stone, Ronald W. |
| Garcia, Oscar | Kantor, Henry | Newman, Michael A. | Stuart, Diana I. |
| * Gerking, Timothy C. | Kasubhai, Mustafa T. | * Nichols, Robert F. Jr. | Svetkey, Susan M. |
| Geyer, Courtland | Karabeika, Heather L. | Norby, Susie L. | Temple, Eva J. |
| * Grant, Jenefer S. | LaBarre, Jerome E. | Novotny, DeAnn L. | Tennyson, Katherine E. |
| Greenlich, Michael A. | Landis, Erin K. | * Olson, John A. | Thompson, Kirsten E. |
| Greif, Lisa C. | Leith, David E. | Osborne, Roxanne B. | Trevino, Mari G. |
| Grensky, Ronald D. | Letourneau, Donald R. | Ostrye, Karen | Tripp, Susan M. |
| Grove, Ted E. | Lieuallen, Jonathan S. | Pagán, Ramón A. | Upton, Suzanne M. |
| Hampton, Lynn W. | Litzenberger, Marilyn E. | Partridge, Lindsay R. | Van Dyk, Douglas V. |
| Hart, Thomas M. | Lopez, Angel | Pellegrini, Cheryl A. | Villa-Smith, Kathryn L. |
| Hehn, Amy Holmes | Love, Valeri L. | * Prall, Tracy A. | Vogt, Debra K. |
| Henry, Patrick W. | Loy, Michael S. | Raines, Keith R. | Walker, Kenneth R. |
| * Herndon, Robert D. | Margolis, Jesse C. | * Rasmussen, Karsten H. | * Waller, Nan G. |
| * Hill, Daniel J. | Marshall, Christopher J. | Rastetter, Thomas J. | Weber, Katherine E. |
| * Hill, Jonathan R. | Marshall, William A. | Ravassipour, Kelly W. | West, Russell B. |
| Hill, Norman R. | Matarazzo, Judith H. | Rees, David F. | Wetzel, Michael C. |
| Hillman, Annette | Matyas, Cindee S. | Rigmaiden, Clara L. | Wiles, Ladd |
| Hodson, Jerry B. | McAlpin, Jay A. | Roberts, Beth L. | Williams, Gary L. |
| Holland, Lauren S. | McHill, Thomas A. | Roberts, Leslie M. | Williams, Locke A. |
| Hoppe, David O. | McIntosh, Dawn M. | Rooke-Ley, Ilisa | Wipper, Janelle F. |
| Hull, Thomas M. | McIntyre, Karrie K. | Ryan, Thomas M. | Wittmayer, John A. |

ORGANIZATION

Circuit Court Judge (*continued*) (Alphabetical Order)

Wogan, Cameron F.
Wolf, John A.

Wolke, Pat
Wyatt, Merri Souther

Zennaché, Charles M.

** Presiding Judge, appointed by Chief Justice for two-year term*

Court Administration Roster

Office of the State Court Administrator

Click, Kingsley W.
State Court Administrator
Baehr, Bryant, Director
Enterprise Technology Services Division
Chandler, Terrie J., Director
Human Resource Services Division
Croisan, Mollie A., Director
Education, Training, and Outreach Division

Hightower, Karen, Director
Legal Counsel Division
Hotrum, Darrin, Chief Audit Executive
Internal Audit
McKenzie, Leola, Programs Director
Juvenile and Family Court Programs Division
Mills, Kelly, Program Manager
Court Language Access Services

Moon, David T., Director
Business and Fiscal Services Division
Osborne, Rebecca J., Administrator
Appellate Court Services Division
West, Evan, Chief Marshal
Security and Emergency Preparedness Office

Trial Court Administrators

(Alphabetical Order / Court / Judicial District)

Belshe, Jim, Trial Court Administrator
Linn (23rd JD)
Bittick, Heidi, Trial Court Administrator
Polk (12th JD)
Blaine, Roy N., Trial Court Administrator
Morrow, Umatilla (6th JD)
Bonkosky, Amy D., Trial Court Administrator
Crook, Jefferson (22nd JD)
Brust, Kirk L., Trial Court Administrator
Josephine (14th JD)

Calloway, Elaine, Trial Court Administrator
Baker (8th JD)
Curtis, Angie R., Trial Court Administrator
Gilliam, Hood River, Sherman, Wasco,
Wheeler (7th JD)
Dover, Tammy R., Trial Court Administrator
Yamhill (25th JD)
Hall, Jeffrey, Trial Court Administrator
Deschutes (11th JD)
Hukari, Linda, Trial Court Administrator
Benton (21st JD)

Hurliman, Emily A., Trial Court Administrator
Tillamook (27th JD)
Kleker, Robert, Trial Court Administrator
Jackson (1st JD)
Leonard, Michelle, Trial Court Administrator
Union, Wallowa (10th JD)
Marcille, Barbara B., Trial Court Administrator
Multnomah (4th JD)
Merrill, Lee, Trial Court Administrator
Clatsop (18th JD)

ORGANIZATION

Trial Court Administrators (*continued*)

(Alphabetical Order / Court / Judicial District)

Migliaccio, Kim, Trial Court Administrator
Malheur (9th JD)
Moellmer, Richard E., Trial Court Administrator
Washington (20th JD)
Morse, Diane M., Trial Court Administrator
Marion (3rd)
Powell, John, Trial Court Administrator
Klamath, Lake (13th & 26th JD)

Rambo, Elizabeth, Trial Court Administrator
Lane (2nd JD)
Savage, Bonnie R., Trial Court Administrator
Lincoln (17th JD)
Spradley, Debbie D., Trial Court Administrator
Clackamas (5th JD)
Wheeler, Tammy L. Trial Court Administrator
Grant, Harney (24th JD)

Wild, Zoe, Trial Court Administrator
Columbia (19th JD)
Vacant, Trial Court Administrator
Coos, Curry (15th JD)
Vacant, Trial Court Administrator
Douglas (16th JD)

Court Administration Locations

Supreme Court, Court of Appeals, Office of the State Court Administrator

Supreme Court Bldg., 1163 State Street, Salem 97301-2563

Tax Court/Tax Magistrate Division

Supreme Court Bldg., 1163 State Street, Salem 97301-2563

Baker County Courthouse – Judicial District 8

1995 3rd Street, Suite 220, Baker City 97814-3313

Benton County Courthouse – Judicial District 21

120 NW Fourth Street, P.O. Box 1870, Corvallis 97339

Clackamas County Courthouse – Judicial District 5

807 Main Street, Oregon City 97045

Clatsop County Courthouse – Judicial District 18

749 Commercial Street, P.O. Box 835, Astoria 97103

Columbia County Courthouse – Judicial District 19

230 Strand Street, St. Helens 97051-2041

Coos County Courthouse – Judicial District 15

250 N. Baxter, Coquille 97423

Crook County Courthouse – Judicial District 22

300 NE Third Street, Prineville 97754

Curry County Courthouse – Judicial District 15

29821 Ellensburg Ave., 94235 Moore St., Ste. 200, Gold Beach 97444

Deschutes County Courthouse - Judicial District 11

1100 NW Bond, Bend 97703

Douglas County Courts – Judicial District 16

Justice Building, Room 201, 1036 SE Douglas Street, Roseburg 97470

Gilliam County Courthouse – Judicial District 7

221 S. Oregon, P.O. Box 427, Condon 97823-0427

Grant County Courthouse – Judicial District 24

201 S. Humbolt St., P.O. Box 159, Canyon City 97820

Harney County Courthouse – Judicial District 24

450 N. Buena Vista, No. 16, Burns 97720

ORGANIZATION

Court Administration Locations (*continued*)

Hood River County Courthouse – Judicial District 7

309 State Street, Hood River 97031

Jackson County Courts – Judicial District 1

Justice Building, 100 S. Oakdale Avenue, Medford 97501

Jefferson County Courthouse – Judicial District 22

129 SW “E” Street, Suite 101, Madras 97741-1794

Josephine County Courthouse – Judicial District 14

500 NW 6th, Dept. 17, Grants Pass 97526

Klamath County Courthouse – Judicial District 13

316 Main Street, Klamath Falls 97601

Lake County Courthouse – Judicial District 26

513 Center Street, Lakeview 97630

Lane County Courthouse – Judicial District 2

125 E. 8th Avenue, Eugene 97401

Lincoln County Courthouse – Judicial District 17

225 W. Olive, P.O. Box 100, Newport 97365

Linn County Courthouse – Judicial District 23

300 Fourth Avenue SW, P.O. Box 1749, Albany 97321

Malheur County Courthouse – Judicial District 9

251 “B” Street W., #3, Vale 97918

Marion County Courthouse – Judicial District 3

100 High Street NE, P.O. Box 12869, Salem 97309-0869

Morrow County Courthouse – Judicial District 6

P.O. Box 609, Heppner 97836

Multnomah County Courthouse – Judicial District 4

1021 SW 4th Avenue, Portland 97204

Polk County Courthouse -- Judicial District 12

850 Main Street, Dallas 97338

Sherman County Courthouse – Judicial District 7

P.O. Box 402, Moro 97039

Tillamook County Courthouse – Judicial District 27

201 Laurel Avenue, Tillamook 97141-2311

Umatilla County Courthouse - Judicial District 6

216 SE Fourth, Pendleton 97801

Union County Courthouse – Judicial District 10

1105 “K” Avenue, La Grande 97850

Wallowa County Courthouse – Judicial District 10

101 S. River Street, Room 204, Enterprise 97828

Wasco County Courthouse – Judicial District 7

Fifth & Washington, P.O. Box 1400, The Dalles 97058-1400

Washington County Courthouse – Judicial District 20

150 N. First Avenue, Hillsboro 97124

Wheeler County Courthouse – Judicial District 7

P.O. Box 308, Fossil 97830

Yamhill County Courthouse – Judicial District 25

535 NE 5th Street, Rm. #133, McMinnville 97128

ORGANIZATION

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LEGISLATIVE ACTION

Legislative Action

Budget Background

Over the past few biennia, the budget for the Oregon Judicial Department (OJD) has undergone significant changes. The state financial crisis from 2007 through 2011 required significant reductions in operational budgets, resulting in 169 fewer full-time equivalent positions in the department, and temporary surcharges to court fees and fines added to the revenue structure to pay for court operations. During the 2011 legislative session, HB 2710 and HB 2712 were passed. These bills:

- Restructured revenue and statutory distributions associated with filing fees to include them in the OJD budget;
- Modified presumptive fines for violations and expanded judicial discretion to reduce fines;
- Changed the monetary flow into and out of the Criminal Fine Account and operation of the State Court Facilities and Security Account;
- Moved collection and revenue management for OJD from Other Funds to General Fund; and
- Established payment for Legal Aid out of filing fees.

These changes required major moves in the OJD budget, establishment of new General Fund appropriations, moves between General Fund and Other Funds expenses, and creation of many pass-through payments of General Fund to Other Funds to various entities.

Budgets over the past few biennia have included:

- Oregon eCourt bonding, debt service, and implementation costs;
- Payments for Legal Aid by pass-through (instead of direct allocation) and additional General Fund support;
- Establishment of the State Court Technology Fund; and
- Establishment of the Oregon Courthouse Capital Construction and Improvement Fund.

Major Budget Impacts to the 2015-17 Legislatively Approved Budget

During the 2015 legislative session, several changes were made to the 2015-17 OJD budget.

- **Expansion of the State Court Technology Fund:** HB 2562 established the State Court Technology Fund for the purpose of funding state court electronic applications, service, systems, and public access. In prior biennia, some expenditures associated with the Oregon Judicial

LEGISLATIVE ACTION

Information Network (OJIN) were paid for from user fees associated with data access. For the 2015-17 biennium, increasing costs for electronic filing of case documents and online payment of court fines required increases in limitation. New support positions and funding for public outreach were added. Funds from the old OJIN fund were moved into the Technology Fund during 2016.

- **Expansion of the Oregon Courthouse Capital Construction and Improvement Fund:** In the 2013 legislative session, HB 5008 established the Oregon Courthouse Capital Construction and Improvement Fund (OCCCIF), with the intent of providing matching state funds through the sale of Article XI-Q bonds for county courthouse construction under rules established by SB 5506. Two projects were authorized for bonding during the 2013-15 biennium, Multnomah County (up to \$15 million) and Jefferson County (up to \$4 million). For the 2015-17 biennium, continued support for Multnomah County (\$17.7 million) and Jefferson County (\$2.6 million) were approved by the Legislature. Additional projects were added for Tillamook County (\$8 million) and Lane County (\$1.45 million). A budget note for OJD was added in the 2016 session to report to the Legislature on the 12-year outlook for courthouse replacement projects and priority rankings for those projects. See “Chief Justice Report on Potential Courthouse Replacement Funding Requests” in the [Special Reports](#) section.
- **Fixed Photo Radar in Multnomah County:** During the 2015 legislative session, the City of Portland received approval to allow for fixed photo radar locations in high traffic corridors (HB 2621). OJD received budget and positions to allow for processing of 50,000 additional citations annually for startup of the program, and a special purpose appropriation of \$1 million that would need to be accessed by December of 2016 if the projected additional citation volume exceeded projections.

Legislation Impacting 2015-17 Legislatively Approved Budget

- **SB 5514 (2015)** – Budget Bill
- **HB 5029 (2015)** – Criminal Fine Account Allocations
- **HB 5005 (2015)** – Bonding Bill
- **SB 5507 (2015)** – Rebalance Bill
- **HB 2621 (2015)** – Photo Radar Bill
- **SB 501 (2015)** – Program Change Bill
- **HB 5201 (2016)** – Criminal Fine Account Allocations
- **HB 5202 (2016)** – Bonding Bill
- **SB 1597 (2016)** – Program Change Bill
- **SB 5701 (2016)** – Rebalance Bill

LEGISLATIVE ACTION

78th OREGON LEGISLATIVE ASSEMBLY--2015 Regular Session

Enrolled Senate Bill 5514

Printed pursuant to Senate Interim Rule 213.28 by order of the President of the Senate in conformance with pre-session filing rules, indicating neither advocacy nor opposition on the part of the President (at the request of Oregon Department of Administrative Services)

CHAPTER

AN ACT

Relating to the financial administration of the Judicial Department; and declaring an emergency.

Be It Enacted by the People of the State of Oregon:

SECTION 1. There are appropriated to the Judicial Department, for the biennium beginning July 1, 2015, out of the General Fund, the following amounts, for the following purposes:

| | |
|--------------------------------------|---------------|
| (1) Judicial compensation..... | \$ 70,295,909 |
| (2) Operations..... | \$287,907,999 |
| (3) Mandated payments..... | \$ 15,558,373 |
| (4) Electronic court..... | \$ 1,978,661 |
| (5) Debt service..... | \$ 18,508,525 |
| (6) Third-party debt collection..... | \$ 11,776,898 |

SECTION 2. Notwithstanding any other law limiting expenditures, the following amounts are established for the biennium beginning July 1, 2015, as the maximum limits for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts and including reimbursements from federal service agreements, but excluding lottery funds and federal funds not described in this section, collected or received by the Judicial Department for the following purposes:

| | |
|--|---------------|
| (1) Operations..... | \$ 13,048,139 |
| (2) Mandated payments..... | \$ 660,444 |
| (3) Electronic court..... | \$ 292,900 |
| (4) State Court Facilities and Security Account | \$ 11,071,244 |
| (5) Legal Aid Account | \$ 11,900,000 |
| (6) State Court Technology Fund... | \$ 6,955,217 |
| (7) Oregon Courthouse Capital Construction and Improvement Fund..... | \$ 37,472,985 |

SECTION 3. Notwithstanding any other law limiting expenditures, the amount of \$17,276,215 is established for the biennium beginning July 1, 2015, as the maximum limit for payment of expenses for electronic court from bond proceeds collected or received by the Judicial Department.

SECTION 4. Notwithstanding any other law limiting expenditures, the amount of \$1,598,284 is established for the biennium beginning July 1, 2015, as the maximum limit for

payment of expenses from federal funds other than those described in section 2 of this 2015 Act collected or received by the Judicial Department.

SECTION 5. In addition to and not in lieu of any other appropriation, there is appropriated to the Judicial Department, for the biennium beginning July 1, 2015, out of the General Fund, the amount of \$231,319 for payment of expenses of the Oregon Law Commission.

SECTION 6. In addition to and not in lieu of any other appropriation, there is appropriated to the Judicial Department, for the biennium beginning July 1, 2015, out of the General Fund, the amount of \$53,560 for payment of expenses of the Council on Court Procedures.

SECTION 7. (1) In addition to and not in lieu of any other appropriation, there is appropriated to the Judicial Department, for the biennium beginning July 1, 2015, out of the General Fund, the amount of \$7,428,755 for the purpose of providing conciliation and mediation services in circuit courts.

(2) The Chief Justice of the Supreme Court shall distribute the moneys appropriated under this section to the counties of this state to fund conciliation and mediation services in circuit courts. The Chief Justice shall consult with the presiding judges of the circuit courts before making the distributions.

SECTION 8. (1) In addition to and not in lieu of any other appropriation, there is appropriated to the Judicial Department, for the biennium beginning July 1, 2015, out of the General Fund, the amount of \$7,428,756 for the purpose of operating law libraries or providing law library services.

(2) The Chief Justice of the Supreme Court shall distribute the moneys appropriated under this section to the counties of this state based on revenues received from filing fees collected during the 2013-2015 biennium in civil actions commenced in the circuit court for the county.

SECTION 9. (1) Notwithstanding any other provision of law, the General Fund appropriation made to the Judicial Department by section 1 (6), chapter 632, Oregon Laws 2013, for the biennium beginning July 1, 2013, is decreased by \$400,000 for third-party debt collection.

(2) Notwithstanding any other provision of law, the General Fund appropriation made to the Judicial Department by section 1 (3), chapter 632, Oregon Laws 2013, for the biennium beginning July 1, 2013, is increased by \$400,000 for mandated payments.

SECTION 10. This 2015 Act being necessary for the immediate preservation of the public peace, health and safety, an emergency is declared to exist, and this 2015 Act takes effect on its passage.

LEGISLATIVE ACTION

78th OREGON LEGISLATIVE ASSEMBLY--2015 Regular Session

Enrolled House Bill 5029

Introduced and printed pursuant to House Rule 12.00. Pre-session filed (at the request of Oregon Department of Administrative Services)

CHAPTER

AN ACT

Relating to state financial administration; and declaring an emergency.

Be It Enacted by the People of the State of Oregon:

SECTION 1. During the biennium beginning July 1, 2015, all lottery revenues available to benefit the public purposes specified in Article XV, section 4, of the Oregon Constitution, that are in excess of distributions or allocations required by law shall be maintained in the Administrative Services Economic Development Fund.

SECTION 2. All moneys in the Administrative Services Economic Development Fund as of July 1, 2015, and thereafter are reserved to meet the commitments of sections 1 to 13 of this 2015 Act.

SECTION 3. The following amounts are allocated for the biennium beginning July 1, 2015, from the Administrative Services Economic Development Fund, to the Oregon Business Development Department, for the following purposes:

- (1) Shared services..... \$ 7,037,404
- (2) Business, innovation
and trade..... \$ 50,866,257
- (3) Infrastructure
Finance Authority..... \$ 3,025,181
- (4) Oregon Film and Video Office .. \$ 1,164,460

SECTION 4. There is allocated for the biennium beginning July 1, 2015, from the Administrative Services Economic Development Fund, to the Department of Education, for the State School Fund, the amount of \$408,150,516.

SECTION 5. There is transferred to the Lottery Bond Fund for the biennium beginning July 1, 2015, out of the Oregon Education Fund, 100 percent of the declared earnings on the Education Stability Fund that are transferred to the Oregon Education Fund during the biennium beginning July 1, 2015, to be used by the Department of Education for the purposes of maintaining cash flow and paying, when due, the principal, interest and premium, if any, on outstanding education lottery bonds.

SECTION 6. There is allocated for the biennium beginning July 1, 2015, from the Administrative Services Economic Development Fund, to the office of the Governor, the amount of \$4,058,418 for expenses of the Regional Solutions Program.

SECTION 7. (1) The Oregon Department of Administrative Services shall establish a process for allocating available moneys in the Administrative Services Economic Develop-

ment Fund on a quarterly basis to fulfill the biennial allocations made by sections 1 to 13 of this 2015 Act. The department shall set the quarterly allocations.

(2) If, in any quarter, the moneys transferred from the State Lottery Fund to the Administrative Services Economic Development Fund are insufficient to pay for the quarterly allocations made by sections 1 to 13 of this 2015 Act or any other 2015 Act, prior to making any other allocations pursuant to sections 1 to 13 of this 2015 Act, the department shall satisfy lottery bond debt service obligations in the amount of \$225,477,038 for outstanding lottery bonds.

(3) After the lottery bond debt service obligations described in subsection (2) of this section are satisfied, if the remaining moneys transferred from the State Lottery Fund to the Administrative Services Economic Development Fund are insufficient to pay for the quarterly allocations made by sections 1 to 13 of this 2015 Act, the department shall reduce the quarterly allocations not described in subsection (2) of this section proportionately in amounts sufficient to accommodate the revenue shortfall.

SECTION 8. There is allocated for the biennium beginning July 1, 2015, from the Administrative Services Economic Development Fund, to the Oregon Department of Administrative Services, the amount of \$225,477,038 for the purpose of paying, when due, the principal, interest and premium, if any, on outstanding lottery bonds, as described in section 7 of this 2015 Act.

SECTION 9. Notwithstanding and in lieu of the requirement in ORS 461.547 (1) for a percentage-based transfer of moneys, for the biennium beginning July 1, 2015, the amount allocated from the Administrative Services Economic Development Fund to the Oregon Department of Administrative Services for distribution to counties for economic development activities as provided by ORS 461.547 is \$39,083,827.

SECTION 10. Notwithstanding and in lieu of the requirement in ORS 461.549 (2) for a percentage-based transfer of moneys, for the biennium beginning July 1, 2015, the amount allocated from the Administrative Services Economic Development Fund to the Problem Gambling Treatment Fund is \$11,292,544.

SECTION 11. Notwithstanding and in lieu of the requirement in ORS 565.447 for a percentage-based transfer of moneys, for the biennium beginning July 1, 2015, the amount allocated from the Administrative Services Economic Development Fund to the County Fair Account established in ORS 565.445 is \$3,864,000.

SECTION 12. Notwithstanding and in lieu of the requirement in ORS 461.543 (4) for a percentage-based transfer of moneys, for the biennium beginning July 1, 2015, the amount allocated from the Administrative Services Economic Development Fund to the Sports Lottery Account is \$8,240,000.

SECTION 13. There is allocated for the biennium beginning July 1, 2015, from the Administrative Services Economic Development Fund, to the State Forestry Department, the amount of \$5,000,000 for federal forest restoration.

SECTION 14. Notwithstanding ORS 137.300, for the biennium beginning July 1, 2015, the Department of Revenue shall distribute the moneys in the **Criminal Fine Account** established by ORS 137.300 as specified in sections 15 to 19 of this 2015 Act.

SECTION 15. There are allocated to the Department of Public Safety Standards and Training for the biennium beginning July 1, 2015, from the Criminal Fine Account, the following amounts for the following purposes:

- (1) Criminal justice training
and standards operations..... \$ 27,250,583
- (2) Public Safety Memorial Fund... \$ 128,420

SECTION 16. There are allocated to the Department of Justice for the biennium beginning July 1, 2015, from the Criminal Fine Account, the following amounts for the following purposes:

- (1) Child Abuse Multidisciplinary

LEGISLATIVE ACTION

- Intervention Account..... \$ 10,311,579
- (2) Creation and operation of a statewide system of regional assessment centers as provided under ORS 418.746 to 418.796..... \$ 787,663
- (3) Criminal Injuries Compensation Account..... \$ 8,775,830
- (4) Services to children eligible for compensation under ORS 147.390 and costs to administer provision of these services \$ 666,107

SECTION 17. There are allocated to the Department of Human Services for the biennium beginning July 1, 2015, from the Criminal Fine Account, the following amounts for the following purposes:

- (1) Domestic Violence Fund established for ORS 409.300 for the purpose of ORS 409.292 (1)(a) to (c)..... \$ 2,224,675
- (2) Sexual Assault Victims Fund.... \$ 533,332

SECTION 18. There are allocated to the State Court Facilities and Security Account established under ORS 1.178, for the biennium beginning July 1, 2015, from the Criminal Fine Account, the following amounts for the following purposes:

- (1) State court security and emergency preparedness.... \$ 3,422,322
- (2) Distributions to county court facilities security accounts..... \$ 4,148,922
- (3) Capital improvements for courthouses and other state court facilities..... \$ 3,500,000

SECTION 19. (1) There is allocated to the Oregon Health Authority for the biennium beginning July 1, 2015, from the Criminal Fine Account, the amount of \$42,884 for the purpose of grants under ORS 430.345 for the establishment, operation and maintenance of alcohol and drug abuse prevention, early intervention and treatment services provided through a county.

(2) There is allocated to the Law Enforcement Medical Liability Account established under ORS 414.815, for the biennium beginning July 1, 2015, from the Criminal Fine Account, the amount of \$1,339,000.

(3) There is allocated to the Oregon State Police for the biennium beginning July 1, 2015, from the Criminal Fine Account, the amount of \$253,000 for the purpose of enforcing the laws relating to driving under the influence of intoxicants.

(4) There is allocated to the Department of Corrections for the biennium beginning July 1, 2015, from the Criminal Fine Account, the amount of \$4,391,472 for the purpose of planning, operating and maintaining county juvenile and adult corrections programs and facilities and drug and alcohol programs. The grant to each county shall be based on amounts deposited in the Criminal Fine and Assessment Account by the circuit court for the county in the 2009-2011 biennium.

(5) There is allocated to the Arrest and Return Account established under ORS 133.865, for the biennium beginning July 1, 2015, from the Criminal Fine Account, the amount of \$22,500.

(6) There is allocated to the Intoxicated Driver Program Fund created under ORS 813.270, for the biennium beginning July 1, 2015, from the Criminal Fine Account, the amount of \$4,323,000.

(7) There is allocated to the Oregon Health Authority for the biennium beginning July 1, 2015, from the Criminal Fine Account, the amount of \$331,824 for the Emergency Medical Services and Trauma Systems Program created under ORS 431.623.

SECTION 20. After distributing the amounts specified in sections 15 to 19 of this 2015 Act, the Department of Revenue shall distribute funds remaining in the Criminal Fine Account to the General Fund.

SECTION 21. This 2015 Act being necessary for the immediate preservation of the public peace, health and safety, an emergency is declared to exist, and this 2015 Act takes effect July 1, 2015.

Passed by House July 6, 2015

Timothy G. Sekerak, Chief Clerk of House

Tina Kotek, Speaker of House

Passed by Senate July 6, 2015

Peter Courtney, President of Senate

Received by Governor:

M., 2015

Approved:

M., 2015

Kate Brown, Governor

Filed in Office of Secretary of State:

M., 2015

Jeanne P. Atkins, Secretary of State

LEGISLATIVE ACTION

Seventy-Eighth Oregon Legislative Assembly - 2015 Regular Session

BUDGET REPORT AND MEASURE SUMMARY

MEASURE: HB 5005 A

CARRIER: Sen. Girod

Joint Committee On Ways and Means

Action: Do Pass The A-Eng Bill.

Action Date: 07/03/15

Vote:

Senate

Yeas: 12 - Burdick, Devlin, Girod, Hansell, Johnson, Monroe, Roblan, Shields, Steiner Hayward, Thomsen, Whitsett, Winters

House

Yeas: 11 - Buckley, Gomberg, Huffman, Komp, McLane, Nathanson, Rayfield, Read, Smith, Whitsett, Williamson

Exc: 1 - Whisnant

Prepared By: Jean Gabriel, Department of Administrative Services

Reviewed By: Daron Hill, Legislative Fiscal Office

Agencies: Various

Biennium: 2015-17

HB 5005 A

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LEGISLATIVE ACTION

Article XI-Q Authority

Department of Human Services

| | |
|--|--------------|
| Adult Abuse Data and Report Writing System | \$ 3,355,000 |
|--|--------------|

Department of Administrative Services

| | |
|----------------------------------|---------------|
| Capital Investments/Acquisitions | \$ 17,275,000 |
|----------------------------------|---------------|

Department of Justice

| | |
|----------------------------------|---------------|
| Child Support Enforcement System | \$ 15,415,000 |
|----------------------------------|---------------|

Department of Revenue

| | |
|--------------------------------------|---------------|
| Core Tax Revenue Systems Replacement | \$ 19,375,000 |
|--------------------------------------|---------------|

| | |
|---------------------------|-----------|
| Property Valuation System | 1,960,000 |
|---------------------------|-----------|

| | |
|----------|---------------|
| Subtotal | \$ 21,335,000 |
|----------|---------------|

Oregon Judicial Department

| | |
|----------------|---------------|
| E-Court System | \$ 14,755,000 |
|----------------|---------------|

| | |
|-----------------------------|------------|
| Multnomah County Courthouse | 17,675,000 |
|-----------------------------|------------|

| | |
|-----------------------------|-----------|
| Jefferson County Courthouse | 2,550,000 |
|-----------------------------|-----------|

| | |
|-----------------------------|-----------|
| Tillamook County Courthouse | 8,005,000 |
|-----------------------------|-----------|

| | |
|----------|---------------|
| Subtotal | \$ 42,985,000 |
|----------|---------------|

Oregon Military Department

| | |
|-----------------|--------------|
| Youth Challenge | \$ 5,045,000 |
|-----------------|--------------|

| | |
|--------------------------------|-----------|
| Military Headquarters Facility | 6,785,000 |
|--------------------------------|-----------|

| | |
|----------|---------------|
| Subtotal | \$ 11,830,000 |
|----------|---------------|

Department of Corrections

| | |
|-------------------------------------|---------------|
| Deferred Maintenance for Facilities | \$ 14,475,000 |
|-------------------------------------|---------------|

LEGISLATIVE ACTION

House Bill 5005, SECTIONS 1 - 3.

| Program Designation | 2013-15 Legislatively Approved | 2015-17 Governor's Budget | 2015-17 Committee Recommendations | Changes from Governor's Budget |
|---|--------------------------------------|---------------------------------|--------------------------------------|--------------------------------------|
| GENERAL OBLIGATION BONDS | | | | |
| General Fund Obligations | | | | |
| Higher Education Coordinating Comm. - PU (Art. XI-G) | \$ 117,711,000 | \$ 117,375,000 | \$ 92,450,000 | \$ (24,925,000) |
| Higher Education Coordinating Comm. - CC (Art. XI-G) | \$ 123,451,600 | \$ 79,321,600 | \$ 53,331,600 | \$ (25,990,000) |
| Oregon Health and Science University (Art. XI-G) | \$ 161,490,000 | \$ 199,770,000 | \$ 200,035,000 | \$ 265,000 |
| Oregon Business Development Dept. (Art. XI-M) | \$ 15,000,000 | \$ 70,000,000 | \$ 176,870,000 | \$ 106,870,000 |
| Oregon Business Development Dept. (Art. XI-N) | \$ 15,000,000 | \$ 30,000,000 | \$ 30,440,000 | \$ 440,000 |
| Oregon Department of Education (Art. XI-P) | \$ 0 | \$ 0 | \$ 126,210,000 | \$ 126,210,000 |
| Department of Administrative Services (Art. XI-Q) | \$ 459,618,100 | \$ 506,690,000 | \$ 369,640,000 | \$ (137,050,000) |
| Oregon Department of Transportation (Art. XI, Sec. 7) | \$ 453,725,000 | \$ 0 | \$ 35,475,000 | \$ 35,475,000 |
| Dedicated Fund Obligations | | | | |
| Department of Veterans' Affairs (Art. XI-A) | \$ 60,000,000 | \$ 100,000,000 | \$ 100,000,000 | \$ 0 |
| Higher Education Coordinating Comm. (Art. XI-F(1)) | \$ 390,977,500 | \$ 67,900,000 | \$ 70,985,000 | \$ 3,085,000 |
| Dept of Environmental Quality (Art. XI-H) | \$ 10,000,000 | \$ 10,000,000 | \$ 10,000,000 | \$ 0 |
| Water Resources Department (Art. XI-I(1)) | \$ 10,235,000 | \$ 30,520,000 | \$ 30,520,000 | \$ 0 |
| Housing and Community Services Dept (Art. XI-I(2)) | \$ 25,000,000 | \$ 25,000,000 | \$ 25,000,000 | \$ 0 |
| Department of Energy (Art. XI-J) | \$ 60,000,000 | \$ 100,000,000 | \$ 25,000,000 | \$ (75,000,000) |
| Total General Obligation Bonds | \$ 1,902,208,200 | \$ 1,336,576,600 | \$ 1,345,956,600 | \$ 9,380,000 |
| REVENUE BONDS | | | | |
| Direct Revenue Bonds | | | | |
| Housing and Community Services Department | \$ 150,000,000 | \$ 300,000,000 | \$ 300,000,000 | \$ 0 |
| Department of Transportation | | | | \$ 0 |
| Infrastructure Fund | \$ 20,400,000 | \$ 0 | \$ 0 | \$ 0 |
| Highway User Tax | \$ 846,690,000 | \$ 393,160,000 | \$ 393,160,000 | \$ 0 |
| Toll-Backed Revenue Bonds | \$ 663,000,000 | \$ 0 | \$ 0 | \$ 0 |
| Oregon Business Development Department | \$ 35,000,000 | \$ 30,000,000 | \$ 30,000,000 | \$ 0 |
| Department of Energy | \$ 20,000,000 | \$ 20,000,000 | \$ 20,000,000 | \$ 0 |
| Oregon University System (former) | \$ 50,000,000 | \$ 0 | \$ 0 | \$ 0 |
| Department of Administrative Services | | | | \$ 0 |
| Lottery Revenue Bonds | \$ 219,717,715 | \$ 219,290,000 | \$ 201,795,000 | \$ (17,495,000) |
| Total Direct Revenue Bonds | \$ 2,004,807,715 | \$ 962,450,000 | \$ 944,955,000 | \$ (17,495,000) |

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LEGISLATIVE ACTION

78th OREGON LEGISLATIVE ASSEMBLY--2015 Regular Session

Enrolled Senate Bill 5507

Printed pursuant to Senate Interim Rule 213.28 by order of the President of the Senate in conformance with pre-session filing rules, indicating neither advocacy nor opposition on the part of the President (at the request of Oregon Department of Administrative Services)

CHAPTER

AN ACT

Relating to state financial administration; creating new provisions; amending section 5, chapter 25, Oregon Laws 2015 (Enrolled House Bill 5017); repealing section 3, chapter 303, Oregon Laws 2015 (Enrolled Senate Bill 5528); and declaring an emergency.

Be It Enacted by the People of the State of Oregon:

SECTION 1. In addition to and not in lieu of any other appropriation, there is appropriated to the Emergency Board, for the biennium beginning July 1, 2015, out of the General Fund, the amount of \$30,000,000 for the purposes for which the Emergency Board lawfully may allocate funds.

SECTION 2. (1) In addition to and not in lieu of any other appropriation, there is appropriated to the Emergency Board, for the biennium beginning July 1, 2015, out of the General Fund, the amount of \$120,000,000, to be allocated to state agencies for state employee compensation changes for the biennium beginning July 1, 2015.

(2) If any of the moneys appropriated by subsection (1) of this section are not allocated by the Emergency Board prior to December 1, 2016, the moneys remaining on that date become available for any purpose for which the Emergency Board lawfully may allocate funds.

SECTION 3. In addition to and not in lieu of any other appropriation, there is appropriated to the Department of Revenue, for the biennium beginning July 1, 2015, out of the General Fund, the amount of \$3,935,414 for the core system replacement project.

SECTION 4. Notwithstanding any other law limiting expenditures, the amount of \$25,929,440 is established for the biennium beginning July 1, 2015, for the core system replacement project, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts and reimbursements from federal service agreements, but excluding lottery funds and federal funds not described in this section, collected or received by the Department of Revenue.

SECTION 5. Notwithstanding any other provision of law, the General Fund appropriation made to the Department of Revenue by section 1 (7), chapter 596, Oregon Laws 2015 (Enrolled House Bill 5035), for the biennium beginning July 1, 2015, is increased by \$3,684,413 for capital debt service and related costs for outstanding general obligation bonds sold pursuant to Article XI-Q of the Oregon Constitution for the core system replacement project.

SECTION 6. Notwithstanding any other law limiting expenditures, the amount of \$375,000 is established for the biennium beginning July 1, 2015, as the maximum limit for payment of expenses for costs of issuance of general obligation bonds sold pursuant to Article XI-Q

2013, for the biennium ending June 30, 2015, for extraordinary expenses, is increased by \$5,000.

SECTION 83. (1) Notwithstanding any other provision of law, the General Fund appropriation made to the Judicial Department by section 5, chapter __, Oregon Laws 2015 (Enrolled Senate Bill 5514), for the biennium beginning July 1, 2015, for payment of expenses of the **Oregon Law Commission**, is increased by \$100,000.

(2) Notwithstanding any other law limiting expenditures, the limitation on expenditures established by section 2 (1), chapter __, Oregon Laws 2015 (Enrolled Senate Bill 5514), for the biennium beginning July 1, 2015, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts and including reimbursements from federal service agreements, but excluding lottery funds and federal funds not described in section 2, chapter __, Oregon Laws 2015 (Enrolled Senate Bill 5514), collected or received by the **Judicial Department** for operations, is increased by \$455,000.

(3) Notwithstanding any other law limiting expenditures, the limitation on expenditures established by section 2 (7), chapter __, Oregon Laws 2015 (Enrolled Senate Bill 5514), for the biennium beginning July 1, 2015, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts and including reimbursements from federal service agreements, but excluding lottery funds and federal funds not described in section 2, chapter __, Oregon Laws 2015 (Enrolled Senate Bill 5514), collected or received by the Judicial Department for the **Oregon Courthouse Capital Construction and Improvement Fund**, is increased by \$39,800,000.

(4) In addition to and not in lieu of any other appropriation, there is appropriated to the Judicial Department, for the biennium beginning July 1, 2015, out of the General Fund, the amount of \$600,000 for distribution to the Oregon State Bar for funding of the **Legal Services Program** established under ORS 9.572.

SECTION 84. (1) Notwithstanding any other provision of law, the General Fund appropriation made to the Oregon Business Development Department by section 1 (2), chapter __, Oregon Laws 2015 (Enrolled Senate Bill 5525), for the biennium beginning July 1, 2015, for debt service, is increased by \$4,089,357.

(2) Notwithstanding any other law limiting expenditures, the limitation on expenditures established by section 2 (2), chapter __, Oregon Laws 2015 (Enrolled Senate Bill 5525), for the biennium beginning July 1, 2015, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts, but excluding lottery funds and federal funds, collected or received by the Oregon Business Development Department for Infrastructure Finance Authority, is increased by \$4,610,032.

(3) Notwithstanding any other law limiting expenditures, the limitation on expenditures established by section 2 (4), chapter __, Oregon Laws 2015 (Enrolled Senate Bill 5525), for the biennium beginning July 1, 2015, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts, but excluding lottery funds and federal funds, collected or received by the Oregon Business Development Department for Arts and Cultural Trust, is increased by \$4,568,184.

(4) Notwithstanding any other law limiting expenditures, the limitation on expenditures established by section 2 (6), chapter __, Oregon Laws 2015 (Enrolled Senate Bill 5525), for the biennium beginning July 1, 2015, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts, but excluding lottery funds and federal funds, collected or received by the Oregon Business Development Department for Regional Solutions, is increased by \$13,000,000.

(5) Notwithstanding any other law limiting expenditures, the amount of \$205,000,000 is established for the biennium beginning July 1, 2015, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts, but excluding lottery funds and federal funds, collected or received by the Oregon Business Development Department for payment of expenses for the seismic rehabilitation grant program.

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| | | |
|---|--------------|------------|
| General Fund | SB 5503 1 | -7,046 |
| Other funds | SB 5503 2 | -906 |
| Federal funds | SB 5503 3 | -42,236 |
| Psychiatric Security Review Board: | | |
| Operating Expenses | | |
| General Fund | SB 5532 1 | -13,699 |
| Department of Human Services: | | |
| Central Services, Statewide | | |
| Assessments and Enterprise-Wide | | |
| Costs and Program Design | | |
| Services | | |
| General Fund | HB 5026 1(1) | -5,262,869 |
| Other funds | HB 5026 2(1) | -3,319 |
| Federal funds | HB 5026 3(1) | -4,620,516 |
| Child Welfare, Self-Sufficiency and Vocational Rehabilitation Services | | |
| General Fund | HB 5026 1(2) | -1,312,468 |
| Other funds | HB 5026 2(2) | -570 |
| Federal funds | HB 5026 3(2) | -1,782,563 |
| Aging and People With Disabilities and Intellectual/Developmental Disabilities Programs | | |
| General Fund | HB 5026 1(3) | -45,690 |
| Other funds | HB 5026 2(3) | -885 |
| Federal funds | HB 5026 3(3) | -23,075 |
| Shared Services | | |
| Other funds | HB 5026 2(4) | -104,553 |
| Oregon Health Authority: Programs | | |
| General Fund | SB 5526 1(1) | -191,196 |
| Other funds | SB 5526 2(1) | -227,413 |
| Federal funds | SB 5526 4(1) | -62,939 |
| Central Services, Statewide | | |
| Assessments and Enterprise-wide Costs | | |
| General Fund | SB 5526 1(2) | -4,482,205 |
| Other funds | SB 5526 2(2) | -1,007,062 |
| Federal funds | SB 5526 4(2) | -2,951,263 |
| Debt Service | | |
| General Fund | SB 5526 1(4) | -515,705 |
| Gambling Addiction | | |
| Lottery funds | SB 5526 3 | -20 |

(6) JUDICIAL BRANCH.

2015
Oregon Laws

| Agency/Program/Funds | Chapter/ Section | Adjustment |
|---|---------------------|------------|
| Commission on Judicial Fitness and Disability: Administration | | |
| General Fund | SB 5515 1(1) | -\$10 |
| Judicial Department: Operations | | |
| General Fund | SB 5514 1(2) | -1,203,200 |
| Public Defense Services Commission: Appellate Division | | |
| General Fund | SB 5533 1(1) | -17,468 |
| Contract and Business Services Division | | |
| General Fund | SB 5533 1(3) | -7,520 |

(7) LEGISLATIVE BRANCH.

| Agency/Program/Funds | 2015 Oregon Laws Chapter/ Section | Adjustment |
|---|--|------------|
| Legislative Administration Committee: | | |
| General Program | | |
| General Fund | SB 5518 1(1) | -\$25,313 |
| Legislative Assembly: Biennial General Fund | | |
| General Fund | SB 5518 4 | -74,477 |
| Legislative Counsel Committee: | | |
| Operating Expenses | | |
| General Fund | SB 5518 8 | -13,529 |
| Legislative Fiscal Officer: | | |
| Operating Expenses | | |
| General Fund | SB 5518 11(1) | -6,546 |
| Legislative Revenue Officer: | | |
| Operating Expenses | | |
| General Fund | SB 5518 12 | -2,951 |
| Commission on Indian Services | | |
| Operating Expenses | | |
| General Fund | SB 5518 13 | -590 |

LEGISLATIVE ACTION

78th OREGON LEGISLATIVE ASSEMBLY--2015 Regular Session

Enrolled House Bill 2621

Sponsored by Representative REARDON; Representatives GORSEK, LIVELY, TAYLOR, Senators
MONROE, ROSENBAUM (Presession filed.)

CHAPTER

AN ACT

Relating to photo radar; and declaring an emergency.

Be It Enacted by the People of the State of Oregon:

SECTION 1. (1) As used in this section, "urban high crash corridor" means a segment of highway that has an incidence rate of reported traffic crashes resulting in fatalities or serious injuries that is at least 25 percent higher than the rate for highways with the same speed limit or designated speed within the jurisdiction on average between January 1, 2006, and January 1, 2016, and for which the governing body of the city makes a finding that speeding has had a negative impact on traffic safety.

(2) Notwithstanding ORS 810.438, the City of Portland may, at its own cost, operate a fixed photo radar system on urban high crash corridors.

(3) A fixed photo radar unit operated under this section:

(a) May not be used on controlled access highways.

(b) May not be used unless a sign is posted announcing "Traffic Laws Photo Enforced."

The sign posted under this paragraph must:

(A) Be on the street on which the fixed photo radar unit is being operated;

(B) Be between 100 and 400 yards before the location of the fixed photo radar unit;

(C) Be at least two feet above ground level;

(D) Provide drivers with information about the driver's current rate of speed; and

(E) Conform with specifications for traffic control devices approved by the Oregon Transportation Commission under ORS 810.200.

(c) Must remain in the same location for at least 180 days.

(4) The City of Portland shall, once each biennium, conduct an outcome evaluation for the purposes of subsection (5) of this section that includes:

(a) The effect of the operation of the fixed photo radar system on traffic safety;

(b) The degree of public acceptance of the operation of the fixed photo radar system; and

(c) The process of administering the use of the fixed photo radar system.

(5) By March 1 of each odd-numbered year, the City of Portland shall present to the Legislative Assembly the outcome evaluation conducted by the city under subsection (4) of this section in the manner provided in ORS 192.245.

SECTION 2. (1) Notwithstanding any other provision of law, in the jurisdiction operating a fixed photo radar system under section 1 of this 2015 Act:

(a) A citation for speeding may be issued on the basis of fixed photo radar if:

(A) A sign that provides drivers with information about the driver's current rate of speed is posted between 100 and 400 yards before the location of each fixed photo radar unit; and

(B) A police officer who has reviewed the photographic evidence of the conduct signs the citation.

(b) A rebuttable presumption exists that the registered owner of the vehicle was the driver of the vehicle when the citation is issued and delivered as provided in subsection (2) of this section.

(c) An individual issued a citation under this subsection may respond to the citation by submitting a certificate of innocence under subsection (3)(a) of this section or may make any other response allowed by law.

(d) A business or public agency issued a citation under this subsection may respond to the citation by submitting an affidavit of nonliability under subsection (3)(b) of this section or may make any other response allowed by law.

(2) A citation issued on the basis of fixed photo radar may be delivered by mail or otherwise to the registered owner of the vehicle or to the driver. The citation may be prepared on a digital medium, and the signature may be electronic in accordance with the provisions of ORS 84.001 to 84.061.

(3)(a) An individual named as the registered owner of a vehicle in current records of the Department of Transportation may respond by mail to a citation issued under subsection (1) of this section by submitting a certificate of innocence within 30 days from the mailing of the citation swearing or affirming that the registered owner was not the driver of the vehicle and by providing a photocopy of the registered owner's driver license. A jurisdiction that receives a certificate of innocence under this paragraph shall dismiss the citation without requiring a court appearance by the registered owner or any other information from the registered owner other than the swearing or affirmation and the photocopy. The citation may be reissued only once, only to the registered owner and only if the jurisdiction verifies that the registered owner appears to have been the driver at the time of the violation. A registered owner may not submit a certificate of innocence in response to a reissued citation.

(b) If a business or public agency named as the registered owner of a vehicle in current records of the Department of Transportation responds to a citation issued under subsection (1) of this section by submitting an affidavit of nonliability within 30 days from the mailing of the citation stating that at the time of the alleged speeding violation the vehicle was in the custody and control of an employee, or was in the custody and control of a renter or lessee under the terms of a rental agreement or lease, and if the business or public agency provides the driver license number, name and address of the employee, renter or lessee, the citation shall be dismissed with respect to the business or public agency. The citation may then be issued and delivered by mail or otherwise to the employee, renter or lessee identified in the affidavit of nonliability.

(4) If the registered owner, employee, renter or lessee fails to respond to a citation issued under this section, a default judgment under ORS 153.102 may be entered for failure to appear after notice has been given that the judgment will be entered.

(5) The penalties for and all consequences of a speeding violation initiated by the use of fixed photo radar are the same as for a speeding violation initiated by any other means.

(6) A registered owner, employee, renter or lessee against whom a judgment for failure to appear is entered may move the court to relieve the registered owner, employee, renter or lessee from the judgment as provided in ORS 153.105 if the failure to appear was due to mistake, inadvertence, surprise or excusable neglect.

SECTION 3. Notwithstanding ORS 153.675, all of the amounts paid to the City of Portland under ORS 153.640 from citations issued under section 2 of this 2015 Act may be used only for the costs of operating and maintaining fixed photo radar units in urban high crash cor-

LEGISLATIVE ACTION

ridors, as defined in section 1 of this 2015 Act, and for improving traffic safety for all modes of transportation.

SECTION 4. Sections 1, 2 and 3 of this 2015 Act are repealed on January 2, 2024.

SECTION 5. In addition to and not in lieu of any other appropriation, there is appropriated to the Judicial Department, for the biennium beginning July 1, 2015, out of the General Fund, the amount of \$1,250,000, which may be expended for the Multnomah County Circuit Court Violations Bureau.

SECTION 6. (1) In addition to and not in lieu of any other appropriation, there is appropriated to the Emergency Board, for the biennium beginning July 1, 2015, out of the General Fund, the amount of \$1,000,000 to be allocated to the Judicial Department for the Multnomah County Circuit Court Violations Bureau.

(2) If any moneys appropriated by subsection (1) of this section are not allocated by the Emergency Board prior to December 1, 2016, the moneys remaining on that date become available for any purpose for which the Emergency Board lawfully may allocate funds.

SECTION 7. Sections 1 to 4 of this 2015 Act become operative on January 1, 2016.

SECTION 8. This 2015 Act being necessary for the immediate preservation of the public peace, health and safety, an emergency is declared to exist, and this 2015 Act takes effect on its passage.

Passed by House June 30, 2015

.....
Timothy G. Sekerak, Chief Clerk of House

.....
Tina Kotek, Speaker of House

Passed by Senate July 3, 2015

.....
Peter Courtney, President of Senate

Received by Governor:

.....M,....., 2015

Approved:

.....M,....., 2015

.....
Kate Brown, Governor

Filed in Office of Secretary of State:

.....M,....., 2015

.....
Jeanne P. Atkins, Secretary of State

LEGISLATIVE ACTION

78th OREGON LEGISLATIVE ASSEMBLY--2015 Regular Session

Enrolled Senate Bill 501

Sponsored by Senator MONNES ANDERSON, Representatives GORSEK, PILUSO

CHAPTER

AN ACT

Relating to state financial administration; creating new provisions; amending ORS 291.278, 293.701, 336.431, 348.696, 357.195, 418.330, 418.335, 418.340, 461.559 and 471.810 and section 4, chapter 578, Oregon Laws 2013, section 3, chapter 20, Oregon Laws 2015 (Enrolled Senate Bill 605), section 2, chapter 459, Oregon Laws 2015 (Enrolled Senate Bill 779), and section 2, chapter 600, Oregon Laws 2015 (Enrolled Senate Bill 5520); repealing sections 7, 8 and 9, chapter 25, Oregon Laws 2015 (Enrolled House Bill 5017); and declaring an emergency.

Be It Enacted by the People of the State of Oregon:

TASK FORCE ON THE CAPITAL CONSTRUCTION BUDGET PROCESS

SECTION 1. (1) The Task Force on the Capital Construction Budget Process is established. The task force shall consist of:

- (a) The cochairs of the Joint Committee on Ways and Means;
 - (b) One member of the Senate appointed by the President of the Senate and who is a member of a different political party from the Senate cochair of the joint committee;
 - (c) One member of the House of Representatives appointed by the Speaker of the House of Representatives and who is a member of a different political party from the House cochair of the joint committee;
 - (d) The Legislative Fiscal Officer; and
 - (e) The Director of the Oregon Department of Administrative Services or a designee of the Director of the Oregon Department of Administrative Services.
- (2) The task force shall:
- (a) Create a current inventory of state-owned buildings, including a description of the condition of each building;
 - (b) Review existing statutory provisions governing the process of developing the capital construction portion of the state budget, including but not limited to provisions in ORS chapters 291 and 293;
 - (c) Identify current statutory provisions relating to the capital construction portion of the state budget that are outdated, are unnecessary or need modification;
 - (d) Identify new provisions that would aid in the development of the capital construction portion of the state budget;
 - (e) Identify and recommend a long-range process for determining and implementing future capital construction needs and priorities for this state;

Enrolled Senate Bill 501 (SB 501-A)

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STATE TREASURER

SECTION 25. Notwithstanding ORS 173.240:

(1) The Legislative Counsel and the Legislative Fiscal Officer shall conduct a review of state law governing the investment by the State Treasurer of the funds of this state and of local and tribal governments. The purpose of the review is to:

- (a) Identify deficiencies in current law; and
- (b) Make recommendations to clarify, simplify, consolidate and update the existing statutory framework.

(2) For purposes of the review, the Legislative Counsel and the Legislative Fiscal Officer may consult with the Department of Justice and the State Treasurer and any other officer or employee of this state or of any local or tribal government.

(3) The Legislative Counsel and the Legislative Fiscal Officer shall submit a report in the manner provided in ORS 192.245, and may include recommendations for legislation, to the Joint Committee on Ways and Means, or the Joint Interim Committee on Ways and Means, no later than December 31, 2016.

SECTION 26. Section 25 of this 2015 Act is repealed on January 2, 2017.

JUDICIAL SALARIES

SECTION 27. (1) Annual salaries of judges of the Supreme Court, the Court of Appeals, circuit courts and the Oregon Tax Court established under ORS 292.406, 292.411, 292.416 and 292.426 shall be adjusted to reflect the same percentage amount of any positive cost of living adjustment granted to employees in the management service in the executive department.

(2) The adjustment described in subsection (1) of this section shall occur at the same time that salaries of employees in the management service in the executive department are adjusted.

(3) As used in this section:

(a) "Executive department" has the meaning given that term in ORS 174.112.

(b) "Management service" means the management service as provided in ORS 240.212.

SECTION 28. Section 27 of this 2015 Act applies to any positive cost of living adjustment granted to employees in the management service in the executive department on or after the effective date of this 2015 Act.

REVERSION OF LOTTERY ALLOCATIONS

SECTION 29. ORS 461.559 is amended to read:

461.559. (1) On December 31 in each odd-numbered year, all amounts remaining unspent by a state agency from statutory allocations made from the Administrative Services Economic Development Fund to that agency for the prior biennium shall revert to the Administrative Services Economic Development Fund.

(2) Subsection (1) of this section does not apply to allocations for debt service, capital construction, continuing contracts, contested claims or special allocations designated by legislative action.

HIGHER EDUCATION COORDINATING COMMISSION

SECTION 30. (1) Notwithstanding any law limiting tuition and mandatory enrollment fee increases at public universities listed in ORS 352.002, if a public university listed in ORS 352.002 increases either resident undergraduate tuition or mandatory enrollment fees by more than three percent for the 2016-2017 academic year, the public university must report

Enrolled Senate Bill 501 (SB 501-A)

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Legislative Fiscal Office

900 Court St. NE, H-178
Salem OR 97301
503-986-1828



Oregon Legislative Emergency Board

Sen. Peter Courtney, Senate Co-Chair
Rep. Tina Kotek, House Co-Chair

Certificate

May 25, 2016

Pursuant to the provisions of ORS 291.328, and acting under the authority of ORS 8.105; ORS 291.326(1)(a), (b), (c), and (d); ORS 276.390; ORS 291.371; and ORS 291.375; this hereby certifies that the Emergency Board, meeting on May 25, 2016, took the following actions:

1. **Commission on Judicial Fitness and Disability**
Acknowledged receipt of a report on compensation plan changes.
2. **Public Defense Services Commission**
Deferred consideration of a request to fund salary increases.
3. **Department of Education**
Acknowledged receipt of a report on the implementation of the mixed delivery preschool program.
4. **Department of Education**
Approved the submission of a federal grant application to the U.S. Department of Health and Human Services in an amount of up to \$75,000 for a Child Care and Development Block Grant Implementation Research and Evaluation Planning Grant.
6. **Department of Education**
Allocated \$273,062 from the Emergency Fund established by section 1, chapter 837, Oregon Laws 2015 to supplement the appropriation made to the Department of Education by section 1(1), chapter 759, Oregon Laws 2015, Operations, for grants to school districts to improve Internet connectivity and access, with the understanding the Department of Administrative Services will unschedule that amount until school districts and the Department of Education have been notified of the approval of the federal funding.
7. **Higher Education Coordinating Commission**
Acknowledged receipt of a report on 2016-17 proposed increases to resident undergraduate tuition and mandatory fees at public universities.
8. **Higher Education Coordinating Commission**
Acknowledged receipt of a report relating to the distribution of funding for Community College academic counselors.

Legislative Fiscal Office

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Emergency Board – May 2016

61. Department of Administrative Services

Increased the Other Funds expenditure limitation established for the Department of Administrative Services by section 2(4), chapter 654, Oregon Laws 2015, Chief Human Resource Office, by \$6,520,731; authorized the establishment of 22 limited duration positions (9.17 FTE) and the extension of six existing limited duration positions through the end of the biennium (4.29 FTE), including the reclassification of one to a Principal Executive Manager (PEM) G; adjusted state agency budgets by allocating \$4,292,256 from the special purpose appropriation made to the Emergency Board by section 52, chapter 837, Oregon Laws 2015; increased Lottery Funds expenditure limitations by \$95,628; increased Other Funds expenditure limitations by \$3,357,479; and increased Federal Funds expenditure limitations by \$1,489,374; to adjust state agency budgets to fund assessment increases related to continuation of the Human Resources Information System project and staffing adjustments related to the previously approved DAS Information Technology reorganization per the attached table.

62. Department of Administrative Services

Established a \$2,336,040 Other Funds Capital Construction expenditure limitation for the Department of Administrative Services to replace the roof at the Department of Environmental Quality and Public Health laboratory, and established a \$4,000,000 Other Funds Capital Construction expenditure limitation for the Department of Administrative Services for capital and tenant improvements at the 550 Building.

63. Department of Administrative Services

Acknowledged receipt of a report on compensation plan changes and position allocations.

64. Department of Administrative Services

Approved the 2017-19 uniform rent rates as proposed by the Department of Administrative Services and required under ORS 276.390.

65. Department of Revenue

Deferred consideration of a funding request for the Property Valuation System information technology project, and directed the agency to report to the Emergency Board in September of 2016 on the status of the project.

66. Department of Revenue

Increased the Other Funds expenditure limitation established for the Department of Revenue by section 2(1), chapter 596, Oregon Laws 2015, Administration, by \$379,481 and authorized the establishment of five permanent full-time positions (2.71 FTE) for the Recreational Marijuana Program.

68. Department of Revenue

Acknowledged receipt of a report on the availability of data for tax research and forecasting purposes, and directed the agency to report to the Emergency Board in September of 2016 with an updated status report.

Legislative Fiscal Office

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Emergency Board – May 2016

LEGISLATIVE ACTION

#61 DAS - Attachment A

| Agency Name | Chapter | Section | GF | LF | OF | FF | Total |
|--------------------------------|---------|---------|-----------|-------|---------|---------|-----------|
| SECRETARY OF STATE | 688 | 01-02 | 11,079 | - | - | - | 11,079 |
| SECRETARY OF STATE | 688 | 02-04 | - | - | 3,767 | - | 3,767 |
| SECRETARY OF STATE | 688 | 02-01 | - | - | 7,211 | - | 7,211 |
| SECRETARY OF STATE | 688 | 02-05 | - | - | 7,636 | - | 7,636 |
| SECRETARY OF STATE | 688 | 02-03 | - | - | 17,437 | - | 17,437 |
| OREGON STATE TREASURY | 689 | 01-02 | - | - | 171 | - | 171 |
| OREGON STATE TREASURY | 689 | 01-01 | - | - | 21,769 | - | 21,769 |
| JUDICIAL FIT OR DISABILITY COM | 93 | 01-01 | 123 | - | - | - | 123 |
| DISTRICT ATTORNEYS/DEPUTIES | 332 | 01 | 8,787 | - | - | - | 8,787 |
| JUDICIAL DEPARTMENT | 691 | 01-02 | 430,457 | - | - | - | 430,457 |
| GOVERNMENT ETHICS COMMISSION | 465 | 01-01 | - | - | 1,924 | - | 1,924 |
| CRIMINAL JUSTICE COMMISSION | 606 | 03 | - | - | - | 23 | 23 |
| CRIMINAL JUSTICE COMMISSION | 606 | 01 | 1,995 | - | - | - | 1,995 |
| CRIMINAL JUSTICE COMMISSION | 606 | 02-00 | - | - | 27 | - | 27 |
| DEPT OF MILITARY | 594 | 03-01 | - | - | - | 40,057 | 40,057 |
| DEPT OF MILITARY | 594 | 03-02 | - | - | - | 1,878 | 1,878 |
| DEPT OF MILITARY | 594 | 03-03 | - | - | - | 9,518 | 9,518 |
| DEPT OF MILITARY | 594 | 01-04 | 2 | - | - | - | 2 |
| DEPT OF MILITARY | 594 | 01-03 | 1,969 | - | - | - | 1,969 |
| DEPT OF MILITARY | 594 | 01-01 | 9,999 | - | - | - | 9,999 |
| DEPT OF MILITARY | 594 | 01-02 | 11,713 | - | - | - | 11,713 |
| DEPT OF MILITARY | 594 | 02-01 | - | - | 933 | - | 933 |
| DEPT OF MILITARY | 594 | 02-02 | - | - | 5,292 | - | 5,292 |
| DEPT OF MILITARY | 594 | 02-04 | - | - | 6,653 | - | 6,653 |
| DEPT OF MILITARY | 594 | 02-03 | - | - | 28,657 | - | 28,657 |
| MARINE BOARD | 601 | 01-01 | - | - | 9,642 | - | 9,642 |
| BOARD OF PAROLE/POST PRISON | 304 | 01 | 3,825 | - | - | - | 3,825 |
| OREGON STATE POLICE | 696 | 03-02 | - | - | - | 821 | 821 |
| OREGON STATE POLICE | 696 | 03-04 | - | - | - | 183 | 183 |
| OREGON STATE POLICE | 696 | 01-02 | 1,968 | - | - | - | 1,968 |
| OREGON STATE POLICE | 696 | 01-03 | 16,107 | - | - | - | 16,107 |
| OREGON STATE POLICE | 696 | 01-04 | 32,324 | - | - | - | 32,324 |
| OREGON STATE POLICE | 696 | 01-01 | 162,181 | - | - | - | 162,181 |
| OREGON STATE POLICE | 696 | 04-00 | - | 7,935 | - | - | 7,935 |
| OREGON STATE POLICE | 696 | 02-03 | - | - | 171 | - | 171 |
| OREGON STATE POLICE | 696 | 02-01 | - | - | 21,845 | - | 21,845 |
| OREGON STATE POLICE | 696 | 02-02 | - | - | 27,833 | - | 27,833 |
| OREGON STATE POLICE | 696 | 02-04 | - | - | 33,030 | - | 33,030 |
| PUBLIC SAFETY/STDS/TRAINING | 658 | 02-01 | - | - | 32,477 | - | 32,477 |
| DEPT OF VETERANS AFFAIRS | 616 | 01-01 | 5,189 | - | - | - | 5,189 |
| DEPT OF VETERANS AFFAIRS | 616 | 03 | - | - | 14,629 | - | 14,629 |
| DEPT OF CORRECTIONS | 655 | 01-02 | 1,084,608 | - | - | - | 1,084,608 |
| DEPARTMENT OF ENERGY | 656 | 01 | - | - | 27,830 | - | 27,830 |
| DEPT OF ENVIRONMENTAL QUALITY | 593 | 02-04 | - | - | 172,399 | - | 172,399 |
| PSYCHIATRIC REVIEW BOARD | 411 | 01 | 2,685 | - | - | - | 2,685 |
| PUBLIC DEFENSE SERVICES | 615 | 01-03 | 6,104 | - | - | - | 6,104 |
| PUBLIC DEFENSE SERVICES | 615 | 01-01 | 12,395 | - | - | - | 12,395 |
| OREGON YOUTH AUTHORITY | 617 | 03 | - | - | - | 7,684 | 7,684 |
| OREGON YOUTH AUTHORITY | 617 | 01-01 | 234,585 | - | - | - | 234,585 |
| INDIAN SERVICES COMMISSION | 772 | 13 | 488 | - | - | - | 488 |
| DEPT OF CONSUMER/BSN SERVICES | 592 | 02 | - | - | - | 1,826 | 1,826 |
| DEPT OF CONSUMER/BSN SERVICES | 592 | 01 | - | - | 222,548 | - | 222,548 |
| OREGON HEALTH AUTHORITY | 838 | 04-01 | - | - | - | 191 | 191 |
| OREGON HEALTH AUTHORITY | 838 | 04-02 | - | - | - | 324,234 | 324,234 |
| OREGON HEALTH AUTHORITY | 838 | 01-01 | 2 | - | - | - | 2 |
| OREGON HEALTH AUTHORITY | 838 | 01-02 | 582,422 | - | - | - | 582,422 |
| OREGON HEALTH AUTHORITY | 838 | 02-01 | - | - | 31 | - | 31 |
| OREGON HEALTH AUTHORITY | 838 | 02-02 | - | - | 107,079 | - | 107,079 |
| PUB EMPLOYEES RETIREMNT SYSTEI | 595 | 01-01 | - | - | 89,634 | - | 89,634 |
| DEPT OF EMPLOYMENT | 485 | 04 | - | - | - | 149,532 | 149,532 |

LEGISLATIVE ACTION

78th OREGON LEGISLATIVE ASSEMBLY--2016 Regular Session

Enrolled House Bill 5201

Sponsored by JOINT COMMITTEE ON WAYS AND MEANS

CHAPTER

AN ACT

Relating to state financial administration; creating new provisions; amending sections 3, 4, 6, 7, 10, 13, 15 and 18, chapter 811, Oregon Laws 2015; and declaring an emergency.

Be It Enacted by the People of the State of Oregon:

SECTION 1. Section 7, chapter 811, Oregon Laws 2015, is amended to read:

Sec. 7. (1) The Oregon Department of Administrative Services shall establish a process for allocating available moneys in the Administrative Services Economic Development Fund on a quarterly basis to fulfill the biennial allocations made by sections 1 to 13 [of this 2015 Act], chapter 811, Oregon Laws 2015, and by this 2016 Act. The department shall set the quarterly allocations.

(2) If, in any quarter, the moneys transferred from the State Lottery Fund to the Administrative Services Economic Development Fund are insufficient to pay for the quarterly allocations made by sections 1 to 13 [of this 2015 Act or any other 2015 Act], chapter 811, Oregon Laws 2015, or by this 2016 Act, prior to making any other allocations pursuant to sections 1 to 13 [of this 2015 Act], chapter 811, Oregon Laws 2015, or pursuant to this 2016 Act, the department shall satisfy lottery bond debt service obligations in the amount of \$225,477,038 for outstanding lottery bonds.

(3) After the lottery bond debt service obligations described in subsection (2) of this section are satisfied, if the remaining moneys transferred from the State Lottery Fund to the Administrative Services Economic Development Fund are insufficient to pay for the quarterly allocations made by sections 1 to 13 [of this 2015 Act], chapter 811, Oregon Laws 2015, or by this 2016 Act, the department shall reduce the quarterly allocations not described in subsection (2) of this section proportionately in amounts sufficient to accommodate the revenue shortfall.

SECTION 2. There is allocated for the biennium beginning July 1, 2015, from the Administrative Services Economic Development Fund, to the Oregon Business Development Department, the amount of \$400,000 for support of redevelopment of the Port of Port Orford Cannery Building.

SECTION 3. Section 3, chapter 811, Oregon Laws 2015, is amended to read:

Sec. 3. The following amounts are allocated for the biennium beginning July 1, 2015, from the Administrative Services Economic Development Fund, to the Oregon Business Development Department, for the following purposes:

- | | |
|--------------------------|----------------|
| (1) Shared services..... | [\$ 7,037,404] |
| | \$ 7,223,270 |
| (2) Business, innovation | |
| and trade..... | [\$50,866,257] |
| | \$ 51,400,966 |
| (3) Infrastructure | |

Finance Authority..... [\$ 3,025,181]

..... \$ 3,405,177

(4) Oregon Film and Video Office..... \$ 1,164,460

SECTION 4. Section 4, chapter 811, Oregon Laws 2015, is amended to read:

Sec. 4. There is allocated for the biennium beginning July 1, 2015, from the Administrative Services Economic Development Fund, to the Department of Education, for the State School Fund, the amount of [\$408,150,516] \$447,703,907.

SECTION 5. Section 6, chapter 811, Oregon Laws 2015, is amended to read:

Sec. 6. There is allocated for the biennium beginning July 1, 2015, from the Administrative Services Economic Development Fund, to the office of the Governor, the amount of [\$4,058,418] \$4,209,051 for expenses of the Regional Solutions Program.

SECTION 6. Section 10, chapter 811, Oregon Laws 2015, is amended to read:

Sec. 10. Notwithstanding and in lieu of the requirement in ORS 461.549 (2) for a percentage-based transfer of moneys, for the biennium beginning July 1, 2015, the amount allocated from the Administrative Services Economic Development Fund to the Problem Gambling Treatment Fund is [\$11,292,544] \$11,348,753.

SECTION 7. Section 13, chapter 811, Oregon Laws 2015, is amended to read:

Sec. 13. There is allocated for the biennium beginning July 1, 2015, from the Administrative Services Economic Development Fund, to the State Forestry Department, the amount of [\$5,000,000] \$5,072,136 for federal forest restoration.

SECTION 8. Section 15, chapter 811, Oregon Laws 2015, is amended to read:

Sec. 15. There are allocated to the Department of Public Safety Standards and Training for the biennium beginning July 1, 2015, from the Criminal Fine Account, the following amounts for the following purposes:

- | | |
|---------------------------------------|----------------|
| (1) Criminal justice training | |
| and standards operations..... | [\$27,250,583] |
| | \$ 31,080,778 |
| (2) Public Safety Memorial Fund | \$ 128,420 |

SECTION 9. Section 18, chapter 811, Oregon Laws 2015, is amended to read:

Sec. 18. There are allocated to the State Court Facilities and Security Account established under ORS 1.178, for the biennium beginning July 1, 2015, from the Criminal Fine Account, the following amounts for the following purposes:

- | | |
|-----------------------------------|----------------|
| (1) State court security | |
| and emergency preparedness..... | [\$ 3,422,322] |
| | \$ 3,446,002 |
| (2) Distributions to county court | |
| facilities security accounts..... | \$ 4,148,922 |
| (3) Capital improvements for | |
| courthouses and other state | |
| court facilities..... | \$ 3,500,000 |

SECTION 10. This 2016 Act being necessary for the immediate preservation of the public peace, health and safety, an emergency is declared to exist, and this 2016 Act takes effect on its passage.

LEGISLATIVE ACTION

78th Oregon Legislative Assembly - 2016 Regular Session

BUDGET REPORT AND MEASURE SUMMARY

MEASURE: HB 5202 A

CARRIER: Sen. Girod

Joint Committee On Ways and Means

Action: Do Pass The A-Eng Bill.

Action Date: 02/25/16

Vote:

Senate

Yeas: 11 - Bates, Devlin, Girod, Hansell, Johnson, Monroe, Roblan, Shields, Steiner Hayward, Thomsen, Whitsett

Exc: 1 - Winters

House

Yeas: 11 - Buckley, Gomberg, Huffman, Komp, Nathanson, Rayfield, Read, Smith, Whisnant, Whitsett, Williamson

Exc: 1 - McLane

Prepared By: Jean Gabriel and Bill McGee, Department of Administrative Services

Reviewed By: Daron Hill, Legislative Fiscal Office

Various Agencies

Biennium: 2015-17

HB 5202 A

1 of 6

LEGISLATIVE ACTION

Summary of Subcommittee Action

General Fund Obligations

The Subcommittee increased the Higher Education Coordinating Commission Article XI-G general obligation bond authorization for community colleges by \$5,070,000 from \$53,331,600 to \$58,401,600. The increase provides funding for Portland Community College to finance the acquisition of and improvements to land and the acquisition, construction, or alteration of the American Manufacturing Innovation District Building, including furnishing and equipping of the building. The authorized amount includes \$5,000,000 of funding for the project and \$70,000 for bond issuance costs.

The Subcommittee increased the Department of Administrative Services Article XI-Q general obligation bond authority from \$369,640,000 to \$450,735,000 to reflect increases in funding of \$81,095,000 for projects owned or operated by the state. Increases include the following:

- \$2,555,000 for the Department of Administrative Services for repairs and improvements to the Oregon State Fair facilities;
- \$7,590,000 for the Department of Human Services to implement a multi-program integrated eligibility determination system;
- \$1,795,000 for the Department of Forestry East Lane Warehouse, a project that was budgeted in 2015-17 but not included in the bond bill;
- \$3,210,000 to continue implementation of the Department of Justice Child Support Enforcement Automated System;
- \$2,050,000 for the McNeal Hall project at Southern Oregon University for Higher Education Coordinating Commission (see page 6);
- \$5,070,000 for the repairs of a utility corridor and storm drainage at Oregon Institute of Technology for the Higher Education Coordinating Commission (see page 6);
- \$30,460,000 for repairs and improvements to the Oregon Capitol building;
- \$20,340,000 to complete implementation of the Department of Transportation State Radio Project;
- \$1,445,000 for planning and design of a new Lane County Courthouse through the Oregon Judicial Department OCCCIF program; and
- \$6,580,000 for the Oregon Military Department to refurbish existing buildings in Umatilla to serve as the new Regional Training Institute;

Other Fund Obligations

The Subcommittee increased the Higher Education Coordinating Commission Article XI-F (1) general obligation bond authorization by \$3,240,000 from \$70,985,000 to \$74,225,000. The net change reflects approval of three projects for public universities and one repurpose, as described on page 6.

Direct Revenue Bonds

The Subcommittee decreased the Department of Energy's direct revenue bond authority by \$20,000,000 from \$20,000,000 to \$0, as the Department has no plans to issue revenue bonds during the 2015-17 biennium.

LEGISLATIVE ACTION

78th OREGON LEGISLATIVE ASSEMBLY--2016 Regular Session

Enrolled Senate Bill 1597

Sponsored by JOINT COMMITTEE ON WAYS AND MEANS

CHAPTER

AN ACT

Relating to state financial administration; creating new provisions; amending ORS 284.885, 286A.250, 292.406, 292.411, 292.416, 292.426, 348.696, 565.495 and 565.545 and sections 8 and 9, chapter 705, Oregon Laws 2013, section 64, chapter 723, Oregon Laws 2013, section 102, chapter 366, Oregon Laws 2015, and section 10, chapter 685, Oregon Laws 2015; and declaring an emergency.

Be It Enacted by the People of the State of Oregon:

SECTION 1. Section 10, chapter 685, Oregon Laws 2015, is amended to read:

Sec. 10. Out of the amount specified in section 1 (6) [of this 2015 Act], chapter 685, Oregon Laws 2015, the State Treasurer may issue Article XI-Q bonds in an amount not to exceed \$27,775,000 of net proceeds for the purposes and in the manner specified in section 8 [(3)], chapter 705, Oregon Laws 2013, plus an amount estimated by the State Treasurer to pay estimated bond-related costs.

SECTION 2. Section 8, chapter 705, Oregon Laws 2013, as amended by section 6, chapter 121, Oregon Laws 2014, is amended to read:

Sec. 8. (1) Out of the amount specified in section 1 (6), chapter 705, Oregon Laws 2013, the State Treasurer may issue Article XI-Q bonds in an amount not to exceed \$19 million of net proceeds for the purposes specified in subsection (3) of this section, plus an amount estimated by the State Treasurer to pay estimated bond-related costs.

(2)(a) Bonds may not be issued pursuant to this section or section 10, chapter 685, Oregon Laws 2015, unless:

(A) The Chief Justice of the Supreme Court has determined that:

(i) The courthouse with respect to which the bonds will be issued has significant structural defects, including seismic defects, that present actual or potential threats to human health and safety;

(ii) Replacing the courthouse, whether by acquiring and remodeling or repairing an existing building or by constructing a new building, is more cost-effective than remodeling or repairing the courthouse; and

(iii) Replacing the courthouse creates an opportunity for colocation of the court with other state offices; and

(B) The Oregon Department of Administrative Services has approved the project for which the bonds will be issued.

(b) The Oregon Department of Administrative Services, after consultation with the Judicial Department, shall determine when net proceeds are needed for the purposes described in subsection (3) of this section and shall consult with the Judicial Department regarding the sale of bonds to be issued pursuant to this section.

(3) The State Treasurer shall deposit the net proceeds of bonds issued pursuant to this section and section 10, chapter 685, Oregon Laws 2015, in the Oregon Courthouse Capital Construction and Improvement Fund. The net proceeds and any interest earnings may be used solely to finance costs related to acquiring, constructing, remodeling, repairing, equipping or furnishing land, improvements, courthouses or portions of courthouses that are, or that upon completion of a project funded under this section will be, owned or operated by the State of Oregon.

(4) As used in ORS 286A.816 to 286A.826 with respect to this section:

(a) "Project agency" means the Judicial Department.

(b) "Project fund" means the Oregon Courthouse Capital Construction and Improvement Fund.

SECTION 3. Section 9, chapter 705, Oregon Laws 2013, as amended by section 7, chapter 121, Oregon Laws 2014, is amended to read:

Sec. 9. (1)(a) Notwithstanding ORS 1.185, a county and the state, acting by and through the Oregon Department of Administrative Services on behalf of the **Judicial Department**, may enter into interim agreements that provide for the funding, acquisition, development and construction of a courthouse and require the parties to negotiate in good faith and execute a long-term lease agreement or a long-term intergovernmental agreement with respect to the ownership or operation of a courthouse or portions of a courthouse that the county is required to provide under ORS 1.185, pursuant to which the state agrees to provide the property and services described in ORS 1.185 (1)(a).

(b)(A) An agreement entered into pursuant to this subsection may include a requirement that the county transfer to the Oregon Courthouse Capital Construction and Improvement Fund an amount not less than 50 percent of the total estimated costs of a project funded with bonds issued pursuant to section 8, chapter 705, Oregon Laws 2013, or section 10, chapter 685, Oregon Laws 2015, with respect to the courthouse or portions of a courthouse that are the subject of the agreement.

(B) The amount transferred by a county pursuant to this paragraph may comprise, singly or in any combination and proportion:

(i) Property tax revenues, bond proceeds or any other county moneys; and

(ii) A credit equal to the higher of the appraised value or the actual purchase price of land purchased by the county for the courthouse if the state approves of the land as the site for the courthouse.

(C) The amount required to be transferred by the county under this subsection may not be less than 75 percent of the total estimated costs unless the project includes colocation in the courthouse of state offices in addition to the state circuit court facilities.

(2) For purposes of section 8, chapter 705, Oregon Laws 2013, and section 10, chapter 685, Oregon Laws 2015, the state shall be considered to operate a courthouse or portions of a courthouse that are the subject of an agreement entered into pursuant to subsection (1) of this section if, as applicable:

(a) The lease agreement conveys to the state a full leasehold interest, including exclusive rights to control and use the courthouse or portions of the courthouse that are typical of a long-term lease, for a term that is at least equal to the term during which the bonds issued pursuant to section 8, chapter 705, Oregon Laws 2013, and section 10, chapter 685, Oregon Laws 2015, will remain outstanding.

(b) The intergovernmental agreement grants the state the exclusive right to control and use the courthouse or portions of the courthouse for a term that is at least equal to the term during which the bonds issued pursuant to section 8, chapter 705, Oregon Laws 2013, and section 10, chapter 685, Oregon Laws 2015, will remain outstanding.

SECTION 4. Section 64, chapter 723, Oregon Laws 2013, is amended to read:

Sec. 64. (1) The Oregon Courthouse Capital Construction and Improvement Fund is established in the State Treasury, separate and distinct from the General Fund. Interest earned on moneys in the Oregon Courthouse Capital Construction and Improvement Fund shall be credited to the fund.

LEGISLATIVE ACTION

Services. Upon receiving notice from the council under this subsection, the department shall cause an appraisal to be made of the sale and long-term lease values of fairground properties and facilities. The department shall also determine the payment schedule and outstanding amount of any obligations that have been incurred by state agencies for the purpose of paying for the construction, repair or remodeling of fairground properties and facilities, including but not limited to any amounts owing in payment of revenue bonds or lottery bonds issued for the construction, repair or remodeling of fairground properties and facilities. The department shall provide the appraisal and obligation information to the council. The council shall include information regarding the balance of the depository and investment accounts described in subsection (1)(a) of this section and the properties and facilities appraisal obligation information provided by the department in the annual report submitted by the council under ORS 565.555.

SECTION 8. The amendments to ORS 565.495 and 565.545 by sections 6 and 7 of this 2016 Act apply to expenditures made from moneys appropriated prior to, on or after the effective date of this 2016 Act.

SECTION 9. (1) The **Judicial Department** shall identify moneys in the possession of the department as of the effective date of this 2016 Act that were received by the department prior to July 1, 2013, from fees for the use of the Oregon Judicial Information Network and for the use of other state court electronic applications and systems.

(2) On June 30, 2016, the department shall transfer the moneys described in subsection (1) of this section to the State Court Technology Fund established in ORS 1.012.

SECTION 10. Section 102, chapter 366, Oregon Laws 2015, is amended to read:

Sec. 102. (1) The unexpended balances authorized to be expended by the Department of Community Colleges and Workforce Development for a one-year period beginning July 1, 2015, from revenues dedicated, continuously appropriated, appropriated or otherwise made available for the purpose of administering and enforcing the duties, functions and powers transferred from the Department of Community Colleges and Workforce Development to the Higher Education Coordinating Commission by the amendments to statutes by sections 1 to 99, **chapter 366, Oregon Laws 2015, [of this 2015 Act]** by acquiring, constructing, improving, repairing, equipping and furnishing buildings, structures, land and other projects at community colleges pursuant to section 7 (1) and (7), chapter 904, Oregon Laws 2009, and section 4 (3), chapter 808, Oregon Laws 2015, are transferred to and are available for expenditure by the Higher Education Coordinating Commission for the one-year period specified for the purpose of administering and enforcing the duties, functions and powers transferred by the amendments to statutes by sections 1 to 99, **chapter 366, Oregon Laws 2015 [of this 2015 Act]**.

(2) The unexpended balances authorized to be expended by the Department of Community Colleges and Workforce Development for a two-year period beginning July 1, 2015, from revenues dedicated, continuously appropriated, appropriated or otherwise made available for the purpose of administering and enforcing the duties, functions and powers transferred from the Department of Community Colleges and Workforce Development to the Higher Education Coordinating Commission by the amendments to statutes by sections 1 to 99, **chapter 366, Oregon Laws 2015, [of this 2015 Act]** for community college districts for capital construction, deferred maintenance capital renewal, code compliance and safety projects pursuant to section 2, chapter 78, Oregon Laws 2012, and section 11 (1), (3), (4) to (6), (8), (10), (11), (13), (14) and (17), chapter 79, Oregon Laws 2012, are transferred to and are available for expenditure by the Higher Education Coordinating Commission for the two-year period specified for the purpose of administering and enforcing the duties, functions and powers transferred by the amendments to statutes by sections 1 to 99, **chapter 366, Oregon Laws 2015 [of this 2015 Act]**.

(3) The unexpended balances authorized to be expended by the Department of Community Colleges and Workforce Development for a period ending July 1, 2015, from revenues dedicated, continuously appropriated, appropriated or otherwise made available for the purpose of administering and enforcing the duties, functions and powers transferred from the Department of Community Colleges and Workforce Development to the Higher Education Coordinating Commission by the

amendments to statutes by sections 1 to 99, **chapter 366, Oregon Laws 2015, [of this 2015 Act]** by acquiring, constructing, improving, repairing, equipping and furnishing buildings, structures, land and other projects at community colleges pursuant to section 7 (3) and (9), chapter 904, Oregon Laws 2009, are transferred to and are available for expenditure by the Higher Education Coordinating Commission for the six-year period specified for the purpose of administering and enforcing the duties, functions and powers transferred by the amendments to statutes by sections 1 to 99, **chapter 366, Oregon Laws 2015 [of this 2015 Act]**.

(4) The unexpended balances authorized to be expended by the Department of Community Colleges and Workforce Development for a four-year period beginning July 1, 2015, from revenues dedicated, continuously appropriated, appropriated or otherwise made available for the purpose of administering and enforcing the duties, functions and powers transferred from the Department of Community Colleges and Workforce Development to the Higher Education Coordinating Commission by the amendments to statutes by sections 1 to 99, **chapter 366, Oregon Laws 2015, [of this 2015 Act]** by acquiring, constructing, improving, repairing, equipping and furnishing buildings, structures, land and other projects at community colleges pursuant to section 6 (2) to (5), (8), (9), (11) and (14), chapter 727, Oregon Laws 2013, and sections 3 (1) and 4, chapter 120, Oregon Laws 2014, are transferred to and are available for expenditure by the Higher Education Coordinating Commission for the four-year period specified for the purpose of administering and enforcing the duties, functions and powers transferred by the amendments to statutes by sections 1 to 99, **chapter 366, Oregon Laws 2015 [of this 2015 Act]**.

SECTION 11. ORS 292.406 is amended to read:

292.406. (1)(a) The annual salary of the Chief Judge of the Court of Appeals shall be \$135,688 for the year beginning January 1, 2015, and for each year thereafter.

(b) On January 1, 2017, the annual salary of the Chief Judge of the Court of Appeals, as adjusted under ORS 292.428, shall be increased by \$5,000.

(2)(a) The annual salary of each other judge of the Court of Appeals shall be \$132,820 for the year beginning January 1, 2015, and for each year thereafter.

(b) On January 1, 2017, the annual salary of each other judge of the Court of Appeals, as adjusted under ORS 292.428, shall be increased by \$5,000.

SECTION 12. ORS 292.411 is amended to read:

292.411. (1)(a) The annual salary of the Chief Justice of the Supreme Court shall be \$138,556 for the year beginning January 1, 2015, and for each year thereafter.

(b) On January 1, 2017, the annual salary of the Chief Justice of the Supreme Court, as adjusted under ORS 292.428, shall be increased by \$5,000.

(2)(a) The annual salary of each other judge of the Supreme Court shall be \$135,688 for the year beginning January 1, 2015, and for each year thereafter.

(b) On January 1, 2017, the annual salary of each other judge of the Supreme Court, as adjusted under ORS 292.428, shall be increased by \$5,000.

SECTION 13. ORS 292.416 is amended to read:

292.416. (1) The annual salary of each judge of a circuit court shall be \$124,468 for the year beginning January 1, 2015, and for each year thereafter.

(2) On January 1, 2017, the annual salary of each judge of a circuit court, as adjusted under ORS 292.428, shall be increased by \$5,000.

SECTION 14. ORS 292.426 is amended to read:

292.426. (1) The annual salary of the judge of the Oregon Tax Court shall be \$128,164 for the year beginning January 1, 2015, and for each year thereafter.

(2) On January 1, 2017, the annual salary of the judge of the Oregon Tax Court, as adjusted under ORS 292.428, shall be increased by \$5,000.

SECTION 15. (1) The Oregon Capitol History Gateway Fund is established in the State Treasury, separate and distinct from the General Fund. Interest earned by the Oregon Capitol History Gateway Fund shall be credited to the fund. Moneys in the fund are continuously

LEGISLATIVE ACTION

78th OREGON LEGISLATIVE ASSEMBLY--2016 Regular Session

Enrolled Senate Bill 5701

Sponsored by JOINT COMMITTEE ON WAYS AND MEANS

CHAPTER

AN ACT

Relating to state financial administration; and declaring an emergency.

Be It Enacted by the People of the State of Oregon:

SECTION 1. (1) Notwithstanding any other law limiting expenditures, the limitation on expenditures established by section 4 (1), chapter 694, Oregon Laws 2015, for the biennium beginning July 1, 2015, as the maximum limit for payment of expenses from federal funds collected or received by the Oregon Business Development Department, is increased by \$61,227 for business, innovation and trade.

(2) Notwithstanding any other law limiting expenditures, the limitation on expenditures established by section 2 (1), chapter 694, Oregon Laws 2015, for the biennium beginning July 1, 2015, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts, but excluding lottery funds and federal funds, collected or received by the Oregon Business Development Department, is increased by \$443,641 for business, innovation and trade.

(3)(a) Notwithstanding any other provision of law, the General Fund appropriation made to the Oregon Business Development Department by section 1 (2), chapter 694, Oregon Laws 2015, for the biennium beginning July 1, 2015, for debt service, is decreased by \$1,328,407.

(b) Notwithstanding any other law limiting expenditures, the amount of \$1,330,500 is established for the biennium beginning July 1, 2015, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts, but excluding lottery funds and federal funds, collected or received by the Oregon Business Development Department, for general obligation bond debt service.

(4) Notwithstanding any other law limiting expenditures, the amount of \$400,000 is established for the biennium beginning July 1, 2015, as the maximum limit for payment of expenses from lottery moneys allocated from the Administrative Services Economic Development Fund to the Oregon Business Development Department, for Infrastructure Finance Authority for redevelopment of the Port of Port Orford Cannery Building.

(5) Notwithstanding any other law limiting expenditures, the limitation on expenditures established by section 3 (6), chapter 694, Oregon Laws 2015, for the biennium beginning July 1, 2015, as the maximum limit for payment of expenses from lottery moneys allocated from the Administrative Services Economic Development Fund to the Oregon Business Development Department for Infrastructure Finance Authority, is increased by \$260,514 for administration of seismic rehabilitation grants.

(6) Notwithstanding any other law limiting expenditures, the amount of \$100,000 is established for the biennium beginning July 1, 2015, as the maximum limit for payment of ex-

SECTION 44. Notwithstanding any other law limiting expenditures, the limitation on expenditures established by section 2 (2), chapter 690, Oregon Laws 2015, for the biennium beginning July 1, 2015, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts and including federal funds received from the Pacific Coastal Salmon Recovery Fund, but excluding lottery funds and federal funds not described in section 2, chapter 690, Oregon Laws 2015, collected or received by the State Department of Fish and Wildlife for the Wildlife Division, is increased by \$180,000 to continue the Sage-Grouse Initiative Program through June 30, 2017.

SECTION 45. (1) Notwithstanding any other law limiting expenditures, the limitation on expenditures established by section 2 (6), chapter 691, Oregon Laws 2015, for the biennium beginning July 1, 2015, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts and including reimbursements from federal service agreements, but excluding lottery funds and federal funds not described in section 2, chapter 691, Oregon Laws 2015, collected or received by the **Judicial Department**, for the State Court Technology Fund, is increased by \$5,330,000.

(2) Notwithstanding any other law limiting expenditures, the limitation on expenditures established by section 2 (1), chapter 691, Oregon Laws 2015, for the biennium beginning July 1, 2015, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts and including reimbursements from federal service agreements, but excluding lottery funds and federal funds not described in section 2, chapter 691, Oregon Laws 2015, collected or received by the **Judicial Department**, for operations, is increased by \$45,000.

(3) Notwithstanding any other law limiting expenditures, the limitation on expenditures established by section 2 (7), chapter 691, Oregon Laws 2015, for the biennium beginning July 1, 2015, as the maximum limit for payment of expenses from fees, moneys or other revenues, including Miscellaneous Receipts and including reimbursements from federal service agreements, but excluding lottery funds and federal funds not described in section 2, chapter 691, Oregon Laws 2015, collected or received by the **Judicial Department**, for the Oregon Courthouse Capital Construction and Improvement Fund, is increased by \$2,800,000 for planning and designing a new Lane County Courthouse facility.

SECTION 46. (1) Notwithstanding any other provision of law, the General Fund appropriation made to the Commission on Judicial Fitness and Disability by section 1 (2), chapter 93, Oregon Laws 2015, for the biennium beginning July 1, 2015, for extraordinary expenses, is increased by \$172,000.

(2) Notwithstanding any other provision of law, the General Fund appropriation made to the Judicial Department by section 1 (1), chapter 691, Oregon Laws 2015, for the biennium beginning July 1, 2015, for judicial compensation, is increased by \$630,000.

(3) Notwithstanding any other provision of law, the General Fund appropriation made to the Judicial Department by section 83 (4), chapter 837, Oregon Laws 2015, for the biennium beginning July 1, 2015, for distribution to the Oregon State Bar for funding of the Legal Services Program established under ORS 9.572, is increased by \$200,000 for services relating to housing issues.

SECTION 47. (1) Notwithstanding any other provision of law, the General Fund appropriation made to the Department of Corrections by section 1 (1), chapter 655, Oregon Laws 2015, for the biennium beginning July 1, 2015, for operations and health services, is increased by \$2,558,694.

(2) Notwithstanding any other provision of law, the General Fund appropriation made to the Department of Corrections by section 1 (1), chapter 655, Oregon Laws 2015, for the biennium beginning July 1, 2015, for operations and health services, is increased by \$800,454.

(3) Notwithstanding any other provision of law, the General Fund appropriation made to the Department of Corrections by section 1 (2), chapter 655, Oregon Laws 2015, for the

LEGISLATIVE ACTION

| | | |
|---------------------------|--------------|------------|
| Federal funds | Ch. 838 4(2) | +1,659,081 |
| Commission for the Blind: | | |
| General Fund | Ch. 484 1 | +118,439 |
| Other funds | Ch. 484 2 | -7,604 |
| Federal funds | Ch. 484 3 | +258,991 |

(6) JUDICIAL.

| Agency/Program/Funds | 2015 Oregon Laws | |
|---|---------------------|------------|
| | Chapter/ Section | Adjustment |
| Commission on Judicial Fitness and Disability: | | |
| General Fund | Ch. 93 1(1) | +\$3,737 |
| Judicial Department: | | |
| General Fund | Ch. 691 1(1) | +1,649,338 |
| General Fund | Ch. 691 1(2) | +5,813,034 |
| General Fund | Ch. 691 1(3) | +96,887 |
| Other funds | Ch. 691 2(1) | +564,326 |
| Other funds | Ch. 691 2(2) | +2,296 |
| Other funds | Ch. 691 2(4) | +23,680 |
| Other funds | Ch. 691 3 | +291,501 |
| Federal funds | Ch. 691 4 | +8,485 |
| Public Defense Services Commission: | | |
| General Fund | Ch. 615 1(1) | +328,472 |
| General Fund | Ch. 615 1(3) | +96,756 |
| Other funds | Ch. 615 2(2) | +13,140 |

(7) LEGISLATIVE BRANCH.

| Agency/Program/Funds | 2015 Oregon Laws | |
|--------------------------------|---------------------|------------|
| | Chapter/ Section | Adjustment |
| Legislative Counsel Committee: | | |
| General Fund | Ch. 772 8 | +\$227,337 |
| Other funds | Ch. 772 9 | +37,014 |
| Legislative Revenue Officer: | | |
| General Fund | Ch. 772 12 | +56,281 |
| Legislative Fiscal Officer: | | |
| General Fund | Ch. 772 11(1) | +97,141 |
| Other funds | Ch. 772 11(2) | +87,037 |
| Legislative Assembly: | | |
| General Fund | Ch. 772 4 | +224,862 |

Enrolled Senate Bill 5701 (SB 5701-A)

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LEGISLATIVE ACTION

FISCAL IMPACT OF PROPOSED LEGISLATION

Seventy-Eighth Oregon Legislative Assembly – 2015 Regular Session
Legislative Fiscal Office

Measure: SB 501 - A

*Only Impacts on Original or Engrossed
Versions are Considered Official*

Prepared by: John Borden
Reviewed by: Ken Rocco; Daron Hill; Steve Bender; Laurie Byerly; Linda Ames; Doug Wilson; Paul Siebert; Michelle Deister; and Julie Neburka
Date: July 3, 2015

Measure Description:

Implements the statutory changes necessary to support the 2015-17 legislatively adopted budget and to clarify the application of statutes.

Government Unit(s) Affected:

Legislative Assembly; Legislative Fiscal Office; Legislative Counsel; Department of Administrative Services; Secretary of State; Liquor Control Commission; Employment Department; Department of Education; State School Fund; Department of Transportation; Oregon Health Authority; Department of Human Services; Department of Fish and Wildlife; Oregon Judicial Department; Counties; Oregon Business Development Department; State Library; Oregon University System; and the Higher Education Coordinating Commission.

Summary of Expenditure Impact:

See Analysis.

Summary of Revenue Impact:

See Legislative Revenue Office Impact Statement

Local Government Mandate:

This bill does not affect local governments' service levels or shared revenues sufficient to trigger Section 15, Article XI of the Oregon Constitution.

Analysis:

This measure implements statutory changes necessary to support the legislatively approved budget and to clarify the application of statutes. This measure, relating to state financial administration, is not an appropriation bill and therefore does not include the appropriation of funds. The measure, however, is necessary to achieve a balanced budget for the 2015-17 biennium. The measure has an emergency clause and is effective on passage.

The budgetary impacts of provisions of this measure are contained in SB 5507, which is the budget reconciliation bill for the 2015-17 biennium, HB 5029, the Lottery and Criminal Fines Account allocation(s) bill, or specific agency budget measures.

Other Funds transfers provided in this measure are one-time in nature and only apply to the 2015-17 biennium, unless otherwise noted, and are to be made on the effective date of the measure, unless otherwise noted.

The following table summarizes, by section and agency, the fiscal impact of this measure:

| Section/Gov't Unit | Program Change | Fiscal Impact |
|---|--|--|
| §14 Oregon Department of Transportation | Within the approved Other Funds expenditure limitation for Highway Maintenance, allocates \$3.9 million to Multnomah County for the construction of operational improvements on Cornelius Pass Road, and allocates \$5 million for the construction of safety improvement projects located on OR 47 at Verboort and Purdin Roads in Washington County. | No Fiscal |
| §15 Oregon Health Authority | Transfers Public Employees Revolving Fund revenues to the General Fund for general governmental purposes on May 1, 2017. | \$120 million General Fund Revenue |
| §16-18 Department of Human Services | Modifies ability to make guardianship payments under ORS 418.330; 418.335; and 418.340. Guardianship subsidies are less costly than foster care payments. | <\$1,894,462> General Fund |
| §19 Department of Fish and Wildlife | Changes repeal date in SB 779 [Relating to the State Department of Fish and Wildlife] from January 2, 2016 to January 2, 2017. | \$5,000 General Fund |
| §20 Oregon Judicial Department/ Counties | Allows counties to reallocate up to one-half of General Fund appropriated for county law libraries to conciliation and mediation services in circuit courts. The maximum amount that could potentially be reallocated totals \$3,714,378. | Indeterminate Fiscal Impact |
| §21 Oregon Business Development Department | Transfers the remaining balance in the Connecting Oregon Communities Fund to the General Fund for general governmental purposes. | \$88,000 General Fund Revenue |
| §22 Education Stability Fund | Authorizes Education Stability Fund earnings dedicated in ORS 348.696 to pay lottery bond debt service, to be used for Oregon Opportunity Grants when those earnings are not needed to pay debt service. | \$7,660,324 Lottery Funds |
| §23-24 State Library | Allows State Library Donation Fund to be discretely invested in intermediate term investment pool. | No Fiscal |
| §25-26 Legislative Counsel/ Legislative Fiscal Office | Directs review of intermediate term investment statutes. | No Fiscal |
| §27-28 Judicial Department | Increases state judge salaries by the same percentage increases granted to management service employees in the executive department for cost of living adjustments. | Indeterminate Fiscal Impact |
| §29 Statewide | Excludes Lottery debt service allocations from amounts subject to reversion to the Administrative Services Economic Development Fund. | No Fiscal |

LEGISLATIVE ACTION

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DEPARTMENT SUMMARY

Department Summary

Judicial Branch Mission Statement

As a separate and independent branch of government, we provide fair and accessible justice services that protect the rights of individuals, preserve community welfare, and inspire public confidence.

Mission

The judicial branch is a separate and coequal branch of state government. The core function of the judicial branch is adjudication. The Chief Justice of the Oregon Supreme Court is the administrative head of the unified court system and the state judicial branch, and submits the budget request to the Legislature. The Chief Justice's Recommended Budget requests resources to address the current operational needs of the state court system and the funding priorities established by the Chief Justice for the Oregon Judicial Department for each biennium.

Each branch of government in a democratic society has a vital role to play. The judicial branch plays a unique and pivotal role in the political, cultural, social, and economic life of the nation. Oregonians can be proud of their state courts, which every day strive to meet our constitutional obligations to provide impartial justice completely and without delay, while being open and accessible to all Oregonians.

Whether it is protecting individual rights, sentencing a person convicted of a crime, helping victims of domestic violence or abuse, resolving child custody or other family disputes, enforcing the rules of the marketplace among businesses and consumers, or ensuring that government acts within its legal authority, Oregon's elected judges in the Supreme Court, Court of Appeals, Tax Court, and in the circuit courts across the state – and the professional court staff that assist them – work hard every day to provide justice efficiently, fairly, and promptly.

A mission statement for the branch was first created as part of a visioning project begun in 1992 by then Chief Justice Wallace P. Carson, Jr., with the purpose of creating a long-range blueprint based on core institutional values that identified goals and strategic initiatives for the Oregon Judicial Department. The vision project, then known as "Justice 2020: The New Oregon Trail," and its successor documents have influenced and guided planning, budgeting, and direction for the court system ever since. While the opportunities, challenges, and priorities have changed over the years, the underlying guiding values and vision goals have remained constant and have continued to shape our present and future budgets.

The underlying guiding values and vision goals for the Oregon judicial branch are as follows:

- 1. Access:** To ensure access to court services for all people
- 2. Administration:** To make courts work for people

DEPARTMENT SUMMARY

3. **Dispute Resolution:** To help people choose the best way to resolve their disputes
4. **Partnerships:** To build strong partnerships with local communities to promote public safety and quality of life
5. **Trust and Confidence:** To earn the public's enduring trust and confidence

Structure

The Chief Justice of the Oregon Supreme Court is the administrative head of the Oregon judicial branch and of the unified state court system. On May 1, 2012, the Honorable Thomas A. Balmer was sworn in as the 43rd Chief Justice of the Oregon Supreme Court. The Chief Justice supervises the state court system, makes rules and issues orders to carry out the duties of the office, and appoints the Chief Judge of the Court of Appeals and the presiding judges of the circuit courts. The Chief Justice approves and submits the statewide fiscal plan and budget for all state courts.

The Oregon Constitution and Oregon statutes define the state court system's organizational structure and its obligations. In statute, the unified "state court system" entity is called "the Oregon Judicial Department" (OJD). It includes the Oregon Supreme Court; the Court of Appeals; the Tax Court; and 36 circuit courts statewide, organized into 27 judicial districts. It also includes the Office of the State Court Administrator. The State Court Administrator (SCA), appointed by the Chief Justice, is the state court system's chief operating officer. This position, established by statute, supports and assists the Chief Justice in exercising administrative authority and supervision over the trial and appellate courts of this state as well as provides the day-to-day central infrastructure services to the state court system and manages its mandatory state programs.

By statute, the Chief Justice may delegate additional administrative responsibilities, respectively, to the presiding judges of the appellate court, tax court, and judicial districts, the latter group whom by statute oversee the operations of the local circuit courts statewide. The Chief Justice appoints a presiding judge for each judicial district, the Tax Court, and the Court of Appeals for a two-year term, which can be renewed. A trial court administrator (TCA) is hired by the presiding judge to assist in managing day-to-day local court administrative operations.

Constitutional and Statutory Authority

Judicial branch authority is established by the Oregon Constitution, primarily Article VII (Amended) and Article VII (original). The authority covers all actions brought before a court under the Oregon Constitution and under the laws of the state. Courts must respond or interpret mandates contained in the Federal and Oregon constitutions and set of Oregon Revised Statutes (ORS).

Circuit courts are required by statute to have locations in all 36 counties in the county seat of government. Some are required by statute to hold court at multiple court locations in the county. Statute sets the number of judicial positions and their locations. Court jurisdiction (case type and eligibility), deadlines, priorities, procedures, and process requirements are determined by statute.

DEPARTMENT SUMMARY

The general organization, jurisdiction, and operation of OJD; appellate, tax, and trial court operations; and Office of the State Court Administrator are set out mainly in the following chapters of the ORS, with the relevant topic(s) noted:

- Chapter 1 – Courts and Judicial Officers Generally
- Chapter 2 and 19 – Supreme Court; Court of Appeals
- Chapter 3 – Circuit Courts Generally
- Chapter 7 and 21 – Records and Files of Courts; Fees Generally
- Chapter 8 – Court Officers
- Chapters 10 and 132 – Juries
- Chapter 14 – Jurisdiction; Venue
- Chapter 36 – Court Mediation and Arbitration Programs
- Chapter 45 – Interpreters
- Chapter 46 – Small Claims Departments
- Chapter 105 – Property Right Actions; Forcible Entry and Detainers (FEDs)
- Chapter 107 – Marital Dissolution; Family Abuse Prevention
- Chapter 115 – Claims; Actions and Suits
- Chapter 124 – Protective Proceedings; Abuse of Elderly, Disabled and Incapacitated
- Chapter 125 – Protective Proceedings; Guardianships and Conservatorships
- Chapters 131-167 – Procedures in Criminal Matters; Sentencing; Appeals; Post-conviction
- Chapter 151 – State Indigent Verification
- Chapter 153 – Violations and Traffic Offenses
- Chapter 305 – Oregon Tax Court; Tax Magistrates Division
- Chapter 419 – Juvenile Courts and Citizen Review Board Program

DEPARTMENT SUMMARY

Standing Committees

The Chief Justice also uses several standing committees of the Judicial Conference and OJD, as well as the presiding judges, to make recommendation to him on a variety of issues. The list below identifies a few of the current committees:

- Oregon Judicial Conference (statutory)
- Uniform Trial Court Rules Committee
- Judicial Education and Staff Education Advisory Committees
- Statewide Family Law Advisory Committee (SFLAC)
- State Security and Emergency Preparedness Advisory Committee (SEPAC)
- Court Reengineering and Efficiencies Workgroup (CREW)
- Judicial Conduct Committee

Program Descriptions

Administration: The Chief Justice is responsible for the administration of the unified state-funded court system in the judicial branch of government. This program area covers the administration infrastructure and central state entity costs. The SCA serves under the direction of the Chief Justice and manages the Office of the State Court Administrator (OSCA) and the central administrative infrastructure and state programs of the court system. ORS chapter 8 establishes and defines the primary duties of the SCA. In this capacity, the SCA supervises administration of OJD's central business and infrastructure services for the court system such as budget, accounting, procurement, human resources, legal, audit, education and outreach, *pro tempore* services, information technology infrastructure, and technology projects such as the recently implemented Oregon eCourt program. In addition, the SCA has responsibility for administrative management of the Appellate Court Records section, the State of Oregon Law Library, OJD publications, OJD security and emergency preparedness program, OJD court interpreter certification and services program, OJD shorthand reporter certification (CSR) program, juvenile court improvement program, and state Citizen Review Board program.

The Administration program area also funds and manages the centralized costs and assessments paid for all of OJD as a state entity and for its judges and staff, including state government assessments and system use charges, rent, debt service, tort claims, and risk management.

Appellate/Tax Court Operations: This budget program area covers the staff and operations of the Supreme Court, the Court of Appeals, and the Tax Court. All three courts are located in Salem. The Supreme Court is the highest-level court in Oregon. It has discretion to accept review of appeals from the

DEPARTMENT SUMMARY

Court of Appeals and the Tax Court and has areas of original jurisdiction as well. Administratively it has additional statutory responsibilities as a body, such as being involved with regulation of the state practice of law (through the state bar) and approving *pro tempore* judges. The Supreme Court consists of seven justices elected in statewide elections to serve six-year terms. From among themselves, the justices elect one to serve as the Chief Justice for a six-year term as the administrative head of the judicial branch.

The Court of Appeals is Oregon's intermediate appellate court. By statute, the Court of Appeals is charged with deciding nearly all the civil and criminal appeals taken from Oregon's state trial courts and nearly all the judicial reviews taken from administrative agencies in contested cases. Created by statute in 1969, the Court of Appeals does not exercise any constitutional jurisdiction; instead, its jurisdiction is set by the Legislature. The Court of Appeals consists of 13 justices elected in statewide elections to serve six-year terms.

The Tax Court is a unique court with statewide exclusive jurisdiction to hear only cases that involve Oregon's tax laws, including income taxes, corporate excise taxes, property taxes, timber taxes, cigarette taxes, local budget laws, and property tax limitations. There are no jury trials, and appeals go directly to the Supreme Court. The Tax Court has one judge who is elected as a statewide judicial position, also for a term of six years. The Oregon Tax Court has two divisions – a Regular Division and the Magistrate Division. In the late 1990s, the Tax Magistrate Division was created as a component part of the Tax Court to replace the informal administrative tax appeals process previously conducted by the Department of Revenue. The Tax Court judge appoints a presiding magistrate and other magistrates to hear cases in the Magistrate Division. The Magistrate Division tries or mediates all tax appeals, unless the Tax Court judge assigns the case to the Regular Division. A party may appeal a magistrate's decision to the judge of the Tax Court, except in cases filed as small claims. Decisions in small claims procedures are final and not appealable. Appeals from Regular Division decisions go directly to the Supreme Court.

Trial Court Operations: Local funding for the staff and operations of all state trial courts (circuit courts) are included in this program area. It is the largest resource program area because it includes the staff and services for all local court operations in courthouses statewide. There are circuit courts in each of the 36 counties, organized as 27 judicial districts, and served by 173 judges statewide. State law specifies the number of judges elected in each judicial district. They are elected locally for six-year terms.

The circuit court is Oregon's trial court of general jurisdiction. This means the courts hear all case types provided regardless of the subject matter, amount of money involved, or the severity of the crime alleged. In the trial courts, the circuit court judges adjudicate matters and disputes in criminal, civil, domestic relations, traffic, juvenile, small claims, violations, abuse prevention, probate, mental commitments, adoption, and guardianship cases. These courts handle over 500,000 case filings a year, or over one million filings a biennium. This number does not include the thousands of motions and hearings that happen within the cases nor post-judgment proceedings. Decisions appealed from circuit courts go directly to the Court of Appeals, except for cases where the circuit court sentenced a defendant to death. Those death penalty appeals go directly to the Supreme Court.

DEPARTMENT SUMMARY

Mandated Payments: The Mandated Payments program funds the federally and state mandated ancillary services of providing and paying for both trial jurors and grand jurors, court interpreters, civil arbitration costs for indigents, appellate civil transcript costs, and Americans with Disabilities Act accommodation equipment and services for litigants and the public.

DEPARTMENT SUMMARY

Oregon Judicial Department Budget History (\$ in millions)

| | 2001-03 | 2003-05 | 2005-07 | 2007-09 | 2009-11 | 2011-13 | 2013-15 | 2015-17 | 2017-19 (CSL) | 2017-19 (ARB) |
|--------------------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Judicial Comp ¹ | | | | | \$ 60.663 | \$ 64.741 | \$ 69.167 | \$ 73.258 | \$ 78.105 | \$ 81.996 |
| Operations | \$ 215.788 | \$ 225.544 | \$ 259.005 | \$ 294.166 | \$ 198.746 | \$ 241.451 | \$ 272.032 | \$ 295.563 | \$ 317.262 | \$ 324.651 |
| OF – Operations | \$ 21.066 | \$ 36.165 | \$ 30.431 | \$ 37.804 | \$ 62.177 | \$ 16.312 | \$ 17.141 | \$ 21.058 | \$ 14.172 | \$ 26.662 |
| Subtotal | \$ 236.854 | \$ 261.709 | \$ 289.436 | \$ 331.971 | \$ 321.586 | \$ 322.504 | \$ 358.340 | \$ 389.879 | \$ 409.539 | \$ 433.308 |
| Indigent Defense ² | \$ 144.122 | | | | | | | | | |
| Third-Party Collections ³ | | | \$ 1.031 | \$ 8.713 | \$ 9.552 | \$ 11.680 | \$ 11.512 | \$ 12.192 | \$ 12.643 | \$ 15.950 |
| Mandated Payments | \$ 12.307 | \$ 12.111 | \$ 12.526 | \$ 15.374 | \$ 13.903 | \$ 13.364 | \$ 14.901 | \$ 15.664 | \$ 16.217 | \$ 16.217 |
| Debt Service ⁴ | | | | | \$ 10.540 | \$ 20.259 | \$ 18.133 | \$ 18.509 | \$ 20.426 | \$ 21.480 |
| Pass-Throughs | | | | | | \$ 14.552 | \$ 14.531 | \$ 16.042 | \$ 15.806 | \$ 17.994 |
| eCourt Program | | | | \$ 14.000 | \$ 12.445 | \$ 36.124 | \$ 27.244 | \$ 20.107 | \$ 2.336 | \$ 2.336 |
| OF Pass-Through | | | | | | \$ 4.780 | \$ 18.406 | \$ 16.049 | \$ 15.062 | \$ 15.062 |
| Federal Funds / Jury | \$ 2.106 | \$ 2.893 | \$ 1.790 | \$ 2.014 | \$ 1.594 | \$ 1.838 | \$ 1.828 | \$ 2.270 | \$ 1.919 | \$ 2.002 |
| State Court Tech Fund | | | | | | | \$ 3.850 | \$ 12.285 | \$ 12.295 | \$ 14.495 |
| Supreme Court Bldg Remodel | | | | | | | \$ 4.400 | | | \$ 29.410 |
| OCCCIF | | | | | | | \$ 38.000 | \$ 80.073 | | \$ 212.400 |
| Total Funds | \$ 395.388 | \$ 276.713 | \$ 304.782 | \$ 372.072 | \$ 369.620 | \$ 425.100 | \$ 511.146 | \$ 583.069 | \$ 506.893 | \$ 780.654 |
| Positions ⁵ | 2,061 | 2,022 | 2,025 | 2,071 | 1,862 | 1,878 | 1,889 | 1,921 | 1,862 | 1,958 |
| FTE ^{5,6} | 1,851.89 | 1,855.17 | 1,863.54 | 1,911.47 | 1,815.97 | 1,752.66 | 1,763.60 | 1,783.83 | 1,749.25 | 1,815.89 |

¹Judicial Compensation was established as a separate appropriation during the 2009-11 biennium.

²Budget for 1999-2001 and 2001-03 included the Indigent Defense Program.

³Third-Party Collections costs were part of Other Funds expenditures prior to the 2011-13 biennium, when a separate General Fund appropriation was created.

⁴2017-19 CSL includes approx. \$1.3 million in debt service on bond sales for the Tillamook Courthouse, a project that has now been suspended.

⁵Positions and full-time equivalent (FTE) figures include limited duration positions, including Oregon eCourt Program and grant funded positions in 2009-11 through 2017-19 ARB.

⁶Budget for 2009-11 included move of 129.74 FTE from General Fund to Other Funds, supported from HB 2287 temporary judicial surcharges.

DEPARTMENT SUMMARY

Current Service Levels

Chief Justice's Recommended Budget

Department Budget Summary – All Funds

| | 2013-15 Actual Expenditures | 2015-17 Legislatively Approved Budget | 2017-19 Current Service Level (CSL)* | 2017-19 Chief Justice's Recommended** |
|----------------------------------|--|--|---|--|
| General Fund | \$ 381,663,600 | \$ 414,534,175 | \$ 442,369,274 | \$ 459,143,922 |
| General Fund Debt Service | \$ 18,133,375 | \$ 18,508,525 | \$ 20,426,495 | \$ 21,480,003 |
| Other Funds Capital Construction | \$ 4,400,000 | \$ - | \$ - | \$ 29,410,000 |
| Other Funds Debt Service Ltd | | | | |
| Other Funds Ltd | \$ 58,235,761 | \$ 147,988,947 | \$ 142,763,179 | \$ 269,281,015 |
| Other Funds Non-Ltd | | | | |
| Federal Funds Ltd | \$ 1,067,674 | \$ 1,606,769 | \$ 1,339,352 | \$ 1,339,352 |
| TOTAL – ALL FUNDS | \$ 463,500,410 | \$ 582,638,416 | \$ 506,898,300 | \$ 780,654,292 |
| Positions | 1,879 | 1,921 | 1,862 | 1,958 |
| FTE | 1,763.28 | 1,783.83 | 1,749.25 | 1,815.89 |

* 2017-19 CSL includes approx. \$1.3 million in debt service on bond sales for the Tillamook Courthouse, a project that has now been suspended.

**Includes CSL and all policy option packages

DEPARTMENT SUMMARY

Policy Option Packages Summary

Package 401 – New Judgeships and Support Staff (\$2,778,606 GF, 36 positions, 11.16 FTE): This package provides funding for new judgeships and support staff in Multnomah, Washington (two), Marion, Deschutes, Douglas, Josephine, Clackamas, and Jackson counties.

Package 402 – Judicial Compensation (\$2,992,360 GF): This package provides funding to support judicial compensation increases to median levels for comparable positions in other states.

Package 403 – Judicial Resources – Hearings Referees (\$1,019,394 GF, 5 positions, 4.40 FTE): This package provides three centralized Hearings Referee positions for juvenile dependency cases and one Hearings Referee and support position for Linn County to decrease judicial workload.

Package 404 – State Court Technology Fund (\$10,690,190 OF, 7 positions, 7.0 FTE): This package provides the limitation necessary for increased funding to support public access and statewide support for court electronic applications, systems and services.

Package 405 –Support Effective Court Programs – *Pro Se* (\$3,198,916 GF, 20 positions, 17.16 FTE): This package provides program coordination and trial court resources to assist Oregonians in accessing the courts when they choose to be self-represented.

Package 406 – Multnomah County Violations Processing Staff (\$741,696 GF, 6 positions, 5.28 FTE): This package provides funding for clerical support positions in Multnomah County to support parking citation growth.

Package 407 – Supreme Court Coordinating Councils (\$376,744 GF, 2 positions, 1.76 FTE): This package increases resources to support the Oregon Supreme Court Council on Inclusion and Fairness and the Tribal, State, and Federal Court Forum.

Package 408 – County Mediation and Conciliation Funding and Support (\$2,171,920 GF, 1 position, 0.88 FTE): This package increases pass-through funding for county mediation and conciliation services and program coordination.

Package 409 – Treatment/Specialty Courts Grant Funding (\$4,109,856 OF, 19 positions, 19.00 FTE): This package provides position authority and expenditure limitation for grants that either extend into the 2017-19 biennium or are expected to renew.

Package 410 – Oregon Courthouse Capital Construction and Improvement Fund Program (\$212,400,000 OF/Bonding): This package provides continued support for courthouse replacements in Multnomah, Clackamas and Hood River counties.

DEPARTMENT SUMMARY

Package 411 – Oregon Courthouse Capital Construction and Improvement Fund Debt Service (\$1,053,508 GF, \$1,245.000 OF): This package provides debt service and cost of issuance for bonds sold during the 2017-19 biennium to support courthouse replacement projects.

Package 412 – Local Court Facilities Infrastructure (\$3,600,000 OF/Criminal Fine Account Allocation): This package provides funding from the Criminal Fine Account for capital construction and capital improvement projects in county courthouses.

Package 413 – Third-Party Debt Collection (\$3,307,095 GF): This package increases funding to support costs associates with debt collections and credit card payments.

Package 414 – Supreme Court Building Preservation and Seismic Retrofit (\$29,410,000 OF/Bonding): This package provides capital construction funding for continued renovations and seismic retrofit of the Oregon Supreme Court Building.

Package 420 – Law Commission – Full Program Cost Funding (\$20,671 GF): This package seeks additional funding for the Law Commission to eliminate calculated use of Willamette University funds to support Commission activities.

Package 421 – Law Commission Staff Attorney (\$167,246 GF): This package is intended to provide resources for an additional Staff Attorney for the Law Commission.

DEPARTMENT SUMMARY

Reduction Planning

ORS 291.216 requires the Governor to submit an alternative budget plan funding agencies at 90 percent of their funding levels. The following information summarizes the application of this level of reduction to the Current Service Level budget in the Chief Justice's Recommended Budget. Because of non-reducible items in the budget, a ten percent reduction would translate up to a 15 percent reduction to the mandated payments program area and to the operations areas of appellate, administration, and trial courts, as explained below.

Oregon Judicial Department Budget

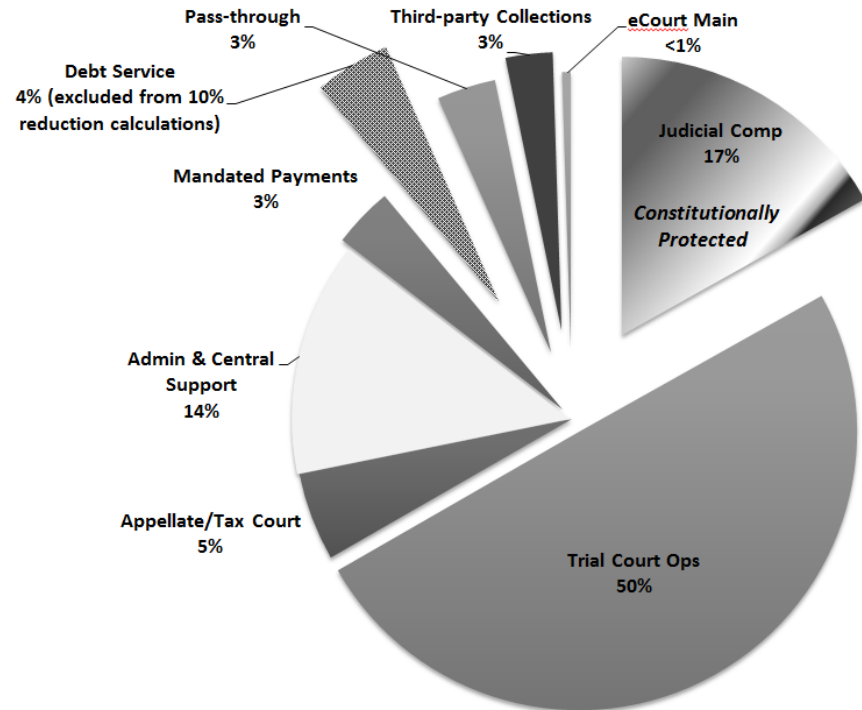
The OJD Current Service Level (CSL) budget request is for \$462.8 million in General Fund for the 2017-19 biennium. For calculation of reductions, debt service (\$20.4 million, 4.41 percent of the budget) is excluded per statute, resulting in a budget number of \$442.4 million for OJD and a ten percent reduction target of \$44.24 million.

Judicial Compensation: 2017-19 CSL budget \$78,105,091 (16.88 percent of CSL budget). This appropriation provides for constitutionally protected compensation (within term) of filled judgeship positions. Any reductions that are required for this appropriation would have to be made up by additional reductions to operations if not covered sufficiently by vacancy savings (time between vacancy created and appointment by the Governor or through an election). This would push a required \$7.8 million of reductions into other OJD appropriations (the equivalent of an additional 50 FTE reductions in other appropriation areas).

Pass-Throughs: 2017-19 CSL budget \$15,806,359 (3.42 percent of CSL budget). This appropriation provides pass-through funding for county law libraries, county mediation and conciliation services, biennial funding for the Council on Court Procedures, and biennial funding for the Oregon Law Commission. Reductions to these pass-through entities will result in impacts to communities that depend on these services.

Third-Party Collections: 2017-19 CSL budget \$12,642,905 (2.73 percent of CSL budget). This appropriation finances costs for collection of past-due fines and fees, and also credit card fees and State Treasury fees for fee/fine payments. The major recipients of these cost payments are the

2017-19 CSL Budget – General Fund By Area



DEPARTMENT SUMMARY

Department of Revenue (DOR) and private collection companies. On average, 63 percent of budget funding is paid to DOR for collection and tax-offset activities. Expenditures are only paid for successful collection of a debt. Additionally, approximately 16 percent of expenditures are the result of merchant fees/discounts associated with the use of credit cards to pay fees and fines. On average, spending returns \$4.68 in revenues for each \$1.00 expended on collections. The possible impact from ten percent reductions of \$1.3 million to collections would be a \$5.9 million loss in revenue to the state's General Fund.

Mandated Payments: 2017-19 CSL budget \$16,216,686 (3.5 percent of CSL budget). The appropriation provides statutory payments for jury service, statutory interpreter services for non-English speakers (including crime victims exercising their constitutional rights of participation), statutory arbitration expenses, and Americans with Disabilities Act compliance funding related to jury service or interpreting. The vast majority of expenditures are for jury payments and interpreter services. Reductions to this appropriation would require a reduction in the number of jury trials conducted and increase the wait time for trials requiring juries or interpreters. This slowdown would reduce timely access to justice and increase the state's liability for not meeting statutory and constitutional requirements for timely trials.

Oregon eCourt Program Operations and Maintenance: 2017-19 CSL budget \$2,336,363 (0.50 percent of CSL budget). A ten percent reduction would be \$233,636. Due to the nature of the expenses paid out of this appropriation, OJD would have limited opportunities to implement reductions without impacting the ongoing operations of the Oregon eCourt Program. This would require backfilling from the Operations appropriation, increasing possible reductions in those areas. Some of the expenditures in this program are contractual and would have to be paid at the expense of further reductions to Operations.

Operations – Trial Courts: 2017-19 CSL budget \$230,609,265 (49.83 percent of CSL budget). A ten percent reduction to this appropriation would be \$23.1 million to the trial courts operating budget. Trial court operations are the mostly publicly-visible aspect of OJD as well as the largest appropriation in the OJD budget. Trial court operations consist primarily of personal services costs. As with past reduction implementations, reductions in the trial courts predominately impact staffing for court operations. A ten percent reduction in funding would result in an approximate loss of 128 FTE in court personnel. Reductions of this magnitude could cripple court operations, dramatically reducing service hours, delaying timely entry of judgments or arrest warrants, or reducing the number of cases the courts could process. Court staff likely would be required to prioritize criminal trials over civil and family law cases or other functions, delaying critical work that is not subject to specific constitutional or statutory time restrictions. Actual implementation of FTE losses of this magnitude may result in the Chief Justice partially closing some court locations in order to maintain public access and services at other locations serving a larger population base.

Operations – Appellate/Tax Court: 2017-19 CSL budget \$23,696,837 (5.12 percent of CSL budget). A ten percent reduction in this area would be \$2.37 million. This reduction likely would result in a minimum loss of 12 FTE who provide direct legal and administrative support to the judges on the Supreme Court, the Court of Appeals, and the Tax Court. Expected outcomes include severe delays of review, analysis and decisions in all three courts, resulting in less guidance to Oregonians on legal issues of statewide importance, undermining the ability of these courts to provide timely

DEPARTMENT SUMMARY

decisions, maintenance of briefs and decisions for the court system, and deferment of all building maintenance projects for the century-old Supreme Court Building. Courts will be required to reduce operational hours and only process critical cases.

Operations – Administration and Central Support: 2017-19 CSL budget \$62,955,768 (13.6 percent of CSL budget). A ten percent reduction in this appropriation area would be \$6.3 million. More than one-third of this appropriation funds non-reducible expenses like state government service changes, rent (a significant part to the Department of Administrative Services), workers compensation insurance, and network and system access. Although some reductions would only reflect reductions in FTE from other appropriations (e.g., fewer trial court staff), reductions at this level would result in less support for improvements to Oregon's foster-care program through juvenile court programs, reducing computer and information technology support, threaten the ability to test and implement patches and upgrades to technology systems, reduced computer security investment and stopping maintenance payments on security programs, which would increase system risk and computer downtime. OJD would be forced to reduce legal review, training and education for judges and staff, reduce access to legal resources available to courts and the public through the State of Oregon Law Library, reduce support to trial court operations in resolving legal issues and developing more efficient business processes, reduce support for courts in adjudicating family law cases, and stop replacement of critical systems. Due to non-reducible areas, the result of reductions would hit more heavily in required FTE reductions to balance reductions and would result in the loss of 29 FTE (or greater).

DEPARTMENT SUMMARY

Annual Performance Progress Report (APPR) for Fiscal Years 2015-17

Submission Date: December 2016

The APPR has been modified in this report to contain two sections. The first section contains the current legislatively adopted Key Performance Measures (KPMs), and is presented in the same format as previous biennial versions. The second section is new to the APPR and contains KPMs that are being proposed to the legislature for adoption for future budget periods beginning with the 2019-21 biennium.

Section One - Current KPMs

The following are the Key Performance Measures (KPMs) that were developed in cooperation with the Legislature, most dating back to 2004. However, as noted on the following pages, budget reductions and technology changes have impacted their future relevance and OJD's ability to provide continued coverage of the adopted KPMs. As a result, new and revised KPMs that can be reported from the new Oregon eCourt system and current OJD programs are submitted for approval and use for future budget periods beginning with the 2019-21.

| KPM# | Key Performance Measures (KPMs) |
|------|---|
| 1 | Accessible Interpreter Services: <i>The percentage of dollars spent on OJD certified freelance interpreters out of total expenditures for freelance (nonstaff) interpreters of languages in which certification testing is offered by OJD.</i> |
| 2 | Collection Rate: <i>The percentage of all monetary penalties imposed by circuit courts and appellate courts that are collected.</i> |
| 3 | OJIN Data Timelines and Accuracy: <i>The average number of calendar days between the date a judge signs a judgment and the date that the judgment is entered into the official record.</i> |
| 4 | Representative Workforce: <i>The parity between the representation of persons of color in the civilian labor force and the representation of the same group in the workforce of the OJD.</i> |
| 5 | Trained Workforce: <i>The percentage of OJD education program participants who reported gaining specific knowledge related to OJD by attending the program.</i> |
| *6 | Timely Case Processing: <i>The percentage of cases disposed of or otherwise resolved within established time frames.</i> |
| 7 | Permanency Action Plans: <i>The percentage of circuit courts with a performance measure supporting permanency outcomes for children in foster care.</i> |
| *8 | Drug Court Recidivism: <i>The percentage of adult drug court graduates with no misdemeanor or felony charges filed in the Oregon circuit courts within one year of program graduation.</i> |

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* **Note:** KPM 6 shows only data from courts still using OJIN. All counties were transitioned to the Oregon eCourt system by June 2016. New reports to replace KPM 6 are proposed in section two of this report. KPM 8 was retained by the Legislature with the expectation that OJD could get necessary data from the Criminal Justice Commission (CJC).

| | |
|-----------------------------|---------------------|
| Contact: David Moon | Phone: 503-986-5150 |
| Alternate: Jessica Basinger | Phone: 503-986-5601 |

1. SCOPE OF REPORT

These OJD programs are partially addressed by our key performance measures: Court Language Access Services, Collections, Court Improvement, Human Resources, Judicial and Staff Education, Juvenile Court Improvement Program, and Drug Courts.

2. THE OREGON CONTEXT

OJD is responsible for:

- Enforcing laws and the Oregon Constitution;
- Resolving disputes fairly to ensure public and private safety;
- Enforcing promises without favor or bias to enforce economic and property rights;
- Protecting children and strengthening families; and,
- Applying sentencing resources to promote public safety.

OJD's partners in the executive and legislative branches recognize the critical responsibilities of the courts in protecting children and families, enhancing public safety, and enforcing economic and property rights. The business community is committed to an experienced, efficient, and impartial bench as a critical component of continued economic development in Oregon. In addition, nongovernmental and professional organizations work daily with the local courts as well as support statewide issues.

3. PERFORMANCE SUMMARY

OJD continues to make progress on three of the eight key performance measures (1, 2, 3 and 7). For measure 6 – Timely Case Processing, we are no longer able to report this KPM as we have transitioned off of the legacy OJIN system and no longer measure this data in the same way in the new Oregon

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eCourt system. It is unclear if the department is making progress on measure 4 – Representative Workforce, since it is difficult to compare OJD with other state agencies because the data for the majority of our workforce is composed of county labor force data for local positions rather than statewide labor force data. Additionally, we are unable to provide a report for measure 8 – Drug Court Recidivism; however, the Legislature has directed us to seek this information from the Criminal Justice Commission (CJC). The most recent CJC report on recidivism is provided in the [Special Reports](#) section. The reporting cycle for KPMs is the Oregon fiscal year.

4. CHALLENGES

Since 2003, when OJD initiated work on performance measurement, the department has strived to be inclusive in each phase of its work, beginning with education of judges, administrators, and local court staff on performance measures and strategic planning. Our early phases focused on developing output measures prior to initiating work on outcome measures.

In 2007, OJD’s long-standing statewide Performance Measures Advisory Committee launched an intensive redesign of the department’s performance measurement system in order to:

- Provide the right performance information, to the right people, at the right time;
- Create a “bottom-up,” transparent, and accountable performance management system environment; and,
- Allow for possible future enhancements including added and refined core and subordinate KPMs, improved delivery and distribution of the KPMs, and integration of the performance areas and KPMs with key management processes and operations of the judicial branch.

In 2009, due to the budget shortfall brought on by the economic crisis, OJD was forced to take drastic reduction measures, including layoffs and furloughs of central and court staff. As a result, the Court Programs and Services Division (CPSD) of OJD ceased operations and the staff was laid off. Among its primary duties, CPSD was responsible for gathering, monitoring, and analyzing the data to measure performance, in addition to providing statewide program coordination for the treatment courts (including drug courts), family law facilitation, and access/jury administration programs that have KPMs attached. CPSD staff also supported the OJD Performance Measures Advisory Committee (PMAC) that actively designed, improved, and monitored the KPMs, as well as strategic planning.

The layoff of CPSD staff meant that OJD did not have the necessary resources or central data repository to provide reports for KPMs 8, 9, and 10 beyond fiscal year 2007-08. With the advent of the Oregon eCourt system, the KPMs are moving to data that can be automated for reporting and to measures that current staff oversees for 2017 and beyond.

In 2013, the Legislature dropped KPMs 9 and 10, which are no longer noted on this report. In 2012 we began implementing the new Oregon eCourt system, which allows us access to new and more relevant reports. The new system also captures data differently than our legacy OJIN system. While this

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allows us better access to data, it also makes several of our existing KPMs obsolete. KPMs reported below are prepared from one-time reports gathered by budget and other staff from the data that resides on current OJD systems and, while time consuming, can be compiled. The continuing economic downturn has meant that OJD continues to lack the resources to do most of the monthly ongoing and analytical work on measuring performance; therefore, this report will simply provide the measures.

5. RESOURCES USED AND EFFICIENCY

The Chief Justice's Recommended Budget for the 2017-19 biennium is \$780.7 million (All funds). The Efficiency Measures are KPM 1 – Accessible Interpreter Services, KPM 2 – Collection Rate, and KPM 3 – OJIN Data Timeliness and Accuracy (see Key Measure Analysis).

6. FUTURE KPM PLANS

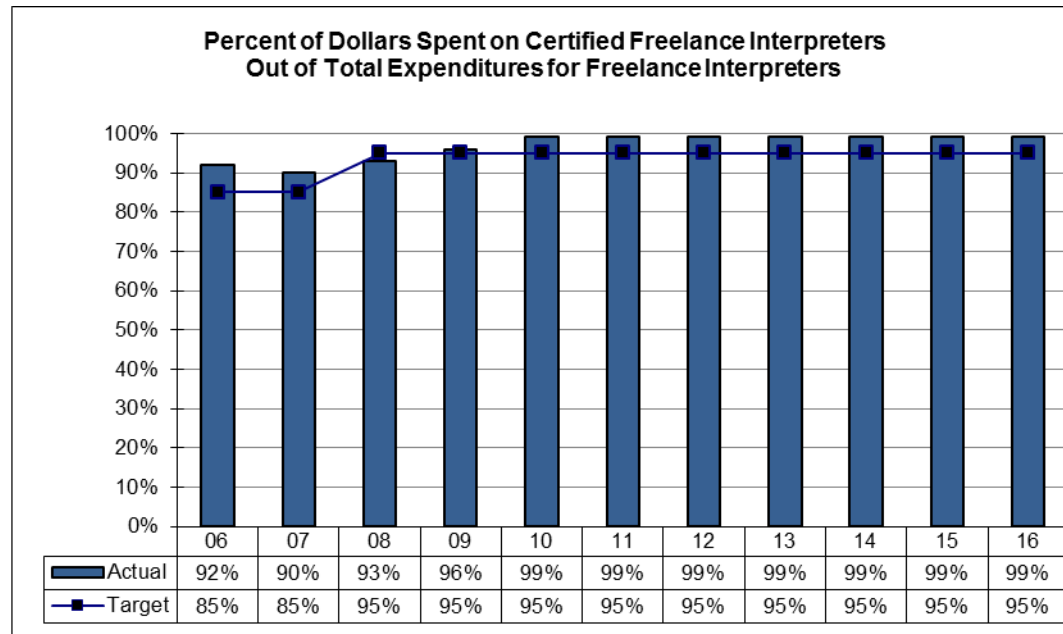
OJD is proposing nine new KPMs that will both increase efficiency in our state system reporting and allow comparison and review with other court systems nationally. This in turn will improve our ability to evaluate issues and improve performance where feasible. While our existing KPMs are reported for the 2017-19 budget report, if approved by the Legislature we will replace them with the KPMs proposed in section two of this report for reporting periods included in the 2019-2021 biennium budget document.

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| KPM #1 | Accessible Interpreter Services The percentage of dollars spent on OJD certified freelance interpreters out of the total expenditures for freelance (nonstaff) interpreters of languages in which certification testing is offered by OJD. | | Measure since: 2005 |
|----------------|--|------------------------------------|---------------------|
| Goal | Justice 2020 Access: Ensure access to court services for all people | | |
| Oregon Context | OJD Mission and Access Standards | | |
| Data source | Monthly Mandated Funds Financial Reports | | |
| Owner | Court Language Access Services | Contact: Kelly Mills, 503-986-7004 | |

1. OUR STRATEGY: The Oregon Judicial Department's 5-Year Strategic Plan indicates that interpreting services are an integral part in meeting the goals of protecting public access to justice. OJD will improve and expand, through the use of technology and other means, the availability, distribution, and scheduling of qualified court interpreting services. OJD will increase the number of languages for which a certification or registration process is available to ensure quality interpreter services.

2. ABOUT THE TARGETS: Without access to court interpreter services, language barriers can exclude non-English speaking people from meaningful participation in their own court proceedings. Through Court Language Access Services (CLAS), OJD complies administratively with federal and state laws. It promotes effective and efficient case resolution, assists in keeping cases within timelines, and assists in meeting collections measures. Certification testing and the credentialing of interpreters based on objective assessments of an interpreter's qualifications meet the unique demands of court interpreting. Overall, the Oregon pass rate for the certification is just 19.2 percent.



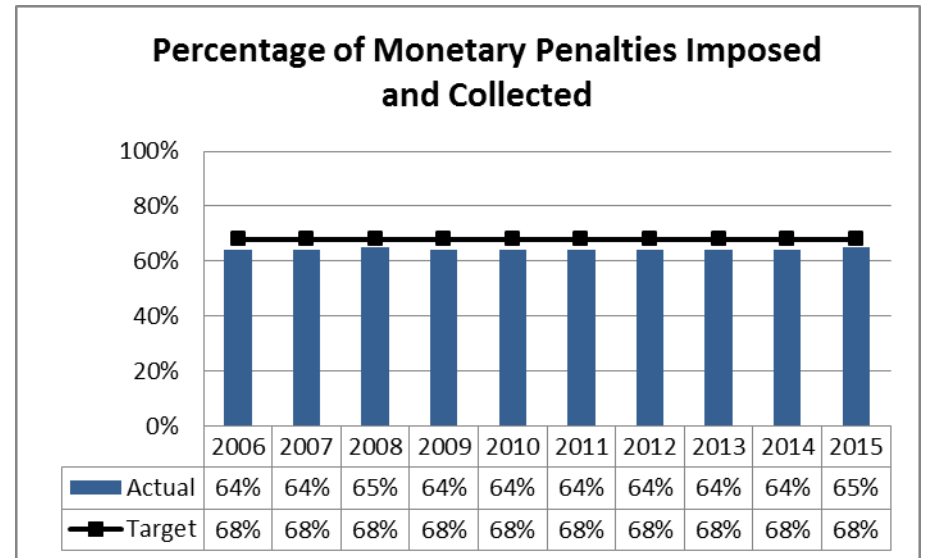
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3. **HOW WE ARE DOING:** CLAS anticipates increased use of certified interpreters in 2017-19 as the number of Limited English Proficient (LEP) individuals within Oregon increases, more interpreters sit for examinations and become certified, recruitment efforts are enhanced, and centralized scheduling is accomplished. In addition, education efforts increase awareness that certified court interpreters provide more accurate interpreting and prevent expensive retrials. Oregon counties schedule 100 percent of needed interpreters through CLAS's centralized scheduling process for cost savings, efficiency, and interpreting accuracy.
4. **FACTORS AFFECTING RESULTS:** In 2015, the number of interpreter requests increased slightly with the final deployment of Oregon eCourt and the Odyssey case management system, as more accurate language need data became available. The 2013 certified interpreter hourly rate increase allowed OJD to retain the highest-quality court certified interpreters for LEP persons.
5. **WHAT NEEDS TO BE DONE:** CLAS continues to increase use of OJD remote interpreting technology to bring certified interpreter services to all courts. Technology is being used at shorter, less complex hearings, as well as used as a tool to provide training to prospective and certified interpreters in remote areas of the state.
6. **ABOUT THE DATA:** The Business and Fiscal Services Division of OJD provides a statewide summary of expenditures for freelance court interpreter services. The expenditures are organized by court, language, travel, and certified or uncertified interpreter expenditures.

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| KPM #2 | Collection Rate The percentage of all monetary penalties imposed by circuit courts and appellate courts that are collected. | Measure since: 2005 |
|----------------|--|------------------------|
| Goal | Justice 2020 Access: Make courts work for people | |
| Oregon Context | OJD Mission and Access Standards | |
| Data source | Oregon eCourt System | |
| Owner | Business and Fiscal Services Division Contact: Jessica Basinger, 503-986-5601 | |

- OUR STRATEGY:** The Business and Fiscal Services Division (BFSD) educates administrators, judges, and community partners about OJD collection efforts, programs, and resources.
- ABOUT THE TARGETS:** The OJD collection rate measures how much of the amounts imposed are collected. Most of the unpaid balances are related to felony and misdemeanor crimes. The target was set based on trending of previous years and plans for program improvements. Due to the length of time judgment remedies exist on these cases and the large dollar amounts that may be imposed, the unpaid balances are often pursued for many years.
- HOW WE ARE DOING:** OJD continues to maintain a consistent collection rate despite staff cuts, budget reductions, and large increases in amounts imposed year over year.
- HOW WE COMPARE:** While we compare favorably to other court systems, it is difficult to find a statewide court system that uses the identical collection rate calculation. We do exchange information with other court systems to compare effectiveness of programs and tools.
- FACTORS AFFECTING RESULTS:** Most delinquent debt is related to felony and misdemeanor case types (91 percent). Persons committing these types of crimes and not paying are typically in and out of incarceration, transient, and hard to locate.



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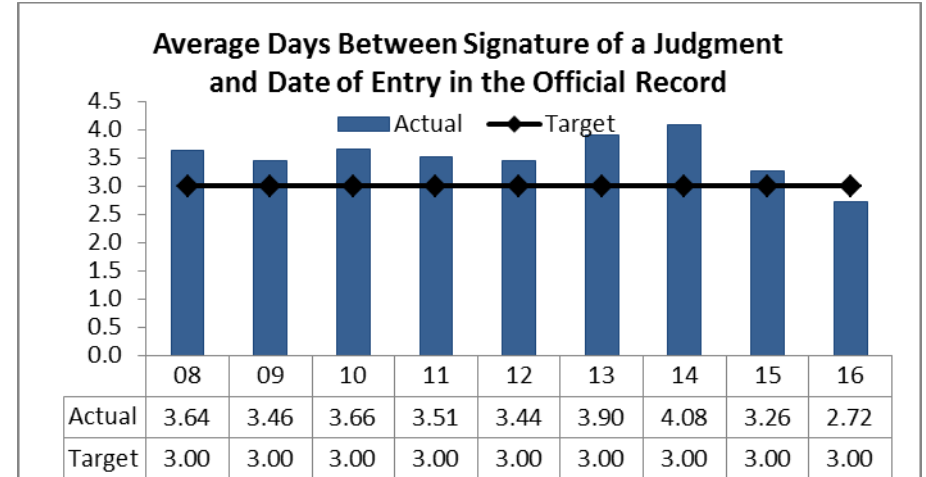
- 6. WHAT NEEDS TO BE DONE:** The department is working with the Oregon legislative delegation and the National Center for State Courts on federal legislation that will allow the courts to intercept federal tax refunds. Oregon has already passed legislation and will be ready once federal legislation is passed. In 2010, OJD centralized the management of delinquent debt to shift the focus from in-house collection at the courts to outsourcing the collection of delinquent debt to the Department of Revenue (DOR) and private collection firms (PCFs). OJD contracted directly with three different PCFs, which has allowed the department to monitor performance and balance the volume of delinquent debt at each PCF. OJD has been working with these PCFs for the past six years to augment the services provided by DOR. In fiscal year 2016, OJD experienced significant increases in collections among DOR and PCFs and hopes to continue that trend by referring delinquent debt out sooner, increased use of garnishments, automated delinquency notices, and other tools like tax offsets and license reinstatement programs. In 2017, OJD will begin to develop criteria for a new debt settlement program authorized by Senate Bill 55 (2015) and will be working with other state agencies and the statewide accounts receivable committee on new pilot initiatives to do vendor and lottery offsets.
- 7. ABOUT THE DATA:** The measure is the cumulative collection rate calculated by dividing all moneys collected by the net amounts imposed. Net amounts imposed are receivables minus adjustments, to accommodate the modification of sentences, data entry error, administrative write-offs, expired judgments, or other instances where the imposed amount was changed or where no receivable is created, as in some civil case types.

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| KPM #3 | OJIN Data Timeliness and Accuracy Average number of calendar days between the date a judge signs a judgment and the date that the judgment is entered into the official record. | | Measure since: 2007 |
|----------------|---|---|---------------------|
| Goal | Justice 2020 Access: Make courts work for people | | |
| Oregon Context | OJD Mission and Access Standards | | |
| Data source | Oregon eCourt System | | |
| Owner | Business and Fiscal Services Division | Contact: Jessica Basinger, 503-986-5601 | |

- OUR STRATEGY:** Administrators and supervisors periodically review data entry protocols, statistics policy, and case flowcharts with staff.
- ABOUT THE TARGETS:** This KPM reflects only “general judgments” in civil and domestic relations cases and “judgments” in criminal cases. Circuit court staff should enter all court case actions into the official register of actions as expeditiously and accurately as possible. This is especially true for judgments, since any delay in the entry of a judgment into the official register of actions for a case may have important legal consequences under Oregon law.

- HOW WE ARE DOING:** The courts started making slow progress in reducing time to entry in 2009. The time to entry increased in 2010, likely due to the reduction in court staff caused by layoffs and furloughs, but improved again in 2011 and in 2012 as courts shortened public access hours to provide “catch-up time.” Furthermore, Multnomah County received some additional funds in May 2012 to help with these delays. In 2013, several courts started to prepare for the transition to Oregon eCourt and the data conversion that would be necessary. While this KPM primarily reflects timeliness, the measure is also dependent upon and reflective of data entry accuracy. Incidents where the absolute number of days between the signature date and the entry date of judgments is large are sometimes due to data entry errors rather than real delays between signature date and entry of judgments into the official record. With the implementation of Odyssey, our methodology has changed slightly for counties as they begin using the system and start using new Odyssey business processes.



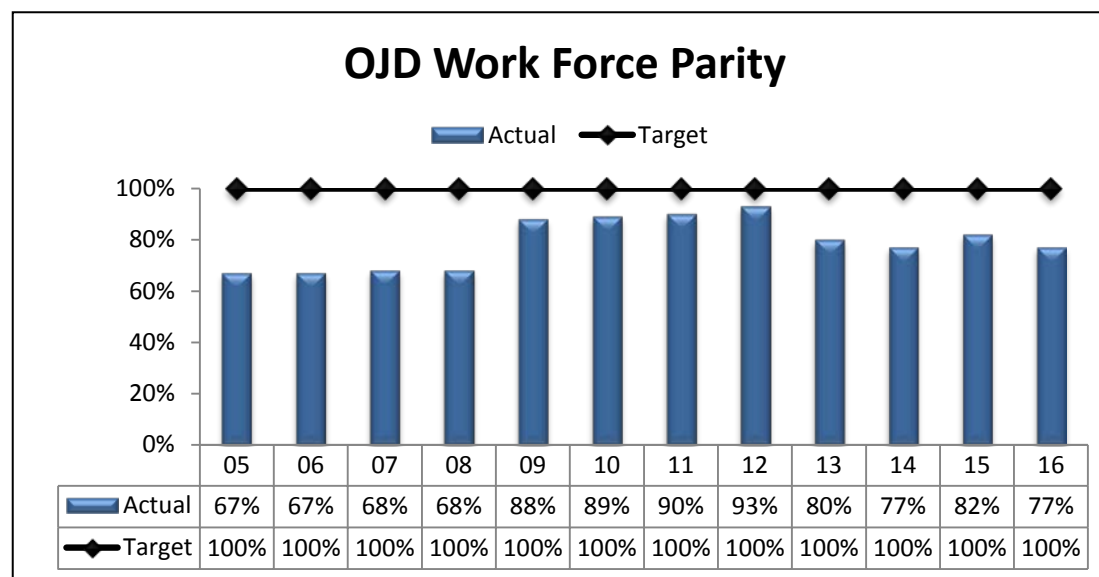
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4. **HOW WE COMPARE:** While data timeliness and accuracy are important to court systems, the department is not aware of other states tracking this measure.
5. **FACTORS AFFECTING RESULTS:** When court staff manually enter data, human error is always possible. The department, through its uniform protocols, local and state education programs, and monitoring procedures ensures a mid-course correction is the standard. If courts are not entering the signed date in the judgment event or are not conforming to statewide data entry practices, those judgments cannot be included in the KPM calculation.
6. **WHAT NEEDS TO BE DONE:** The Court Programs and Services Division (CPSD) used to provide biennial reports, but due to budgetary constraints, CPSD ceased operation and most program staff support services are no longer provided. If data entry time lag is the problem, subject to availability of staffing resources, court administrators may need to increase staffing in a particular area and/or provide training. The courts have attempted to reduce backlogs by shortening public access hours to devote uninterrupted time to data entry (with fewer clerks).
7. **ABOUT THE DATA:** KPM 3 is calculated using data in the Oregon eCourt system. The measure is the average number of days between signature and entry for general judgments in civil and domestic relations cases and judgments in criminal cases that resolve charges. In June 2012, courts began transitioning to Odyssey, a new case and financial management system. As of June 2016, all courts had completed the transition to Odyssey and for the years 2015 and 2016, the data reflects a slight change in this methodology to reflect new business processes and data entry protocols in Odyssey.

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| KPM #4 | Representative Workforce The parity between the representation of persons of color in the civilian labor force and the representation of the same group in the workforce of OJD. | Measure since: 2003 |
|----------------|---|--|
| Goal | Justice 2020 Access: Make courts work for people | |
| Oregon Context | OJD Mission and Access Standards | |
| Data source | Oregon Judicial Department Biennial Affirmative Action Report and Database Reports | |
| Owner | Human Resource Services Division | Contact: Terrie Chandler, 503-986-5926 |

- OUR STRATEGY:** OJD participates in outreach activities and job fairs and provides recruitment and selection training to supervisors and lead workers, including affirmative action and diversity components.
- ABOUT THE TARGETS:** OJD strives to attain 100 percent parity with the Oregon civilian labor force.
- HOW WE ARE DOING:** OJD data from 2016 depicts 14.9 percent (231/1,554), 2015 depicts 14.1 percent (221/1,569), 2014 depicts 14.1 percent (220/1,561) of OJD's workforce as persons of color. Snapshot from Oregon Civilian Labor Force (2010 Census EEO Detailed Report by Oregon Workforce) depicts 18.2 percent of Oregon's workforce as persons of color.



- HOW WE COMPARE:** It is difficult to compare OJD with other state agencies because the data for the majority of our workforce is based on county labor force data rather than statewide labor force data.
- FACTORS AFFECTING RESULTS:** According to 2010 Census data, the Oregon workforce for persons of color increased from 15 percent to 18.2 percent (as applied to the 2013 and 2014 periods identified above).

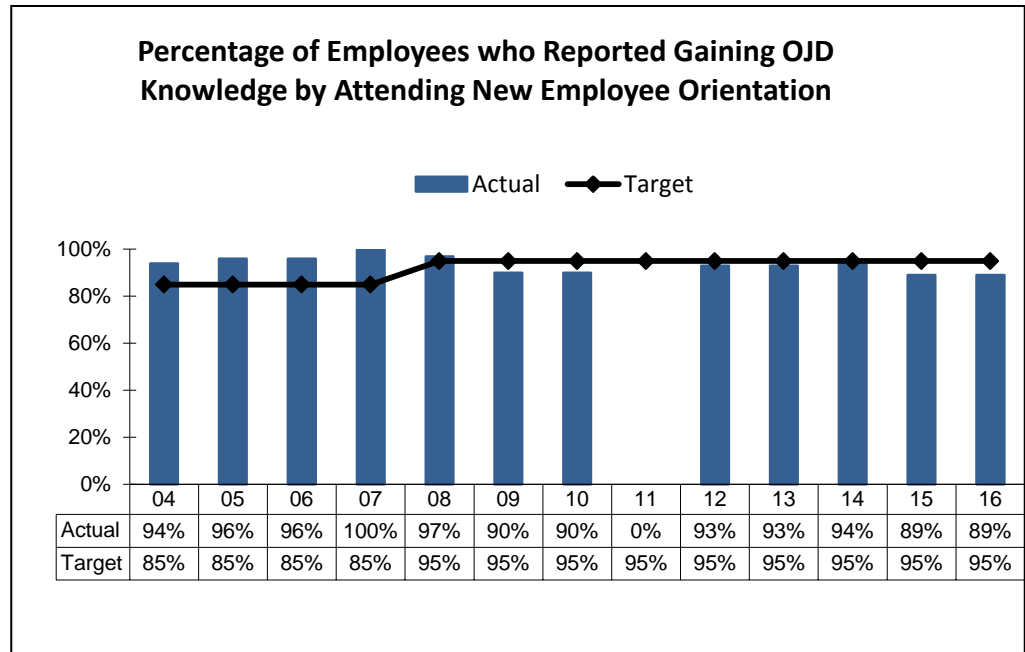
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6. **WHAT NEEDS TO BE DONE:** As the budget has stabilized, OJD seeks out and participates in outreach activities and career fairs to promote employment opportunities. In addition, OJD continues to develop additional tools and resources to expand applicant pools.
7. **ABOUT THE DATA:** Effective June 30, 2013, the data basis for this report was compiled from an OJD database generated June 30th of each year, comparing OJD's data against the 2010 US Census data using American FactFinder, 2006-2010 American Community Survey (workforce by worksite). Prior to that date, the data was compiled from the OJD Affirmative Action Plan data effective September 30th of each even-numbered year and compared against the 2000 Census EEO Detailed Report by Residence – Persons in Civilian Labor Force by Occupation, Sex, and Race/Ethnicity.

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| KPM #5 | Trained Workforce The percentage of OJD education program participants who reported gaining specific knowledge related to OJD by attending the program. | | Measure since: 2005 |
|----------------|---|---------------------------------------|---------------------|
| Goal | Justice 2020 Access: Make courts work for people | | |
| Oregon Context | OJD Mission and Access Standards | | |
| Data source | Education program participant surveys | | |
| Owner | Office of Education, Training, and Outreach | Contact: Mollie Croisan, 503-986-5924 | |

- OUR STRATEGY:** The Office of Education, Training, and Outreach (OETO) develops, delivers, and coordinates evaluation assessments for OJD education programs (e.g. New Employee Orientation, New Judge Seminar, etc.).
- ABOUT THE TARGETS:** KPM 5 focuses on the effectiveness of OSCA's orientation trainings by tracking the percentage of attendees who reported gaining specific knowledge about the department and their job by attending the training.
- HOW WE ARE DOING:** Due to the severe budget and resource cuts in 2009-11 and then again for the 2011-13 biennium, OETO has had to reduce and eliminate the majority of education programs. In 2011, no trainings were held.
- HOW WE COMPARE:** Under normal circumstances, our evaluation results are similar or exceed similar efforts by other state courts.



- FACTORS AFFECTING RESULTS:** How often the department is able to provide education programs impacts the evaluation ratings. Due to extreme budgetary constraints, OJD has had to reduce/eliminate the majority of education programs.

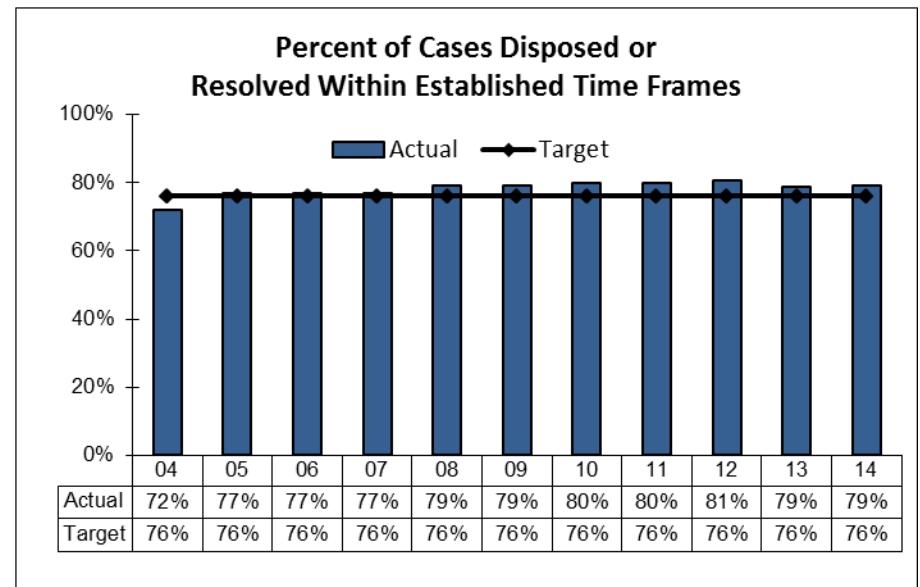
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6. **WHAT NEEDS TO BE DONE:** Funding needs to be restored to provide education programs to court staff and judges.
7. **ABOUT THE DATA:** Due to reduced funding, no programs were held in 2011. There was a slight increase in funding that allowed the department to provide limited trainings for new employees up through this reporting period, ending June 2016.

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| KPM #6 | Timely Case Processing The percentage of cases disposed of or otherwise resolved within established timeframes. | Measure since: 2005 |
|----------------|---|------------------------|
| Goal | Justice 2020 Access: Make courts work for people | |
| Oregon Context | OJD Mission and Access Standards | |
| Data source | Oregon Judicial Information Network (OJIN) and OJD's Data Warehouse. Does not include information for courts that have transitioned to using the Oregon eCourt system that was concluded in June 2016. We propose replacing this KPM with a new one that draws from enhanced reports available through Oregon eCourt. | |
| Owner | Business and Fiscal Services Division Contact: Jessica Basinger, 503-986-5601 | |

- OUR STRATEGY:** Courts analyze, implement, and monitor model case flow management principles.
- ABOUT THE TARGETS:** The performance measure target in most cases is less than the Oregon Standards of Timely Disposition 90 percent goal as it was not actively monitored.
- HOW WE ARE DOING:** The 2004 to 2012 trend was showing a very gradual improvement, mostly due to composite changes in the overall caseload mix. In June 2012, several courts started the transition and data conversion to Oregon eCourt.
- HOW WE COMPARE:** The composite performance measure target is composed of singular and different disposition goals by case type; thus, identical other state court data is not available.



- FACTORS AFFECTING RESULTS:** It is evident from the slow progress that insufficient resources exist to meet the national and state standards. In addition, as courts transition to eCourt, they cannot be measured using the current methodology that was originally developed for OJIN.

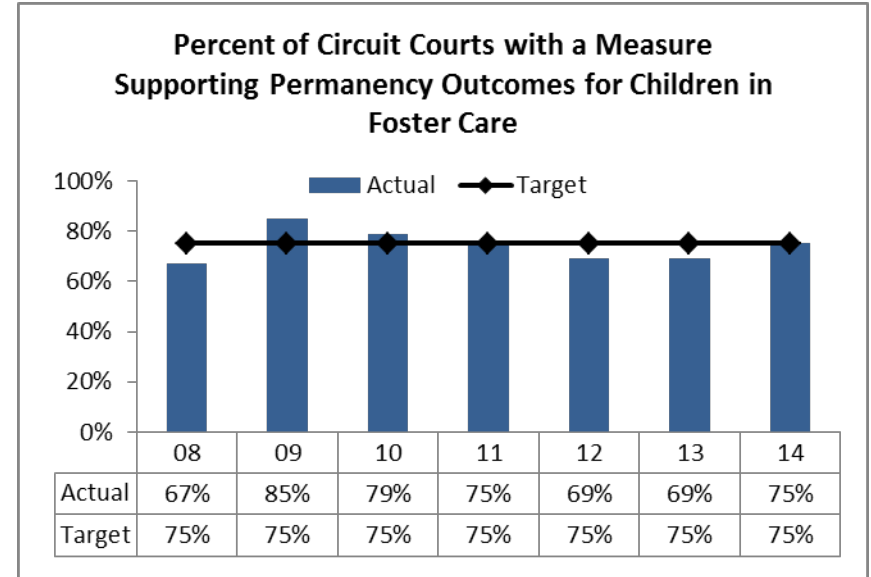
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6. **WHAT NEEDS TO BE DONE:** The department has individual case type goals and has existing criminal and juvenile model court programs focusing on caseflow management and timely resolution of cases. There is no central staff to monitor and provide assistance, so improvements are initiated at the local court level and dependent on the availability of resources.
7. **ABOUT THE DATA:** The data is from OJIN statistics. The statewide statistics are updated every six months. Juvenile data is derived from quarterly juvenile reports from OJD's Data Warehouse. These categories are combined and weighed according to the case type priorities to produce the composite measure target and data. The methodology that was developed for this measure account for OJIN business processes and database structures. Therefore, as all courts have now converted to Odyssey, they are no longer measured using this method. New reports for this KPM for Oregon eCourt are currently being proposed the next section of this report.

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| KPM #7 | Permanency Action Plans The percentage of circuit courts with a performance measure supporting permanency outcomes for children in foster care. | | Measure since: 2007 |
|-----------------------|---|---------------------------------------|---------------------|
| Goal | Justice 2020 Access: Make courts work for people | | |
| Oregon Context | OJD Mission and Access Standards | | |
| Data source | Biannual survey of courts | | |
| Owner | Juvenile Court Improvement Project | Contact: Leola McKenzie, 503-986-5942 | |

- OUR STRATEGY:** Juvenile Court Improvement Project (JCIP) staff helps local model court teams develop, implement, and monitor intergovernmental plans and statewide performance measures.
- ABOUT THE TARGETS:** First adopted in 2007, the goal is for the local teams to work on strategies to achieve state and local measure targets for children in foster care. Creating the intergovernmental plans with firm commitments from all partners is the initial critical step.
- HOW WE ARE DOING:** Local model court teams developed plans identifying court and system improvement priorities with strategies to implement those improvements.
- HOW WE COMPARE:** All courts track performance measures related to timely jurisdiction and permanency hearings.
- FACTORS AFFECTING RESULTS:** Data is based upon 32, not 36, counties because four county courts still have jurisdiction over dependency cases (see ORS 3.265): Sherman, Wheeler, Gilliam, and Morrow. Coos, Deschutes, Jackson, Josephine, Lane, Marion, Multnomah, Malheur, Tillamook, Washington, and Umatilla counties all have Safe and Equitable Foster Care Reduction teams in which the local courts are actively involved. These teams track performance measures related to reducing the number of kids in foster care. Although the following counties do not currently have a model court team or equivalent, they do monitor and track OJD's statewide performance measures for dependency cases: Baker, Clackamas, Columbia, Crook, Hood River, Jefferson, Union, and Wallowa.



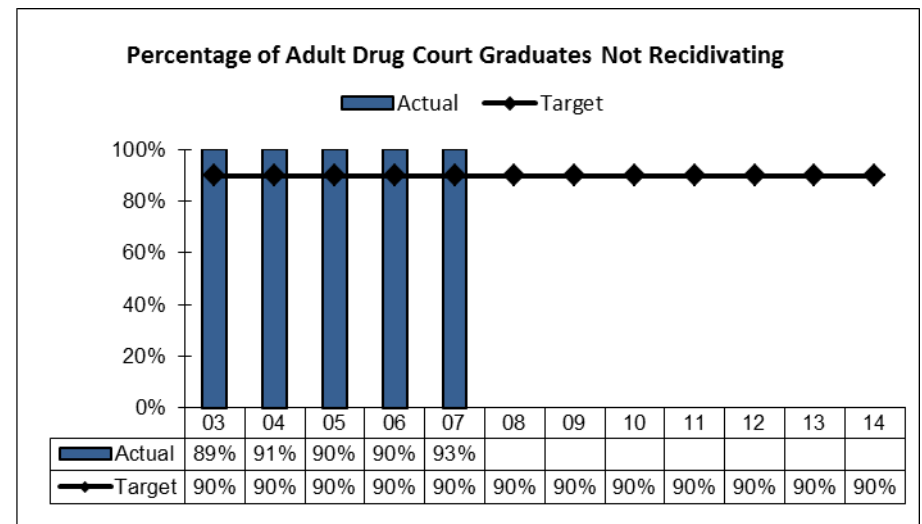
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| KPM #8 | Drug Court Recidivism The percentage of adult drug court graduates with no misdemeanor or felony charge filed in the Oregon circuit courts within one year of program graduation. | Measure since: 2003 |
|----------------|---|---------------------|
| Goal | Justice 2020 Access: Make courts work for people | |
| Oregon Context | OJD Mission and Partnership Standards | |
| Data source | OJD Data Warehouse and Oregon Treatment Court Management System (2003 - 2008), Criminal Justice Commission Reports (2013 - present) | |
| Owner | Not applicable to OJD (last available data 2007) | |

1. OUR STRATEGY: In early years, OJD used the Oregon Treatment Court Management System (OTCMS); however, budget reductions caused the elimination of that tracking and recording. In 2013, the Legislature instructed OJD to request the information from the Criminal Justice Commission (CJC).

2. ABOUT THE TARGETS: Some adult drug court graduates do not acquire the skills required to lead lives free of the criminal justice system. Participants not completing the program are often correlated with the inadequate capacity of services and supervision available to the treatment court programs.

3. HOW WE ARE DOING: The layoff of Court Programs and Services Division (CPSD) staff meant that OJD did not have a statewide treatment court reporting system or coordinator to track and analyze the data statewide to provide a report for fiscal year 2008 and beyond. CJC has conducted rigorous evaluations of drug court programs in the state. The most recent recidivism evaluation was released in May 2016 and is available in the [Special Reports](#) section.



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4. **HOW WE COMPARE:** In the 2007 report, the largest national study of adult drug court recidivism (sample = 2,020 graduates from 95 drug courts) was based on charges estimates. The result was 16.4 percent charged within one year of graduation (*John Roman, et al. Recidivism Rates for Drug Court Graduates: Final Report*), or an 83.6 percent national recidivism rate. The Criminal Justice Commission in the executive branch now compiles this information through its grant reporting when needed.
5. **FACTORS AFFECTING RESULTS:** Availability of program services, including community corrections supervision, alcohol and drug and mental health treatment, and other wraparound services associated with Oregon's collaborative treatment courts.
6. **WHAT NEEDS TO BE DONE:** Increase the capacity of adult, family, and juvenile drug courts through increased and stable funding for the Oregon treatment courts and program staff.
7. **ABOUT THE DATA:** When performed by OJD, this data was gathered from the OJIN Data Warehouse query; each program graduate's name, date of birth, state identification number, driver's license number, Social Security number, and Federal Bureau of Investigation numbers were matched against court filings for one year post graduation. Graduates were identified in OJIN through records with the associated "DGCM" code (for "Drug Court Completed") and by data tracked in OTCMS, which is no longer supported. For 2014 and beyond, drug court recidivism data is analyzed and reported by the CJC. Their most recent report is provided in the [Special Reports](#) section.

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Section Two – Proposed KPMs

This section of the APPR report includes nine KPMs that we are proposing the Legislature adopt for reporting periods beginning with the 2019-2021 biennium. Adoption of the proposed measures will both increase efficiency in our state system reporting and allow comparison for some KPMs and review with other court systems nationally. This in turn will improve our ability to evaluate issues and improve performance where feasible.

The National Center for State Courts (NCSC) has developed a set of performance measures called CourTools that courts nationwide may use to demonstrate quality of service delivery, accountability, and efficiency of the judicial branch of government. An objective of the Oregon eCourt program is to align certain enterprise customer reports in Odyssey with certain pertinent CourTools performance measures to the extent feasible and meaningful. In addition, OJD seeks to maintain revised KPMs in OJD's vision and goal areas.

As of June 2016, all courts statewide are on the Odyssey system for case management and statistical reporting. This means that beginning with the calendar year 2017, the annual reports for each court and statewide reports will be comparable in definition and many will be automated in compilation.

| KPM# | 2017-19 Proposed Key Performance Measures (KPMs) |
|------|---|
| 1* | Access and Fairness: <i>The Rating of court users on the court's accessibility and its treatment of customers in terms of fairness, equality, respect.</i> |
| 2* | Clearance Rates: <i>The number of cases closed as a percentage of the number of cases filed.</i> |
| 3* | Time to Disposition: <i>The percentage of cases disposed or otherwise resolved within established timeframes.</i> |
| 4 | Time to Entry of Judgment: <i>The average number of days between signature of a judgment and the date of entry into the official record.</i> |
| 5 | Time to First Permanency Hearing: <i>The percentage of cases that have first permanency hearings within 14 months.</i> |
| 6 | Collection Rate: <i>The percentage of cases paid in full within a year of judgment (violations only).</i> |
| 7 | Oregon Recidivism Rates: <i>The arrest, conviction, or incarceration of adults who have previously been convicted of a crime within three years of the date of conviction or release from custody of the previously convicted crime.</i> |
| 8* | Effective Use of Jurors: <i>The percentage of available jurors who are selected for jury duty who are qualified and available to serve (juror yield).</i> |
| 9 | Employee Retention: <i>The annual employee turnover rate.</i> |

* Measures from CourTools – modified for Oregon if standard exists.

DEPARTMENT SUMMARY

| | |
|---|--|
| 2017-19 Proposed Key Performance Measure | 1. Access and Fairness Rating of court users on the court's accessibility and its treatment of customers in terms of fairness, equality, respect |
|---|--|

Our strategy

The Access and Fairness survey was developed by the National Center for State Courts. The anonymous survey asks questions on access and fairness, along with background information about the respondent. The questions are clear, concise, and most importantly, *actionable*. The rating method is straightforward so the survey can be completed in 5 minutes or less.

About the targets

The Oregon Judicial Department (OJD) will pilot the survey in 2017 to establish a baseline index score for this measure. Once a baseline index score is determined, OJD can set a performance goal for access and fairness, and seek to improve over time.

How we are doing and how we compare

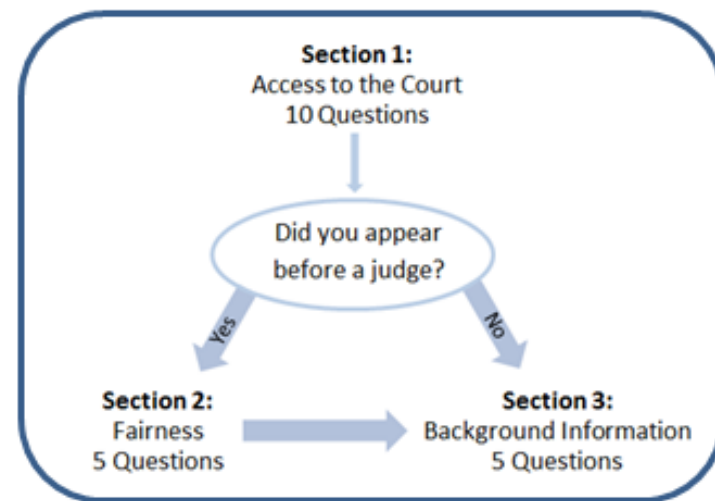
This measure provides a tool for surveying all court users about their experience in the courthouse. The results can be compared by county, by court unit, and by type of customer, and will help inform courts on management practices that are perceived well by court users and areas that need improvement. Research consistently shows that positive perceptions of court experience are shaped more by court users' perceptions of how they are treated in court rather than 'winning' or 'losing' their case, and whether the court's process of making decisions seems fair.

Factors affecting results and what needs to be done

Assessments of access and fairness may vary by case type, reasons for being in the courthouse, frequency of court use, and demographic characteristics that might be associated with differential treatment or ability to access court services. Comparisons of survey results over time and across courts can be a basis for identifying trends in perception of court user's experience and will assist OJD in identifying which courts have the most successful customer service and communications practices and where courts need to improve.

About the data

This performance measure will require each court choose a "typical" day to administer the survey, gather the needed materials to administer the survey, and assemble and train a survey team for each court. Finally, the data will be compiled statewide so it can be analyzed.



DEPARTMENT SUMMARY

Contact information

David Moon, Business and Fiscal Services Division, 503-986-5150

Data source

Access and Fairness Survey Results

DEPARTMENT SUMMARY

2017-19 Proposed Key Performance Measure

2. Clearance Rates

The number of cases closed as a percentage of the number of cases filed

Our strategy

Clearance rates measure whether the courts are keeping up with their incoming caseload. If cases are not disposed in a timely manner, a backlog of cases awaiting disposition will grow. This measure is a single number that can be compared within the court for any and all case types, from month to month and year to year, or between one court and another. This information can help courts pinpoint emerging problems and indicate where improvements can be made.

About the targets

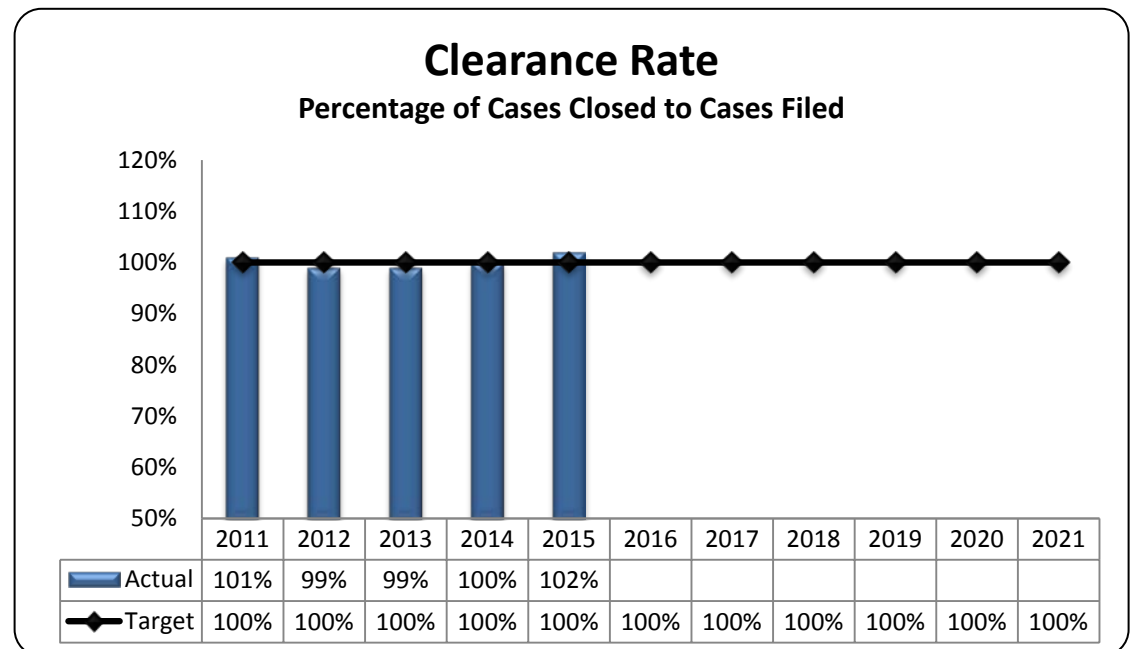
Courts should aspire to clear at least as many cases as have been filed in a period by having a clearance rate of 100 percent or higher.

How we are doing and how we compare

We are currently meeting our target, probably because the filings have been lower. When courts exceed the clearance rate targets, dispositions are outpacing filings and when courts fall below their clearance rate targets, caseload management practices and resource allocations need to be reviewed. In addition, OJD will look at the pending case volume and age to analyze the true effect of the impact on reduction of delay on courts.

Factors affecting results and what needs to be done

Changes in caseload could impact the allocation of judicial officers to certain case types and initiate caseload management improvements. Time to disposition rates may also vary due to the seriousness or complexity of the caseload, charging and pleading practices, variation in court case management practices, and the use of statewide business processes. Identifying the differences in case processing time among courts is the first step toward determining the reasons for those differences.



DEPARTMENT SUMMARY

About the data

This performance measure requires a count of cases closed and cases filed during a given time period. The clearance rate is calculated by dividing the number of cases closed by the number of cases filed during a given time period.

Contact information

David Moon, Business and Fiscal Services Division, 503-986-5150

Data source

Odyssey Case Management System

DEPARTMENT SUMMARY

| | |
|---|---|
| 2017-19 Proposed Key Performance Measure | 3. Time to Disposition The percentage of cases disposed or otherwise resolved within established timeframes |
|---|---|

Our strategy

This measure, in conjunction with Clearance Rates, is a fundamental management tool that assesses the length of time it takes a court to process cases. It compares a court's performance with national guidelines for timely case processing. The measure takes into account periods of inactivity beyond the court's control and provides a framework for meaningful measurement across all case types.

About the targets

National case processing time standards are published by the American Bar Association (ABA) and more recently by the Conference of State Court Administrators (COSCA). The Oregon Goals for Timely Disposition were originally based on the ABA standards as revised for Oregon by the Judicial Conference in the early 1990s. They continue to be a stable benchmark.

How we are doing and how we compare

Oregon eCourt reports for time to disposition for circuit courts are currently being developed and will be available in 2017. These reports will provide the ability to review the data on a regular basis so courts can observe trends as they develop, then aggregate the data for annual reporting. Each court will examine the caseload management where they do not reach their goals.

Factors affecting results and what needs to be done

Changes in caseload could impact the allocation of judicial officers to certain case types and initiate caseload management improvements. Time to disposition rates may also vary due to the seriousness or complexity of the caseload, charging and pleading practices, variation in court case management practices, and the use of statewide business processes. Identifying the differences in case processing time among courts is the first step in determining the reasons for those differences.

About the data

This performance measure will require compiling data on the timing of key case events, consistent definition of terms and business processes, standard data entry practices for all courts, and distinguishing between active and inactive cases.

Contact information

David Moon, Business and Fiscal Services Division, 503-986-5150

Data source

Odyssey Case Management System

NOTE: Will become a chart in 2017

Oregon Goals for Timely Disposition

Civil

- 90% within 12 months
- 98% within 18 months
- 100% within 24 months

Criminal

- 90% within 120 days
- 98% within 180 days
- 100% within 1 year

Domestic

- 90% within 9 months
- 100% within 1 year

DEPARTMENT SUMMARY

2017-19 Proposed Key Performance Measure

4. Time to Judgment Entry

The average number of days between signature of a judgment and the date of entry into the official record

Our strategy

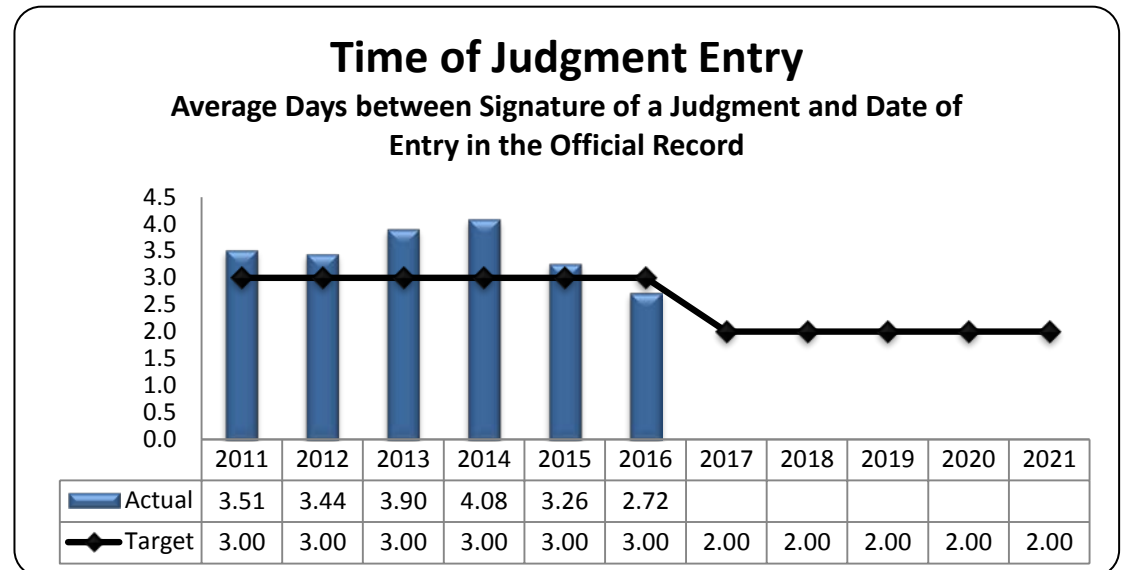
Equality, fairness, and integrity in trial courts depend in substantial measure on the accuracy, availability, and accessibility of records. It is important that trial courts preserve an accurate record of their proceedings, decisions, orders, and judgments. Court managers and supervisors periodically review data entry protocols, caseload management practices, and resource allocations to ensure judgments are being entered in a timely manner.

About the targets

KPM #4 is continued from the previous set of KPMs (was KPM #3) as an efficiency measure. This measure reflects only general judgments in civil and domestic relations cases and judgments in criminal cases. Court staff should enter all court case actions as expeditiously and accurately as possible. This is especially true for judgments since any delay in the entry of a judgment may have important legal consequences under Oregon law. All judgments should be entered within three days of being signed by a judge. Lower values are better than higher values for this measure.

How we are doing and how we compare

In 2011 and 2012, courts shortened public access hours to provide ‘catch-up time’ after experiencing reductions in court staff caused by layoffs and Multnomah County received some additional funds in 2012 to help with delays. In 2013, several courts started to prepare for the transition to Oregon eCourt and the data conversion that would be necessary. While this measure primarily reflects timeliness, it is also dependent upon and reflective of data entry accuracy. As more courts transitioned to Odyssey and business processes were standardized and automated, the days to judgment entry has improved. The proposed target for 2017-19 and after is being shortened to two working days for entry.



DEPARTMENT SUMMARY

Factors affecting results and what needs to be done

When court staff manually enter data, human error is always possible. These errors are mitigated through standard data entry protocols as well as education programs and monitoring procedures to ensure that corrections can be made to court practices. This measure is not only a way to measure data timeliness and accuracy, but also a tool to identify training or resource needs at the courts.

About the data

This performance measure uses the date of judge's signature and the date of clerical entry into the register of a case judgment. The latter entry is the statutory legally effective date of the judgment. The days to judgment entry is then calculated using the time lapse between the signed date and the system entered judgment entry date.

Contact information

David Moon, Business and Fiscal Services Division, 503-986-5150

Data source

Odyssey Case Management System

DEPARTMENT SUMMARY

2017-19 Proposed Key Performance Measure

5. Time to First Permanency Hearing

Percent of cases that have first permanency hearing within 14 months

Our strategy

Child abuse and neglect cases are driven by one underlying principle: expeditious permanency for children. The longer children are in substitute care, the longer they are in doubt as to where their permanent home will be and the more likely it is that they will have multiple placements.

About the targets

Our target is to have 95 percent of cases have their first permanency hearing within the statutorily mandated timeframe of 14 months.

How we are doing and how we compare

In 2015 we were at 91 percent, which is an improvement over the previous year.

Factors affecting results and what needs to be done

Reports from stakeholders and informal reviews of case files indicate a main reason that cases do not meet the timeline is that hearings are continued or rescheduled due to lack of court time and/or attorney availability for contested hearings. Making additional court time available and increasing the availability of legal counsel for parties would likely move the numbers toward their target.

About the data

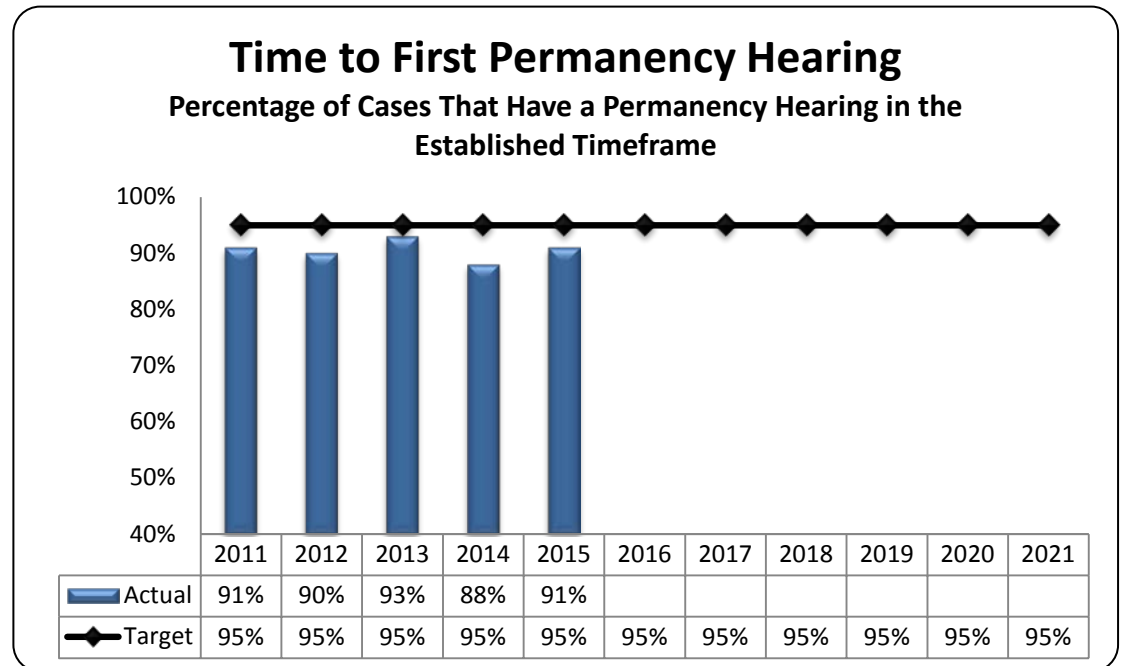
The review period is the calendar year in which the case is due for a first permanency hearing and is compiled by the Juvenile and Family Court Programs Division. The data is calculated by taking the time the case is filed and the first event file date in the case register indicating that the court held a permanency hearing.

Contact information

David Moon, Business and Fiscal Services Division, 503-986-5150

Data sources

Odyssey Case Management System
OJIN Case Management System



DEPARTMENT SUMMARY

| | |
|---|--|
| 2017-19 Proposed Key Performance Measure | 6. Collection Rate Percent of cases paid in full within a year of judgment (violations only) |
|---|--|

Our strategy

The Oregon Judicial Department (OJD) collection program is focused on statewide time standards for collection actions and early intervention to obtain payment in full as soon as possible. When court collection efforts fail to obtain payment in full or an extended payment agreement, prompt referral to the Department of Revenue (DOR), or a private collection firm (PCF) is critical to successful collection efforts.

This measure focuses solely on violations to evaluate the timeliness and effectiveness of collection actions. Most violations do not have the same barriers to collections that are encountered when collecting on felony and misdemeanor debt (debtors with history of criminal activity or drug/alcohol abuse, incarceration, unemployment, multiple debts with OJD and other probation/parole agencies, higher amounts owed).

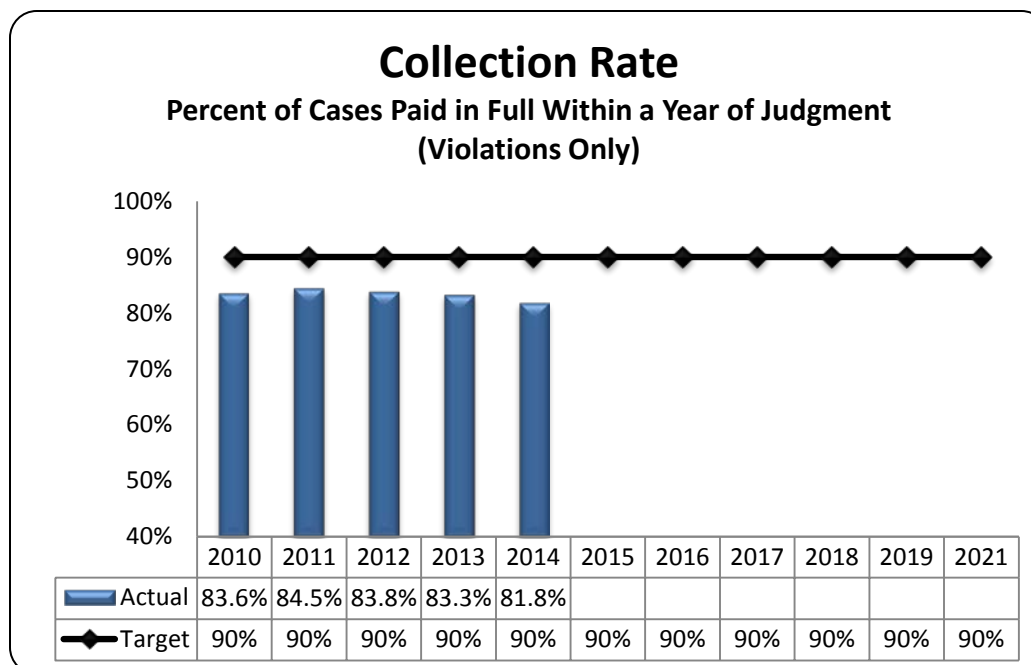
By evaluating violations only, OJD can determine which collection practices are most successful and what needs to change to see improvement. The collection practices that apply well in violations can often be applied to misdemeanor and felony cases even if the collection rate will be lower in those case types because of the barriers to collection described above.

About the targets

Courts should aspire to get payment in full on most violations within a year (90 percent). We know that when the fine imposed exceeds \$300 on violations, the collection rate within a year of judgment drops significantly, however most violations are in the highly collectible dollar amount of \$100 to \$200.

How we are doing and how we compare

The National Center for State Courts does not currently have a national standard for court collection rates so it is difficult to compare to other court systems. Improvements for OJD should come in the next few years as courts benefit from the conclusion of the Oregon eCourt implementation, and as we develop further automation.



DEPARTMENT SUMMARY

Factors affecting results and what needs to be done

Our biggest challenge in the next few years will be keeping up with our caseload. New violations, for example are expected to increase by 60 percent in 2017 in Multnomah County.

To reach our goals courts are streamlining their business processes to:

- Adjudicate cases faster,
- Route people straight from traffic court to the payment counter,
- Send notices soon after judgment entry so people know what they owe, their payment options, and the consequences of not paying immediately.

Cases are being monitored so that delinquency notices are sent promptly, license suspensions can be sent to DMV, and referral to DOR and PCFs happen quickly if people do not respond to delinquency notices.

About the data

This performance measure calculates the percent of citations imposed and paid one year after a violation case is closed (includes parking). The number of cases paid in full is divided by the total number of cases closed with fines imposed in a given year. Data for this KPM ends with calendar year 2014 as it requires at least one year of aging for information on new debt.

Contact information

David Moon, Business and Fiscal Services Division, 503-986-5150

Data source

Odyssey Case Management System

DEPARTMENT SUMMARY

| | |
|---|--|
| 2017-19 Proposed Key Performance Measure | 7. Oregon Recidivism Rates The arrest, conviction, or incarceration of adults who have previously been convicted of a crime within three years of the date of conviction or release from custody of the previously convicted crime |
|---|--|

Our strategy

HB 3194 (2013) provides a new statewide definition of recidivism. The definition includes the arrest, conviction, or incarceration for a new crime within three years. The Department of Corrections (DOC) tracks recidivism for offenders starting felony probation and for offenders starting post-prison supervision or parole supervision in six month cohorts. This cohort is the starting population to track recidivism. The Oregon Judicial Department (OJD) submits quarterly circuit court case data to the Criminal Justice Commission (CJC) so it can be combined with the DOC data, along with arrest data from Oregon State Police (OSP), to track the three components of recidivism. The three components (incarceration, conviction, arrest) of this new recidivism analysis are tracked separately; a single offender can contribute to all three measures, or a subset depending on the criminal justice system's response to the new criminal activity committed.

About the targets

Many factors can impact recidivism rates, such as law enforcement resources and other criminal justice system resources, the risk profile of individuals in the system, changing emphasis on arrests or prosecutions, as well as the use of evidence based programs. The CJC analysis does not attempt to explain why recidivism rates have changed over time or what changes can be made to improve recidivism rates, but simply displays the recidivism rates for offenders released from incarceration or sentenced to felony probation statewide.

How we are doing and how we compare

The CJC analysis shows the current statewide rates of recidivism shown below.

For those released from prison or from a felony jail sentence in the second six months of 2012:

- 17 percent were re-incarcerated for a new felony crime within three years of release,
- 41 percent were convicted of a new misdemeanor or felony crime within three years of release, and
- 55 percent were arrested for a new crime within three years of release.

For those who started a felony probation sentence in the first six months of 2012:

- 13 percent were incarcerated for a new felony crime within three years,
- 41 percent were convicted of a new misdemeanor or felony crime within three years, and

DEPARTMENT SUMMARY

- 48 percent were arrested for a new crime within three years.

The CJC provides comprehensive statewide analysis of adult recidivism rates in Oregon. The most recent evaluation was released in May 2016 and is available in the [Special Reports](#) section. The CJC also maintains an interactive dashboard of recidivism data at <http://www.oregon.gov/cjc/data/Pages/recidivism.aspx>.

Factors affecting results and what needs to be done

The availability of program services, including community corrections supervision, alcohol and drug and mental health treatment, and other wraparound services associated with Oregon's collaborative treatment courts affect recidivism rates. Increasing the capacity of adult, family, and juvenile drug courts through increased and stable funding for the Oregon treatment courts and program staff can have a direct impact.

About the data

OJD provides quarterly conviction person based data used by the CJC to analyze recidivism rates in Oregon. The data includes misdemeanor and felony convictions from Oregon's 36 circuit courts and the person based identifiers to match individuals. It does not include convictions from municipal courts or justice courts, as those courts are not part of the unified state court system.

Contact information

David Moon, Business and Fiscal Services Division, 503-986-5150

Data sources

OJD Odyssey Case Management System
DOC Incarceration Data
OSP Law Enforcement Data System (LEDS)

DEPARTMENT SUMMARY

| | |
|---|---|
| 2017-19 Proposed Key Performance Measure | 8. Effective Use of Jurors The percentage of available jurors who are selected for jury duty who are qualified and available to serve (juror yield) |
|---|---|

Our strategy

The percentage of citizens available to serve relates to the integrity of the jury pool list, the effectiveness of jury management practices, the willingness of citizens to serve, the efficacy of excuse and postponement policies, and the number of exemptions allowed.

About the targets

The National Center for State Courts (NCSC) commonly uses a juror yield goal of 40 percent, a value demonstrated to be realistic in many well-managed courts. The national average juror yield is approximately 53 percent. Although variations are expected, points falling well above or well below the average can alert the court to the need for possible adjustments to the number of persons summoned.

NOTE: Will be turned into a chart for 2017

$$\text{Juror Yield} = \left\{ \frac{\# \text{qualified and available to serve}}{\# \text{of summons mailed}} \right\}$$

How we are doing and how we compare

Oregon eCourt reports for this measure are currently being developed and will be available in 2017. These reports will provide information on the number of jury summons mailed, how many jurors were qualified and available to serve, and the number and reason jurors were disqualified.

Factors affecting results and what needs to be done

Juror yield is used by court administrators to estimate the number of jury summonses to mail to secure an adequate number of jurors from which to select juries. However, it is also a measure of system efficiency as it indicates the relative amount of work a court must perform to achieve an adequate jury pool. Nationally, courts send approximately two jury summonses for every qualified and available juror they need to secure. Courts with higher yields require fewer jurors so it is in the juror and courts' best interest to maximize jury yields to the greatest extent possible.

About the data

This performance measure requires a count of the total number of summonses sent to prospective jurors, the number of jurors postponed to or from a previous period, the number of jurors who failed to appear for jury duty, the number of jury summonses returned undeliverable, the number of jurors who were excused or exempt from service, and the number of jurors who were disqualified or unable to serve.

Contact information

David Moon, Business and Fiscal Services Division, 503-986-5150

Data source

Odyssey Jury Management System

DEPARTMENT SUMMARY

2017-19 Proposed Key Performance Measure

9. Employee Retention

Annual employee turnover rate

Our strategy

The Oregon Judicial department (OJD) strives to retain an experienced, well-trained, and competent workforce.

About the targets

Our target is to have a retention rate with no greater annual turnover than the State of Oregon's Department of Administrative Service (DAS) annual retention rate.

How we are doing and how we compare

OJD has consistently met our goal of retaining current employees, and has exceeded the national average of 83 percent for government jobs as reported by the Bureau of Labor Statistics. The DAS calculated retention rate is 87.8 percent for the fiscal year ending June 30, 2016. The OJD target is 88 percent at this time. The target rate may adjust if the DAS calculated rate rises significantly above 88 percent in the future since the OJD target goal is to exceed the state rate as a measure.

Factors affecting results and what needs to be done

Two-thirds of our turnover was due to voluntary resignations. We continue to analyze the specific reasons for the voluntary resignations and will be prepared to report those details in 2017. Additionally, retirements accounted for over 16 percent of our turnover. We will continue to collect data from exiting employees and analyze their reasons for leaving as part of our strategy to maintain and improve our performance in this measure.

About the data

The review period was based on actual termination coding entered into the HR systems; however, the voluntary resignation category can be a "catch all" for many reasons that can only be identified through exit interviews.

Contact information

David Moon, Business and Fiscal Services Division, 503-986-5150

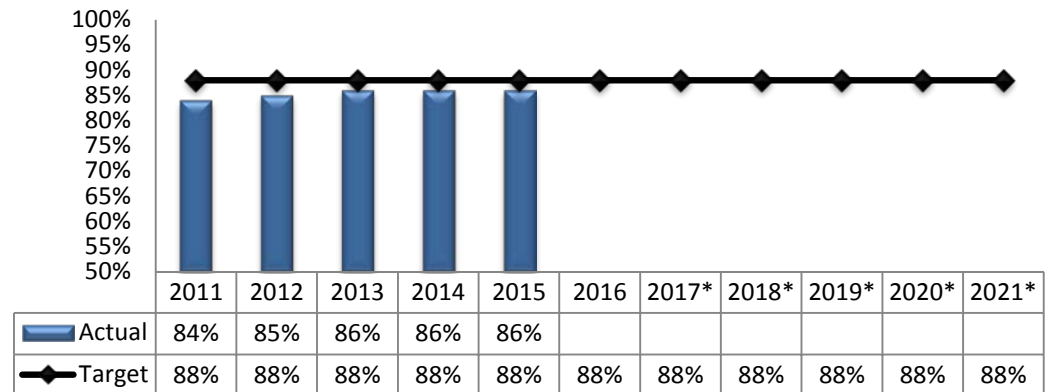
Data source

PPDB

Retention Rate

Percentage of Employees Retained by OJD

* Illustration only



DEPARTMENT SUMMARY

ORBITS and PICS Reports

BDV104 – Biennial Budget Summary

Summary of 2017-19 Biennium Budget

| Judicial Dept | | Agency Request Budget | | | | | | | |
|--|--------------|---|---------------------|--------------------|---------------|---------------------|------------------|------------------------|--------------------------|
| Judicial Dept | | Cross Reference Number: 19800-000-00-00-00000 | | | | | | | |
| 2017-19 Biennium | | | | | | | | | |
| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
| 2015-17 Leg Adopted Budget | 1,921 | 1,783.83 | 562,545,983 | 422,015,555 | - | 138,932,144 | 1,598,284 | - | - |
| 2015-17 Emergency Boards | - | - | 20,092,433 | 11,027,145 | - | 9,056,803 | 8,485 | - | - |
| 2015-17 Leg Approved Budget | 1,921 | 1,783.83 | 582,638,416 | 433,042,700 | - | 147,988,947 | 1,606,769 | - | - |
| 2017-19 Base Budget Adjustments | | | | | | | | | |
| Net Cost of Position Actions | | | | | | | | | |
| Administrative Biennialized E-Board, Phase-Out | (59) | (34.58) | 7,695,520 | 15,121,907 | - | (7,458,589) | 32,202 | - | - |
| Estimated Cost of Merit Increase | | | 6,444,809 | 6,143,423 | - | 285,833 | 15,553 | - | - |
| Base Debt Service Adjustment | | | 1,917,970 | 1,917,970 | - | - | - | - | - |
| Base Nonlimited Adjustment | | | - | - | - | - | - | - | - |
| Capital Construction | | | - | - | - | - | - | - | - |
| Subtotal 2017-19 Base Budget | 1,862 | 1,749.25 | 598,696,715 | 456,226,000 | - | 140,816,191 | 1,654,524 | - | - |
| Essential Packages | | | | | | | | | |
| 010 - Non-PICS Pers Svc/Vacancy Factor | | | | | | | | | |
| Non-PICS Personal Service Increase/(Decrease) | - | - | 870,256 | 921,649 | - | (53,577) | 2,184 | - | - |
| Subtotal | - | - | 870,256 | 921,649 | - | (53,577) | 2,184 | - | - |
| 020 - Phase In / Out Pgm & One-time Cost | | | | | | | | | |
| 021 - Phase - In | - | - | - | - | - | - | - | - | - |
| 022 - Phase-out Pgm & One-time Costs | - | - | (99,818,230) | (892,309) | - | (98,585,921) | (340,000) | - | - |
| Subtotal | - | - | (99,818,230) | (892,309) | - | (98,585,921) | (340,000) | - | - |
| 030 - Inflation & Price List Adjustments | | | | | | | | | |
| Cost of Goods & Services Increase/(Decrease) | - | - | 3,183,605 | 2,574,475 | - | 586,486 | 22,644 | - | - |
| State Gov't & Services Charges Increase/(Decrease) | | | 3,965,954 | 3,965,954 | - | - | - | - | - |
| Subtotal | - | - | 7,149,559 | 6,540,429 | - | 586,486 | 22,644 | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
Judicial Dept
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-000-00-00-00000

| <i>Description</i> | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|---|--------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| 040 - Mandated Caseload | | | | | | | | | |
| 040 - Mandated Caseload | - | - | - | - | - | - | - | - | - |
| 050 - Fundshifts and Revenue Reductions | | | | | | | | | |
| 050 - Fundshifts | - | - | - | - | - | - | - | - | - |
| 060 - Technical Adjustments | | | | | | | | | |
| 060 - Technical Adjustments | - | - | - | - | - | - | - | - | - |
| Subtotal: 2017-19 Current Service Level | 1,862 | 1,749.25 | 506,898,300 | 462,795,769 | - | 42,763,179 | 1,339,352 | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
Judicial Dept
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-000-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------|-------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|
| Subtotal: 2017-19 Current Service Level | 1,862 | 1,749.25 | 506,898,300 | 462,795,769 | - | 42,763,179 | 1,339,352 | - | - |
| 070 - Revenue Reductions/Shortfall | | | | | | | | | |
| 070 - Revenue Shortfalls | - | - | (5,527,210) | - | - | (5,527,210) | - | - | - |
| Modified 2017-19 Current Service Level | 1,862 | 1,749.25 | 501,371,090 | 462,795,769 | - | 37,235,969 | 1,339,352 | - | - |
| 080 - E-Boards | | | | | | | | | |
| 080 - May 2016 E-Board | - | - | - | - | - | - | - | - | - |
| Subtotal Emergency Board Packages | - | - | - | - | - | - | - | - | - |
| Policy Packages | | | | | | | | | |
| 401 - New Judgeships & Support Staff | 36 | 11.16 | 2,778,606 | 2,778,606 | - | - | - | - | - |
| 402 - Judicial Compensation | - | - | 2,992,360 | 2,992,360 | - | - | - | - | - |
| 403 - Judicial Resources - Hearings Referees | 5 | 4.40 | 1,019,394 | 1,019,394 | - | - | - | - | - |
| 404 - Technology Fund | 7 | 7.00 | 10,690,190 | - | - | 10,690,190 | - | - | - |
| 405 - Support Effective Circuit Court Programs | 20 | 17.16 | 3,198,916 | 3,198,916 | - | - | - | - | - |
| 406 - Multnomah County Violations Processing Staff | 6 | 5.28 | 741,696 | 741,696 | - | - | - | - | - |
| 407 - Supreme Court Coordinating Councils for Justice Access & I | 2 | 1.76 | 376,744 | 376,744 | - | - | - | - | - |
| 408 - County Mediation & Conciliation Funding and Support | 1 | 0.88 | 2,171,920 | 2,171,920 | - | - | - | - | - |
| 409 - Treatment/Specialty Courts Grant Funding | 19 | 19.00 | 4,109,856 | - | - | 4,109,856 | - | - | - |
| 410 - Oregon Courthouse Capital Construction & Improvement Fu | - | - | 212,400,000 | - | - | 212,400,000 | - | - | - |
| 411 - OCCCIF Debt Service and Cost of Issuance | - | - | 2,298,508 | 1,053,508 | - | 1,245,000 | - | - | - |
| 412 - Local Court Facilities Infrastructure | - | - | 3,600,000 | - | - | 3,600,000 | - | - | - |
| 413 - Debt Collection Funding | - | - | 3,307,095 | 3,307,095 | - | - | - | - | - |
| 414 - Supreme Court Building - Seismic Retrofit and Renovation | - | - | 29,410,000 | - | - | 29,410,000 | - | - | - |
| 420 - Full Program Cost Funding | - | - | 20,671 | 20,671 | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
Judicial Dept
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-000-00-00-00000

| <i>Description</i> | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|---|--------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| 421 - Added Staff Attorney | - | - | 167,246 | 167,246 | - | - | - | - | - |
| Subtotal Policy Packages | 96 | 66.64 | 279,283,202 | 17,828,156 | - | 261,455,046 | - | - | - |
| Total 2017-19 Agency Request Budget | 1,958 | 1,815.89 | 780,654,292 | 480,623,925 | - | 298,691,015 | 1,339,352 | - | - |
| Percentage Change From 2015-17 Leg Approved Budget | 1.93% | 1.80% | 33.99% | 10.99% | - | 101.83% | -16.64% | - | - |
| Percentage Change From 2017-19 Current Service Level | 5.16% | 3.81% | 54.01% | 3.85% | - | 598.48% | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

Judicial Compensation

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-010-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|------------|----------------------------------|-------------------|-------------------|------------------|-------------|------------------|---------------------------|--------------------------------|
| 2015-17 Leg Adopted Budget | 194 | 194.00 | 70,395,909 | 70,395,909 | - | - | - | - | - |
| 2015-17 Emergency Boards | - | - | 2,861,647 | 2,861,647 | - | - | - | - | - |
| 2015-17 Leg Approved Budget | 194 | 194.00 | 73,257,556 | 73,257,556 | - | - | - | - | - |
| 2017-19 Base Budget Adjustments | | | | | | | | | |
| Net Cost of Position Actions | | | | | | | | | |
| Administrative Biennialized E-Board, Phase-Out | - | - | 4,808,260 | 4,808,260 | - | - | - | - | - |
| Estimated Cost of Merit Increase | | | - | - | - | - | - | - | - |
| Base Debt Service Adjustment | | | - | - | - | - | - | - | - |
| Base Nonlimited Adjustment | | | - | - | - | - | - | - | - |
| Capital Construction | | | - | - | - | - | - | - | - |
| Subtotal 2017-19 Base Budget | 194 | 194.00 | 78,065,816 | 78,065,816 | - | - | - | - | - |
| Essential Packages | | | | | | | | | |
| 010 - Non-PICS Pers Svc/Vacancy Factor | | | | | | | | | |
| Non-PICS Personal Service Increase/(Decrease) | - | - | 131,584 | 131,584 | - | - | - | - | - |
| Subtotal | - | - | 131,584 | 131,584 | - | - | - | - | - |
| 020 - Phase In / Out Pgm & One-time Cost | | | | | | | | | |
| 021 - Phase - In | - | - | - | - | - | - | - | - | - |
| 022 - Phase-out Pgm & One-time Costs | - | - | (92,309) | (92,309) | - | - | - | - | - |
| Subtotal | - | - | (92,309) | (92,309) | - | - | - | - | - |
| 030 - Inflation & Price List Adjustments | | | | | | | | | |
| Cost of Goods & Services Increase/(Decrease) | - | - | - | - | - | - | - | - | - |
| Subtotal | - | - | - | - | - | - | - | - | - |
| 040 - Mandated Caseload | | | | | | | | | |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

Judicial Compensation

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-010-00-00-00000

| <i>Description</i> | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|---|-------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| 040 - Mandated Caseload | - | - | - | - | - | - | - | - | - |
| 050 - Fundshifts and Revenue Reductions | | | | | | | | | |
| 050 - Fundshifts | - | - | - | - | - | - | - | - | - |
| 060 - Technical Adjustments | | | | | | | | | |
| 060 - Technical Adjustments | - | - | - | - | - | - | - | - | - |
| Subtotal: 2017-19 Current Service Level | 194 | 194.00 | 78,105,091 | 78,105,091 | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

Judicial Compensation

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-010-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------------|------------|--------------|------------------|-------------|------------------|---------------------------|--------------------------------|
| Subtotal: 2017-19 Current Service Level | 194 | 194.00 | 78,105,091 | 78,105,091 | - | - | - | - | - |
| 070 - Revenue Reductions/Shortfall | | | | | | | | | |
| 070 - Revenue Shortfalls | - | - | - | - | - | - | - | - | - |
| Modified 2017-19 Current Service Level | 194 | 194.00 | 78,105,091 | 78,105,091 | - | - | - | - | - |
| 080 - E-Boards | | | | | | | | | |
| 080 - May 2016 E-Board | - | - | - | - | - | - | - | - | - |
| Subtotal Emergency Board Packages | - | - | - | - | - | - | - | - | - |
| Policy Packages | | | | | | | | | |
| 401 - New Judgeships & Support Staff | 9 | 2.25 | 898,479 | 898,479 | - | - | - | - | - |
| 402 - Judicial Compensation | - | - | 2,992,360 | 2,992,360 | - | - | - | - | - |
| 403 - Judicial Resources - Hearings Referees | - | - | - | - | - | - | - | - | - |
| 404 - Technology Fund | - | - | - | - | - | - | - | - | - |
| 405 - Support Effective Circuit Court Programs | - | - | - | - | - | - | - | - | - |
| 406 - Multnomah County Violations Processing Staff | - | - | - | - | - | - | - | - | - |
| 407 - Supreme Court Coordinating Councils for Justice Access & I | - | - | - | - | - | - | - | - | - |
| 408 - County Mediation & Conciliation Funding and Support | - | - | - | - | - | - | - | - | - |
| 409 - Treatment/Speciality Courts Grant Funding | - | - | - | - | - | - | - | - | - |
| 410 - Oregon Courthouse Capital Construction & Improvement Fu | - | - | - | - | - | - | - | - | - |
| 411 - OCCCF Debt Service and Cost of Issuance | - | - | - | - | - | - | - | - | - |
| 412 - Local Court Facilities Infrastructure | - | - | - | - | - | - | - | - | - |
| 413 - Debt Collection Funding | - | - | - | - | - | - | - | - | - |
| 414 - Supreme Court Building - Seismic Retrofit and Renovation | - | - | - | - | - | - | - | - | - |
| 420 - Full Program Cost Funding | - | - | - | - | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
 Judicial Compensation
 2017-19 Biennium

Agency Request Budget
 Cross Reference Number: 19800-010-00-00-00000

| <i>Description</i> | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|---|-------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| 421 - Added Staff Attorney | - | - | - | - | - | - | - | - | - |
| Subtotal Policy Packages | 9 | 2.25 | 3,890,839 | 3,890,839 | - | - | - | - | - |
| Total 2017-19 Agency Request Budget | 203 | 196.25 | 81,995,930 | 81,995,930 | - | - | - | - | - |
| Percentage Change From 2015-17 Leg Approved Budget | 4.64% | 1.16% | 11.93% | 11.93% | - | - | - | - | - |
| Percentage Change From 2017-19 Current Service Level | 4.64% | 1.16% | 4.98% | 4.98% | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
OJD Debt Service
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-087-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------------|-------------------|-------------------|------------------|------------------|------------------|---------------------------|--------------------------------|
| 2015-17 Leg Adopted Budget | - | - | 18,801,425 | 18,508,525 | - | 292,900 | - | - | - |
| 2015-17 Emergency Boards | - | - | - | - | - | - | - | - | - |
| 2015-17 Leg Approved Budget | - | - | 18,801,425 | 18,508,525 | - | 292,900 | - | - | - |
| 2017-19 Base Budget Adjustments | | | | | | | | | |
| Net Cost of Position Actions | | | | | | | | | |
| Administrative Biennialized E-Board, Phase-Out | - | - | - | - | - | - | - | - | - |
| Estimated Cost of Merit Increase | - | - | - | - | - | - | - | - | - |
| Base Debt Service Adjustment | - | - | 1,917,970 | 1,917,970 | - | - | - | - | - |
| Base Nonlimited Adjustment | - | - | - | - | - | - | - | - | - |
| Capital Construction | - | - | - | - | - | - | - | - | - |
| Subtotal 2017-19 Base Budget | - | - | 20,719,395 | 20,426,495 | - | 292,900 | - | - | - |
| 020 - Phase In / Out Pgm & One-time Cost | | | | | | | | | |
| 021 - Phase - In | - | - | - | - | - | - | - | - | - |
| 022 - Phase-out Pgm & One-time Costs | - | - | (292,900) | - | - | (292,900) | - | - | - |
| Subtotal | - | - | (292,900) | - | - | (292,900) | - | - | - |
| 040 - Mandated Caseload | | | | | | | | | |
| 040 - Mandated Caseload | - | - | - | - | - | - | - | - | - |
| 050 - Fundshifts and Revenue Reductions | | | | | | | | | |
| 050 - Fundshifts | - | - | - | - | - | - | - | - | - |
| 060 - Technical Adjustments | | | | | | | | | |
| 060 - Technical Adjustments | - | - | - | - | - | - | - | - | - |
| Subtotal: 2017-19 Current Service Level | - | - | 20,426,495 | 20,426,495 | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
OJD Debt Service
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-087-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------|------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|
| Subtotal: 2017-19 Current Service Level | - | - | 20,426,495 | 20,426,495 | - | - | - | - | - |
| 070 - Revenue Reductions/Shortfall | | | | | | | | | |
| 070 - Revenue Shortfalls | - | - | - | - | - | - | - | - | - |
| Modified 2017-19 Current Service Level | - | - | 20,426,495 | 20,426,495 | - | - | - | - | - |
| 080 - E-Boards | | | | | | | | | |
| 080 - May 2016 E-Board | - | - | - | - | - | - | - | - | - |
| Subtotal Emergency Board Packages | - | - | - | - | - | - | - | - | - |
| Policy Packages | | | | | | | | | |
| 401 - New Judgeships & Support Staff | - | - | - | - | - | - | - | - | - |
| 402 - Judicial Compensation | - | - | - | - | - | - | - | - | - |
| 403 - Judicial Resources - Hearings Referees | - | - | - | - | - | - | - | - | - |
| 404 - Technology Fund | - | - | - | - | - | - | - | - | - |
| 405 - Support Effective Circuit Court Programs | - | - | - | - | - | - | - | - | - |
| 406 - Multnomah County Violations Processing Staff | - | - | - | - | - | - | - | - | - |
| 407 - Supreme Court Coordinating Councils for Justice Access & I | - | - | - | - | - | - | - | - | - |
| 408 - County Mediation & Conciliation Funding and Support | - | - | - | - | - | - | - | - | - |
| 409 - Treatment/Specialty Courts Grant Funding | - | - | - | - | - | - | - | - | - |
| 410 - Oregon Courthouse Capital Construction & Improvement Fu | - | - | - | - | - | - | - | - | - |
| 411 - OCCIF Debt Service and Cost of Issuance | - | - | 2,298,508 | 1,053,508 | - | 1,245,000 | - | - | - |
| 412 - Local Court Facilities Infrastructure | - | - | - | - | - | - | - | - | - |
| 413 - Debt Collection Funding | - | - | - | - | - | - | - | - | - |
| 414 - Supreme Court Building - Seismic Retrofit and Renovation | - | - | - | - | - | - | - | - | - |
| 420 - Full Program Cost Funding | - | - | - | - | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
OJD Debt Service
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-087-00-00-00000

| <i>Description</i> | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|---|------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| 421 - Added Staff Attorney | - | - | - | - | - | - | - | - | - |
| Subtotal Policy Packages | - | - | 2,298,508 | 1,053,508 | - | 1,245,000 | - | - | - |
| Total 2017-19 Agency Request Budget | - | - | 22,725,003 | 21,480,003 | - | 1,245,000 | - | - | - |
| Percentage Change From 2015-17 Leg Approved Budget | - | - | 20.87% | 16.05% | - | 325.06% | - | - | - |
| Percentage Change From 2017-19 Current Service Level | - | - | 11.25% | 5.16% | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
Capital Construction
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-089-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------------|-----------|--------------|------------------|-------------|------------------|---------------------------|--------------------------------|
| 2015-17 Leg Adopted Budget | - | - | - | - | - | - | - | - | - |
| 2015-17 Emergency Boards | - | - | - | - | - | - | - | - | - |
| 2015-17 Leg Approved Budget | - | - | - | - | - | - | - | - | - |
| 2017-19 Base Budget Adjustments | | | | | | | | | |
| Net Cost of Position Actions | | | | | | | | | |
| Administrative Biennialized E-Board, Phase-Out | - | - | - | - | - | - | - | - | - |
| Estimated Cost of Merit Increase | | | - | - | - | - | - | - | - |
| Base Debt Service Adjustment | | | - | - | - | - | - | - | - |
| Base Nonlimited Adjustment | | | - | - | - | - | - | - | - |
| Capital Construction | | | - | - | - | - | - | - | - |
| Subtotal 2017-19 Base Budget | - | - | - | - | - | - | - | - | - |
| 020 - Phase In / Out Pgm & One-time Cost | | | | | | | | | |
| 021 - Phase - In | - | - | - | - | - | - | - | - | - |
| 022 - Phase-out Pgm & One-time Costs | - | - | - | - | - | - | - | - | - |
| Subtotal | - | - | - | - | - | - | - | - | - |
| 030 - Inflation & Price List Adjustments | | | | | | | | | |
| Cost of Goods & Services Increase/(Decrease) | - | - | - | - | - | - | - | - | - |
| Subtotal | - | - | - | - | - | - | - | - | - |
| 040 - Mandated Caseload | | | | | | | | | |
| 040 - Mandated Caseload | - | - | - | - | - | - | - | - | - |
| 050 - Fundshifts and Revenue Reductions | | | | | | | | | |
| 050 - Fundshifts | - | - | - | - | - | - | - | - | - |
| 060 - Technical Adjustments | | | | | | | | | |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

Capital Construction

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-089-00-00-00000

| <i>Description</i> | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|---|------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| 060 - Technical Adjustments | - | - | - | - | - | - | - | - | - |
| Subtotal: 2017-19 Current Service Level | - | - | - | - | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
Capital Construction
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-089-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------------|------------|--------------|------------------|-------------|------------------|---------------------------|--------------------------------|
| Subtotal: 2017-19 Current Service Level | - | - | - | - | - | - | - | - | - |
| 070 - Revenue Reductions/Shortfall | | | | | | | | | |
| 070 - Revenue Shortfalls | - | - | - | - | - | - | - | - | - |
| Modified 2017-19 Current Service Level | - | - | - | - | - | - | - | - | - |
| 080 - E-Boards | | | | | | | | | |
| 080 - May 2016 E-Board | - | - | - | - | - | - | - | - | - |
| Subtotal Emergency Board Packages | - | - | - | - | - | - | - | - | - |
| Policy Packages | | | | | | | | | |
| 401 - New Judgeships & Support Staff | - | - | - | - | - | - | - | - | - |
| 402 - Judicial Compensation | - | - | - | - | - | - | - | - | - |
| 403 - Judicial Resources - Hearings Referees | - | - | - | - | - | - | - | - | - |
| 404 - Technology Fund | - | - | - | - | - | - | - | - | - |
| 405 - Support Effective Circuit Court Programs | - | - | - | - | - | - | - | - | - |
| 406 - Multnomah County Violations Processing Staff | - | - | - | - | - | - | - | - | - |
| 407 - Supreme Court Coordinating Councils for Justice Access & I | - | - | - | - | - | - | - | - | - |
| 408 - County Mediation & Conciliation Funding and Support | - | - | - | - | - | - | - | - | - |
| 409 - Treatment/Specialty Courts Grant Funding | - | - | - | - | - | - | - | - | - |
| 410 - Oregon Courthouse Capital Construction & Improvement Fu | - | - | - | - | - | - | - | - | - |
| 411 - OCCCIF Debt Service and Cost of Issuance | - | - | - | - | - | - | - | - | - |
| 412 - Local Court Facilities Infrastructure | - | - | - | - | - | - | - | - | - |
| 413 - Debt Collection Funding | - | - | - | - | - | - | - | - | - |
| 414 - Supreme Court Building - Seismic Retrofit and Renovation | - | - | 29,410,000 | - | - | 29,410,000 | - | - | - |
| 420 - Full Program Cost Funding | - | - | - | - | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

Capital Construction

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-089-00-00-00000

| <i>Description</i> | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|---|-------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| 421 - Added Staff Attorney | - | - | - | - | - | - | - | - | - |
| Subtotal Policy Packages | - | - | 29,410,000 | - | - | 29,410,000 | - | - | - |
| Total 2017-19 Agency Request Budget | - | - | 29,410,000 | - | - | 29,410,000 | - | - | - |
| Percentage Change From 2015-17 Leg Approved Budget | - | - | - | - | - | - | - | - | - |
| Percentage Change From 2017-19 Current Service Level | - | - | - | - | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

Trial Courts

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-100-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|--------------|----------------------------------|--------------------|--------------------|------------------|------------------|------------------|---------------------------|--------------------------------|
| 2015-17 Leg Adopted Budget | 1,373 | 1,261.90 | 219,077,983 | 211,057,230 | - | 7,680,753 | 340,000 | - | - |
| 2015-17 Emergency Boards | - | - | 6,236,225 | 5,964,073 | - | 272,152 | - | - | - |
| 2015-17 Leg Approved Budget | 1,373 | 1,261.90 | 225,314,208 | 217,021,303 | - | 7,952,905 | 340,000 | - | - |
| 2017-19 Base Budget Adjustments | | | | | | | | | |
| Net Cost of Position Actions | | | | | | | | | |
| Administrative Biennialized E-Board, Phase-Out | (14) | (11.01) | 5,129,814 | 7,776,571 | - | (2,646,757) | - | - | - |
| Estimated Cost of Merit Increase | | | 4,980,127 | 4,876,976 | - | 103,151 | - | - | - |
| Base Debt Service Adjustment | | | - | - | - | - | - | - | - |
| Base Nonlimited Adjustment | | | - | - | - | - | - | - | - |
| Capital Construction | | | - | - | - | - | - | - | - |
| Subtotal 2017-19 Base Budget | 1,359 | 1,250.89 | 235,424,149 | 229,674,850 | - | 5,409,299 | 340,000 | - | - |
| Essential Packages | | | | | | | | | |
| 010 - Non-PICS Pers Svc/Vacancy Factor | | | | | | | | | |
| Non-PICS Personal Service Increase/(Decrease) | - | - | 490,310 | 568,564 | - | (78,254) | - | - | - |
| Subtotal | - | - | 490,310 | 568,564 | - | (78,254) | - | - | - |
| 020 - Phase In / Out Pgm & One-time Cost | | | | | | | | | |
| 021 - Phase - In | - | - | - | - | - | - | - | - | - |
| 022 - Phase-out Pgm & One-time Costs | - | - | (699,768) | - | - | (359,768) | (340,000) | - | - |
| Subtotal | - | - | (699,768) | - | - | (359,768) | (340,000) | - | - |
| 030 - Inflation & Price List Adjustments | | | | | | | | | |
| Cost of Goods & Services Increase/(Decrease) | - | - | 384,489 | 365,851 | - | 18,638 | - | - | - |
| Subtotal | - | - | 384,489 | 365,851 | - | 18,638 | - | - | - |
| 040 - Mandated Caseload | | | | | | | | | |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

Trial Courts

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-100-00-00-00000

| <i>Description</i> | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|---|--------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| 040 - Mandated Caseload | - | - | - | - | - | - | - | - | - |
| 050 - Fundshifts and Revenue Reductions | | | | | | | | | |
| 050 - Fundshifts | - | - | - | - | - | - | - | - | - |
| 060 - Technical Adjustments | | | | | | | | | |
| 060 - Technical Adjustments | - | - | - | - | - | - | - | - | - |
| Subtotal: 2017-19 Current Service Level | 1,359 | 1,250.89 | 235,599,180 | 230,609,265 | - | 4,989,915 | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

Trial Courts

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-100-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------|-------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|
| Subtotal: 2017-19 Current Service Level | 1,359 | 1,250.89 | 235,599,180 | 230,609,265 | - | 4,989,915 | - | - | - |
| 070 - Revenue Reductions/Shortfall | | | | | | | | | |
| 070 - Revenue Shortfalls | - | - | - | - | - | - | - | - | - |
| Modified 2017-19 Current Service Level | 1,359 | 1,250.89 | 235,599,180 | 230,609,265 | - | 4,989,915 | - | - | - |
| 080 - E-Boards | | | | | | | | | |
| 080 - May 2016 E-Board | - | - | - | - | - | - | - | - | - |
| Subtotal Emergency Board Packages | - | - | - | - | - | - | - | - | - |
| Policy Packages | | | | | | | | | |
| 401 - New Judgeships & Support Staff | 27 | 8.91 | 1,880,127 | 1,880,127 | - | - | - | - | - |
| 402 - Judicial Compensation | - | - | - | - | - | - | - | - | - |
| 403 - Judicial Resources - Hearings Referees | 5 | 4.40 | 1,019,394 | 1,019,394 | - | - | - | - | - |
| 404 - Technology Fund | - | - | - | - | - | - | - | - | - |
| 405 - Support Effective Circuit Court Programs | 20 | 17.16 | 3,198,916 | 3,198,916 | - | - | - | - | - |
| 406 - Multnomah County Violations Processing Staff | 6 | 5.28 | 741,696 | 741,696 | - | - | - | - | - |
| 407 - Supreme Court Coordinating Councils for Justice Access & I | - | - | - | - | - | - | - | - | - |
| 408 - County Mediation & Conciliation Funding and Support | - | - | - | - | - | - | - | - | - |
| 409 - Treatment/Specialty Courts Grant Funding | 19 | 19.00 | 4,109,856 | - | - | 4,109,856 | - | - | - |
| 410 - Oregon Courthouse Capital Construction & Improvement Fu | - | - | - | - | - | - | - | - | - |
| 411 - OCCCIF Debt Service and Cost of Issuance | - | - | - | - | - | - | - | - | - |
| 412 - Local Court Facilities Infrastructure | - | - | - | - | - | - | - | - | - |
| 413 - Debt Collection Funding | - | - | - | - | - | - | - | - | - |
| 414 - Supreme Court Building - Seismic Retrofit and Renovation | - | - | - | - | - | - | - | - | - |
| 420 - Full Program Cost Funding | - | - | - | - | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

Trial Courts

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-100-00-00-00000

| <i>Description</i> | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|---|--------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| 421 - Added Staff Attorney | - | - | - | - | - | - | - | - | - |
| Subtotal Policy Packages | 77 | 54.75 | 10,949,989 | 6,840,133 | - | 4,109,856 | - | - | - |
| Total 2017-19 Agency Request Budget | 1,436 | 1,305.64 | 246,549,169 | 237,449,398 | - | 9,099,771 | - | - | - |
| Percentage Change From 2015-17 Leg Approved Budget | 4.59% | 3.47% | 9.42% | 9.41% | - | 14.42% | -100.00% | - | - |
| Percentage Change From 2017-19 Current Service Level | 5.67% | 4.38% | 4.65% | 2.97% | - | 82.36% | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
Appellate/Tax Courts
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-101-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|------------|----------------------------------|-------------------|-------------------|------------------|------------------|------------------|---------------------------|--------------------------------|
| 2015-17 Leg Adopted Budget | 103 | 101.80 | 25,087,097 | 22,414,951 | - | 2,672,146 | - | - | - |
| 2015-17 Emergency Boards | - | - | 469,821 | 439,957 | - | 29,864 | - | - | - |
| 2015-17 Leg Approved Budget | 103 | 101.80 | 25,556,918 | 22,854,908 | - | 2,702,010 | - | - | - |
| 2017-19 Base Budget Adjustments | | | | | | | | | |
| Net Cost of Position Actions | | | | | | | | | |
| Administrative Biennialized E-Board, Phase-Out | - | - | 299,213 | 285,939 | - | 13,274 | - | - | - |
| Estimated Cost of Merit Increase | | | 478,253 | 448,308 | - | 29,945 | - | - | - |
| Base Debt Service Adjustment | | | - | - | - | - | - | - | - |
| Base Nonlimited Adjustment | | | - | - | - | - | - | - | - |
| Capital Construction | | | - | - | - | - | - | - | - |
| Subtotal 2017-19 Base Budget | 103 | 101.80 | 26,334,384 | 23,589,155 | - | 2,745,229 | - | - | - |
| Essential Packages | | | | | | | | | |
| 010 - Non-PICS Pers Svc/Vacancy Factor | | | | | | | | | |
| Non-PICS Personal Service Increase/(Decrease) | - | - | 50,421 | 48,664 | - | 1,757 | - | - | - |
| Subtotal | - | - | 50,421 | 48,664 | - | 1,757 | - | - | - |
| 020 - Phase In / Out Pgm & One-time Cost | | | | | | | | | |
| 021 - Phase - In | - | - | - | - | - | - | - | - | - |
| 022 - Phase-out Pgm & One-time Costs | - | - | - | - | - | - | - | - | - |
| Subtotal | - | - | - | - | - | - | - | - | - |
| 030 - Inflation & Price List Adjustments | | | | | | | | | |
| Cost of Goods & Services Increase/(Decrease) | - | - | 113,992 | 59,018 | - | 54,974 | - | - | - |
| Subtotal | - | - | 113,992 | 59,018 | - | 54,974 | - | - | - |
| 040 - Mandated Caseload | | | | | | | | | |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
Appellate/Tax Courts
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-101-00-00-00000

| <i>Description</i> | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|---|-------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| 040 - Mandated Caseload | - | - | - | - | - | - | - | - | - |
| 050 - Fundshifts and Revenue Reductions | | | | | | | | | |
| 050 - Fundshifts | - | - | - | - | - | - | - | - | - |
| 060 - Technical Adjustments | | | | | | | | | |
| 060 - Technical Adjustments | - | - | - | - | - | - | - | - | - |
| Subtotal: 2017-19 Current Service Level | 103 | 101.80 | 26,498,797 | 23,696,837 | - | 2,801,960 | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
Appellate/Tax Courts
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-101-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------|------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|
| Subtotal: 2017-19 Current Service Level | 103 | 101.80 | 26,498,797 | 23,696,837 | - | 2,801,960 | - | - | - |
| 070 - Revenue Reductions/Shortfall | | | | | | | | | |
| 070 - Revenue Shortfalls | - | - | - | - | - | - | - | - | - |
| Modified 2017-19 Current Service Level | 103 | 101.80 | 26,498,797 | 23,696,837 | - | 2,801,960 | - | - | - |
| 080 - E-Boards | | | | | | | | | |
| 080 - May 2016 E-Board | - | - | - | - | - | - | - | - | - |
| Subtotal Emergency Board Packages | - | - | - | - | - | - | - | - | - |
| Policy Packages | | | | | | | | | |
| 401 - New Judgeships & Support Staff | - | - | - | - | - | - | - | - | - |
| 402 - Judicial Compensation | - | - | - | - | - | - | - | - | - |
| 403 - Judicial Resources - Hearings Referees | - | - | - | - | - | - | - | - | - |
| 404 - Technology Fund | - | - | - | - | - | - | - | - | - |
| 405 - Support Effective Circuit Court Programs | - | - | - | - | - | - | - | - | - |
| 406 - Multnomah County Violations Processing Staff | - | - | - | - | - | - | - | - | - |
| 407 - Supreme Court Coordinating Councils for Justice Access & I | 2 | 1.76 | 376,744 | 376,744 | - | - | - | - | - |
| 408 - County Mediation & Conciliation Funding and Support | - | - | - | - | - | - | - | - | - |
| 409 - Treatment/Specialty Courts Grant Funding | - | - | - | - | - | - | - | - | - |
| 410 - Oregon Courthouse Capital Construction & Improvement Fu | - | - | - | - | - | - | - | - | - |
| 411 - OCCCIF Debt Service and Cost of Issuance | - | - | - | - | - | - | - | - | - |
| 412 - Local Court Facilities Infrastructure | - | - | - | - | - | - | - | - | - |
| 413 - Debt Collection Funding | - | - | - | - | - | - | - | - | - |
| 414 - Supreme Court Building - Seismic Retrofit and Renovation | - | - | - | - | - | - | - | - | - |
| 420 - Full Program Cost Funding | - | - | - | - | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
Appellate/Tax Courts
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-101-00-00-00000

| <i>Description</i> | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|---|-------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| 421 - Added Staff Attorney | - | - | - | - | - | - | - | - | - |
| Subtotal Policy Packages | 2 | 1.76 | 376,744 | 376,744 | - | - | - | - | - |
| Total 2017-19 Agency Request Budget | 105 | 103.56 | 26,875,541 | 24,073,581 | - | 2,801,960 | - | - | - |
| Percentage Change From 2015-17 Leg Approved Budget | 1.94% | 1.73% | 5.16% | 5.33% | - | 3.70% | - | - | - |
| Percentage Change From 2017-19 Current Service Level | 1.94% | 1.73% | 1.42% | 1.59% | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
Administration and Central Support
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-102-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|------------|----------------------------------|---------------------|-------------------|------------------|---------------------|------------------|---------------------------|--------------------------------|
| 2015-17 Leg Adopted Budget | 186 | 177.28 | 143,119,344 | 54,482,618 | - | 87,378,442 | 1,258,284 | - | - |
| 2015-17 Emergency Boards | - | - | 9,219,442 | 773,647 | - | 8,437,310 | 8,485 | - | - |
| 2015-17 Leg Approved Budget | 186 | 177.28 | 152,338,786 | 55,256,265 | - | 95,815,752 | 1,266,769 | - | - |
| 2017-19 Base Budget Adjustments | | | | | | | | | |
| Net Cost of Position Actions | | | | | | | | | |
| Administrative Biennialized E-Board, Phase-Out | (7) | (1.33) | 2,258,231 | 2,245,223 | - | (19,194) | 32,202 | - | - |
| Estimated Cost of Merit Increase | | | 858,413 | 709,023 | - | 133,837 | 15,553 | - | - |
| Base Debt Service Adjustment | | | - | - | - | - | - | - | - |
| Base Nonlimited Adjustment | | | - | - | - | - | - | - | - |
| Capital Construction | | | - | - | - | - | - | - | - |
| Subtotal 2017-19 Base Budget | 179 | 175.95 | 155,455,430 | 58,210,511 | - | 95,930,395 | 1,314,524 | - | - |
| Essential Packages | | | | | | | | | |
| 010 - Non-PICS Pers Svc/Vacancy Factor | | | | | | | | | |
| Non-PICS Personal Service Increase/(Decrease) | - | - | 191,935 | 167,467 | - | 22,284 | 2,184 | - | - |
| Subtotal | - | - | 191,935 | 167,467 | - | 22,284 | 2,184 | - | - |
| 020 - Phase In / Out Pgm & One-time Cost | | | | | | | | | |
| 021 - Phase - In | - | - | - | - | - | - | - | - | - |
| 022 - Phase-out Pgm & One-time Costs | - | - | (80,572,985) | - | - | (80,572,985) | - | - | - |
| Subtotal | - | - | (80,572,985) | - | - | (80,572,985) | - | - | - |
| 030 - Inflation & Price List Adjustments | | | | | | | | | |
| Cost of Goods & Services Increase/(Decrease) | - | - | 912,946 | 611,836 | - | 278,466 | 22,644 | - | - |
| State Gov't & Services Charges Increase/(Decrease) | | | 3,965,954 | 3,965,954 | - | - | - | - | - |
| Subtotal | - | - | 4,878,900 | 4,577,790 | - | 278,466 | 22,644 | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
Administration and Central Support
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-102-00-00-00000

| <i>Description</i> | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|---|-------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| 040 - Mandated Caseload | | | | | | | | | |
| 040 - Mandated Caseload | - | - | - | - | - | - | - | - | - |
| 050 - Fundshifts and Revenue Reductions | | | | | | | | | |
| 050 - Fundshifts | - | - | - | - | - | - | - | - | - |
| 060 - Technical Adjustments | | | | | | | | | |
| 060 - Technical Adjustments | - | - | - | - | - | - | - | - | - |
| Subtotal: 2017-19 Current Service Level | 179 | 175.95 | 79,953,280 | 62,955,768 | - | 15,658,160 | 1,339,352 | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

Administration and Central Support

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-102-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------|-------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|
| Subtotal: 2017-19 Current Service Level | 179 | 175.95 | 79,953,280 | 62,955,768 | - | 15,658,160 | 1,339,352 | - | - |
| 070 - Revenue Reductions/Shortfall | | | | | | | | | |
| 070 - Revenue Shortfalls | - | - | (5,527,210) | - | - | (5,527,210) | - | - | - |
| Modified 2017-19 Current Service Level | 179 | 175.95 | 74,426,070 | 62,955,768 | - | 10,130,950 | 1,339,352 | - | - |
| 080 - E-Boards | | | | | | | | | |
| 080 - May 2016 E-Board | - | - | - | - | - | - | - | - | - |
| Subtotal Emergency Board Packages | - | - | - | - | - | - | - | - | - |
| Policy Packages | | | | | | | | | |
| 401 - New Judgeships & Support Staff | - | - | - | - | - | - | - | - | - |
| 402 - Judicial Compensation | - | - | - | - | - | - | - | - | - |
| 403 - Judicial Resources - Hearings Referees | - | - | - | - | - | - | - | - | - |
| 404 - Technology Fund | 7 | 7.00 | 10,690,190 | - | - | 10,690,190 | - | - | - |
| 405 - Support Effective Circuit Court Programs | - | - | - | - | - | - | - | - | - |
| 406 - Multnomah County Violations Processing Staff | - | - | - | - | - | - | - | - | - |
| 407 - Supreme Court Coordinating Councils for Justice Access & I | - | - | - | - | - | - | - | - | - |
| 408 - County Mediation & Conciliation Funding and Support | 1 | 0.88 | 171,920 | 171,920 | - | - | - | - | - |
| 409 - Treatment/Speciality Courts Grant Funding | - | - | - | - | - | - | - | - | - |
| 410 - Oregon Courthouse Capital Construction & Improvement Fu | - | - | - | - | - | - | - | - | - |
| 411 - OCCCF Debt Service and Cost of Issuance | - | - | - | - | - | - | - | - | - |
| 412 - Local Court Facilities Infrastructure | - | - | - | - | - | - | - | - | - |
| 413 - Debt Collection Funding | - | - | - | - | - | - | - | - | - |
| 414 - Supreme Court Building - Seismic Retrofit and Renovation | - | - | - | - | - | - | - | - | - |
| 420 - Full Program Cost Funding | - | - | - | - | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

Administration and Central Support

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-102-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------------|------------|--------------|------------------|-------------|------------------|---------------------------|--------------------------------|
| 421 - Added Staff Attorney | - | - | - | - | - | - | - | - | - |
| Subtotal Policy Packages | 8 | 7.88 | 10,862,110 | 171,920 | - | 10,690,190 | - | - | - |
| Total 2017-19 Agency Request Budget | 187 | 183.83 | 85,288,180 | 63,127,688 | - | 20,821,140 | 1,339,352 | - | - |
| Percentage Change From 2015-17 Leg Approved Budget | 0.54% | 3.69% | -44.01% | 14.25% | - | -78.27% | 5.73% | - | - |
| Percentage Change From 2017-19 Current Service Level | 4.47% | 4.48% | 6.67% | 0.27% | - | 32.97% | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

Mandated Payments

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-200-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------------|-------------------|-------------------|------------------|----------------|------------------|---------------------------|--------------------------------|
| 2015-17 Leg Adopted Budget | 23 | 22.61 | 16,218,817 | 15,558,373 | - | 660,444 | - | - | - |
| 2015-17 Emergency Boards | - | - | 107,792 | 105,496 | - | 2,296 | - | - | - |
| 2015-17 Leg Approved Budget | 23 | 22.61 | 16,326,609 | 15,663,869 | - | 662,740 | - | - | - |
| 2017-19 Base Budget Adjustments | | | | | | | | | |
| Net Cost of Position Actions | | | | | | | | | |
| Administrative Biennialized E-Board, Phase-Out | - | - | (14,351) | 5,914 | - | (20,265) | - | - | - |
| Estimated Cost of Merit Increase | | | 109,116 | 109,116 | - | - | - | - | - |
| Base Debt Service Adjustment | | | - | - | - | - | - | - | - |
| Base Nonlimited Adjustment | | | - | - | - | - | - | - | - |
| Capital Construction | | | - | - | - | - | - | - | - |
| Subtotal 2017-19 Base Budget | 23 | 22.61 | 16,421,374 | 15,778,899 | - | 642,475 | - | - | - |
| Essential Packages | | | | | | | | | |
| 010 - Non-PICS Pers Svc/Vacancy Factor | | | | | | | | | |
| Non-PICS Personal Service Increase/(Decrease) | - | - | 4,357 | 5,370 | - | (1,013) | - | - | - |
| Subtotal | - | - | 4,357 | 5,370 | - | (1,013) | - | - | - |
| 020 - Phase In / Out Pgm & One-time Cost | | | | | | | | | |
| 021 - Phase - In | - | - | - | - | - | - | - | - | - |
| 022 - Phase-out Pgm & One-time Costs | - | - | - | - | - | - | - | - | - |
| Subtotal | - | - | - | - | - | - | - | - | - |
| 030 - Inflation & Price List Adjustments | | | | | | | | | |
| Cost of Goods & Services Increase/(Decrease) | - | - | 453,622 | 432,417 | - | 21,205 | - | - | - |
| Subtotal | - | - | 453,622 | 432,417 | - | 21,205 | - | - | - |
| 040 - Mandated Caseload | | | | | | | | | |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

Mandated Payments

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-200-00-00-00000

| <i>Description</i> | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|---|-------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| 040 - Mandated Caseload | - | - | - | - | - | - | - | - | - |
| 050 - Fundshifts and Revenue Reductions | | | | | | | | | |
| 050 - Fundshifts | - | - | - | - | - | - | - | - | - |
| 060 - Technical Adjustments | | | | | | | | | |
| 060 - Technical Adjustments | - | - | - | - | - | - | - | - | - |
| Subtotal: 2017-19 Current Service Level | 23 | 22.61 | 16,879,353 | 16,216,686 | - | 662,667 | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
Mandated Payments
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-200-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------------|------------|--------------|------------------|-------------|------------------|---------------------------|--------------------------------|
| Subtotal: 2017-19 Current Service Level | 23 | 22.61 | 16,879,353 | 16,216,686 | - | 662,667 | - | - | - |
| 070 - Revenue Reductions/Shortfall | | | | | | | | | |
| 070 - Revenue Shortfalls | - | - | - | - | - | - | - | - | - |
| Modified 2017-19 Current Service Level | 23 | 22.61 | 16,879,353 | 16,216,686 | - | 662,667 | - | - | - |
| 080 - E-Boards | | | | | | | | | |
| 080 - May 2016 E-Board | - | - | - | - | - | - | - | - | - |
| Subtotal Emergency Board Packages | - | - | - | - | - | - | - | - | - |
| Policy Packages | | | | | | | | | |
| 401 - New Judgeships & Support Staff | - | - | - | - | - | - | - | - | - |
| 402 - Judicial Compensation | - | - | - | - | - | - | - | - | - |
| 403 - Judicial Resources - Hearings Referees | - | - | - | - | - | - | - | - | - |
| 404 - Technology Fund | - | - | - | - | - | - | - | - | - |
| 405 - Support Effective Circuit Court Programs | - | - | - | - | - | - | - | - | - |
| 406 - Multnomah County Violations Processing Staff | - | - | - | - | - | - | - | - | - |
| 407 - Supreme Court Coordinating Councils for Justice Access & I | - | - | - | - | - | - | - | - | - |
| 408 - County Mediation & Conciliation Funding and Support | - | - | - | - | - | - | - | - | - |
| 409 - Treatment/Speciality Courts Grant Funding | - | - | - | - | - | - | - | - | - |
| 410 - Oregon Courthouse Capital Construction & Improvement Fu | - | - | - | - | - | - | - | - | - |
| 411 - OCCCIF Debt Service and Cost of Issuance | - | - | - | - | - | - | - | - | - |
| 412 - Local Court Facilities Infrastructure | - | - | - | - | - | - | - | - | - |
| 413 - Debt Collection Funding | - | - | - | - | - | - | - | - | - |
| 414 - Supreme Court Building - Seismic Retrofit and Renovation | - | - | - | - | - | - | - | - | - |
| 420 - Full Program Cost Funding | - | - | - | - | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

| Judicial Dept | | | | | Agency Request Budget | | | | |
|--|-----------|----------------------------|------------|--------------|---|-------------|---------------|------------------------|--------------------------|
| Mandated Payments | | | | | Cross Reference Number: 19800-200-00-00-00000 | | | | |
| 2017-19 Biennium | | | | | | | | | |
| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
| 421 - Added Staff Attorney | - | - | - | - | - | - | - | - | - |
| Subtotal Policy Packages | - | - | - | - | - | - | - | - | - |
| Total 2017-19 Agency Request Budget | 23 | 22.61 | 16,879,353 | 16,216,686 | - | 662,667 | - | - | - |
| Percentage Change From 2015-17 Leg Approved Budget | - | - | 3.39% | 3.53% | - | -0.01% | - | - | - |
| Percentage Change From 2017-19 Current Service Level | - | - | - | - | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
3rd Party Debt Collection
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-210-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|---|-----------|----------------------------------|------------|--------------|------------------|-------------|------------------|---------------------------|--------------------------------|
| 2015-17 Leg Adopted Budget | - | - | 11,776,898 | 11,776,898 | - | - | - | - | - |
| 2015-17 Emergency Boards | - | - | 414,910 | 414,910 | - | - | - | - | - |
| 2015-17 Leg Approved Budget | - | - | 12,191,808 | 12,191,808 | - | - | - | - | - |
| 2017-19 Base Budget Adjustments | | | | | | | | | |
| Net Cost of Position Actions | | | | | | | | | |
| Administrative Biennialized E-Board, Phase-Out | - | - | - | - | - | - | - | - | - |
| Estimated Cost of Merit Increase | | | - | - | - | - | - | - | - |
| Base Debt Service Adjustment | | | - | - | - | - | - | - | - |
| Base Nonlimited Adjustment | | | - | - | - | - | - | - | - |
| Capital Construction | | | - | - | - | - | - | - | - |
| Subtotal 2017-19 Base Budget | - | - | 12,191,808 | 12,191,808 | - | - | - | - | - |
| 020 - Phase In / Out Pgm & One-time Cost | | | | | | | | | |
| 021 - Phase - In | - | - | - | - | - | - | - | - | - |
| 022 - Phase-out Pgm & One-time Costs | - | - | - | - | - | - | - | - | - |
| Subtotal | - | - | - | - | - | - | - | - | - |
| 030 - Inflation & Price List Adjustments | | | | | | | | | |
| Cost of Goods & Services Increase/(Decrease) | - | - | 451,097 | 451,097 | - | - | - | - | - |
| Subtotal | - | - | 451,097 | 451,097 | - | - | - | - | - |
| 040 - Mandated Caseload | | | | | | | | | |
| 040 - Mandated Caseload | - | - | - | - | - | - | - | - | - |
| 050 - Fundshifts and Revenue Reductions | | | | | | | | | |
| 050 - Fundshifts | - | - | - | - | - | - | - | - | - |
| 060 - Technical Adjustments | | | | | | | | | |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

3rd Party Debt Collection

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-210-00-00-00000

| <i>Description</i> | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|---|------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| 060 - Technical Adjustments | - | - | - | - | - | - | - | - | - |
| Subtotal: 2017-19 Current Service Level | - | - | 12,642,905 | 12,642,905 | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
3rd Party Debt Collection
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-210-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------|------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|
| Subtotal: 2017-19 Current Service Level | - | - | 12,642,905 | 12,642,905 | - | - | - | - | - |
| 070 - Revenue Reductions/Shortfall | | | | | | | | | |
| 070 - Revenue Shortfalls | - | - | - | - | - | - | - | - | - |
| Modified 2017-19 Current Service Level | - | - | 12,642,905 | 12,642,905 | - | - | - | - | - |
| 080 - E-Boards | | | | | | | | | |
| 080 - May 2016 E-Board | - | - | - | - | - | - | - | - | - |
| Subtotal Emergency Board Packages | - | - | - | - | - | - | - | - | - |
| Policy Packages | | | | | | | | | |
| 401 - New Judgeships & Support Staff | - | - | - | - | - | - | - | - | - |
| 402 - Judicial Compensation | - | - | - | - | - | - | - | - | - |
| 403 - Judicial Resources - Hearings Referees | - | - | - | - | - | - | - | - | - |
| 404 - Technology Fund | - | - | - | - | - | - | - | - | - |
| 405 - Support Effective Circuit Court Programs | - | - | - | - | - | - | - | - | - |
| 406 - Multnomah County Violations Processing Staff | - | - | - | - | - | - | - | - | - |
| 407 - Supreme Court Coordinating Councils for Justice Access & I | - | - | - | - | - | - | - | - | - |
| 408 - County Mediation & Conciliation Funding and Support | - | - | - | - | - | - | - | - | - |
| 409 - Treatment/Specialty Courts Grant Funding | - | - | - | - | - | - | - | - | - |
| 410 - Oregon Courthouse Capital Construction & Improvement Fu | - | - | - | - | - | - | - | - | - |
| 411 - OCCIF Debt Service and Cost of Issuance | - | - | - | - | - | - | - | - | - |
| 412 - Local Court Facilities Infrastructure | - | - | - | - | - | - | - | - | - |
| 413 - Debt Collection Funding | - | - | 3,307,095 | 3,307,095 | - | - | - | - | - |
| 414 - Supreme Court Building - Seismic Retrofit and Renovation | - | - | - | - | - | - | - | - | - |
| 420 - Full Program Cost Funding | - | - | - | - | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
3rd Party Debt Collection
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-210-00-00-00000

| <i>Description</i> | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|---|------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| 421 - Added Staff Attorney | - | - | - | - | - | - | - | - | - |
| Subtotal Policy Packages | - | - | 3,307,095 | 3,307,095 | - | - | - | - | - |
| Total 2017-19 Agency Request Budget | - | - | 15,950,000 | 15,950,000 | - | - | - | - | - |
| Percentage Change From 2015-17 Leg Approved Budget | - | - | 30.83% | 30.83% | - | - | - | - | - |
| Percentage Change From 2017-19 Current Service Level | - | - | 26.16% | 26.16% | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

External Pass-Throughs

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-220-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------|------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|
| 2015-17 Leg Adopted Budget | - | - | 27,742,390 | 15,842,390 | - | 11,900,000 | - | - | - |
| 2015-17 Emergency Boards | - | - | 200,000 | 200,000 | - | - | - | - | - |
| 2015-17 Leg Approved Budget | - | - | 27,942,390 | 16,042,390 | - | 11,900,000 | - | - | - |
| 2017-19 Base Budget Adjustments | | | | | | | | | |
| Net Cost of Position Actions | | | | | | | | | |
| Administrative Biennialized E-Board, Phase-Out | - | - | - | - | - | - | - | - | - |
| Estimated Cost of Merit Increase | | | - | - | - | - | - | - | - |
| Base Debt Service Adjustment | | | - | - | - | - | - | - | - |
| Base Nonlimited Adjustment | | | - | - | - | - | - | - | - |
| Capital Construction | | | - | - | - | - | - | - | - |
| Subtotal 2017-19 Base Budget | - | - | 27,942,390 | 16,042,390 | - | 11,900,000 | - | - | - |
| 020 - Phase In / Out Pgm & One-time Cost | | | | | | | | | |
| 021 - Phase - In | - | - | - | - | - | - | - | - | - |
| 022 - Phase-out Pgm & One-time Costs | - | - | (800,000) | (800,000) | - | - | - | - | - |
| Subtotal | - | - | (800,000) | (800,000) | - | - | - | - | - |
| 030 - Inflation & Price List Adjustments | | | | | | | | | |
| Cost of Goods & Services Increase/(Decrease) | - | - | 563,969 | 563,969 | - | - | - | - | - |
| Subtotal | - | - | 563,969 | 563,969 | - | - | - | - | - |
| 040 - Mandated Caseload | | | | | | | | | |
| 040 - Mandated Caseload | - | - | - | - | - | - | - | - | - |
| 050 - Fundshifts and Revenue Reductions | | | | | | | | | |
| 050 - Fundshifts | - | - | - | - | - | - | - | - | - |
| 060 - Technical Adjustments | | | | | | | | | |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

External Pass-Throughs

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-220-00-00-00000

| <i>Description</i> | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|---|------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| 060 - Technical Adjustments | - | - | - | - | - | - | - | - | - |
| Subtotal: 2017-19 Current Service Level | - | - | 27,706,359 | 15,806,359 | - | 11,900,000 | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

External Pass-Throughs

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-220-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------------|------------|--------------|------------------|-------------|------------------|---------------------------|--------------------------------|
| Subtotal: 2017-19 Current Service Level | - | - | 27,706,359 | 15,806,359 | - | 11,900,000 | - | - | - |
| 070 - Revenue Reductions/Shortfall | | | | | | | | | |
| 070 - Revenue Shortfalls | - | - | - | - | - | - | - | - | - |
| Modified 2017-19 Current Service Level | - | - | 27,706,359 | 15,806,359 | - | 11,900,000 | - | - | - |
| 080 - E-Boards | | | | | | | | | |
| 080 - May 2016 E-Board | - | - | - | - | - | - | - | - | - |
| Subtotal Emergency Board Packages | - | - | - | - | - | - | - | - | - |
| Policy Packages | | | | | | | | | |
| 401 - New Judgeships & Support Staff | - | - | - | - | - | - | - | - | - |
| 402 - Judicial Compensation | - | - | - | - | - | - | - | - | - |
| 403 - Judicial Resources - Hearings Referees | - | - | - | - | - | - | - | - | - |
| 404 - Technology Fund | - | - | - | - | - | - | - | - | - |
| 405 - Support Effective Circuit Court Programs | - | - | - | - | - | - | - | - | - |
| 406 - Multnomah County Violations Processing Staff | - | - | - | - | - | - | - | - | - |
| 407 - Supreme Court Coordinating Councils for Justice Access & I | - | - | - | - | - | - | - | - | - |
| 408 - County Mediation & Conciliation Funding and Support | - | - | 2,000,000 | 2,000,000 | - | - | - | - | - |
| 409 - Treatment/Specialty Courts Grant Funding | - | - | - | - | - | - | - | - | - |
| 410 - Oregon Courthouse Capital Construction & Improvement Fu | - | - | - | - | - | - | - | - | - |
| 411 - OCCCIF Debt Service and Cost of Issuance | - | - | - | - | - | - | - | - | - |
| 412 - Local Court Facilities Infrastructure | - | - | - | - | - | - | - | - | - |
| 413 - Debt Collection Funding | - | - | - | - | - | - | - | - | - |
| 414 - Supreme Court Building - Seismic Retrofit and Renovation | - | - | - | - | - | - | - | - | - |
| 420 - Full Program Cost Funding | - | - | 20,671 | 20,671 | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

External Pass-Throughs

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-220-00-00-00000

| <i>Description</i> | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|---|-------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| 421 - Added Staff Attorney | - | - | 167,246 | 167,246 | - | - | - | - | - |
| Subtotal Policy Packages | - | - | 2,187,917 | 2,187,917 | - | - | - | - | - |
| Total 2017-19 Agency Request Budget | - | - | 29,894,276 | 17,994,276 | - | 11,900,000 | - | - | - |
| Percentage Change From 2015-17 Leg Approved Budget | - | - | 6.99% | 12.17% | - | - | - | - | - |
| Percentage Change From 2017-19 Current Service Level | - | - | 7.90% | 13.84% | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

OR Courthouse Cap Const & Improvement Fd

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-230-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------------|-----------|--------------|------------------|-------------|------------------|---------------------------|--------------------------------|
| 2015-17 Leg Adopted Budget | - | - | - | - | - | - | - | - | - |
| 2015-17 Emergency Boards | - | - | - | - | - | - | - | - | - |
| 2015-17 Leg Approved Budget | - | - | - | - | - | - | - | - | - |
| 2017-19 Base Budget Adjustments | | | | | | | | | |
| Net Cost of Position Actions | | | | | | | | | |
| Administrative Biennialized E-Board, Phase-Out | - | - | - | - | - | - | - | - | - |
| Estimated Cost of Merit Increase | | | - | - | - | - | - | - | - |
| Base Debt Service Adjustment | | | - | - | - | - | - | - | - |
| Base Nonlimited Adjustment | | | - | - | - | - | - | - | - |
| Capital Construction | | | - | - | - | - | - | - | - |
| Subtotal 2017-19 Base Budget | - | - | - | - | - | - | - | - | - |
| 020 - Phase In / Out Pgm & One-time Cost | | | | | | | | | |
| 021 - Phase - In | - | - | - | - | - | - | - | - | - |
| 022 - Phase-out Pgm & One-time Costs | - | - | - | - | - | - | - | - | - |
| Subtotal | - | - | - | - | - | - | - | - | - |
| 040 - Mandated Caseload | | | | | | | | | |
| 040 - Mandated Caseload | - | - | - | - | - | - | - | - | - |
| 050 - Fundshifts and Revenue Reductions | | | | | | | | | |
| 050 - Fundshifts | - | - | - | - | - | - | - | - | - |
| 060 - Technical Adjustments | | | | | | | | | |
| 060 - Technical Adjustments | - | - | - | - | - | - | - | - | - |
| Subtotal: 2017-19 Current Service Level | - | - | - | - | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

OR Courthouse Cap Const & Improvement Fd

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-230-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------|-------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|
| Subtotal: 2017-19 Current Service Level | - | - | - | - | - | - | - | - | - |
| 070 - Revenue Reductions/Shortfall | | | | | | | | | |
| 070 - Revenue Shortfalls | - | - | - | - | - | - | - | - | - |
| Modified 2017-19 Current Service Level | - | - | - | - | - | - | - | - | - |
| 080 - E-Boards | | | | | | | | | |
| 080 - May 2016 E-Board | - | - | - | - | - | - | - | - | - |
| Subtotal Emergency Board Packages | - | - | - | - | - | - | - | - | - |
| Policy Packages | | | | | | | | | |
| 401 - New Judgeships & Support Staff | - | - | - | - | - | - | - | - | - |
| 402 - Judicial Compensation | - | - | - | - | - | - | - | - | - |
| 403 - Judicial Resources - Hearings Referees | - | - | - | - | - | - | - | - | - |
| 404 - Technology Fund | - | - | - | - | - | - | - | - | - |
| 405 - Support Effective Circuit Court Programs | - | - | - | - | - | - | - | - | - |
| 406 - Multnomah County Violations Processing Staff | - | - | - | - | - | - | - | - | - |
| 407 - Supreme Court Coordinating Councils for Justice Access & I | - | - | - | - | - | - | - | - | - |
| 408 - County Mediation & Conciliation Funding and Support | - | - | - | - | - | - | - | - | - |
| 409 - Treatment/Speciality Courts Grant Funding | - | - | - | - | - | - | - | - | - |
| 410 - Oregon Courthouse Capital Construction & Improvement Fu | - | - | 212,400,000 | - | - | 212,400,000 | - | - | - |
| 411 - OCCCF Debt Service and Cost of Issuance | - | - | - | - | - | - | - | - | - |
| 412 - Local Court Facilities Infrastructure | - | - | - | - | - | - | - | - | - |
| 413 - Debt Collection Funding | - | - | - | - | - | - | - | - | - |
| 414 - Supreme Court Building - Seismic Retrofit and Renovation | - | - | - | - | - | - | - | - | - |
| 420 - Full Program Cost Funding | - | - | - | - | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

OR Courthouse Cap Const & Improvement Fd

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-230-00-00-00000

| <i>Description</i> | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|---|------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| 421 - Added Staff Attorney | - | - | - | - | - | - | - | - | - |
| Subtotal Policy Packages | - | - | 212,400,000 | - | - | 212,400,000 | - | - | - |
| Total 2017-19 Agency Request Budget | - | - | 212,400,000 | - | - | 212,400,000 | - | - | - |
| Percentage Change From 2015-17 Leg Approved Budget | - | - | - | - | - | - | - | - | - |
| Percentage Change From 2017-19 Current Service Level | - | - | - | - | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

State Court Facilities Security Account

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-400-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------------|--------------------|--------------|------------------|--------------------|------------------|---------------------------|--------------------------------|
| 2015-17 Leg Adopted Budget | 4 | 4.00 | 11,071,244 | - | - | 11,071,244 | - | - | - |
| 2015-17 Emergency Boards | - | - | 23,680 | - | - | 23,680 | - | - | - |
| 2015-17 Leg Approved Budget | 4 | 4.00 | 11,094,924 | - | - | 11,094,924 | - | - | - |
| 2017-19 Base Budget Adjustments | | | | | | | | | |
| Net Cost of Position Actions | | | | | | | | | |
| Administrative Biennialized E-Board, Phase-Out | - | - | 21,801 | - | - | 21,801 | - | - | - |
| Estimated Cost of Merit Increase | | | 18,900 | - | - | 18,900 | - | - | - |
| Base Debt Service Adjustment | | | - | - | - | - | - | - | - |
| Base Nonlimited Adjustment | | | - | - | - | - | - | - | - |
| Capital Construction | | | - | - | - | - | - | - | - |
| Subtotal 2017-19 Base Budget | 4 | 4.00 | 11,135,625 | - | - | 11,135,625 | - | - | - |
| Essential Packages | | | | | | | | | |
| 010 - Non-PICS Pers Svc/Vacancy Factor | | | | | | | | | |
| Non-PICS Personal Service Increase/(Decrease) | - | - | 1,649 | - | - | 1,649 | - | - | - |
| Subtotal | - | - | 1,649 | - | - | 1,649 | - | - | - |
| 020 - Phase In / Out Pgm & One-time Cost | | | | | | | | | |
| 021 - Phase - In | - | - | - | - | - | - | - | - | - |
| 022 - Phase-out Pgm & One-time Costs | - | - | (4,600,000) | - | - | (4,600,000) | - | - | - |
| Subtotal | - | - | (4,600,000) | - | - | (4,600,000) | - | - | - |
| 030 - Inflation & Price List Adjustments | | | | | | | | | |
| Cost of Goods & Services Increase/(Decrease) | - | - | 213,203 | - | - | 213,203 | - | - | - |
| Subtotal | - | - | 213,203 | - | - | 213,203 | - | - | - |
| 040 - Mandated Caseload | | | | | | | | | |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

State Court Facilities Security Account

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-400-00-00-00000

| <i>Description</i> | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|---|------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| 040 - Mandated Caseload | - | - | - | - | - | - | - | - | - |
| 050 - Fundshifts and Revenue Reductions | | | | | | | | | |
| 050 - Fundshifts | - | - | - | - | - | - | - | - | - |
| 060 - Technical Adjustments | | | | | | | | | |
| 060 - Technical Adjustments | - | - | - | - | - | - | - | - | - |
| Subtotal: 2017-19 Current Service Level | 4 | 4.00 | 6,750,477 | - | - | 6,750,477 | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

State Court Facilities Security Account

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-400-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------------|-----------|--------------|------------------|-------------|------------------|---------------------------|--------------------------------|
| Subtotal: 2017-19 Current Service Level | 4 | 4.00 | 6,750,477 | - | - | 6,750,477 | - | - | - |
| 070 - Revenue Reductions/Shortfall | | | | | | | | | |
| 070 - Revenue Shortfalls | - | - | - | - | - | - | - | - | - |
| Modified 2017-19 Current Service Level | 4 | 4.00 | 6,750,477 | - | - | 6,750,477 | - | - | - |
| 080 - E-Boards | | | | | | | | | |
| 080 - May 2016 E-Board | - | - | - | - | - | - | - | - | - |
| Subtotal Emergency Board Packages | - | - | - | - | - | - | - | - | - |
| Policy Packages | | | | | | | | | |
| 401 - New Judgeships & Support Staff | - | - | - | - | - | - | - | - | - |
| 402 - Judicial Compensation | - | - | - | - | - | - | - | - | - |
| 403 - Judicial Resources - Hearings Referees | - | - | - | - | - | - | - | - | - |
| 404 - Technology Fund | - | - | - | - | - | - | - | - | - |
| 405 - Support Effective Circuit Court Programs | - | - | - | - | - | - | - | - | - |
| 406 - Multnomah County Violations Processing Staff | - | - | - | - | - | - | - | - | - |
| 407 - Supreme Court Coordinating Councils for Justice Access & I | - | - | - | - | - | - | - | - | - |
| 408 - County Mediation & Conciliation Funding and Support | - | - | - | - | - | - | - | - | - |
| 409 - Treatment/Specialty Courts Grant Funding | - | - | - | - | - | - | - | - | - |
| 410 - Oregon Courthouse Capital Construction & Improvement Fu | - | - | - | - | - | - | - | - | - |
| 411 - OCCCIF Debt Service and Cost of Issuance | - | - | - | - | - | - | - | - | - |
| 412 - Local Court Facilities Infrastructure | - | - | 3,600,000 | - | - | 3,600,000 | - | - | - |
| 413 - Debt Collection Funding | - | - | - | - | - | - | - | - | - |
| 414 - Supreme Court Building - Seismic Retrofit and Renovation | - | - | - | - | - | - | - | - | - |
| 420 - Full Program Cost Funding | - | - | - | - | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept

State Court Facilities Security Account

2017-19 Biennium

Agency Request Budget

Cross Reference Number: 19800-400-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------------|------------|--------------|------------------|-------------|------------------|---------------------------|--------------------------------|
| 421 - Added Staff Attorney | - | - | - | - | - | - | - | - | - |
| Subtotal Policy Packages | - | - | 3,600,000 | - | - | 3,600,000 | - | - | - |
| Total 2017-19 Agency Request Budget | 4 | 4.00 | 10,350,477 | - | - | 10,350,477 | - | - | - |
| Percentage Change From 2015-17 Leg Approved Budget | - | - | -6.71% | - | - | -6.71% | - | - | - |
| Percentage Change From 2017-19 Current Service Level | - | - | 53.33% | - | - | 53.33% | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
eCourt Program
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-500-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------------|---------------------|------------------|------------------|---------------------|------------------|---------------------------|--------------------------------|
| 2015-17 Leg Adopted Budget | 38 | 22.24 | 19,254,876 | 1,978,661 | - | 17,276,215 | - | - | - |
| 2015-17 Emergency Boards | - | - | 558,916 | 267,415 | - | 291,501 | - | - | - |
| 2015-17 Leg Approved Budget | 38 | 22.24 | 19,813,792 | 2,246,076 | - | 17,567,716 | - | - | - |
| 2017-19 Base Budget Adjustments | | | | | | | | | |
| Net Cost of Position Actions | | | | | | | | | |
| Administrative Biennialized E-Board, Phase-Out | (38) | (22.24) | (4,807,448) | - | - | (4,807,448) | - | - | - |
| Estimated Cost of Merit Increase | | | - | - | - | - | - | - | - |
| Base Debt Service Adjustment | | | - | - | - | - | - | - | - |
| Base Nonlimited Adjustment | | | - | - | - | - | - | - | - |
| Capital Construction | | | - | - | - | - | - | - | - |
| Subtotal 2017-19 Base Budget | - | - | 15,006,344 | 2,246,076 | - | 12,760,268 | - | - | - |
| Essential Packages | | | | | | | | | |
| 010 - Non-PICS Pers Svc/Vacancy Factor | | | | | | | | | |
| Non-PICS Personal Service Increase/(Decrease) | - | - | - | - | - | - | - | - | - |
| Subtotal | - | - | - | - | - | - | - | - | - |
| 020 - Phase In / Out Pgm & One-time Cost | | | | | | | | | |
| 021 - Phase - In | - | - | - | - | - | - | - | - | - |
| 022 - Phase-out Pgm & One-time Costs | - | - | (12,760,268) | - | - | (12,760,268) | - | - | - |
| Subtotal | - | - | (12,760,268) | - | - | (12,760,268) | - | - | - |
| 030 - Inflation & Price List Adjustments | | | | | | | | | |
| Cost of Goods & Services Increase/(Decrease) | - | - | 90,287 | 90,287 | - | - | - | - | - |
| Subtotal | - | - | 90,287 | 90,287 | - | - | - | - | - |
| 040 - Mandated Caseload | | | | | | | | | |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
eCourt Program
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-500-00-00-00000

| <i>Description</i> | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|---|------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| 040 - Mandated Caseload | - | - | - | - | - | - | - | - | - |
| 050 - Fundshifts and Revenue Reductions | | | | | | | | | |
| 050 - Fundshifts | - | - | - | - | - | - | - | - | - |
| 060 - Technical Adjustments | | | | | | | | | |
| 060 - Technical Adjustments | - | - | - | - | - | - | - | - | - |
| Subtotal: 2017-19 Current Service Level | - | - | 2,336,363 | 2,336,363 | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
eCourt Program
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-500-00-00-00000

| Description | Positions | Full-Time Equivalent (FTE) | ALL FUNDS | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds |
|--|-----------|----------------------------|-----------|--------------|---------------|-------------|---------------|------------------------|--------------------------|
| Subtotal: 2017-19 Current Service Level | - | - | 2,336,363 | 2,336,363 | - | - | - | - | - |
| 070 - Revenue Reductions/Shortfall | | | | | | | | | |
| 070 - Revenue Shortfalls | - | - | - | - | - | - | - | - | - |
| Modified 2017-19 Current Service Level | - | - | 2,336,363 | 2,336,363 | - | - | - | - | - |
| 080 - E-Boards | | | | | | | | | |
| 080 - May 2016 E-Board | - | - | - | - | - | - | - | - | - |
| Subtotal Emergency Board Packages | - | - | - | - | - | - | - | - | - |
| Policy Packages | | | | | | | | | |
| 401 - New Judgeships & Support Staff | - | - | - | - | - | - | - | - | - |
| 402 - Judicial Compensation | - | - | - | - | - | - | - | - | - |
| 403 - Judicial Resources - Hearings Referees | - | - | - | - | - | - | - | - | - |
| 404 - Technology Fund | - | - | - | - | - | - | - | - | - |
| 405 - Support Effective Circuit Court Programs | - | - | - | - | - | - | - | - | - |
| 406 - Multnomah County Violations Processing Staff | - | - | - | - | - | - | - | - | - |
| 407 - Supreme Court Coordinating Councils for Justice Access & I | - | - | - | - | - | - | - | - | - |
| 408 - County Mediation & Conciliation Funding and Support | - | - | - | - | - | - | - | - | - |
| 409 - Treatment/Specialty Courts Grant Funding | - | - | - | - | - | - | - | - | - |
| 410 - Oregon Courthouse Capital Construction & Improvement Fu | - | - | - | - | - | - | - | - | - |
| 411 - OCCCF Debt Service and Cost of Issuance | - | - | - | - | - | - | - | - | - |
| 412 - Local Court Facilities Infrastructure | - | - | - | - | - | - | - | - | - |
| 413 - Debt Collection Funding | - | - | - | - | - | - | - | - | - |
| 414 - Supreme Court Building - Seismic Retrofit and Renovation | - | - | - | - | - | - | - | - | - |
| 420 - Full Program Cost Funding | - | - | - | - | - | - | - | - | - |

DEPARTMENT SUMMARY

Summary of 2017-19 Biennium Budget

Judicial Dept
eCourt Program
2017-19 Biennium

Agency Request Budget
Cross Reference Number: 19800-500-00-00-00000

| <i>Description</i> | <i>Positions</i> | <i>Full-Time Equivalent (FTE)</i> | <i>ALL FUNDS</i> | <i>General Fund</i> | <i>Lottery Funds</i> | <i>Other Funds</i> | <i>Federal Funds</i> | <i>Nonlimited Other Funds</i> | <i>Nonlimited Federal Funds</i> |
|--|------------------|---|------------------|---------------------|--------------------------|--------------------|--------------------------|-----------------------------------|---|
| 421 - Added Staff Attorney | - | - | - | - | - | - | - | - | - |
| Subtotal Policy Packages | - | - | - | - | - | - | - | - | - |
| Total 2017-19 Agency Request Budget | - | - | 2,336,363 | 2,336,363 | - | - | - | - | - |
| Percentage Change From 2015-17 Leg Approved Budget | -100.00% | -100.00% | -88.21% | 4.02% | - | -100.00% | - | - | - |
| Percentage Change From 2017-19 Current Service Level | - | - | - | - | - | - | - | - | - |

DEPARTMENT SUMMARY

BPR010 – Agencywide Program Unit Summary

Judicial Dept

Agency Number: 19800

Agencywide Program Unit Summary
2017-19 Biennium

Version: V - 01 - Agency Request Budget

| Summary Cross Reference Number | Cross Reference Description | 2013-15 Actuals | 2015-17 Leg Adopted Budget | 2015-17 Leg Approved Budget | 2017-19 Agency Request Budget | 2017-19 Governor's Budget | 2017-19 Leg Adopted Budget |
|--------------------------------------|------------------------------------|--------------------|----------------------------------|-----------------------------------|--|---------------------------------|----------------------------------|
| 010-00-00-00000 | Judicial Compensation | | | | | | |
| | General Fund | 68,584,824 | 70,395,909 | 73,257,556 | 81,995,930 | - | - |
| 087-00-00-00000 | OJD Debt Service | | | | | | |
| | General Fund | 18,133,375 | 18,508,525 | 18,508,525 | 21,480,003 | - | - |
| | Other Funds | - | 292,900 | 292,900 | 1,245,000 | - | - |
| | All Funds | 18,133,375 | 18,801,425 | 18,801,425 | 22,725,003 | - | - |
| 089-00-00-00000 | Capital Construction | | | | | | |
| | Other Funds | 4,400,000 | - | - | 29,410,000 | - | - |
| 100-00-00-00000 | Trial Courts | | | | | | |
| | General Fund | 195,945,953 | 211,057,230 | 217,021,303 | 237,449,398 | - | - |
| | Other Funds | 6,135,750 | 7,680,753 | 7,952,905 | 9,099,771 | - | - |
| | Federal Funds | 67,275 | 340,000 | 340,000 | - | - | - |
| | All Funds | 202,148,978 | 219,077,983 | 225,314,208 | 246,549,169 | - | - |
| 101-00-00-00000 | Appellate/Tax Courts | | | | | | |
| | General Fund | 20,592,725 | 22,414,951 | 22,854,908 | 24,073,581 | - | - |
| | Other Funds | 3,430,799 | 2,672,146 | 2,702,010 | 2,801,960 | - | - |
| | All Funds | 24,023,524 | 25,087,097 | 25,556,918 | 26,875,541 | - | - |
| 102-00-00-00000 | Administration and Central Support | | | | | | |
| | General Fund | 54,128,455 | 54,482,618 | 55,256,265 | 63,127,688 | - | - |

DEPARTMENT SUMMARY

Judicial Dept

Agency Number: 19800

Agencywide Program Unit Summary
2017-19 Biennium

Version: V - 01 - Agency Request Budget

| Summary Cross Reference Number | Cross Reference Description | 2013-15 Actuals | 2015-17 Leg Adopted Budget | 2015-17 Leg Approved Budget | 2017-19 Agency Request Budget | 2017-19 Governor's Budget | 2017-19 Leg Adopted Budget |
|--------------------------------------|--|--------------------|----------------------------------|-----------------------------------|--|---------------------------------|----------------------------------|
| 102-00-00-00000 | Administration and Central Support | | | | | | |
| | Other Funds | 7,869,282 | 87,378,442 | 95,815,752 | 20,821,140 | - | - |
| | Federal Funds | 1,000,399 | 1,258,284 | 1,266,769 | 1,339,352 | - | - |
| | All Funds | 62,998,136 | 143,119,344 | 152,338,786 | 85,288,180 | - | - |
| 200-00-00-00000 | Mandated Payments | | | | | | |
| | General Fund | 15,292,854 | 15,558,373 | 15,663,869 | 16,216,686 | - | - |
| | Other Funds | 634,515 | 660,444 | 662,740 | 662,667 | - | - |
| | All Funds | 15,927,369 | 16,218,817 | 16,326,609 | 16,879,353 | - | - |
| 210-00-00-00000 | 3rd Party Debt Collection | | | | | | |
| | General Fund | 10,696,641 | 11,776,898 | 12,191,808 | 15,950,000 | - | - |
| 220-00-00-00000 | External Pass-Throughs | | | | | | |
| | General Fund | 14,530,829 | 15,842,390 | 16,042,390 | 17,994,276 | - | - |
| | Other Funds | 11,900,000 | 11,900,000 | 11,900,000 | 11,900,000 | - | - |
| | All Funds | 26,430,829 | 27,742,390 | 27,942,390 | 29,894,276 | - | - |
| 230-00-00-00000 | OR Courthouse Cap Const & Improvement Fd | | | | | | |
| | Other Funds | - | - | - | 212,400,000 | - | - |
| 400-00-00-00000 | State Court Facilities Security Account | | | | | | |
| | Other Funds | 9,703,960 | 11,071,244 | 11,094,924 | 10,350,477 | - | - |

DEPARTMENT SUMMARY

Judicial Dept

Agency Number: 19800

**Agencywide Program Unit Summary
2017-19 Biennium**

Version: V - 01 - Agency Request Budget

| <i>Summary Cross Reference Number</i> | <i>Cross Reference Description</i> | <i>2013-15 Actuals</i> | <i>2015-17 Leg Adopted Budget</i> | <i>2015-17 Leg Approved Budget</i> | <i>2017-19 Agency Request Budget</i> | <i>2017-19 Governor's Budget</i> | <i>2017-19 Leg Adopted Budget</i> |
|---|------------------------------------|----------------------------|---|--|--|--|---|
| 500-00-00-00000 | eCourt Program | | | | | | |
| | General Fund | 1,891,319 | 1,978,661 | 2,246,076 | 2,336,363 | - | - |
| | Other Funds | 18,561,455 | 17,276,215 | 17,567,716 | - | - | - |
| | All Funds | 20,452,774 | 19,254,876 | 19,813,792 | 2,336,363 | - | - |
| TOTAL AGENCY | | | | | | | |
| | General Fund | 399,796,975 | 422,015,555 | 433,042,700 | 480,623,925 | - | - |
| | Other Funds | 62,635,761 | 138,932,144 | 147,988,947 | 298,691,015 | - | - |
| | Federal Funds | 1,067,674 | 1,598,284 | 1,606,769 | 1,339,352 | - | - |
| | All Funds | 463,500,410 | 562,545,983 | 582,638,416 | 780,654,292 | - | - |

REVENUES

Revenues

The majority of the Oregon Judicial Department's (OJD) revenues are generated from fines, fees, and restitution associated with cases in the Supreme Court, Court of Appeals, Tax Court, and 36 trial courts. Other revenues are generated from the sales of publications and court information, transfers of revenue from other state agencies, local and federal grants, and from others that assist OJD in meeting its mission.

Revenue estimates included in this budget document are based on the June 2016 forecast prepared by the Office of Economic Analysis (OEA). The OEA's General Fund forecast contains two court revenue line items, termed State Court Fees (General Fund) and the Criminal Fine Account, which terms we also use in our publications.

Transfers to General Fund: OJD generates revenue directly for the benefit of the state General Fund from filing fees, driver's license suspension fees, trial and hearing fees, court collection fees, probation and diversion surcharge residual revenue, security release fees, and parking fines. Revenues for the General Fund are projected to total \$118.7 million for the 2017-19 biennium.

Transfers to Criminal Fine Account (CFA): Court revenues from fines, bail security release forfeiture, indigent defense recoupment, and recovery of court costs are transferred to the Department of Revenue for deposit to the CFA. The total amount projected for the 2017-19 biennium is \$85.9 million from the circuit courts. The OEA forecast does not factor in new violations revenue from HB 2621 (2016 session), which is estimated to bring in \$30 million to the CFA in 2017-19. The General Fund portion of CFA revenue is the remainder of total CFA revenue from all sources after accounting for the dedicated distributions and allocations, such as Department of Public Safety Standards and Training operations, Department of Justice Criminal Injuries Compensation Account, OJD State Court Facilities and Security Account, Department of Corrections construction, and Oregon Health Authority Driving Under the Influence of Intoxicants programs.

Transfers to State and Local Government Agencies: Other revenue is generated from fines, fees, and the public defense application/contribution program. These monies are transferred to state and local governments as well as other entities. The 2017-19 biennium projection is \$37.4 million.

Transfers to Legal Aid Account: OJD transfers \$11.9 million from fee revenue to the Legal Aid Account at the Oregon State Bar, as authorized by HB 2710 (2011 session). Funding may only be used for the Legal Services Program established under ORS 9.572.

Transfers to Victims: Collection of \$21.5 million in restitution and compensatory fines are projected for the 2017-19 biennium. These funds are distributed directly to victims.

The following Other Funds revenues are generated by sales of court publications and information, statewide assessments, transfers-in from other state agencies, and from participation in grants at the local and federal level.

REVENUES

Court Publications: Other Funds revenues of \$5.8 million are projected to be generated by the department through the sale and distribution of court publications, manuals and forms, and providing online access to the Oregon Judicial Case Information Network (OJCIN). The revenue from these transactions is used to pay for the cost of these programs.

Transfers-In: Other Funds revenues also include the following:

- State Office for Services to Children and Families to assist in funding of Citizen Review Boards responsible for review of child placements – \$1.9 million
- Statewide assessments to the State of Oregon Law Library – \$2.5 million
- Public Defense Services Commission to pay for the services of court staff to verify indigence of persons seeking state-paid, court-appointed counsel – \$3.8 million
- Criminal Fine Account to the State Court Facilities and Security Account to pay for expenditures authorized under ORS 1.178 for state court security, business continuity, emergency preparedness, local county security accounts, capital improvements to state court facilities, and statewide security training – \$11.1 million
- ePay convenience fees to pay for the vendor transaction costs associated with hosting the ePay system – \$0.5 million
- eFile surcharge fees to pay for the eFile and eService transaction fees for Odyssey File and Serve – \$3.3 million

Grants: The majority of revenues from grants come from local community partners who are direct or pass-through recipients of federal grants. A small portion of our grants are directly provided by the federal government.

- Grants with community partners, including Oregon counties and nonprofit entities, for programs such as specialty courts, juvenile court improvements, and arbitration and mediation programs – \$3.9 million
- Federal Funds from the Department of Health and Human Services for continuation of the Juvenile Court Improvement Project – \$1.6 million

OJD has no costs or programs funded with non-limited Other Funds revenues.

Cost of collections associated with actions performed by the Department of Revenue and third-party collection agencies are described in the [Third-Party Collections](#) section of this budget document.

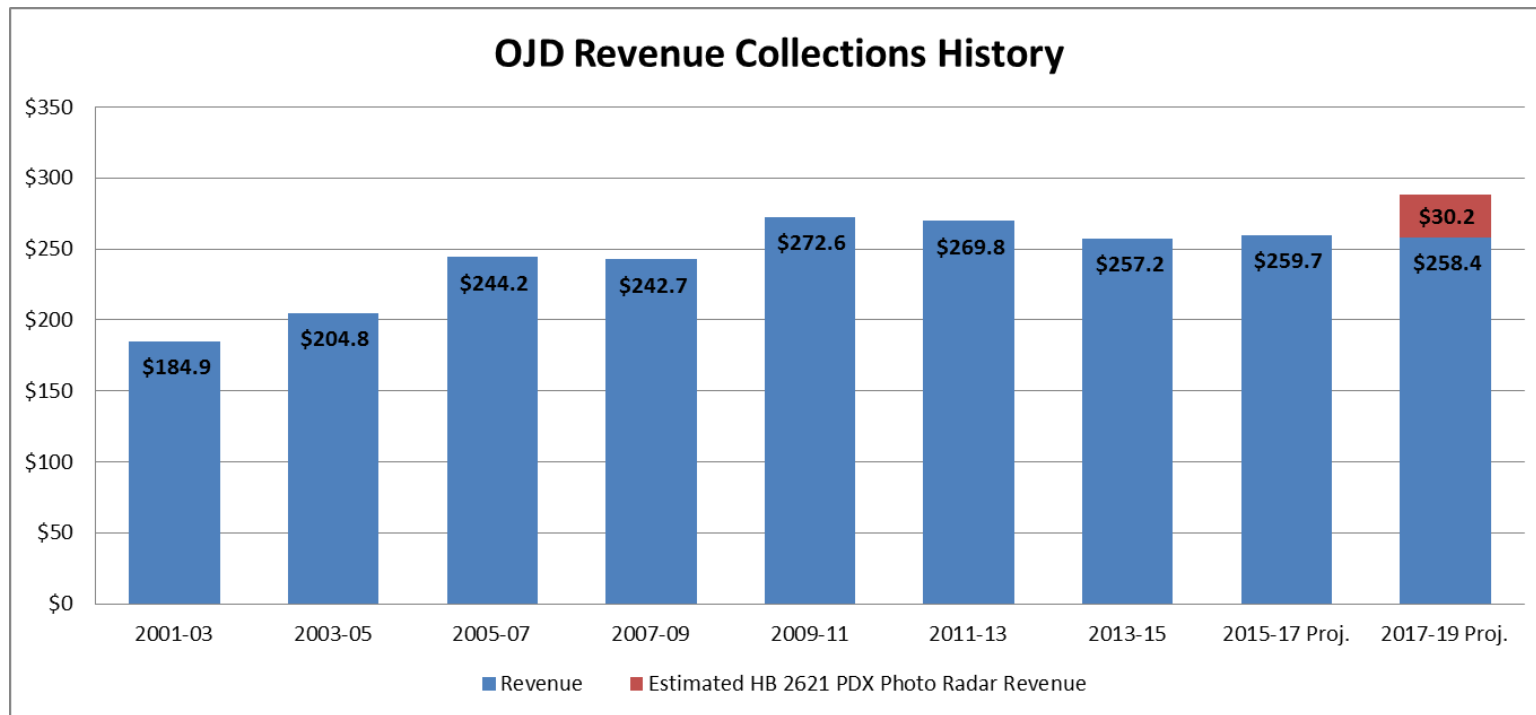
REVENUES

Court Revenue History

Based on the June 2016 revenue forecast, the projected court revenues for the 2017-19 biennium total \$258.4 million, and restitution/compensatory fine collections are estimated at an additional \$21.5 million. The source and distribution of these revenues vary with changes in law. The new revenue from violations filed under HB 2621 (2016 session) is not included in this forecast.

In 2015-17, OJD expects to increase collection of fines/fees on criminal offenses and violations by \$13.7 million. At the same time, collection of filing fees is expected to decline by \$11.2 million due to significantly fewer case filings in civil and small claims cases over the past eighteen months. OJD expects this trend of increases in criminal/violations revenue and decreases in filing fee revenue to continue into the 2017-19 biennium.

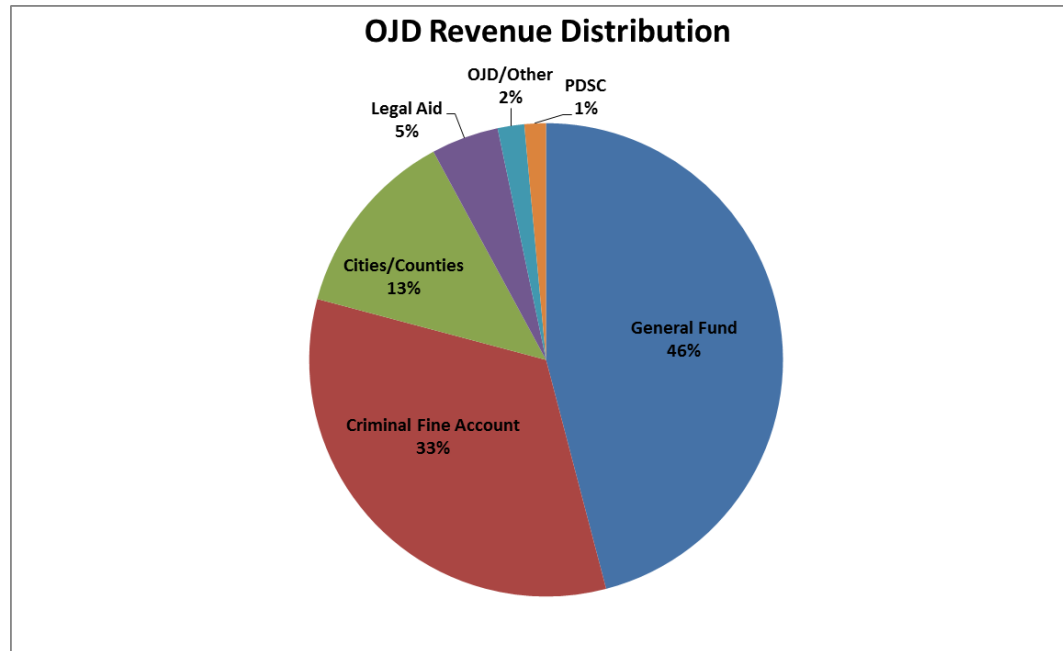
Filing fees on civil, small claims and domestic relations cases are generally paid up front at case filing, while criminal offenses and violations take longer to collect and often involve third parties to collect the full balance.



REVENUES

Court Revenue Distribution

Based on the June 2016 revenue forecast, \$118.7 million is projected to be transferred to the General Fund; \$85.9 million is projected to be transferred to the Criminal Fine Account (CFA); and the remaining \$42 million is projected to be transferred to cities, counties, and other state agencies, including the Public Defense Services Commission (PDSC). Amounts paid to victims for restitution and compensatory fines are not included in the graph below.



REVENUES

ORBITS and PICS Reports

BPR012 – Detail of Lottery Funds, Other Funds, and Federal Funds Revenue

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

| Judicial Dept 2017-19 Biennium | | | | | Agency Number: 19800 Cross Reference Number: 19800-000-00-00-00000 | |
|-----------------------------------|-----------------|-------------------------------|--------------------------------|----------------------------------|---|-------------------------------|
| Source | 2013-15 Actuals | 2015-17 Leg Adopted Budget | 2015-17 Leg Approved Budget | 2017-19 Agency Request Budget | 2017-19 Governor's Budget | 2017-19 Leg Adopted Budget |
| Other Funds | | | | | | |
| Business Lic and Fees | 105,050 | 70,416 | 70,416 | 85,000 | - | - |
| State Court Fees | 140,158,635 | 144,135,586 | 144,135,586 | 143,306,124 | - | - |
| Federal Revenues | 1,020,920 | - | - | - | - | - |
| Charges for Services | 4,289,183 | 3,561,000 | 3,561,000 | 5,499,529 | - | - |
| Fines and Forfeitures | 116,978,499 | 117,710,157 | 117,710,157 | 119,199,756 | - | - |
| General Fund Obligation Bonds | 33,325,000 | 52,265,885 | 53,710,885 | 136,855,000 | - | - |
| Interest Income | 98,536 | - | - | - | - | - |
| Sales Income | 957,270 | 715,000 | 715,000 | 715,000 | - | - |
| Donations | 559,565 | 496,248 | 496,248 | 550,000 | - | - |
| Grants (Non-Fed) | 1,909,738 | 3,609,522 | 3,881,674 | 5,249,592 | - | - |
| Other Revenues | 591,256 | 36,945,970 | 38,637,471 | 106,220,566 | - | - |
| Transfer In - Intrafund | 16,491,467 | 15,985,520 | 15,985,520 | 15,856,666 | - | - |
| Transfer In Other | - | - | - | 3,600,000 | - | - |
| Tsfr From Human Svcs, Dept of | 2,097,284 | 1,870,062 | 1,870,062 | 2,076,494 | - | - |
| Tsfr From Administrative Svcs | 2,411,215 | 2,368,040 | 2,368,040 | 2,496,745 | - | - |
| Tsfr From Justice, Dept of | 166,842 | - | - | - | - | - |
| Tsfr From Revenue, Dept of | 9,415,927 | 11,071,244 | 11,094,924 | 6,750,477 | - | - |
| Tsfr From Criminal Justice Comm | 12,650 | - | - | - | - | - |
| Tsfr From Public Def Svcs Comm | 2,722,500 | 3,168,756 | 3,168,756 | 3,416,569 | - | - |
| Transfer Out - Intrafund | (16,491,467) | (15,985,520) | (15,985,520) | (15,856,666) | - | - |
| Transfer to General Fund | (119,812,358) | (123,942,908) | (123,942,908) | (119,051,837) | - | - |
| Transfer to Cities | (24,565,707) | (24,399,425) | (24,399,425) | (24,399,425) | - | - |
| Transfer to Counties | (5,031,370) | (7,611,275) | (7,611,275) | (7,517,367) | - | - |
| Tsfr To Revenue, Dept of | (87,752,928) | (85,699,457) | (85,699,457) | (83,282,964) | - | - |

REVENUES

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

| Judicial Dept 2017-19 Biennium | | | | | Agency Number: 19800 Cross Reference Number: 19800-000-00-00-00000 | |
|-----------------------------------|---------------------|-------------------------------|--------------------------------|----------------------------------|---|-------------------------------|
| Source | 2013-15 Actuals | 2015-17 Leg Adopted Budget | 2015-17 Leg Approved Budget | 2017-19 Agency Request Budget | 2017-19 Governor's Budget | 2017-19 Leg Adopted Budget |
| Other Funds | | | | | | |
| Tsfr To Public Def Svcs Comm | (3,608,147) | (3,705,255) | (3,705,255) | (3,910,748) | - | - |
| Total Other Funds | \$76,049,560 | \$132,629,566 | \$136,061,899 | \$297,858,511 | - | - |
| Federal Funds | | | | | | |
| Federal Funds | 1,074,559 | 1,598,284 | 1,606,769 | 1,339,352 | - | - |
| Total Federal Funds | \$1,074,559 | \$1,598,284 | \$1,606,769 | \$1,339,352 | - | - |

APPELLATE AND TAX COURTS

Appellate and Tax Courts

The Appellate/Tax Court Operations program budget includes the operations and staffing of the Supreme Court, Court of Appeals, Appellate Court Services Division (ACSD), and Tax Court. The Supreme Court is established by the Oregon Constitution and consists of seven justices elected to serve six-year terms, one of whom is selected from among his/her peers to serve as the Chief Justice for the branch in a six-year term. The Court of Appeals consists of 13 statewide-elected judges who hear appeals from trial courts and state agencies and boards. The Tax Court consists of one statewide-elected judge who hears matters in the Tax Court Regular Division that arise from Oregon tax law and hears appeals from the Tax Magistrate Division, created in 1997 to replace the informal administrative tax appeals process conducted by the Department of Revenue. ACSD is the appellate clerk's office for both the Supreme Court and the Court of Appeals and as such serves attorneys, litigants, and the public in addition to managing ancillary programs and services.

Supreme Court

The Supreme Court is Oregon's court of last resort and exists by virtue of Article VII (Amended) of the Oregon Constitution. The Supreme Court has the ultimate responsibility for interpreting Oregon law. The court's decisions with respect to Oregon constitutional, statutory, administrative, and common laws are not subject to further judicial review, except potentially by the United States Supreme Court to ensure consistency with federal law.

Cases come before the Supreme Court in a variety of ways, and jurisdiction is conferred by both the Oregon Constitution and by statute. The court primarily is a court of appellate review, reviewing the decisions of lower courts and other bodies, but it also has original jurisdiction in some types of cases. In addition, the law mandates that the Supreme Court hear certain types of cases; however, the majority of cases before the court are cases in which the justices have exercised their discretion and determined that the matters present important questions of Oregon law.

(Note: All statistics provided below are from the calendar years 2011 through 2015.)

Constitutional Jurisdiction

When the voters adopted Article VII (Amended) of the Oregon Constitution in 1910, they provided the Supreme Court with constitutional authority to exercise discretionary original jurisdiction in *mandamus* (involving the exercise of public duties), *quo warranto* (concerning the right to hold a public office), and *habeas corpus* (questioning whether incarceration is lawful) proceedings. The court typically receives between 80 and 100 such petitions every year, the majority of which are *mandamus* petitions. The court considers all petitions in those types of cases, but allows only a small percentage to decide on the merits. The Oregon Constitution also imposes mandatory original jurisdiction to consider any challenges to the decennial reapportionment of legislative districts.

APPELLATE AND TAX COURTS

Statutory Jurisdiction

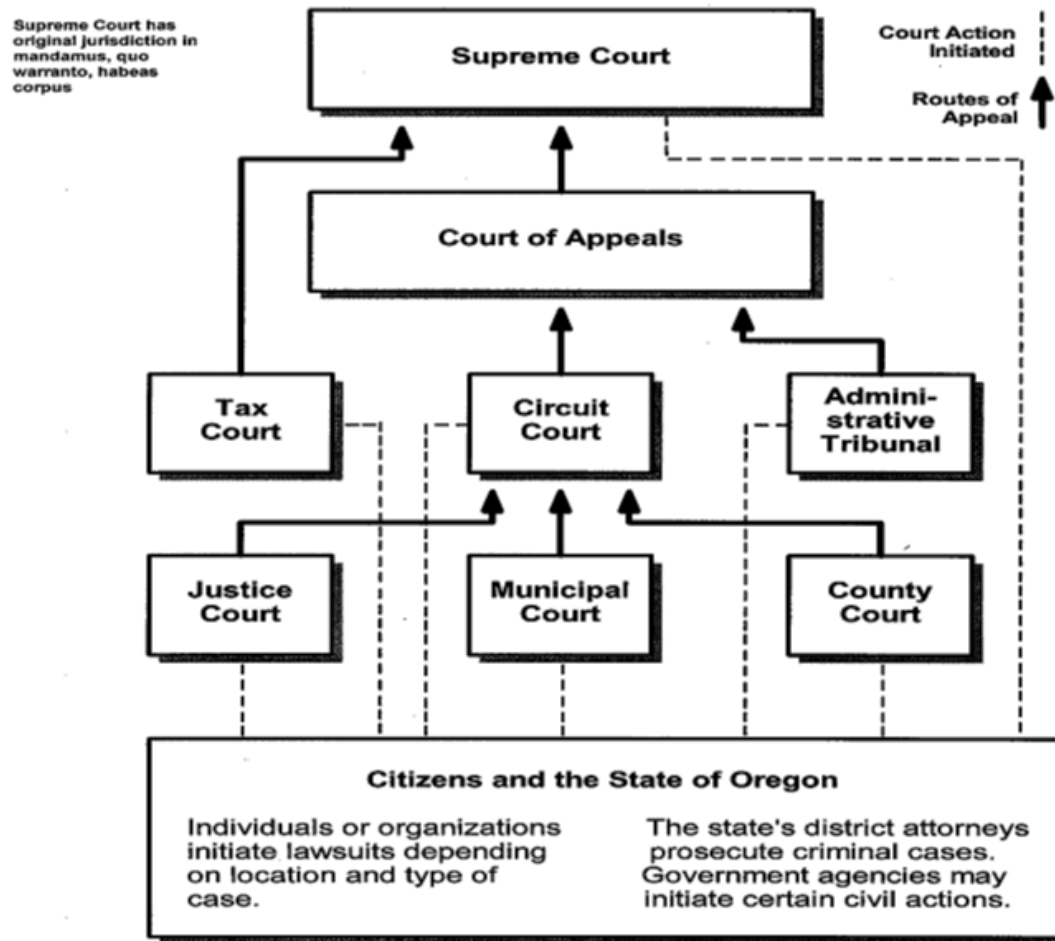
The primary work of the Supreme Court is to perform its legislatively authorized discretionary review of decisions of the Oregon Court of Appeals. Those cases may be appeals from the Oregon circuit courts or may be on petition for judicial review of certain agency decisions. Cases in which a disappointed litigant in the Court of Appeals files a petition seeking review actually present two questions to the Supreme Court: (1) whether to allow review of the petition and consider the legal question presented; and, (2) if the petition is allowed, to decide the legal question on the merits. Both decisions are significant, and the court devotes substantial resources toward considering whether a particular petition for review presents an important question for adjudication. The court considers between 700 and 800 such petitions for review each year and “allows” – that is, agrees to consider the question on the merits – between six to eight percent. The court also has discretionary authority to consider certified questions of Oregon law from other courts (typically from either Oregon’s United States District Court or from the United States Court of Appeals for the Ninth Circuit) and certified appeals from the Oregon Court of Appeals.

The Supreme Court also has a substantial docket of cases that, pursuant to statute, come to the court on mandatory review, including the following:

- Automatic reviews of circuit court cases in which a sentence of death was imposed (typically one to two such cases are filed each year, but the cases are complex and extensively briefed);
- State-initiated appeals of circuit court orders dismissing the accusatory instrument or suppressing evidence in certain criminal cases (an average of one case annually);
- Appeals from crime victims pertaining to the exercise of their rights in criminal proceedings (between one and two cases annually);
- Appeals from the Oregon Tax Court (an average of eight cases annually);
- Appeals (infrequent) involving certain types of labor disputes;
- Reviews of administrative siting decisions for prison, energy production, and waste disposal facilities (also infrequent but often complex);
- Reviews in lawyer discipline and admissions matters (50 to 75 cases annually; of those, the court decides an average of eight cases on the merits, following a party’s request for a review of a Disciplinary Board trial panel decision);
- Reviews involving questions of judicial fitness and disability (infrequent);
- Reviews of election-related petitions, including ballot title review proceedings and challenges to Voters’ Pamphlet explanatory and fiscal impact statements (an average of 22 cases annually); and
- Specific cases or issues that the Legislature has directed the Supreme Court to consider (e.g., PERS challenges), either on original review or on appeal.

APPELLATE AND TAX COURTS

APPEALS AND JUDICIAL REVIEW IN THE OREGON COURTS



Finally, either by legislative direction or pursuant to the court's own internal practices, a number of the case categories described above are considered and decided on an expedited basis. Those cases include death sentence review proceedings; election law matters; attorney and judicial decision cases; *mandamus* petitions; labor and facilities siting cases; and petitions for review of Court of Appeals decisions involving children (juvenile, adoption, and custody disputes).

APPELLATE AND TAX COURTS

Administrative Responsibilities

Sitting, as it does, at the apex of Oregon's third branch of government, the Supreme Court has been assigned significant regulatory responsibilities relating to the administration of Oregon's judicial system. The court, for example, is responsible for appointing, among other positions, *pro tempore* and senior judges, members of the Board of Bar Examiners (law admission), and members of the Bar Disciplinary Board (lawyer discipline). The Supreme Court also has substantial rulemaking responsibilities. The court reviews and approves a variety of rules affecting the practice of law, including amendments to the Rules of Professional Conduct (lawyer ethics), the Rules of Appellate Procedure, the Rules for Admission of Attorneys, the Oregon State Bar Rules of Procedures, the rules governing Mandatory Continuing Legal Education for Oregon Lawyers, the rules governing the Bar's New Lawyer Mentor Program, and some Uniform Trial Court Rules.

The administrative and regulatory elements of the court's workload fall most heavily on the Chief Justice, who, in addition to managing the Supreme Court, is the administrative head of the entire Oregon unified court system. The primary authority is set forth in ORS 1.002. In addition, under ORS 1.003, the Chief Justice is responsible for appointing the Chief Judge of the Court of Appeals, the presiding judge of the Tax Court, the presiding judges for each of Oregon's 27 judicial districts, and the State Court Administrator. The Chief Justice also approves the unified biennial budget for the operating resources of the Oregon Judicial Department.

Workload Distribution and Case Processing

The Supreme Court considers the judicial matters before it *en banc*, with all seven justices participating in the decision (unlike the Court of Appeals, which decides many of its cases by three-judge panels). The Supreme Court does so primarily because it is Oregon's court of last resort. It is critical that each justice – unless recused from the case – fully contribute to the final expression of Oregon law. Full court consideration applies not only to the opinions that the court issues, but also to the petitions and substantive motions that the court decides. The court also receives a substantial number of motions that are not substantive in nature. Nonsubstantive motions, such as motions for extension of time, are decided by the Chief Justice or by a designated Presiding Justice, in coordination with the Appellate Court Records Office staff and court legal staff.

Petitions for review, petitions for reconsideration, petitions for writ, and substantive motions are assigned on a rotational basis to one of the associate justices for preparation of a legal staff memorandum that discusses the petition, motion, or other matter, and for providing the assigned justice's recommended disposition. If the court decides to allow a petition or writ as to which it has discretion, it does so by order and immediately schedules the case for briefing and argument; mandatory review cases are similarly scheduled for briefing and, later, argument, as they are filed. After cases on the merits are argued, the Chief Justice assigns cases to a particular justice for the purpose of writing an opinion. The court sits in conference on average two times each month to consider the cases, petitions, and substantive motions for which an opinion draft or legal staff memorandum (with accompanying justice recommendations) has circulated for each conference. The conferences usually last one day. The court holds emergency conferences when needed to consider petitions or substantive motions requiring immediate attention. Finally, the court holds monthly public meetings at which it addresses the rulemaking and other nonadjudicatory matters described above.

APPELLATE AND TAX COURTS

Automation, Access, and Outreach

As discussed under the Appellate Court Services Division section, the Supreme Court and the Court of Appeals are fully automated on an appellate case management system that encompasses electronic filing, electronic payment in conjunction with electronic filing, electronic case management, internal court workload management, electronic document management, and, by the end of 2016, financial management. Oregon State Bar members are required to file all documents in the appellate courts electronically, unless a waiver is obtained. For those who may file in paper, the courts have eliminated earlier requirements to file accompanying paper copies. Members of the Supreme Court now have the option of reading briefs, draft opinions, and other official documents on tablet devices or desktop computers, rather than by reading paper copies. Otherwise, petitions for review, other petitions and motions, and almost all staff memos are read in electronic format, rather than in paper.

In addition, the Supreme Court maintains a web page with information about the members of the court and its operations. Redacted versions of most briefs are available online, and most Supreme Court oral arguments are broadcast from the Supreme Court Courtroom over the web. Most oral arguments are available both by way of streaming live broadcasts as the oral arguments occur and, any time after the argument is completed, by access to archived versions of those oral arguments. That statewide webcasting service enhances public accessibility and serves as an educational training resource for the larger legal community. The Supreme Court also schedules on-the-road oral arguments around the state each year, at high schools, colleges, law schools, and other community locations, to let students and the public observe oral argument in person, and to engage in question-and-answer exchanges with the justices following argument.

| Supreme Court Cases Filed by Type and Subtype | | | | | |
|---|------|------|------|------|------|
| | 2011 | 2012 | 2013 | 2014 | 2015 |
| Appeal – Civil | | | | | |
| Adoptions | 0 | 0 | 0 | 0 | 0 |
| Agency – Circuit Court | 1 | 1 | 1 | 0 | 6 |
| Armed Forces | 0 | 0 | 0 | 0 | 0 |
| Civil Commitment | 3 | 2 | 2 | 3 | 0 |
| Domestic Relations | 15 | 12 | 13 | 10 | 8 |
| Domestic Relations – Punitive Contempt | 2 | 0 | 1 | 0 | 1 |
| FED | 7 | 9 | 2 | 2 | 4 |
| General | 103 | 69 | 74 | 72 | 85 |
| Isolation/Quarantine Order | 0 | 0 | 0 | 0 | 0 |
| Non-Traffic Violation | 0 | 5 | 0 | 0 | 1 |

APPELLATE AND TAX COURTS

| Supreme Court Cases Filed by Type and Subtype (continued) | | | | | |
|---|------|------|------|------|------|
| | 2011 | 2012 | 2013 | 2014 | 2015 |
| Other | 4 | 2 | 2 | 2 | 8 |
| Probate | 4 | 5 | 8 | 3 | 3 |
| Stalking | 1 | 3 | 0 | 4 | 0 |
| Traffic | 0 | 0 | 2 | 1 | 1 |
| Appeal – Collateral Criminal | | | | | |
| <i>Habeas Corpus</i> | 20 | 21 | 25 | 12 | 9 |
| Other | 0 | 1 | 0 | 0 | 0 |
| Post-Conviction | 145 | 150 | 177 | 160 | 150 |
| Appeal – Criminal | | | | | |
| Armed Forces | 0 | 0 | 0 | 0 | 0 |
| General | 350 | 353 | 321 | 381 | 307 |
| Other | 1 | 0 | 0 | 0 | 1 |
| Pretrial Felony – In Custody | 0 | 0 | 0 | 0 | 0 |
| Stalking | 0 | 0 | 0 | 2 | 1 |
| Traffic | 14 | 4 | 11 | 10 | 4 |
| Appeal – Juvenile | | | | | |
| Delinquency | 1 | 2 | 2 | 1 | 2 |
| Dependency | 17 | 23 | 44 | 39 | 34 |
| Support Judgment | 0 | 0 | 0 | 0 | 0 |
| Termination of Parental Rights | 20 | 17 | 19 | 17 | 27 |
| Judicial Review – Agency/Board | | | | | |
| Columbia River Gorge Commission | 0 | 0 | 0 | 0 | 0 |
| Land Use Decision | 7 | 4 | 1 | 2 | 5 |
| Other | 2 | 1 | 0 | 0 | 0 |
| Other Agency/Board Decision | 14 | 16 | 13 | 9 | 9 |
| Parole Decision | 16 | 21 | 22 | 31 | 30 |
| Rule Challenge | 1 | 0 | 2 | 1 | 3 |

APPELLATE AND TAX COURTS

| Supreme Court Cases Filed by Type and Subtype (continued) | | | | | |
|---|------|------|------|------|------|
| | 2011 | 2012 | 2013 | 2014 | 2015 |
| Urban/Rural Reserves | 0 | 0 | 0 | 0 | 0 |
| Workers' Compensation Decision | 10 | 11 | 13 | 11 | 9 |
| Direct Review – Agency/Board | | | | | |
| Corrections Facility Site Certification Review | 0 | 0 | 0 | 0 | 0 |
| Energy Facility Site Certificate/Exemption Review | 0 | 1 | 0 | 0 | 0 |
| Energy Facility Siting Council Rules | 0 | 0 | 0 | 0 | 0 |
| Mining Permit Issuance/Denial Review | 0 | 0 | 0 | 0 | 0 |
| Municipal Corp Budget Review | 0 | 0 | 0 | 0 | 0 |
| Other – Discretionary | 0 | 0 | 0 | 0 | 0 |
| Other – Mandatory | 1 | 0 | 0 | 0 | 0 |
| Direct Review – Ballot Measure | | | | | |
| Ballot Title | 15 | 18 | 23 | 26 | 30 |
| Constitutionality Review | 0 | 0 | 0 | 0 | 0 |
| Explanatory Statement | 0 | 0 | 0 | 0 | 0 |
| Financial Impact Estimate | 0 | 0 | 0 | 1 | 0 |
| Direct Review – Civil | | | | | |
| Certified Appeals | 2 | 2 | 0 | 0 | 0 |
| Certified Question | 1 | 1 | 0 | 2 | 1 |
| Labor Disputes – TRO | 0 | 0 | 0 | 0 | 0 |
| OCTA Limitations | 0 | 0 | 0 | 1 | 0 |
| Other – Discretionary | 0 | 0 | 0 | 0 | 1 |
| Other – Mandatory | 0 | 0 | 0 | 0 | 0 |
| Direct Review – Criminal | | | | | |
| Death Sentence | 5 | 0 | 1 | 2 | 1 |
| Other – Discretionary | 0 | 0 | 0 | 0 | 0 |
| Other – Mandatory | 0 | 0 | 0 | 0 | 0 |
| Pretrial Murder/Aggravated Murder | 2 | 1 | 0 | 0 | 0 |

APPELLATE AND TAX COURTS

| Supreme Court Cases Filed by Type and Subtype (continued) | | | | | |
|---|------|------|------|------|------|
| | 2011 | 2012 | 2013 | 2014 | 2015 |
| Victim Rights – Felony/Person A Misd'r – Presentencing | 2 | 2 | 2 | 0 | 0 |
| Victim Rights – Other Misd'r/Postsentencing | 1 | 2 | 1 | 2 | 2 |
| Direct Review – Legislation | | | | | |
| Other – Discretionary | 0 | 0 | 0 | 0 | 0 |
| Other – Mandatory | 0 | 0 | 5 | 0 | 0 |
| Review | 0 | 0 | 0 | 0 | 0 |
| Direct Review – Other | | | | | |
| Discretionary | 0 | 0 | 0 | 0 | 0 |
| Mandatory | 0 | 0 | 0 | 0 | 0 |
| Direct Review – Tax | 5 | 8 | 11 | 8 | 8 |
| Original Proceeding – Civil | | | | | |
| Reapportionment Review | 0 | 0 | 0 | 0 | 0 |
| Original Proceeding – Writ | | | | | |
| <i>Habeas Corpus</i> | 18 | 6 | 10 | 7 | 7 |
| <i>Mandamus</i> | 62 | 77 | 72 | 88 | 75 |
| <i>Quo Warrento</i> | 1 | 0 | 0 | 1 | 1 |
| Original Proceeding – Writ/Petition | | | | | |
| Other – Discretionary | 1 | 0 | 0 | 0 | 0 |
| Other – Mandatory | 0 | 0 | 0 | 0 | 0 |
| Professional Regulation – Bar Review | | | | | |
| Disciplinary Proceedings | 12 | 21 | 14 | 15 | 11 |
| Examination | 0 | 0 | 0 | 0 | 0 |
| Other | 3 | 7 | 9 | 9 | 5 |
| Petition for Admission | 13 | 20 | 21 | 23 | 10 |
| Reciprocal Discipline | 2 | 6 | 7 | 3 | 3 |
| Reinstatement | 21 | 18 | 20 | 16 | 19 |
| Student Loan Default | 0 | 0 | 0 | 0 | 0 |

APPELLATE AND TAX COURTS

| Supreme Court Cases Filed by Type and Subtype (continued) | | | | | |
|--|------------|------------|------------|------------|------------|
| | 2011 | 2012 | 2013 | 2014 | 2015 |
| Professional Regulation – Judicial Fitness/Disability | | | | | |
| Disability | 0 | 0 | 0 | 0 | 0 |
| Fitness | 0 | 1 | 1 | 0 | 0 |
| Total | 925 | 923 | 952 | 977 | 882 |

| Initiating Document – Petition for Review – CA Decision – Filings Allowed and Denied, with Aging | | | | | | |
|---|----------------|---------|----|--------|-----|---|
| | Total Filed | Allowed | | Denied | | Ave. days from Filing to Decision |
| 2011 | 759 | 62 | 8% | 697 | 92% | 84 |
| 2012 | 675 | 49 | 7% | 626 | 93% | 95 |
| 2013 | 795 | 47 | 6% | 748 | 94% | 93 |
| 2014 | 703 | 46 | 7% | 657 | 93% | 77 |
| 2015 | 708 | 58 | 8% | 650 | 92% | 82 |

Note: The total number of described filings allowed and decided within a year is not the equivalent of the number filed within a year, because the filings allowed and denied are not necessarily the same as those filed. (“Allowed” filings are those with an “allow” order issued during the calendar year; “denied” filings are those with a dispositional “deny” order issued during the calendar year.)

| Released Opinions – Summary | | | | | |
|-----------------------------|------|------|------|------|------|
| | 2011 | 2012 | 2013 | 2014 | 2015 |
| Opinions | 74 | 64 | 66 | 75 | 58 |
| Concurrences | 5 | 5 | 9 | 8 | 7 |
| Concur/Dissents | 1 | 1 | 2 | 0 | 0 |
| Dissents | 9 | 5 | 7 | 7 | 5 |

APPELLATE AND TAX COURTS

Court of Appeals

The Court of Appeals is Oregon’s intermediate appellate court. By statute, the Court of Appeals is charged with deciding nearly all the civil and criminal appeals taken from Oregon’s state trial courts and nearly all the judicial reviews taken from state administrative agencies in contested cases. Created by statute in 1969, the Court of Appeals does not exercise any constitutional jurisdiction; instead, its jurisdiction is set by the Legislature.

Whether measured against the number of appeals taken by population or by the number of appeals taken by judge, the Oregon Court of Appeals consistently ranks as one of the busiest appellate courts in the nation. Over the past five years, annual filings in the Court of Appeals have ranged from between approximately 2,600 to approximately 2,900 cases per year. That number has varied, at least in part, because of changing economic conditions and changes in statutes or case law that may generate “spikes” in filings.

In 2012, in light of the increasing volume and complexity of the court’s workload, the Legislative Assembly passed HB 4026B, amending ORS 2.540 to increase the number of Court of Appeals judges from ten to 13. As a result, three new judges joined the court in late 2013. Two immediate benefits of this additional judicial resource have been decreasing the length of time to schedule cases for oral argument after briefing has been completed, and increasing the number of opinions issued by the court. Since the new panel started hearing appeals in December 2013, the Court of Appeals has been able to consider more cases every month, resulting in a significant number of appeals being resolved more quickly.

These improvements have been tempered by turnover at the court. During this time, three long-serving judges retired from the Court of Appeals, including former Chief Judge Rick Haselton, who retired at the end of 2015. Indeed, of the ten judges who were members of the court at the end of 2010, only four are still on the court; the remaining nine judges have been elected or appointed since that time.

The loss of experienced and well-seasoned judges always takes a toll on the court’s efficiency, even when (as has occurred) the Governor has acted promptly to appoint highly qualified successors. Notwithstanding the judicial changes, the new panel of judges and some process improvements have allowed the court to significantly reduce the number of “at issue” cases, that is, those cases that are fully briefed but have not yet been scheduled for oral argument or submission for decision on the briefs. That accomplishment is particularly striking given the significant increase, in 2015, of the number of appeals in juvenile dependency cases.

Having successfully reduced the number of “at issue” cases, the court has turned its attention to its backlog of cases that are “under advisement,” that is, those cases in which oral argument has been heard (or the cases have been submitted on the briefs) and in which decisions have not yet been issued. The court has formed a backlog-reduction work group to address that challenge. Members of the work group, which initially convened in February 2016, spoke with all Court of Appeals judges and staff, gathering ideas about process changes that could enhance the court’s ability to efficiently issue decisions while maintaining the quality and integrity of its decision-making process. The work group ultimately recommended about two dozen ways in which the court could streamline some of its internal processes. The court approved those changes in May 2016, and their

APPELLATE AND TAX COURTS

implementation has resulted in new efficiencies in case processing. The work group will meet regularly in 2016 and 2017 to consider additional ways in which the court can reduce the backlog of cases that are under advisement.

The information contained in this narrative is merely a summary of the court's structure, workload, and projects.

Workload Distribution

The Court of Appeals currently consists of 13 judges. To meet the demand of its substantial workload – and consistently with the authority granted the court by the Legislative Assembly – the court is divided into four departments (or “panels”) of three judges each for the purpose of considering and deciding cases. In addition, there is a two-judge motions department – presently drawn from members of the four “regular” departments – that considers some of the substantive motions filed in appeals or judicial reviews. The Chief Judge acts as a nonvoting member in each of the court's departments and participates in their deliberations. That participation, which is in addition to the Chief Judge's administrative and other responsibilities, both permits the Chief Judge to act as a substitute voting member in any department when one of the other judges cannot participate (due to conflict of interest, for example) and also helps to ensure consistency among the decision making of the various departments. Finally, before a department releases an opinion in a case, the proposed opinion is circulated to all the court's judges, and the court then may elect to consider the case *en banc* (by the full 13-judge court), which happens in approximately one percent of the cases in which the court publishes an opinion.

Case Processing

The path of an appeal follows this general pattern, which is described in more detail below. A notice of appeal is filed, following a trial court or agency decision that is subject to review by the court. A transcript or record of the proceeding is filed with the court, and pre-briefing motions may be filed. Some cases are referred to the Appellate Settlement Program (described in more detail below), resolved on motion by the Appellate Commissioner, or dismissed by court rule (and subject to requests for extensions). Once briefing is completed, the case is “at issue,” and ready to be scheduled for oral argument (upon request of the parties) or submitted for decision based only on the briefs. Cases move to the status of “under advisement” once argument has been completed or the case has been submitted to a panel of the court for decision on the briefs.

An appeal or judicial review can result in a dismissal short of a decision on the merits for a number of reasons. A party may voluntarily dismiss the case due to settlement or for some other reason, or there also can be jurisdictional problems or a failure to prosecute. All but a handful of dismissals arise before the case is submitted for decision. Over time, the statistics translate roughly (“roughly” because a case may be dismissed in a year other than the year in which it is filed) into a dismissal rate of 30 to 35 percent. Even cases that are dismissed can involve motions and other matters that need to be resolved by the court's Appellate Commissioner and Motions Department, described below.

With regard to those cases that proceed to a disposition on the merits, an average of more than 600 cases each year are submitted for decision after oral argument; even more than that are submitted for decision on the written briefing alone. Cases are assigned to a department on a random basis.

APPELLATE AND TAX COURTS

Each department hears oral arguments on an average of two to three days each month; oral arguments are heard year-round except that the court sometimes takes one month “off calendar” to focus on deciding cases that have already been heard. In addition, the court has periodically scheduled additional oral argument days to consider “fast track” cases, those matters that the Legislative Assembly or the court has determined required expedited consideration. Primary among those cases are appeals or judicial reviews involving juvenile dependency, termination of parental rights, land use, workers’ compensation, and certain felony convictions.

Before oral argument, all three judges assigned to hear the cases read the parties’ briefs, perform whatever preliminary legal research may be in order, and meet together to discuss the case in a pre-argument conference. Following oral argument, the judges reevaluate the case in a post-argument conference in light of the parties’ oral advocacy and review the record of the case as appropriate. If, based on all those considerations, each of the three judges agrees that (1) none of the arguments by the parties will result in the decision below being vacated, reversed or modified; and (2) a written opinion would not benefit the parties, bench, or bar, then the department will issue a decision affirming the ruling on appeal or review without opinion (“AWOP”). Such decisions normally are issued within a few weeks of oral argument.

For matters in which an unwritten disposition would not be appropriate, the presiding judge of the department assigns the case for preparation of a written opinion. Once prepared, the draft is circulated to the other judges of the department and the Chief Judge, and the proposed decision is discussed at a regularly scheduled conference that the Chief Judge also attends. As noted above, once the department has agreed on a disposition for the case, which may or may not include a concurring or dissenting opinion by one of the department’s judges, the final draft of the opinion is circulated to all the other judges so they will have an opportunity to refer the case for consideration by the full court. All cases considered by the full court are discussed at the full court conference. This typically occurs in cases presenting more novel or complex issues. The court usually considers *en banc* cases on the original briefing and oral argument.

In recent years, the Court of Appeals has issued between approximately 400 and 500 written opinions each year. For example, in 2013 – the last year that the court had only ten judges – the court issued 437 opinions. In 2015, the expanded court issued 515 opinions. At any one time, each judge usually has an active list of between 30 and 40 cases that have been assigned to that judge for a written opinion to be produced. The court continues its efforts to increase efficiency and productivity, including through implementation of recommendations from the court’s internal backlog-reduction work group, discussed above.

Internal Processes – Publication, Assessment and Improvement

The court is committed to improving communications with the bench, the bar, the other branches of government, and the public about its work. As part of its effort to fulfill that commitment, the court’s opinions are electronically published immediately after issuance. In addition, the Court of Appeals has posted a written summary of its internal processes on the public website, the Oregon Court of Appeals Internal Practices Guidelines. The guidelines describe the court’s internal workings. Although the document has not been updated for a few years, it remains informative, and the court

APPELLATE AND TAX COURTS

hopes that, by providing these insights into its internal workings, the court has made its work more accessible and its rules and procedures easier for litigants to comply with.

The court is also committed to reviewing its internal practices on an ongoing basis, in an effort to improve its practices to better serve the bench, the bar, and the public. To that end, the court sponsored and supported a survey of the best practices of state intermediate appellate courts across the nation, developed performance measures for its work, and obtained a grant to enable the National Center for State Courts to conduct an in-depth analysis of the court's workload. The resulting demonstration of need for additional judicial resources led the Legislative Assembly to add three new judges and associated staff to the court in 2013. The court also periodically surveys Oregon appellate lawyers and trial court judges to obtain their views regarding the court's performance. Results from the most recent survey are being reviewed. The efforts of the court's backlog-reduction work group reflect the court's continued commitment to improvement of its practices.

Appellate eCourt Project

In 2008, the Court of Appeals implemented an automated case management system, a key component of the Chief Justice's vision for an "electronic courthouse." That system now includes electronic filing, payment, casement management, and document management. Many litigants now file and serve briefs and other documents electronically instead of on paper, as was previously required. In addition, the system allows the court to process cases without handling traditional hard copies of appellate briefs and other documents. In recent years, members of the court's merits panels have routinely prepared for oral argument and decision by reading (and, in many cases, annotating) electronically filed briefs and related submissions. The court also frequently uses electronic versions of trial court records, exhibits, and transcripts as part of the case review and opinion preparation process. A 2016 upgrade to the system permits some remote access, by certain subscribers, to non-confidential appellate case file documents.

Appellate Commissioner Project

In 2008, the court reorganized the Office of Appellate Legal Counsel into an Appellate Commissioner's Office. The implementation of the Appellate Commissioner's Office has substantially reduced the amount of time it historically has taken for substantive motions in the Court of Appeals to be decided. Pursuant to statute, the commissioner has authority to decide motions, own motion matters, and decide cost and attorney fees matters arising from cases not decided by a department, but is not authorized to decide any appeal on its substantive merits. Parties may seek reconsideration of a decision of the commissioner, resulting in review of the decision by either the Chief Judge or the Motions Department of the Court of Appeals. Since its inception and implementation, this initiative has been highly successful in eliminating procedural bottlenecks in the appellate process, expediting prompt disposition of thousands of matters.

APPELLATE AND TAX COURTS

Special Programs

- **Appellate Settlement Conference Program** – The Court of Appeals has continued to utilize its highly effective and nationally recognized mediation program, which has allowed parties to resolve, on a mutual rather than judicial basis, between 100 and 150 civil, domestic relations, and workers’ compensation cases each year. Those cases are frequently among the most complex that the court would otherwise consider. The settlement rate for cases entering the program has been approximately 80 percent, one of the highest in the nation.
- **Trading Benches Program** – The court has developed and implemented this program in coordination with Oregon’s circuit court judges. Through the program, trial judges periodically participate in the consideration and decision of cases in the Court of Appeals, while appellate judges perform judicial work for the circuit courts, including presiding over hearings and trials. With a better mutual understanding of the work that other courts perform, expensive and time-consuming reversals and remands for new trials can be substantially reduced.
- **School Program** – The Oregon Court of Appeals judges and staff regularly travel around Oregon to hear oral arguments in school settings and talk with high school and college students and community groups about the court’s work and about Oregon’s justice system. The program was re-started in 2013 after a two-year hiatus prompted by budget considerations. Overall, since 1998, the court has held oral arguments at schools, universities and local courts in more than 60 locations throughout the state. A panel of three judges and a staff person work with the schools and local courts to schedule the trips. The judges meet with students who attend the arguments to discuss the appellate process and the court’s work. The students are able to read the briefs and court-provided summaries of the cases. They discuss them in class before the court arrives, integrating the court’s visit into their social studies curriculum. The court works to choose cases that involve local parties and lawyers and present issues that would interest the students. During 2015, the court heard arguments at Molalla High School, McKay High School in Salem, Grants Pass High School, Madras High School, McLoughlin High School in Milton-Freewater, West Albany High School, and Portland Community College (Cascades Campus).

APPELLATE AND TAX COURTS

Comparative Statistics

The following chart shows comparative statistics for the Court of Appeals for the years 2005 through 2015.

| Court of Appeals Comparative Statistics 2005-2015 | | | | | | | | | | | |
|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
| Adoptions | 3 | 4 | 5 | 5 | 3 | 1 | 0 | 3 | 1 | 2 | 0 |
| Criminal | 1,571 | 1,562 | 1,356 | 1,384 | 1,588 | 1,407 | 1,204 | 1,218 | 1,146 | 1,117 | 1,167 |
| Criminal Stalking | n/a | n/a | 1 | 4 | 2 | 3 | 5 | 3 | 3 | 9 | 4 |
| Civil | 418 | 405 | 388 | 402 | 365 | 339 | 340 | 319 | 308 | 310 | 314 |
| Civil Injunctive Relief | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Civil Agency Review | 13 | 12 | 24 | 9 | 0 | 8 | 16 | 10 | 8 | 7 | 10 |
| Civil FED | 35 | 27 | 29 | 28 | 29 | 36 | 30 | 29 | 32 | 34 | 20 |
| Civil Other Violations | 11 | 9 | 6 | 15 | 17 | 22 | 14 | 18 | 11 | 29 | 10 |
| Civil Stalking | 25 | 19 | 25 | 16 | 19 | 14 | 26 | 15 | 18 | 20 | 14 |
| Civil Traffic | 30 | 35 | 31 | 36 | 39 | 20 | 28 | 15 | 16 | 21 | 19 |
| Domestic Relations | 176 | 159 | 187 | 185 | 176 | 146 | 145 | 140 | 152 | 115 | 111 |
| Domestic Relations-Punitive Contempt | n/a | n/a | 5 | 7 | 8 | 5 | 3 | 1 | 4 | 0 | 0 |
| <i>Habeas Corpus</i> | 85 | 81 | 84 | 78 | 48 | 51 | 50 | 45 | 29 | 26 | 30 |
| <i>Mandamus</i> | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Juvenile | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Juvenile Delinquencies | 38 | 32 | 30 | 24 | 31 | 31 | 25 | 16 | 25 | 29 | 38 |
| Juvenile Dependencies | 65 | 64 | 80 | 125 | 100 | 94 | 159 | 188 | 181 | 171 | 253 |
| Juvenile Terminations | 79 | 65 | 67 | 44 | 55 | 46 | 37 | 38 | 35 | 62 | 53 |
| Probate | 23 | 18 | 8 | 31 | 19 | 16 | 20 | 17 | 19 | 10 | 10 |
| Post Conviction | 550 | 334 | 291 | 236 | 225 | 244 | 305 | 305 | 217 | 157 | 173 |
| Traffic | 109 | 88 | 90 | 72 | 87 | 70 | 68 | 45 | 43 | 41 | 26 |
| Administrative Review | 200 | 193 | 232 | 212 | 324 | 277 | 231 | 211 | 141 | 131 | 98 |

APPELLATE AND TAX COURTS

| Court of Appeals Comparative Statistics 2005-2015 (continued) | | | | | | | | | | | |
|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
| LUBA | 36 | 21 | 26 | 34 | 29 | 29 | 31 | 16 | 20 | 47 | 13 |
| Parole Review | 86 | 175 | 103 | 49 | 65 | 53 | 31 | 64 | 66 | 46 | 32 |
| Workers' Compensation | 120 | 116 | 102 | 110 | 79 | 70 | 76 | 94 | 67 | 74 | 76 |
| Mental Commitment | 126 | 94 | 102 | 83 | 71 | 81 | 87 | 84 | 79 | 86 | 96 |
| Columbia River Gorge Commission | n/a | n/a | 1 | 1 | 0 | 1 | 1 | 0 | 0 | 0 | 0 |
| Rule Challenge | n/a | 2 | 1 | 13 | 9 | 9 | 7 | 8 | 16 | 12 | 7 |
| Other | 0 | 2 | 38 | 17 | 28 | 13 | 7 | 7 | 15 | 9 | 24 |
| Total Filings | 3,801 | 3,517 | 3,312 | 3,220 | 3,416 | 3,089 | 2,936 | 2,909 | 2,652 | 2,565 | 2,598 |
| | | | | | | | | | | | |
| Opinions Issued | 400 | 420 | 400 | 436 | 530 | 475 | 494 | 494 | 437 | 504 | 515 |

Oregon Tax Court

The Oregon Tax Court is a specialized trial-level court with statewide jurisdiction. It has exclusive jurisdiction in all questions of law or fact arising under state tax laws. State tax laws include personal income tax, corporate excise tax, property tax, timber tax, cigarette tax, local budget laws, and constitutional property tax limitations. The court has two divisions, Regular Division and Magistrate Division.

Regular Division

Regular Division has one judge who hears appeals from the Magistrate Division, direct appeals that are specially designated, and direct petitions such as *mandamus*, local budget law, and constitutional property tax limitation.

Magistrate Division

Magistrate Division has three magistrates who hear appeals directly from county boards of property tax appeals and from actions of the Department of Revenue. Decisions of the magistrates may be appealed to the Regular Division. ORS 305.505 requires the Magistrate Division to keep records containing information as to the date cases are filed and the date decisions are issued. The statute also requires that “at the time of preparation

APPELLATE AND TAX COURTS

biennially of consolidated budgets for submission to the Legislative Assembly ... the State Court Administrator shall prepare and submit to the Legislative Assembly general statistical information as to the amount of time required by the tax court magistrate division to reach its decisions.”

- For the two-year period July 1, 2014 through June 30, 2016, 965 appeals were filed: 617 property tax and 348 income tax.
- Magistrates produced a written decision in each case. The average time between a case filing date and the date of the decision is slightly more than 7.4 months.
- During the two-year period, 26 cases decided in the Magistrate Division were appealed to the Regular Division. Of those 26 cases, 16 have been closed by the Regular Division. One of those cases reversed the decision of the Magistrate Division.
- As of June 30, 2016, there were 197 active cases pending.

| | | | |
|-------------------------|----|--------------------|----|
| Personal Income | 73 | Omitted Property | 4 |
| Corporate Excise/Income | 11 | Farm Property | 2 |
| Tobacco Income | 1 | Exemption Property | 10 |
| Withholding Income | 1 | Personal Property | 6 |
| Income/Other | 1 | Forest Property | 2 |
| Commercial Property | 32 | Homestead Deferral | 4 |
| Industrial Property | 12 | Property/Other | 7 |

Appellate Court Services Division

The Appellate Court Services Division (ACSD) has two sections that provide specialized administrative support activities on behalf of the Oregon Supreme Court, Court of Appeals, and Office of the State Court Administrator (OSCA). The sections are Appellate Court Records Section and the State of Oregon Law Library (which includes Publications). The specialized functions for each section are as follows:

- **Appellate Court Records Section:** The Appellate Court Records Section (ACRS) is the case processing center for both the Supreme Court and the Court of Appeals. It is responsible for processing all documents filed with either appellate court, including petitions, appeals, motions, briefs, notices, and correspondence. ACRS manages appellate transcript filing, calendars oral arguments, prepares and issues administrative

APPELLATE AND TAX COURTS

orders and appellate judgments, and is responsible for all archival activities for both appellate courts. ACRS also supports the continued improvement of the Appellate Case Management System (ACMS) and Appellate eCourt and components such as eFiling. It also serves as the appellate clerk's office for lawyers, litigants, and the public.

- **State of Oregon Law Library:** The State of Oregon Law Library serves as a principal legal research center for the Oregon appellate and trial courts, tax court, executive agencies, and citizens. The library is open to the public, without charge, and provides a variety of services to lawyers and lay patrons. It is funded mainly through a statewide assessment. Within the State of Oregon Law Library, the Publications program publishes, in print and electronic format, and markets, in print format, the decisions of the appellate courts. The program works with the appellate judicial chambers to format court opinions, decisions, and orders regarding rules amendments for publication on the Library website, utilizing the services of the Department of Administrative Services Publishing and Distribution Center to print and distribute advance sheets, and Lynx Group, Inc. to produce and distribute bound volumes. This program also provides desktop publishing services to OJD.

APPELLATE AND TAX COURTS

Current Service Level

The Current Service Level budget for the Appellate/Tax Courts totals \$23.7 million General Fund and \$2.8 million in Other Funds. This reflects an \$0.8 million increase in General Fund (3.7 percent) and \$0.1 million increase in Other Funds (3.7 percent) over the 2015-17 Legislatively Approved Budget.

Chief Justice's Recommended Budget

The Chief Justice's Recommended Budget for the 2017-19 biennium totals \$26.9 million (All Funds). This amount includes a policy option package totaling \$0.4 million (General Fund):

- **Policy Option Package 407:** Supreme Court Coordinating Councils for Justice Access and Diversity

Appellate/Tax Courts Budget Summary – All Funds

| | 2013-15 Actual Expenditures | 2015-17 Legislatively Approved Budget | 2017-19 Current Service Level (CSL) | 2017-19 Chief Justice's Recommended* |
|----------------------------------|--|--|--|---|
| General Fund | \$ 20,592,725 | \$ 22,854,908 | \$ 23,696,837 | \$ 24,073,581 |
| General Fund Debt Service | | | | |
| Other Funds Capital Construction | | | | |
| Other Funds Debt Service Ltd | | | | |
| Other Funds Ltd | \$ 3,430,799 | \$ 2,702,010 | \$ 2,801,960 | \$ 2,801,960 |
| Other Funds Non-Ltd | | | | |
| Federal Funds Ltd | | | | |
| TOTAL – ALL FUNDS | \$ 24,023,524 | \$ 25,556,918 | \$ 26,498,797 | \$ 26,875,541 |
| Positions | 103 | 103 | 103 | 105 |
| FTE | 101.43 | 101.8 | 101.8 | 103.56 |

* Includes CSL and all policy option packages

APPELLATE AND TAX COURTS

Essential Packages

Purpose

The essential packages present budget adjustments needed to bring the Legislatively Approved Budget to Current Service Level (CSL), the calculated cost of continuing legislatively approved programs into the 2017-19 biennium.

Staffing Impact

No staff is contained in Appellate and Tax Courts for the essential packages.

Revenue Source

The essential packages increase the General Fund by \$107,682 and Other Funds by \$56,731.

010 Non-PICS Personal Service Adjustments

Non-PICS Personal Services adjustments for Appellate and Tax Courts is \$48,664 General Fund and \$1,757 in Other Funds. The primary components of the increases are Pension Obligation Bond increases of \$23,772 for General Fund and \$1,669 for Other Funds.

021 Phase-In

The Appellate and Tax Courts budget has no adjustment for phased-in programs.

022 Phase-Out Program and One-Time Costs

The Appellate and Tax Courts budget has no phased-out programs or one-time costs.

031 Inflation and Price List Adjustments

The cost of goods and services increases totals by \$59,018 in General Fund and \$54,974 in Other Funds. This reflects the standard inflation rate of 3.7 percent on goods and services.

032 Above Standard Inflation

APPELLATE AND TAX COURTS

The Appellate and Tax Courts budget has no adjustment for above standard inflation.

040 Mandated Caseload

The Appellate and Tax Courts budget has no adjustment for mandated caseload.

050 Fund Shifts

The Appellate and Tax Courts budget has no fund shifts within its CSL budget.

060 Technical Adjustments

The Appellate and Tax Courts budget has no technical adjustments within its CSL budget.

APPELLATE AND TAX COURTS

Policy Option Package 407 – Staffing for Supreme Court Council on Inclusion and Fairness and State/Tribal Forum

Companion Package: No

Purpose

In the 2015-17 biennium, the Chief Justice established the Oregon Supreme Court Council on Inclusion and Fairness (OSCCIF) and the Tribal, State, and Federal Court Forum (TSFCF). The establishment of these councils will help OJD efforts towards the development and implementation of strategies to increase the integration of OJD judicial fairness values, especially relating to accessing justice and towards ongoing coordination between state, tribal and federal courts. Pieces of FTE in OSCA divisions helped staff the initial meetings but dedicated staff positions will ensure the continuation of the work and its viability longer term.

The OSCCIF has 15 members statewide, made up of judges, judicial officers, criminal justice stakeholders, Oregon legislative leaders, citizens, and community leaders. The OSCCIF holds quarterly meetings around the state. The TFSCF includes members from the nine Oregon federally-recognized Native American tribes as well as state and federal court judges. To help ensure the efforts of the OSCCIF and the TFSCF are successful, coordination, administrative support, and additional Services and Supplies budget for travel and council activities are needed.

How Achieved

The package will add two new support positions and Services and Supplies budget for travel and support of the councils.

Staff Impact

- OJD Analyst 3 1 position 0.88 FTE (phased in October 2017)
- Management Assistant 1 1 position 0.88 FTE (phased in October 2017)

Revenue Source

\$376,744 – General Fund

APPELLATE AND TAX COURTS

ORBITS and PICS Reports

BPR013 – Essential and Policy Package Fiscal Impact Summary

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 010 - Non-PICS Psnl Svc / Vacancy Factor

Cross Reference Name: Appellate/Tax Courts

Cross Reference Number: 19800-101-00-00-00000

| Description | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------|-----------------|---------------|----------------|---------------|------------------------|--------------------------|-----------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 48,664 | - | - | - | - | - | 48,664 |
| Total Revenues | \$48,664 | - | - | - | - | - | \$48,664 |
| Personal Services | | | | | | | |
| Temporary Appointments | 18,565 | - | - | - | - | - | 18,565 |
| Overtime Payments | - | - | - | - | - | - | - |
| Shift Differential | - | - | - | - | - | - | - |
| All Other Differential | 5,207 | - | - | - | - | - | 5,207 |
| Public Employees' Retire Cont | - | - | - | - | - | - | - |
| Pension Obligation Bond | 23,383 | - | 1,669 | - | - | - | 25,052 |
| Social Security Taxes | - | - | - | - | - | - | - |
| Mass Transit Tax | 1,509 | - | 88 | - | - | - | 1,597 |
| Total Personal Services | \$48,664 | - | \$1,757 | - | - | - | \$50,421 |
| Special Payments | | | | | | | |
| Dist to Counties | - | - | - | - | - | - | - |
| Total Special Payments | - | - | - | - | - | - | - |
| Total Expenditures | | | | | | | |
| Total Expenditures | 48,664 | - | 1,757 | - | - | - | 50,421 |
| Total Expenditures | \$48,664 | - | \$1,757 | - | - | - | \$50,421 |

APPELLATE AND TAX COURTS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Cross Reference Name: Appellate/Tax Courts

Pkg: 010 - Non-PICS Psnl Svc / Vacancy Factor

Cross Reference Number: 19800-101-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|----------------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|-----------|
| Ending Balance | | | | | | | |
| Ending Balance | - | - | (1,757) | - | - | - | (1,757) |
| Total Ending Balance | - | - | (\$1,757) | - | - | - | (\$1,757) |

APPELLATE AND TAX COURTS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 031 - Standard Inflation

Cross Reference Name: Appellate/Tax Courts

Cross Reference Number: 19800-101-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|----------------------------------|-----------------|---------------|-------------|---------------|------------------------|--------------------------|-----------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 59,018 | - | - | - | - | - | 59,018 |
| Total Revenues | \$59,018 | - | - | - | - | - | \$59,018 |
| Services & Supplies | | | | | | | |
| Instate Travel | 1,290 | - | 1,114 | - | - | - | 2,404 |
| Out of State Travel | 156 | - | 12 | - | - | - | 168 |
| Employee Training | 3,471 | - | 2,920 | - | - | - | 6,391 |
| Office Expenses | 31,869 | - | 12,970 | - | - | - | 44,839 |
| Telecommunications | 5,304 | - | 1,275 | - | - | - | 6,579 |
| Data Processing | 18 | - | 77 | - | - | - | 95 |
| Publicity and Publications | - | - | 1,140 | - | - | - | 1,140 |
| Professional Services | 6,315 | - | 7,434 | - | - | - | 13,749 |
| IT Professional Services | 1,306 | - | - | - | - | - | 1,306 |
| Employee Recruitment and Develop | 483 | - | 69 | - | - | - | 552 |
| Dues and Subscriptions | 3,871 | - | 307 | - | - | - | 4,178 |
| Facilities Rental and Taxes | - | - | - | - | - | - | - |
| Fuels and Utilities | 52 | - | 7 | - | - | - | 59 |
| Facilities Maintenance | 12 | - | 18 | - | - | - | 30 |
| Agency Program Related S and S | 3 | - | 41 | - | - | - | 44 |
| Intra-agency Charges | - | - | - | - | - | - | - |
| Other Services and Supplies | 386 | - | 37 | - | - | - | 423 |
| Expendable Prop 250 - 5000 | 3,751 | - | 10,629 | - | - | - | 14,380 |

APPELLATE AND TAX COURTS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 031 - Standard Inflation

Cross Reference Name: Appellate/Tax Courts

Cross Reference Number: 19800-101-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|-----------------|---------------|-------------------|---------------|------------------------|--------------------------|-------------------|
| Services & Supplies | | | | | | | |
| IT Expendable Property | 731 | - | 16,924 | - | - | - | 17,655 |
| Total Services & Supplies | \$59,018 | - | \$54,974 | - | - | - | \$113,992 |
| Capital Outlay | | | | | | | |
| Telecommunications Equipment | - | - | - | - | - | - | - |
| Data Processing Hardware | - | - | - | - | - | - | - |
| Total Capital Outlay | - | - | - | - | - | - | - |
| Total Expenditures | | | | | | | |
| Total Expenditures | 59,018 | - | 54,974 | - | - | - | 113,992 |
| Total Expenditures | \$59,018 | - | \$54,974 | - | - | - | \$113,992 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | (54,974) | - | - | - | (54,974) |
| Total Ending Balance | - | - | (\$54,974) | - | - | - | (\$54,974) |

APPELLATE AND TAX COURTS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 407 - Supreme Court Coordinating Councils for Justice Access & Diversity

Cross Reference Name: Appellate/Tax Courts

Cross Reference Number: 19800-101-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|------------------|---------------|-------------|---------------|------------------------|--------------------------|------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 376,744 | - | - | - | - | - | 376,744 |
| Total Revenues | \$376,744 | - | - | - | - | - | \$376,744 |
| Personal Services | | | | | | | |
| Class/Unclass Sal. and Per Diem | 167,181 | - | - | - | - | - | 167,181 |
| Empl. Rel. Bd. Assessments | 100 | - | - | - | - | - | 100 |
| Public Employees' Retire Cont | 31,915 | - | - | - | - | - | 31,915 |
| Social Security Taxes | 12,789 | - | - | - | - | - | 12,789 |
| Worker's Comp. Assess. (WCD) | 120 | - | - | - | - | - | 120 |
| Flexible Benefits | 62,391 | - | - | - | - | - | 62,391 |
| Total Personal Services | \$274,496 | - | - | - | - | - | \$274,496 |
| Services & Supplies | | | | | | | |
| Instate Travel | 64,372 | - | - | - | - | - | 64,372 |
| Out of State Travel | 12,800 | - | - | - | - | - | 12,800 |
| Office Expenses | 8,700 | - | - | - | - | - | 8,700 |
| Telecommunications | 2,880 | - | - | - | - | - | 2,880 |
| Employee Recruitment and Develop | 1,000 | - | - | - | - | - | 1,000 |
| Other Services and Supplies | 6,496 | - | - | - | - | - | 6,496 |
| IT Expendable Property | 6,000 | - | - | - | - | - | 6,000 |
| Total Services & Supplies | \$102,248 | - | - | - | - | - | \$102,248 |

APPELLATE AND TAX COURTS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 407 - Supreme Court Coordinating Councils for Justice Access & Diversity

Cross Reference Name: Appellate/Tax Courts

Cross Reference Number: 19800-101-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|----------------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|-----------|
| Total Expenditures | | | | | | | |
| Total Expenditures | 376,744 | - | - | - | - | - | 376,744 |
| Total Expenditures | \$376,744 | - | - | - | - | - | \$376,744 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |
| Total Positions | | | | | | | |
| Total Positions | | | | | | | 2 |
| Total Positions | - | - | - | - | - | - | 2 |
| Total FTE | | | | | | | |
| Total FTE | | | | | | | 1.76 |
| Total FTE | - | - | - | - | - | - | 1.76 |

APPELLATE AND TAX COURTS

PPDPFISCAL – PICS Package Fiscal Impact Report

08/05/16 REPORT NO.: PPDPFISCAL DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM PAGE 9
 REPORT: PACKAGE FISCAL IMPACT REPORT 2017-19 PROD FILE
 AGENCY:19800 JUDICIAL DEPARTMENT PICS SYSTEM: BUDGET PREPARATION
 SUMMARY XREF:101-00-00 Appellate/Tax Courts PACKAGE: 407 - Supreme Court Coordinating Cou

| POSITION NUMBER | CLASS | COMP | CLASS NAME | POS CNT | FTE | MOS | STEP | RATE | GF SAL/OPE | OF SAL/OPE | FF SAL/OPE | LF SAL/OPE | AF SAL/OPE |
|--------------------------------|-------|-------|---------------------------|------------|-----|-------|------|----------|-------------------|---------------|---------------|---------------|-------------------|
| 6001961 | JM | J9645 | AA OJD ANALYST 3 | 1 | .88 | 21.00 | 02 | 5,023.00 | 105,483 60,467 | | | | 105,483 60,467 |
| 6001962 | JUA | J9674 | AA MANAGEMENT ASSISTANT 1 | 1 | .88 | 21.00 | 02 | 2,938.00 | 61,698 46,848 | | | | 61,698 46,848 |
| TOTAL PICS SALARY | | | | | | | | | 167,181 | | | | 167,181 |
| TOTAL PICS OPE | | | | | | | | | 107,315 | | | | 107,315 |
| TOTAL PICS PERSONAL SERVICES = | | | | | | | | | 274,496 | | | | 274,496 |

APPELLATE AND TAX COURTS

BPR012 – Detail of Lottery Funds, Other Funds, and Federal Funds Revenue

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

| Judicial Dept 2017-19 Biennium | | | | | Agency Number: 19800 Cross Reference Number: 19800-101-00-00-00000 | |
|-----------------------------------|--------------------|-------------------------------|--------------------------------|----------------------------------|---|-------------------------------|
| Source | 2013-15 Actuals | 2015-17 Leg Adopted Budget | 2015-17 Leg Approved Budget | 2017-19 Agency Request Budget | 2017-19 Governor's Budget | 2017-19 Leg Adopted Budget |
| Other Funds | | | | | | |
| Charges for Services | 12 | - | - | - | - | - |
| Sales Income | 949,880 | 715,000 | 715,000 | 715,000 | - | - |
| Grants (Non-Fed) | 49,435 | - | - | - | - | - |
| Other Revenues | 84 | - | - | - | - | - |
| Tsfr From Administrative Svcs | 2,411,215 | 2,368,040 | 2,368,040 | 2,496,745 | - | - |
| Total Other Funds | \$3,410,626 | \$3,083,040 | \$3,083,040 | \$3,211,745 | - | - |

TRIAL COURTS

Trial Courts

The Trial Court Operations program includes the resources for operating the state trial-level courts – known as circuit courts – in Oregon. The circuit courts adjudicate matters and disputes in criminal, civil, domestic relations, traffic, juvenile, small claims, violations, abuse prevention, probate, mental commitments, adoption, and guardianship cases.

The state is divided into 27 judicial districts encompassing all 36 counties. There is a circuit court in each county, with a statewide total of 173 circuit judges. Pursuant to ORS 1.003, the Chief Justice of the Oregon Supreme Court appoints presiding judges for each judicial district for administrative purposes for two-year terms. Their general authority is described in ORS 1.171. Operations of the trial courts are managed by trial court administrators who are supervised by the presiding judge. The general authority of a trial court administrator is described in ORS 8.225. Their duties include personnel administration, budget and financial management, court operations, and jury management.

There are also several legislatively mandated local committees that presiding judges and trial court administrators must either initiate or attend. These committees include local criminal justice advisory committees, local public safety steering committees, family law advisory committees, and court security planning committees. Judges and trial court administrators are also involved in many community activities and programs that align with the courts' programs to provide services to people involved in the court system.

In Oregon, the circuit court is the trial court of general jurisdiction. The circuit court hears cases filed for all case types, amounts of money, or severity of crime. In addition to handling all types of cases, the trial courts have been actively involved in both legislatively initiated and self-initiated programs to provide improved dispute resolution processes and outcomes for the people and cases that come before them. The courts have supported, as resources permit, the following types of programs:

- **Treatment courts:** These are collaborative, community-based court programs that utilize an evidence-based, problem-solving model to improve outcomes for people who have mental health issues or who are addicted to drugs and alcohol.
- **Integrated family courts:** These courts have a single judge who is assigned to all cases involving a particular family, and local services are coordinated. Family issues are addressed as a unit, thus improving the family's capabilities to succeed and improve the future of its children.
- **Other specialized courts or programs:** These are courts or programs aimed at addressing the court-related needs of veterans, domestic violence, mental health issues, juvenile delinquency, payment of restitution, and providing community court services.
- **Arbitration and mediation programs:** These are programs designed to help resolve cases, where appropriate, at lesser expense to litigants and in less adversarial settings, including helping to establish local community-based dispute resolution centers.
- **Jury management programs:** These are one-trial/one-day service programs for jurors where a less onerous service requirement improves the diversity and satisfaction of persons summoned for jury duty.

TRIAL COURTS

- **Juvenile Court Improvement Project (JCIP):** JCIP is designed to implement recommendations for improvement in the juvenile dependency process. JCIP ensures that required procedural inquiries are made and all necessary parties notified in order to facilitate a timelier and appropriate permanency setting for abused and neglected children.
- **Parental education programs:** These legislatively mandated programs provide assistance to people dealing with their children and each other while going through divorce and custody issues.
- **Domestic relations *pro se* service centers and websites:** These are service centers and websites where people can find out about court forms and procedures and be referred to appropriate legal and support services.

In addition, trial courts have been instrumental in applying technological solutions to address court operations more efficiently and effectively. In Oregon, we are fortunate to have a committed judiciary and court administrative personnel to further the vision for the future of the courts in very real terms.

Ten-Year Caseload Trend

Court Filings

Total case filings data for the latest full year of 2015 totaled 503,244 cases. While the overall case filings total is down compared to prior years, some case filing types have increased, while others have decreased or stayed relatively constant. In addition, the new Odyssey system counts case filings and events differently than the prior OJIN system did so not all equal comparisons are feasible. Some specific changes in case filings by type and impacts:

- **Civil Cases** – Civil case filings decreased by approximately 14 percent from 2014 to 2015, and were approximately 8 percent lower than the number of cases filed in 2006. While the courts experienced a spike in the number of filings during the mortgage crisis, civil filings overall have declined significantly in recent years.
- **Domestic Relations** – While there has been a small decline in the number of domestic relations cases filed, the Oregon Judicial Department (OJD) has seen an increase in self-represented litigants in this area. With limited departmental resources to help, the result has been that this case type has become more complex and difficult for courts to process. Without guidance, litigants are more prone to errors in the required materials they submit, impacting court operations and often resulting in court delays. In addition, many domestic cases such as restraining orders are emergency proceedings and must be held in 24 hours.
- **Juvenile** – Case filings increased slightly in 2015 compared to 2014, but over the last several years this number has been declining. A portion of the reduction in filings is due to front-end interventions being performed by county juvenile departments, and the work of the Department of Human Services and the courts to provide in-home services and support to avoid court interventions. The remaining instances that require

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filings are, for the most part, more complex and require additional court time and resources to resolve. In addition, juvenile court practices have grown more complex with more than twenty pieces of federal legislation and dozens of Oregon law changes that have required increased judicial oversight of juvenile cases.

- **Felony** – After falling dramatically between 2006 and 2010, annual felony filings have steadily increased since 2010. This case type consumes the most judicial and staff resources. Any increases in felony case filings, depending on the severity of the cases, will have a disproportionate impact on OJD resources required to process these cases.
- **Civil Commitments** – This case type has declined since 2013 when it reached an all-time high in case filings. With the passage of HB 2594 in the 2013 legislative session, these types of cases require additional hearings to determine participation in the possible outpatient treatment options created by the bill.
- **Misdemeanors** – While overall misdemeanor filings are down, courts are experiencing increased workloads associated with this type of case. Misdemeanors are increasingly complex, requiring multiple, and in some instances, more than double the number of hearings associated with an individual case. The use of bench probation has also increased the workload of the courts, due to tracking and monitoring of the probationers.
- **Violations** – The number of violations filed in circuit courts has been consistently declining over the past ten years. The number of new filings is far below the levels seen in 2006. In most cases, violations are the least impactful of these case type filings in terms of required resources, but do have an effect on court revenues as lower filings usually translate to reduced fine revenue deposited into the Criminal Fine Account. OJD expects significant increases in violations filed in Multnomah circuit court in 2017 and beyond as a result of passage of HB 2621 during the 2016 legislative session.

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Below is a table of case filings for 2006 through 2015:

| Type | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
|--------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Civil | 80,120 | 90,898 | 102,116 | 97,235 | 99,000 | 92,449 | 92,642 | 95,191 | 85,712 | 74,070 |
| Small Claims | 75,768 | 75,282 | 80,109 | 74,856 | 74,573 | 73,673 | 76,076 | 70,259 | 78,149 | 67,932 |
| Domestic Relations | 44,882 | 46,829 | 45,318 | 46,987 | 46,425 | 47,919 | 45,279 | 43,898 | 42,323 | 41,735 |
| Juvenile | 18,225 | 17,917 | 17,152 | 15,700 | 15,229 | 14,013 | 12,924 | 11,783 | 10,921 | 11,430 |
| Probate | 9,786 | 10,138 | 10,166 | 10,010 | 9,929 | 10,347 | 10,196 | 10,642 | 10,553 | 11,312 |
| Civil Commitment | 8,863 | 8,723 | 8,585 | 8,669 | 8,529 | 8,871 | 9,459 | 9,582 | 8,619 | 8,512 |
| Felony | 37,808 | 34,630 | 30,461 | 29,479 | 29,444 | 31,086 | 31,980 | 32,464 | 32,180 | 32,407 |
| Misdemeanor | 64,132 | 63,497 | 62,972 | 63,903 | 60,294 | 59,589 | 57,529 | 53,029 | 51,363 | 50,335 |
| Violation | 263,312 | 257,839 | 253,455 | 252,766 | 221,974 | 214,654 | 211,504 | 215,080 | 212,316 | 205,511 |
| TOTAL | 602,896 | 605,753 | 610,334 | 599,605 | 565,397 | 552,601 | 547,589 | 541,928 | 532,136 | 503,244 |

Case workloads continue to be heavy, as alternatives to incarceration have added case management duties to courts, requiring extra hearings or judicial or court staff to monitor adherence to probationary or court ordered treatment. While overall filings have dropped, the workload for the courts has remained the same or increased in some judicial districts, requiring additional resources to ensure that Oregon courts can provide timely and accessible services to the public.

Accounted for separately from the statistics shown above is the Multnomah County parking citations caseload. Over the last four years, caseload has shown a slight growth: 247,696 (2012), 264,874 (2013), 253,166 (2014), 269,480 (2015). This caseload is expected to increase significantly starting in 2016 as the City of Portland adds additional patrol areas and enforcement resources.

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Current Service Level

The Current Service Level budget for the Trial Courts totals \$230.6 million General Fund and \$5.0 million in Other Funds. This reflects a \$13.6 million increase in General Fund (6.3 percent) and \$3.0 million decrease in Other Funds (37.3 percent) over the 2015-17 Legislatively Approved Budget.

Chief Justice's Recommended Budget

The Chief Justice's Recommended Budget for the 2017-19 biennium totals \$246.5 million (All Funds). This amount includes policy option packages totaling \$10.9 million (All Funds):

- **Policy Option Package 401:** New Judgeships and Support Staff
- **Policy Option Package 403:** Judicial Resources – Hearings Referees
- **Policy Option Package 405:** Support Effective Circuit Court Programs
- **Policy Option Package 406:** Multnomah County Violations Processing Staff
- **Policy Option Package 409:** Treatment/Specialty Courts Grant Funding

TRIAL COURTS

Trial Courts Budget Summary – All Funds

| | 2013-15 Actual Expenditures | 2015-17 Legislatively Approved Budget | 2017-19 Current Service Level (CSL) | 2017-19 Chief Justice's Recommended* |
|----------------------------------|--|--|--|---|
| General Fund | \$ 195,945,953 | \$ 217,021,303 | \$ 230,609,265 | \$ 237,449,398 |
| General Fund Debt Service | | | | |
| Other Funds Capital Construction | | | | |
| Other Funds Debt Service Ltd | | | | |
| Other Funds Ltd | \$ 6,135,750 | \$ 7,952,905 | \$ 4,989,915 | \$ 9,099,771 |
| Other Funds Non-Ltd | | | | |
| Federal Funds Ltd | \$ 67,275 | \$ 340,000 | \$ 0 | \$ 0 |
| TOTAL – ALL FUNDS | \$ 202,148,978 | \$ 225,314,208 | \$ 235,599,180 | \$ 246,549,169 |
| Positions | 1,352 | 1,373 | 1,359 | 1,436 |
| FTE | 1,242.77 | 1,261.90 | 1,250.89 | 1,305.64 |

* Includes CSL and all policy option packages

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Essential Packages

Purpose

The essential packages present budget adjustments needed to bring the Legislatively Approved Budget to Current Service Level (CSL), the calculated cost of continuing legislatively approved programs into the 2017-19 biennium.

Staffing Impact

No staff is contained in Trial Courts for the essential packages.

Revenue Source

The essential packages increase the General Fund by \$934,415, decrease Other Funds by \$419,384, and decrease Federal Funds by \$340,000.

010 Non-PICS Personal Service Adjustments

Non-PICS Personal Services adjustments for Trial Courts is \$568,564 General Fund and (\$78,254) in Other Funds. The primary components of the changes are Pension Obligation Bond increases of \$458,999 for General Fund and a decrease of \$95,235 for Other Funds.

021 Phase-In

The Trial Courts budget has no adjustment for phased-in programs.

022 Phase-Out Program and One-Time Costs

The Trial Courts budget has an Other Funds decrease of \$359,768 and a Federal Funds decrease of \$340,000 for phased-out programs or one-time costs.

031 Inflation and Price List Adjustments

The cost of goods and services increases totals by \$365,851 in General Fund and \$18,638 in Other Funds. This reflects the standard inflation rate of 3.7 percent on goods and services.

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032 Above Standard Inflation

The Trial Courts budget has no adjustment for above standard inflation.

040 Mandated Caseload

The Trial Courts budget has no adjustment for mandated caseload.

050 Fund Shifts

The Trial Courts budget has no fund shifts within its CSL budget.

060 Technical Adjustments

The Trial Courts budget has no technical adjustments within its CSL budget.

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Policy Option Package 401 – New Judgeships and Support Staff

Companion Package: No. Legislative Concept 819 introduced in the 2017 legislative session will provide the statutory vehicle to make the changes in ORS 3.012.

Purpose

The package adds new circuit court judgeships and support staff in Marion, Washington (two), Multnomah, Clackamas, Deschutes, Douglas, Jackson, and Josephine counties. The last increase in elected circuit court judicial positions was during the 2001-03 biennium. Most of these counties have undergone significant population growth and/or experienced increases in judge time intensive cases. This package seeks to increase judicial resources in order to reduce the case backlog and improve timely case disposition performance for the courts.

How Achieved

The package provides funding for permanent personnel increases, including one judicial clerk, one judicial assistant, and one general clerk for each of nine judges in eight counties, and associated Services and Supplies budget. Positions are phased in based upon judicial elections in 2018 with support positions starting in November 2018.

Staffing Impact

- | | | |
|---------------------------------|--------------|---------------------------------------|
| • Circuit Court Judge | 9 positions | 2.25 FTE (phased in January 1, 2019) |
| • Judicial Support Specialist 3 | 27 positions | 9.00 FTE (phased in November 1, 2018) |

Revenue Source

\$2,778,606 – General Fund

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Policy Option Package 403 – Judicial Resources – Hearings Referees

Companion Package: No

Purpose

The National Center for State Courts (NCSC) performed a survey of Oregon’s juvenile courts and determined that, on average, less time was spent on juvenile dependency cases than established best practices. NCSC has recommended that OJD allocate an additional 50 minutes of time to dependency cases. This package seeks to add resources that can be used to alleviate judicial workload in these cases by adding centralized, specialized hearings referee positions that can be assigned to dependency cases. This package also adds an additional hearings referee position and clerk in Linn County to help with judicial workload.

How Achieved

The package adds three centralized hearings referee positions for juvenile dependency hearings, to be assigned by the Chief Justice to address juvenile case workload. One hearings referee position and support clerical position for Linn County is added to address judicial workload. All the positions are phased in.

Staff Impact

- | | | |
|---------------------------------|-------------|-----------------------------------|
| • OJD Hearings Referee | 4 positions | 3.52 FTE (phased in October 2017) |
| • Judicial Support Specialist 3 | 1 position | 0.88 FTE (phased in October 2017) |

Revenue Source

\$1,019,394 – General Fund

TRIAL COURTS

Policy Option Package 405 – Pro Se Facilitation

Companion Package: No

Purpose

Over the past several years, the Oregon Judicial Department (OJD) has been experiencing an increase in the number of self-represented litigants entering the legal system. In many cases, these self-represented litigants are ill-prepared to successfully access the courts. Mistakes by self-represented litigants are impacting court operations and delaying the processing of urgent court orders and judgments. This package is intended to provide resources in circuit courts to assist Oregonians in accessing the courts when they choose to be self-represented. This proposal would add 17 family law facilitator positions in 15 counties to help assist self-represented parties in domestic relations cases by:

- Assisting in completion of statewide domestic relations forms
- Providing information on court processes
- Providing information on, and referrals to, mediation and parent education programs
- Providing assistance in completing judgments after hearings
- Providing help in completing restraining orders
- Providing information and referrals related to guardianship/conservatorship cases, juvenile cases, and probate cases
- Providing assistance in the use of new on-line forms and tools

How Achieved

The package provides funding for positions and associated Services and Supplies budget to support *pro se* for self-represented litigants in circuit courts around the state of Oregon, and adds centralized facilitation program support. Positions are phased in.

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Staff Impact

| | | |
|-----------------------------|--------------|------------------------------------|
| • OJD Program Coordinator 1 | 17 positions | 14.96 FTE (phased in October 2017) |
| • OJD Program Coordinator 3 | 1 position | 0.88 FTE (phased in October 2017) |
| • OJD Analyst 3 | 1 position | 0.88 FTE (phased in October 2017) |
| • Management Assistant 1 | 1 position | 0.44 FTE (phased in October 2017) |

Revenue Source

\$3,198,916 – General Fund

TRIAL COURTS

Policy Option Package 406 – Multnomah County Violations Staffing

Companion Package: No

Purpose

The City of Portland added a new district to the parking enforcement area for the city, increasing the number of parking citations processed by the Multnomah County circuit court by approximately 8.3 percent based on projections (\$2.4 million projected in additional revenue for 2016). While new court operating procedures have resulted in increased efficiencies, the new volumes, plus increased patrol staff for the city, have resulted in a backlog and the use of temporary staff to alleviate the problem. This package seeks to add permanent staff to handle the increased citation flow, processing, and revenue collection.

How Achieved

The package will add six new clerical staff positions to reduce backlog and parking citation processing time from the new patrol area. Positions are phased in.

Staff Impact

- Judicial Services Specialist 3 6 positions 5.28 FTE (phased in October 2017)

Revenue Source

\$741,696 – General Fund

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Policy Option Package 409 – Treatment/Specialty Courts Grant Funding

Companion Package: No

Purpose

This package will increase Other Funds limitation to account for specialty court grants. The Oregon Judicial Department (OJD) receives a variety of grants to fund activities of importance to local communities including, but not limited to, drug court, family court, veterans court, pretrial release programs, and the Citizen Review Board. These grants are usually provided to local community partners and, in many cases, OJD's component is a small piece of the overall funding received by the community. Prior to the 2009-11 biennium, some of these programs were funded in OJD through the use of General Fund, but program support and clerical positions were eliminated during the recession due to budget constraints. Federal funding was obtained by the Criminal Justice Commission, and many of the program support/coordination activities were switched to biennial limited duration, Other Funds funded positions. The intent of this package is to account for those grants that have signed agreement terms that extend into the 2017-19 biennium, as well as long-standing grants that are likely to be renewed next biennium. Many grants operate on a federal fiscal year or have terms exceeding one year, which can cross biennial funding cycles.

How Achieved

The package provides limited duration position authority, FTE authority, and Other Funds expenditure limitation for the positions in the grants for which the term of the grant extends beyond the 2015-17 biennium or is likely to renew next biennium.

Staffing Impact

- OJD Program Coordinator 4 19 positions 19.00 FTE

Revenue Source

\$4,109,856 – Other Funds

TRIAL COURTS

ORBITS and PICS Reports

BPR013 – Essential and Policy Package Fiscal Impact Summary

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 010 - Non-PICS Psnl Svc / Vacancy Factor

Cross Reference Name: Trial Courts

Cross Reference Number: 19800-100-00-00-00000

| Description | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------|------------------|---------------|-------------------|---------------|------------------------|--------------------------|------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 568,564 | - | - | - | - | - | 568,564 |
| Tsfr From Public Def Svcs Comm | - | - | (4,915) | - | - | - | (4,915) |
| Tsfr From Consumer/Bus Svcs | - | - | - | - | - | - | - |
| Total Revenues | \$568,564 | - | (\$4,915) | - | - | - | \$563,649 |
| Personal Services | | | | | | | |
| Temporary Appointments | 479 | - | 8,320 | - | - | - | 8,799 |
| Overtime Payments | - | - | - | - | - | - | - |
| Shift Differential | - | - | - | - | - | - | - |
| All Other Differential | 30,832 | - | 3,225 | - | - | - | 34,057 |
| Public Employees' Retire Cont | 5,886 | - | 1,232 | - | - | - | 7,118 |
| Pension Obligation Bond | 458,999 | - | (95,235) | - | - | - | 363,764 |
| Social Security Taxes | 2,396 | - | 2,262 | - | - | - | 4,658 |
| Mass Transit Tax | 66,161 | - | 1,942 | - | - | - | 68,103 |
| Other OPE | 3,811 | - | - | - | - | - | 3,811 |
| Total Personal Services | \$568,564 | - | (\$78,254) | - | - | - | \$490,310 |
| Total Expenditures | | | | | | | |
| Total Expenditures | 568,564 | - | (78,254) | - | - | - | 490,310 |
| Total Expenditures | \$568,564 | - | (\$78,254) | - | - | - | \$490,310 |

TRIAL COURTS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 010 - Non-PICS Psnl Svc / Vacancy Factor

Cross Reference Name: Trial Courts

Cross Reference Number: 19800-100-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|----------------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|-----------|
| Ending Balance | | | | | | | |
| Ending Balance | - | - | 73,339 | - | - | - | 73,339 |
| Total Ending Balance | - | - | \$73,339 | - | - | - | \$73,339 |

TRIAL COURTS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 022 - Phase-out Pgm & One-time Costs

Cross Reference Name: Trial Courts

Cross Reference Number: 19800-100-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|--------------|---------------|--------------------|--------------------|------------------------|--------------------------|--------------------|
| Revenues | | | | | | | |
| Federal Funds | - | - | - | (340,000) | - | - | (340,000) |
| Total Revenues | - | - | - | (\$340,000) | - | - | (\$340,000) |
| Personal Services | | | | | | | |
| Temporary Appointments | - | - | (175,000) | - | - | - | (175,000) |
| Social Security Taxes | - | - | (13,388) | - | - | - | (13,388) |
| Other OPE | - | - | - | (255,000) | - | - | (255,000) |
| Total Personal Services | - | - | (\$188,388) | (\$255,000) | - | - | (\$443,388) |
| Services & Supplies | | | | | | | |
| Instate Travel | - | - | - | (25,000) | - | - | (25,000) |
| Office Expenses | - | - | (86,612) | (40,000) | - | - | (126,612) |
| Professional Services | - | - | (84,768) | (20,000) | - | - | (104,768) |
| Total Services & Supplies | - | - | (\$171,380) | (\$85,000) | - | - | (\$256,380) |
| Total Expenditures | | | | | | | |
| Total Expenditures | - | - | (359,768) | (340,000) | - | - | (699,768) |
| Total Expenditures | - | - | (\$359,768) | (\$340,000) | - | - | (\$699,768) |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | 359,768 | - | - | - | 359,768 |
| Total Ending Balance | - | - | \$359,768 | - | - | - | \$359,768 |

TRIAL COURTS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 031 - Standard Inflation

Cross Reference Name: Trial Courts

Cross Reference Number: 19800-100-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|----------------------------------|------------------|---------------|-------------|---------------|------------------------|--------------------------|------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 365,851 | - | - | - | - | - | 365,851 |
| Federal Funds | - | - | - | - | - | - | - |
| Total Revenues | \$365,851 | - | - | - | - | - | \$365,851 |
| Services & Supplies | | | | | | | |
| Instate Travel | 16,570 | - | - | - | - | - | 16,570 |
| Out of State Travel | 397 | - | - | - | - | - | 397 |
| Employee Training | 14,178 | - | - | - | - | - | 14,178 |
| Office Expenses | 140,637 | - | 18,289 | - | - | - | 158,926 |
| Telecommunications | 66,883 | - | - | - | - | - | 66,883 |
| Data Processing | 6,054 | - | 3 | - | - | - | 6,057 |
| Publicity and Publications | - | - | - | - | - | - | - |
| Professional Services | 25,849 | - | - | - | - | - | 25,849 |
| IT Professional Services | - | - | - | - | - | - | - |
| Attorney General | - | - | - | - | - | - | - |
| Employee Recruitment and Develop | 4,283 | - | - | - | - | - | 4,283 |
| Dues and Subscriptions | 19,022 | - | - | - | - | - | 19,022 |
| Facilities Rental and Taxes | 221 | - | - | - | - | - | 221 |
| Fuels and Utilities | 491 | - | - | - | - | - | 491 |
| Facilities Maintenance | 1,391 | - | - | - | - | - | 1,391 |
| Agency Program Related S and S | 2,367 | - | - | - | - | - | 2,367 |
| Intra-agency Charges | - | - | - | - | - | - | - |
| Other Services and Supplies | 5,850 | - | - | - | - | - | 5,850 |
| Expendable Prop 250 - 5000 | 48,674 | - | - | - | - | - | 48,674 |

TRIAL COURTS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 031 - Standard Inflation

Cross Reference Name: Trial Courts

Cross Reference Number: 19800-100-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|------------------|---------------|-------------------|---------------|------------------------|--------------------------|-------------------|
| Services & Supplies | | | | | | | |
| IT Expendable Property | 9,654 | - | - | - | - | - | 9,654 |
| Total Services & Supplies | \$362,521 | - | \$18,292 | - | - | - | \$380,813 |
| Capital Outlay | | | | | | | |
| Office Furniture and Fixtures | 3,330 | - | 346 | - | - | - | 3,676 |
| Telecommunications Equipment | - | - | - | - | - | - | - |
| Technical Equipment | - | - | - | - | - | - | - |
| Industrial and Heavy Equipment | - | - | - | - | - | - | - |
| Data Processing Software | - | - | - | - | - | - | - |
| Data Processing Hardware | - | - | - | - | - | - | - |
| Total Capital Outlay | \$3,330 | - | \$346 | - | - | - | \$3,676 |
| Special Payments | | | | | | | |
| Dist to Counties | - | - | - | - | - | - | - |
| Total Special Payments | - | - | - | - | - | - | - |
| Total Expenditures | | | | | | | |
| Total Expenditures | 365,851 | - | 18,638 | - | - | - | 384,489 |
| Total Expenditures | \$365,851 | - | \$18,638 | - | - | - | \$384,489 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | (18,638) | - | - | - | (18,638) |
| Total Ending Balance | - | - | (\$18,638) | - | - | - | (\$18,638) |

TRIAL COURTS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 401 - New Judgeships & Support Staff

Cross Reference Name: Trial Courts

Cross Reference Number: 19800-100-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|--------------------|---------------|-------------|---------------|------------------------|--------------------------|--------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 1,880,127 | - | - | - | - | - | 1,880,127 |
| Total Revenues | \$1,880,127 | - | - | - | - | - | \$1,880,127 |
| Personal Services | | | | | | | |
| Class/Unclass Sal. and Per Diem | 634,608 | - | - | - | - | - | 634,608 |
| Empl. Rel. Bd. Assessments | 513 | - | - | - | - | - | 513 |
| Public Employees' Retire Cont | 121,149 | - | - | - | - | - | 121,149 |
| Social Security Taxes | 48,546 | - | - | - | - | - | 48,546 |
| Worker's Comp. Assess. (WCD) | 621 | - | - | - | - | - | 621 |
| Flexible Benefits | 311,040 | - | - | - | - | - | 311,040 |
| Total Personal Services | \$1,116,477 | - | - | - | - | - | \$1,116,477 |
| Services & Supplies | | | | | | | |
| Instate Travel | 54,000 | - | - | - | - | - | 54,000 |
| Employee Training | 36,000 | - | - | - | - | - | 36,000 |
| Office Expenses | 144,000 | - | - | - | - | - | 144,000 |
| Telecommunications | 36,000 | - | - | - | - | - | 36,000 |
| Publicity and Publications | 18,000 | - | - | - | - | - | 18,000 |
| Employee Recruitment and Develop | 10,800 | - | - | - | - | - | 10,800 |
| Dues and Subscriptions | 36,000 | - | - | - | - | - | 36,000 |
| Other Services and Supplies | 36,000 | - | - | - | - | - | 36,000 |
| Expendable Prop 250 - 5000 | 392,850 | - | - | - | - | - | 392,850 |
| Total Services & Supplies | \$763,650 | - | - | - | - | - | \$763,650 |

TRIAL COURTS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 401 - New Judgeships & Support Staff

Cross Reference Name: Trial Courts

Cross Reference Number: 19800-100-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|----------------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|-------------|
| Total Expenditures | | | | | | | |
| Total Expenditures | 1,880,127 | - | - | - | - | - | 1,880,127 |
| Total Expenditures | \$1,880,127 | - | - | - | - | - | \$1,880,127 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |
| Total Positions | | | | | | | |
| Total Positions | | | | | | | 27 |
| Total Positions | - | - | - | - | - | - | 27 |
| Total FTE | | | | | | | |
| Total FTE | | | | | | | 8.91 |
| Total FTE | - | - | - | - | - | - | 8.91 |

TRIAL COURTS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 403 - Judicial Resources - Hearings Referees

Cross Reference Name: Trial Courts

Cross Reference Number: 19800-100-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|--------------------|---------------|-------------|---------------|------------------------|--------------------------|--------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 1,019,394 | - | - | - | - | - | 1,019,394 |
| Total Revenues | \$1,019,394 | - | - | - | - | - | \$1,019,394 |
| Personal Services | | | | | | | |
| Class/Unclass Sal. and Per Diem | 600,474 | - | - | - | - | - | 600,474 |
| Empl. Rel. Bd. Assessments | 250 | - | - | - | - | - | 250 |
| Public Employees' Retire Cont | 114,630 | - | - | - | - | - | 114,630 |
| Social Security Taxes | 45,936 | - | - | - | - | - | 45,936 |
| Worker's Comp. Assess. (WCD) | 300 | - | - | - | - | - | 300 |
| Flexible Benefits | 158,844 | - | - | - | - | - | 158,844 |
| Total Personal Services | \$920,434 | - | - | - | - | - | \$920,434 |
| Services & Supplies | | | | | | | |
| Instate Travel | 56,250 | - | - | - | - | - | 56,250 |
| Office Expenses | 18,350 | - | - | - | - | - | 18,350 |
| Telecommunications | 9,360 | - | - | - | - | - | 9,360 |
| IT Expendable Property | 15,000 | - | - | - | - | - | 15,000 |
| Total Services & Supplies | \$98,960 | - | - | - | - | - | \$98,960 |
| Total Expenditures | | | | | | | |
| Total Expenditures | 1,019,394 | - | - | - | - | - | 1,019,394 |
| Total Expenditures | \$1,019,394 | - | - | - | - | - | \$1,019,394 |

TRIAL COURTS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 403 - Judicial Resources - Hearings Referees

Cross Reference Name: Trial Courts

Cross Reference Number: 19800-100-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|----------------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|-----------|
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |
| Total Positions | | | | | | | |
| Total Positions | | | | | | | 5 |
| Total Positions | - | - | - | - | - | - | 5 |
| Total FTE | | | | | | | |
| Total FTE | | | | | | | 4.40 |
| Total FTE | - | - | - | - | - | - | 4.40 |

TRIAL COURTS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 405 - Support Effective Circuit Court Programs

Cross Reference Name: Trial Courts

Cross Reference Number: 19800-100-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|--------------------|---------------|-------------|---------------|------------------------|--------------------------|--------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 3,198,916 | - | - | - | - | - | 3,198,916 |
| Total Revenues | \$3,198,916 | - | - | - | - | - | \$3,198,916 |
| Personal Services | | | | | | | |
| Class/Unclass Sal. and Per Diem | 1,383,081 | - | - | - | - | - | 1,383,081 |
| Empl. Rel. Bd. Assessments | 1,000 | - | - | - | - | - | 1,000 |
| Public Employees' Retire Cont | 264,034 | - | - | - | - | - | 264,034 |
| Social Security Taxes | 105,801 | - | - | - | - | - | 105,801 |
| Worker's Comp. Assess. (WCD) | 1,200 | - | - | - | - | - | 1,200 |
| Flexible Benefits | 604,800 | - | - | - | - | - | 604,800 |
| Total Personal Services | \$2,359,916 | - | - | - | - | - | \$2,359,916 |
| Services & Supplies | | | | | | | |
| Office Expenses | 491,000 | - | - | - | - | - | 491,000 |
| Telecommunications | 288,000 | - | - | - | - | - | 288,000 |
| IT Expendable Property | 60,000 | - | - | - | - | - | 60,000 |
| Total Services & Supplies | \$839,000 | - | - | - | - | - | \$839,000 |
| Total Expenditures | | | | | | | |
| Total Expenditures | 3,198,916 | - | - | - | - | - | 3,198,916 |
| Total Expenditures | \$3,198,916 | - | - | - | - | - | \$3,198,916 |

TRIAL COURTS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 405 - Support Effective Circuit Court Programs

Cross Reference Name: Trial Courts

Cross Reference Number: 19800-100-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|----------------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|-----------|
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |
| Total Positions | | | | | | | |
| Total Positions | | | | | | | 20 |
| Total Positions | - | - | - | - | - | - | 20 |
| Total FTE | | | | | | | |
| Total FTE | | | | | | | 17.16 |
| Total FTE | - | - | - | - | - | - | 17.16 |

TRIAL COURTS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 406 - Multnomah County Violations Processing Staff

Cross Reference Name: Trial Courts

Cross Reference Number: 19800-100-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|------------------|---------------|-------------|---------------|------------------------|--------------------------|------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 741,696 | - | - | - | - | - | 741,696 |
| Total Revenues | \$741,696 | - | - | - | - | - | \$741,696 |
| Personal Services | | | | | | | |
| Class/Unclass Sal. and Per Diem | 370,188 | - | - | - | - | - | 370,188 |
| Empl. Rel. Bd. Assessments | 300 | - | - | - | - | - | 300 |
| Public Employees' Retire Cont | 70,668 | - | - | - | - | - | 70,668 |
| Social Security Taxes | 28,320 | - | - | - | - | - | 28,320 |
| Worker's Comp. Assess. (WCD) | 360 | - | - | - | - | - | 360 |
| Flexible Benefits | 181,440 | - | - | - | - | - | 181,440 |
| Total Personal Services | \$651,276 | - | - | - | - | - | \$651,276 |
| Services & Supplies | | | | | | | |
| Office Expenses | 46,500 | - | - | - | - | - | 46,500 |
| Telecommunications | 25,920 | - | - | - | - | - | 25,920 |
| IT Expendable Property | 18,000 | - | - | - | - | - | 18,000 |
| Total Services & Supplies | \$90,420 | - | - | - | - | - | \$90,420 |
| Total Expenditures | | | | | | | |
| Total Expenditures | 741,696 | - | - | - | - | - | 741,696 |
| Total Expenditures | \$741,696 | - | - | - | - | - | \$741,696 |

TRIAL COURTS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 406 - Multnomah County Violations Processing Staff

Cross Reference Name: Trial Courts

Cross Reference Number: 19800-100-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|----------------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|-----------|
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |
| Total Positions | | | | | | | |
| Total Positions | | | | | | | 6 |
| Total Positions | - | - | - | - | - | - | 6 |
| Total FTE | | | | | | | |
| Total FTE | | | | | | | 5.28 |
| Total FTE | - | - | - | - | - | - | 5.28 |

TRIAL COURTS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 409 - Treatment/Speciality Courts Grant Funding

Cross Reference Name: Trial Courts

Cross Reference Number: 19800-100-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|--------------|---------------|--------------------|---------------|------------------------|--------------------------|--------------------|
| Revenues | | | | | | | |
| Grants (Non-Fed) | - | - | 4,109,856 | - | - | - | 4,109,856 |
| Total Revenues | - | - | \$4,109,856 | - | - | - | \$4,109,856 |
| Personal Services | | | | | | | |
| Class/Unclass Sal. and Per Diem | - | - | 2,181,504 | - | - | - | 2,181,504 |
| Empl. Rel. Bd. Assessments | - | - | 1,083 | - | - | - | 1,083 |
| Public Employees' Retire Cont | - | - | 416,442 | - | - | - | 416,442 |
| Social Security Taxes | - | - | 166,896 | - | - | - | 166,896 |
| Worker's Comp. Assess. (WCD) | - | - | 1,311 | - | - | - | 1,311 |
| Flexible Benefits | - | - | 656,640 | - | - | - | 656,640 |
| Other OPE | - | - | 425,000 | - | - | - | 425,000 |
| Total Personal Services | - | - | \$3,848,876 | - | - | - | \$3,848,876 |
| Services & Supplies | | | | | | | |
| Office Expenses | - | - | 200,000 | - | - | - | 200,000 |
| Telecommunications | - | - | 6,980 | - | - | - | 6,980 |
| IT Expendable Property | - | - | 54,000 | - | - | - | 54,000 |
| Total Services & Supplies | - | - | \$260,980 | - | - | - | \$260,980 |
| Total Expenditures | | | | | | | |
| Total Expenditures | - | - | 4,109,856 | - | - | - | 4,109,856 |
| Total Expenditures | - | - | \$4,109,856 | - | - | - | \$4,109,856 |

TRIAL COURTS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 409 - Treatment/Speciality Courts Grant Funding

Cross Reference Name: Trial Courts

Cross Reference Number: 19800-100-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|----------------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|-----------|
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |
| Total Positions | | | | | | | |
| Total Positions | | | | | | | 19 |
| Total Positions | - | - | - | - | - | - | 19 |
| Total FTE | | | | | | | |
| Total FTE | | | | | | | 19.00 |
| Total FTE | - | - | - | - | - | - | 19.00 |

TRIAL COURTS

PPDPFISCAL – PICS Package Fiscal Impact Report

| 08/05/16 REPORT NO.: PPDPFISCAL | | | | | | | | DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM | | | | PAGE | 1 |
|--------------------------------------|-------|-------|-----------------------------------|------------|-----|------|------|---|------------------|---------------|---------------|---------------------------------|------------------|
| REPORT: PACKAGE FISCAL IMPACT REPORT | | | | | | | | | | | | 2017-19 | PROD FILE |
| AGENCY:19800 JUDICIAL DEPARTMENT | | | | | | | | | | | | PICS SYSTEM: BUDGET PREPARATION | |
| SUMMARY XREF:100-00-00 Trial Courts | | | | | | | | PACKAGE: 401 - New Judgeships & Support Staff | | | | | |
| POSITION NUMBER | CLASS | COMP | CLASS NAME | POS CNT | FTE | MOS | STEP | RATE | GF SAL/OPE | OF SAL/OPE | FF SAL/OPE | LF SAL/OPE | AF SAL/OPE |
| 6001998 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6001999 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002000 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002001 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002002 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002003 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002004 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002005 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002006 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002007 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002008 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002009 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002010 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002011 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002012 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002013 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |

TRIAL COURTS

08/05/16 REPORT NO.: PDPFISCAL
 REPORT: PACKAGE FISCAL IMPACT REPORT
 AGENCY:19800 JUDICIAL DEPARTMENT
 SUMMARY XREF:100-00-00 Trial Courts

DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM

PAGE 2
 2017-19
 PROD FILE
 PICS SYSTEM: BUDGET PREPARATION

PACKAGE: 401 - New Judgeships & Support Staff

| POSITION NUMBER | CLASS | COMP | CLASS NAME | POS CNT | FTE | MOS | STEP | RATE | GF SAL/OPE | OF SAL/OPE | FF SAL/OPE | LF SAL/OPE | AF SAL/OPE |
|--------------------------------|-------|-------|-----------------------------------|------------|------|--------|------|----------|------------------|---------------|---------------|---------------|------------------|
| 6002014 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002015 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002016 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002017 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002018 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002019 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002020 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002021 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002022 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002023 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| 6002024 | JUA | J9740 | AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .33 | 8.00 | 02 | 2,938.00 | 23,504 17,847 | | | | 23,504 17,847 |
| TOTAL PICS SALARY | | | | | | | | | 634,608 | | | | 634,608 |
| TOTAL PICS OPE | | | | | | | | | 481,869 | | | | 481,869 |
| TOTAL PICS PERSONAL SERVICES = | | | | 27 | 8.91 | 216.00 | | | 1,116,477 | | | | 1,116,477 |

TRIAL COURTS

08/05/16 REPORT NO.: PDPFISCAL DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM PAGE 3
 REPORT: PACKAGE FISCAL IMPACT REPORT 2017-19 PROD FILE
 AGENCY:19800 JUDICIAL DEPARTMENT PICS SYSTEM: BUDGET PREPARATION
 SUMMARY XREF:100-00-00 Trial Courts PACKAGE: 403 - Judicial Resources - Hearings

| POSITION NUMBER CLASS COMP CLASS NAME | POS CNT | FTE | MOS | STEP | RATE | GF SAL/OPE | OF SAL/OPE | FF SAL/OPE | LF SAL/OPE | AF SAL/OPE |
|---|------------|-----|-------|------|----------|-------------------|---------------|---------------|---------------|-------------------|
| 6002025 JM J9718 AA HEARINGS REFEREE | 1 | .88 | 21.00 | 02 | 6,414.00 | 134,694 68,278 | | | | 134,694 68,278 |
| 6002026 JUA J9740 AA JUDICIAL SERVICES SPECIALIST 3 | 1 | .88 | 21.00 | 02 | 2,938.00 | 61,698 46,848 | | | | 61,698 46,848 |
| 6002027 JM J9718 AA HEARINGS REFEREE | 1 | .88 | 21.00 | 02 | 6,414.00 | 134,694 68,278 | | | | 134,694 68,278 |
| 6002028 JM J9718 AA HEARINGS REFEREE | 1 | .88 | 21.00 | 02 | 6,414.00 | 134,694 68,278 | | | | 134,694 68,278 |
| 6002029 JM J9718 AA HEARINGS REFEREE | 1 | .88 | 21.00 | 02 | 6,414.00 | 134,694 68,278 | | | | 134,694 68,278 |
| TOTAL PICS SALARY | | | | | | 600,474 | | | | 600,474 |
| TOTAL PICS OPE | | | | | | 319,960 | | | | 319,960 |
| TOTAL PICS PERSONAL SERVICES = | | | | | | 920,434 | | | | 920,434 |

TRIAL COURTS

08/05/16 REPORT NO.: PDPFISCAL DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM PAGE 4
 REPORT: PACKAGE FISCAL IMPACT REPORT 2017-19 PROD FILE
 AGENCY:19800 JUDICIAL DEPARTMENT PICS SYSTEM: BUDGET PREPARATION
 SUMMARY XREF:100-00-00 Trial Courts PACKAGE: 405 - Support Effective Circuit Cour

| POSITION NUMBER | CLASS COMP | CLASS NAME | POS CNT | FTE | MOS | STEP | RATE | GF SAL/OPE | OF SAL/OPE | FF SAL/OPE | LF SAL/OPE | AF SAL/OPE |
|--------------------|------------------|-----------------------|------------|-----|-------|------|----------|------------------|---------------|---------------|---------------|------------------|
| 6002030 | JUA J9742 AA OJD | PROGRAM COORDINATOR 1 | 1 | .88 | 21.00 | 02 | 3,237.00 | 67,977 48,527 | | | | 67,977 48,527 |
| 6002031 | JUA J9742 AA OJD | PROGRAM COORDINATOR 1 | 1 | .88 | 21.00 | 02 | 3,237.00 | 67,977 48,527 | | | | 67,977 48,527 |
| 6002032 | JUA J9742 AA OJD | PROGRAM COORDINATOR 1 | 1 | .88 | 21.00 | 02 | 3,237.00 | 67,977 48,527 | | | | 67,977 48,527 |
| 6002033 | JUA J9742 AA OJD | PROGRAM COORDINATOR 1 | 1 | .88 | 21.00 | 02 | 3,237.00 | 67,977 48,527 | | | | 67,977 48,527 |
| 6002034 | JUA J9742 AA OJD | PROGRAM COORDINATOR 1 | 1 | .88 | 21.00 | 02 | 3,237.00 | 67,977 48,527 | | | | 67,977 48,527 |
| 6002035 | JUA J9742 AA OJD | PROGRAM COORDINATOR 1 | 1 | .88 | 21.00 | 02 | 3,237.00 | 67,977 48,527 | | | | 67,977 48,527 |
| 6002036 | JUA J9742 AA OJD | PROGRAM COORDINATOR 1 | 1 | .88 | 21.00 | 02 | 3,237.00 | 67,977 48,527 | | | | 67,977 48,527 |
| 6002037 | JUA J9742 AA OJD | PROGRAM COORDINATOR 1 | 1 | .88 | 21.00 | 02 | 3,237.00 | 67,977 48,527 | | | | 67,977 48,527 |
| 6002038 | JUA J9742 AA OJD | PROGRAM COORDINATOR 1 | 1 | .88 | 21.00 | 02 | 3,237.00 | 67,977 48,527 | | | | 67,977 48,527 |
| 6002039 | JUA J9742 AA OJD | PROGRAM COORDINATOR 1 | 1 | .88 | 21.00 | 02 | 3,237.00 | 67,977 48,527 | | | | 67,977 48,527 |
| 6002040 | JUA J9742 AA OJD | PROGRAM COORDINATOR 1 | 1 | .88 | 21.00 | 02 | 3,237.00 | 67,977 48,527 | | | | 67,977 48,527 |
| 6002041 | JUA J9742 AA OJD | PROGRAM COORDINATOR 1 | 1 | .88 | 21.00 | 02 | 3,237.00 | 67,977 48,527 | | | | 67,977 48,527 |
| 6002042 | JUA J9742 AA OJD | PROGRAM COORDINATOR 1 | 1 | .88 | 21.00 | 02 | 3,237.00 | 67,977 48,527 | | | | 67,977 48,527 |
| 6002043 | JUA J9742 AA OJD | PROGRAM COORDINATOR 1 | 1 | .88 | 21.00 | 02 | 3,237.00 | 67,977 48,527 | | | | 67,977 48,527 |
| 6002044 | JUA J9742 AA OJD | PROGRAM COORDINATOR 1 | 1 | .88 | 21.00 | 02 | 3,237.00 | 67,977 48,527 | | | | 67,977 48,527 |
| 6002045 | JUA J9742 AA OJD | PROGRAM COORDINATOR 1 | 1 | .88 | 21.00 | 02 | 3,237.00 | 67,977 48,527 | | | | 67,977 48,527 |

TRIAL COURTS

08/05/16 REPORT NO.: PPDPFISCAL DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM PAGE 5
 REPORT: PACKAGE FISCAL IMPACT REPORT 2017-19 PROD FILE
 AGENCY:19800 JUDICIAL DEPARTMENT PICS SYSTEM: BUDGET PREPARATION
 SUMMARY XREF:100-00-00 Trial Courts PACKAGE: 405 - Support Effective Circuit Cour

| POSITION | | | | POS | | | | | GF | OF | FF | LF | AF |
|--------------------------------|-------|-------|------------------------------|-----|-------|--------|------|----------|-----------|---------|---------|---------|-----------|
| NUMBER | CLASS | COMP | CLASS NAME | CNT | FTE | MOS | STEP | RATE | SAL/OPE | SAL/OPE | SAL/OPE | SAL/OPE | SAL/OPE |
| 6002046 | JUA | J9742 | AA OJD PROGRAM COORDINATOR 1 | 1 | .88 | 21.00 | 02 | 3,237.00 | 67,977 | | | | 67,977 |
| | | | | | | | | | 48,527 | | | | 48,527 |
| 6002047 | JUA | J9744 | AA OJD PROGRAM COORDINATOR 3 | 1 | .88 | 21.00 | 02 | 4,340.00 | 91,140 | | | | 91,140 |
| | | | | | | | | | 54,721 | | | | 54,721 |
| 6002048 | JUA | J9645 | AA OJD ANALYST 3 | 1 | .88 | 21.00 | 02 | 5,023.00 | 105,483 | | | | 105,483 |
| | | | | | | | | | 58,556 | | | | 58,556 |
| 6002049 | JUA | J9674 | AA MANAGEMENT ASSISTANT 1 | 1 | .44 | 10.50 | 02 | 2,938.00 | 30,849 | | | | 30,849 |
| | | | | | | | | | 38,599 | | | | 38,599 |
| TOTAL PICS SALARY | | | | | | | | | 1,383,081 | | | | 1,383,081 |
| TOTAL PICS OPE | | | | | | | | | 976,835 | | | | 976,835 |
| TOTAL PICS PERSONAL SERVICES = | | | | 20 | 17.16 | 409.50 | | | 2,359,916 | | | | 2,359,916 |

TRIAL COURTS

08/05/16 REPORT NO.: PDPFISCAL DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM PAGE 6
 REPORT: PACKAGE FISCAL IMPACT REPORT 2017-19 PROD FILE
 AGENCY:19800 JUDICIAL DEPARTMENT PICS SYSTEM: BUDGET PREPARATION
 SUMMARY XREF:100-00-00 Trial Courts PACKAGE: 406 - Multnomah County Violations Pr

| POSITION NUMBER | CLASS COMP | CLASS NAME | POS CNT | FTE | MOS | STEP | RATE | GF SAL/OPE | OF SAL/OPE | FF SAL/OPE | LF SAL/OPE | AF SAL/OPE |
|--------------------------------|--------------|--------------------------------|------------|-----|-------|------|----------|------------------|---------------|---------------|---------------|------------------|
| 6001983 | JUA J9740 AA | JUDICIAL SERVICES SPECIALIST 3 | 1 | .88 | 21.00 | 02 | 2,938.00 | 61,698 46,848 | | | | 61,698 46,848 |
| 6001984 | JUA J9740 AA | JUDICIAL SERVICES SPECIALIST 3 | 1 | .88 | 21.00 | 02 | 2,938.00 | 61,698 46,848 | | | | 61,698 46,848 |
| 6001985 | JUA J9740 AA | JUDICIAL SERVICES SPECIALIST 3 | 1 | .88 | 21.00 | 02 | 2,938.00 | 61,698 46,848 | | | | 61,698 46,848 |
| 6001986 | JUA J9740 AA | JUDICIAL SERVICES SPECIALIST 3 | 1 | .88 | 21.00 | 02 | 2,938.00 | 61,698 46,848 | | | | 61,698 46,848 |
| 6001987 | JUA J9740 AA | JUDICIAL SERVICES SPECIALIST 3 | 1 | .88 | 21.00 | 02 | 2,938.00 | 61,698 46,848 | | | | 61,698 46,848 |
| 6001988 | JUA J9740 AA | JUDICIAL SERVICES SPECIALIST 3 | 1 | .88 | 21.00 | 02 | 2,938.00 | 61,698 46,848 | | | | 61,698 46,848 |
| TOTAL PICS SALARY | | | | | | | | 370,188 | | | | 370,188 |
| TOTAL PICS OPE | | | | | | | | 281,088 | | | | 281,088 |
| TOTAL PICS PERSONAL SERVICES = | | | | | | | | 651,276 | | | | 651,276 |

TRIAL COURTS

08/05/16 REPORT NO.: PDPFISCAL
 REPORT: PACKAGE FISCAL IMPACT REPORT
 AGENCY:19800 JUDICIAL DEPARTMENT
 SUMMARY XREF:100-00-00 Trial Courts

DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM

PAGE 7

2017-19 PROD FILE

PICS SYSTEM: BUDGET PREPARATION

PACKAGE: 409 - Treatment/Speciality Courts Gr

| POSITION NUMBER | CLASS | COMP | CLASS NAME | POS CNT | FTE | MOS | STEP | RATE | GF SAL/OPE | OF SAL/OPE | FF SAL/OPE | LF SAL/OPE | AF SAL/OPE |
|--------------------|-------|----------|---------------------------|------------|------|-------|------|----------|---------------|-------------------|---------------|---------------|-------------------|
| 6001964 | JUA | J9745 AA | OJD PROGRAM COORDINATOR 4 | 1 | 1.00 | 24.00 | 02 | 4,784.00 | | 114,816 65,388 | | | 114,816 65,388 |
| 6001965 | JUA | J9745 AA | OJD PROGRAM COORDINATOR 4 | 1 | 1.00 | 24.00 | 02 | 4,784.00 | | 114,816 65,388 | | | 114,816 65,388 |
| 6001966 | JUA | J9745 AA | OJD PROGRAM COORDINATOR 4 | 1 | 1.00 | 24.00 | 02 | 4,784.00 | | 114,816 65,388 | | | 114,816 65,388 |
| 6001967 | JUA | J9745 AA | OJD PROGRAM COORDINATOR 4 | 1 | 1.00 | 24.00 | 02 | 4,784.00 | | 114,816 65,388 | | | 114,816 65,388 |
| 6001968 | JUA | J9745 AA | OJD PROGRAM COORDINATOR 4 | 1 | 1.00 | 24.00 | 02 | 4,784.00 | | 114,816 65,388 | | | 114,816 65,388 |
| 6001969 | JUA | J9745 AA | OJD PROGRAM COORDINATOR 4 | 1 | 1.00 | 24.00 | 02 | 4,784.00 | | 114,816 65,388 | | | 114,816 65,388 |
| 6001970 | JUA | J9745 AA | OJD PROGRAM COORDINATOR 4 | 1 | 1.00 | 24.00 | 02 | 4,784.00 | | 114,816 65,388 | | | 114,816 65,388 |
| 6001971 | JUA | J9745 AA | OJD PROGRAM COORDINATOR 4 | 1 | 1.00 | 24.00 | 02 | 4,784.00 | | 114,816 65,388 | | | 114,816 65,388 |
| 6001972 | JUA | J9745 AA | OJD PROGRAM COORDINATOR 4 | 1 | 1.00 | 24.00 | 02 | 4,784.00 | | 114,816 65,388 | | | 114,816 65,388 |
| 6001973 | JUA | J9745 AA | OJD PROGRAM COORDINATOR 4 | 1 | 1.00 | 24.00 | 02 | 4,784.00 | | 114,816 65,388 | | | 114,816 65,388 |
| 6001974 | JUA | J9745 AA | OJD PROGRAM COORDINATOR 4 | 1 | 1.00 | 24.00 | 02 | 4,784.00 | | 114,816 65,388 | | | 114,816 65,388 |
| 6001975 | JUA | J9745 AA | OJD PROGRAM COORDINATOR 4 | 1 | 1.00 | 24.00 | 02 | 4,784.00 | | 114,816 65,388 | | | 114,816 65,388 |
| 6001976 | JUA | J9745 AA | OJD PROGRAM COORDINATOR 4 | 1 | 1.00 | 24.00 | 02 | 4,784.00 | | 114,816 65,388 | | | 114,816 65,388 |
| 6001977 | JUA | J9745 AA | OJD PROGRAM COORDINATOR 4 | 1 | 1.00 | 24.00 | 02 | 4,784.00 | | 114,816 65,388 | | | 114,816 65,388 |
| 6001978 | JUA | J9745 AA | OJD PROGRAM COORDINATOR 4 | 1 | 1.00 | 24.00 | 02 | 4,784.00 | | 114,816 65,388 | | | 114,816 65,388 |
| 6001979 | JUA | J9745 AA | OJD PROGRAM COORDINATOR 4 | 1 | 1.00 | 24.00 | 02 | 4,784.00 | | 114,816 65,388 | | | 114,816 65,388 |

TRIAL COURTS

08/05/16 REPORT NO.: PDPDFISCAL DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM PAGE 8
 REPORT: PACKAGE FISCAL IMPACT REPORT 2017-19 PROD FILE
 AGENCY:19800 JUDICIAL DEPARTMENT PICS SYSTEM: BUDGET PREPARATION
 SUMMARY XREF:100-00-00 Trial Courts PACKAGE: 409 - Treatment/Speciality Courts Gr

| POSITION | | | POS | | | | | GF | OF | FF | LF | AF |
|--------------------------------|-------|-------|------------------------------|-----|-------|--------|------|----------|-----------|---------|---------|-----------|
| NUMBER | CLASS | COMP | CLASS NAME | CNT | FTE | MOS | STEP | RATE | SAL/OPE | SAL/OPE | SAL/OPE | SAL/OPE |
| 6001980 | JUA | J9745 | AA OJD PROGRAM COORDINATOR 4 | 1 | 1.00 | 24.00 | 02 | 4,784.00 | | 114,816 | | 114,816 |
| | | | | | | | | | | 65,388 | | 65,388 |
| 6001981 | JUA | J9745 | AA OJD PROGRAM COORDINATOR 4 | 1 | 1.00 | 24.00 | 02 | 4,784.00 | | 114,816 | | 114,816 |
| | | | | | | | | | | 65,388 | | 65,388 |
| 6001982 | JUA | J9745 | AA OJD PROGRAM COORDINATOR 4 | 1 | 1.00 | 24.00 | 02 | 4,784.00 | | 114,816 | | 114,816 |
| | | | | | | | | | | 65,388 | | 65,388 |
| TOTAL PICS SALARY | | | | | | | | | 2,181,504 | | | 2,181,504 |
| TOTAL PICS OPE | | | | | | | | | 1,242,372 | | | 1,242,372 |
| | | | | --- | ----- | ----- | | ----- | ----- | ----- | ----- | ----- |
| TOTAL PICS PERSONAL SERVICES = | | | | 19 | 19.00 | 456.00 | | | 3,423,876 | | | 3,423,876 |

TRIAL COURTS

BPR012 – Detail of Lottery Funds, Other Funds, and Federal Funds Revenue

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

| Judicial Dept 2017-19 Biennium | | | | | Agency Number: 19800 Cross Reference Number: 19800-100-00-00-00000 | |
|-----------------------------------|--------------------|-------------------------------|--------------------------------|----------------------------------|---|-------------------------------|
| Source | 2013-15 Actuals | 2015-17 Leg Adopted Budget | 2015-17 Leg Approved Budget | 2017-19 Agency Request Budget | 2017-19 Governor's Budget | 2017-19 Leg Adopted Budget |
| Other Funds | | | | | | |
| State Court Fees | - | 144,135,586 | 144,135,586 | 139,306,124 | - | - |
| Federal Revenues | 1,020,920 | - | - | - | - | - |
| Fines and Forfeitures | - | 117,710,157 | 117,710,157 | 115,199,756 | - | - |
| Donations | 30,000 | - | - | - | - | - |
| Grants (Non-Fed) | 1,810,303 | 3,609,522 | 3,881,674 | 5,249,592 | - | - |
| Other Revenues | - | - | - | 20,566 | - | - |
| Transfer In - Intrafund | 483,030 | - | - | - | - | - |
| Tsfr From Criminal Justice Comm | 12,650 | - | - | - | - | - |
| Tsfr From Public Def Svcs Comm | 2,722,500 | 3,067,491 | 3,067,491 | 3,291,744 | - | - |
| Transfer Out - Intrafund | - | (15,985,520) | (15,985,520) | (15,856,666) | - | - |
| Transfer to General Fund | - | (123,942,908) | (123,942,908) | (119,051,837) | - | - |
| Transfer to Cities | - | (24,399,425) | (24,399,425) | (24,399,425) | - | - |
| Transfer to Counties | - | (7,611,275) | (7,611,275) | (7,517,367) | - | - |
| Tsfr To Revenue, Dept of | - | (85,699,457) | (85,699,457) | (83,282,964) | - | - |
| Tsfr To Public Def Svcs Comm | - | (3,705,255) | (3,705,255) | (3,910,748) | - | - |
| Total Other Funds | \$6,079,403 | \$7,178,916 | \$7,451,068 | \$9,048,775 | - | - |
| Federal Funds | | | | | | |
| Federal Funds | 67,276 | 340,000 | 340,000 | - | - | - |
| Total Federal Funds | \$67,276 | \$340,000 | \$340,000 | - | - | - |

ADMINISTRATION AND CENTRAL SUPPORT

Administration and Central Support

Office of the State Court Administrator

State Court Administrator: The State Court Administrator (SCA) position in the Oregon Judicial Department (OJD) was first statutorily created by the 1971 Legislative Assembly. The duties of the SCA are established and defined primarily in ORS chapter 8; however, a wide variety of other statutes assign additional responsibilities. The position supports and assists the Chief Justice in exercising administrative authority and supervision over the circuit, tax, and appellate courts of this state and in establishing and managing statewide administrative policies and procedures for OJD as both an entity and a branch of state government. In this capacity, the SCA supervises administration of OJD's central business and infrastructure services for the court system such as budget, accounting, procurement, human resources, legal, internal audit, education and outreach, statewide forms and materials, information technology infrastructure, and technology initiatives such as the recently implemented Oregon eCourt program.

In addition, the SCA has responsibility for administrative management of the Appellate Court Records section, State of Oregon Law Library, OJD publications, OJD security and emergency preparedness program, OJD court interpreter certification and services program, OJD shorthand reporter program, juvenile court improvement program, family law services, and state Citizen Review Board program. The SCA also oversees the legislative program in OJD's coordination of bills affecting the branch or OJD as a state entity, and preparation of fiscal impact statements; serves as secretary to the Judicial Conference; and provides support to OJD and related external committees. The position also is statutorily charged with calculating and publishing the annual adjustments to the limitations on the liability of public bodies for property damage or destruction (Oregon Tort Claims Act Limitations).

To support carrying out these statutory duties and responsibilities, the SCA has organized the Office of the State Court Administrator (OSCA) into twelve major divisions and program areas. Prior to 2009, OSCA housed the Court Programs and Services Division that provided a full range of policy, analytical, and technical support in case management for all case types, including program support for family law *pro se*, facilitation centers, and treatment courts. It also developed and maintained OJD's strategic planning efforts and performance measures as well as provided internal and external committee support. The severe budget reductions of that biennium resulted in the elimination of the division and personnel. Other minimum mandatory functions were retained and reassigned to other personnel but many functions had to be eliminated and have not yet been restored due to resource constraints.

Divisions and Program Sections

Executive Services Division: The Executive Services Division serves as the central administrative and governance coordination hub for OSCA. This division includes the SCA as its direct supervisor and contains several legal, analytical, and administrative support staff. The staff provides specific direct services and central executive coordination for the SCA in overall OJD administration, and with other state agencies, the Legislature, public and other external organizations. Major functions include the following:

ADMINISTRATION AND CENTRAL SUPPORT

- Support unit staff provides central office reception and assistance services for OSCA, OJD, and the public. Staff also prepares and coordinates official OJD and OSCA documents and communications, manages policy information databases, and manages official OSCA and OJD information distribution systems.
- Legal and analyst staff reviews, evaluates, and responds to a variety of public record requests and also handles a wide range of general media and public information inquiries, issues, and requests. They centrally coordinate OJD's legislative and intergovernmental relations efforts and provide data, legal and fiscal analysis services for those purposes and oversee the reporting of changes and implementation plans post session.
- Legal and analyst staff also researches and oversees the OJD administrative policy and procedure development process. In addition, staff manages the OJD records retention disposition policies and procedures, provides central policy support for Americans with Disabilities Act compliance, manages the Certified Shorthand Reporters program, prepares specific publications and fee schedules, and updates criminal law forms and documents required by statute. Legal staff supports the Judicial Conference's Judicial Conduct Committee, serves as Reporter to the Uniform Trial Court Rules Committee, provides civil and criminal law policy support, and provides law clerk assistance for small/rural courts. Staff manages the statewide judicial *pro tempore* program, senior judge services, and judicial conference arrangements and its records.

Business and Fiscal Services Division: The Business and Fiscal Services Division is responsible for the central budget, fiscal, and main business functions management of OJD. Major functions include the following:

- Budget staff oversees and implements the OJD budget development process and preparation of the Chief Justice's biennial budget document consistent with state requirements. Staff coordinates the timely organization, preparation, and presentation of the OJD budget to the Legislative Ways and Means Committee.
- Analyst staff provides leadership, management, and assistance in the development, review, and implementation of policies and procedures to ensure effective and efficient operations and compliance with federal and state laws and generally accepted accounting principles as related to state government.
- Research staff analyzes the business-related processes of OJD and identifies improvements that better align processes with department strategies and which create operational efficiencies while ensuring internal controls are in place to effectively safeguard state assets.
- Revenue staff performs research and analysis of the department's revenues, fines, fees, collection efforts, and the fiscal impacts of legislative measures. Staff prepares and presents information to judicial and legislative leaders to inform them of impacts of suggested civil-, criminal-, and budget-related decisions.
- Accounting and Revenue staff performs the accounting, case party management, and liquidated and delinquent debt collection functions for all circuit courts. This includes reconciliation of statewide electronic payments, management of the interactions with debt collection contractors and the Department of Revenue, and development of related business processes in the Oregon eCourt system.

ADMINISTRATION AND CENTRAL SUPPORT

- Procurement staff coordinates the procurement processes of OJD from the development of user requirements, solicitation of vendors, scoring of proposals, and selection of contractors, to the tracking of contract deliverables and the completion of contracted work. Staff performs building administration functions to accommodate evolving needs of administrative and appellate court offices including respectful stewardship of the Supreme Court Building. Staff coordinates the disbursement request processing for the Oregon Courthouse Capital Construction and Improvement Fund.
- Principal functions include:
 - Financial reporting;
 - Collection and disbursement of court revenues;
 - Grants management;
 - Pre-audit and processing of payments;
 - Risk management;
 - Violations Bureau duties;
 - Fixed asset management, reporting, and control;
 - Application Contribution Program management, which authorizes courts to require individuals who apply for court-appointed counsel to pay an application fee and contribution amount toward the anticipated costs of court-appointed counsel if they have the financial ability to do so; and
 - Administration of the Oregon Courthouse Capital Construction and Improvement Fund.

Human Resource Services Division: The division provides a full-service personnel program to ensure that OJD meets its statutory obligations as an employer, including overseeing consistent administration and compliance with the Chief Justice’s statewide personnel system, personnel policies and rules, and ensuring an efficient and accurate payroll and benefit records system. As the sole and central OJD Human Resource Services Division (HRSD), it supports the entire statewide OJD workforce of judges and staff and, therefore, its work affects operation of the appellate courts, tax court, state administrative office, and the 27 judicial districts covering Oregon’s 36 counties.

HRSD advises the courts regarding administration of an ever-growing number of personnel-related matters, laws, policies, and programs. HRSD manages the OJD online recruitment and selection procedures, classification and compensation policies and procedures, worker safety and workers’ compensation processes, employer and employee relations, grievance and disciplinary appeals processes, and federal and state labor and wage and hour law compliance. The human resource managers provide direction and technical assistance in these functional areas and in sensitive personnel matters to presiding judges, court administrators and supervisors, and to other employees through personnel rules, policies, and programs and by

ADMINISTRATION AND CENTRAL SUPPORT

direct consultation, advice, and training. HRSD continues to perform traditional personnel and payroll recordkeeping functions and is a division that promotes a positive human work environment combined with a strategic human resources utilization approach.

Enterprise Technology Services Division: The Enterprise Technology Services Division (ETSD) supports the mission of OJD by acquiring and evaluating technology products and services; providing support to OJD administration, courts, business partners, and the public; and facilitating OJD's data and communications infrastructure. ETSD provides business solutions, system support, vendor management, and information security for OJD. ETSD provides the following services to OJD:

- Plans for, acquires, supports, and manages information technology goods and services including common off-the-shelf (COTS) and in-house developed software for OJD in a timely, cost effective manner;
- Designs, acquires, maintains, and supports advanced hardware components supporting OJD technical infrastructure;
- Provides convenient and reliable public access to judicial branch information and documents, and portal access for the electronic filing of court documents;
- Supports OJD in achieving/realizing maximum value of opportunities provided by information technology;
- Provides internal and external customers with a single point of access for problem resolution, system information, and technology guidance;
- Designs, implements, administers, and maintains a robust and secure statewide OJD data infrastructure; and
- Provides post-implementation Oregon eCourt system support to the circuit and appellate courts.

Office of Education, Training, and Outreach: The Office of Education, Training, and Outreach (OETO) is the division responsible for developing and delivering education and training programs for judges and staff, statewide electronic court business processes, and external communications, outreach and civic education materials for OJD. OETO staffs internal education committees and plans many internal meetings and events, such as the statewide meetings of presiding judges and trial court administrators, education sessions for the annual Judicial Conference, and the Chief Justice's Court Reengineering and Efficiencies Workgroup (CREW, which is part of OJD's governance structure). OETO provides unique services to advance the mission of OJD by ensuring knowledgeable and well-trained judges and staff, consistent and efficient business processes, and that internal and external customers understand the role, mission, and activities of the courts. To reflect the ongoing nature of the division's work and role in the post-Oregon eCourt program implementation era, the division name is changing to the Communication, Education and Court Management Division effective January 1, 2017.

OETO provides education and training to judges by providing a week-long orientation and education seminar for new judges as well as providing programs for earning Continuing Legal Education credits (CLEs) that judges are required to attain and report. These CLEs are provided by statewide and regional programs and practicums. Other in-state and out-of-state educational opportunities are provided when feasible.

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Staff education is provided through the statewide New Employee Orientation program as well as ongoing training for current employees. The latter includes the Judicial Support Staff program, to provide initial and updated training for staff who support judges inside and outside the courtroom; Peer Information Exchanges (PIE), for information sharing and peer-based training on statewide practices, policies, and business processes; Clerk College, which provides court staff skills and statewide business processes education and training; Supervisory C.A.M.P., management/supervisory skills training; and other skill- and knowledge-building programs. OETO has used training funding that was partly restored in 2015-17 to reinstate many training programs lost to budget cuts in previous biennia, and to re-focus the content to emphasize consistent business processes and best practices that contribute to OJD's performance measures.

Whenever possible, OETO has developed a package of "e-Training Modules" offering statewide electronic accessibility to "anytime" training – Computer Based Training (CBT) modules that develop prerequisite computer skills for Oregon eCourt Program software, and CBTs that provide general security training for judges and staff. In addition, monthly webinars on specific business processes are recorded and made available electronically for continued learning and development.

OETO was heavily involved in the development and implementation of OJD's Oregon eCourt Program, and will remain integral to its ongoing operation by testing software updates and patches, providing training to internal and external customers, developing and implementing statewide business processes for courts to promote consistency and enhance access, overseeing electronic filing systems, developing and maintaining standard reports, updating and maintaining the online 'help' system, and developing user-friendly, interview-based forms in a variety of case types for use by litigants who are not represented by attorneys.

OETO staff also plays key roles in OJD's legislative program, including post-session trainings on changes and implementation, as well as providing ongoing media, legislative, and civic outreach and support efforts.

Legal Counsel Division: The Legal Counsel Division provides legal advice and services relating to courts and court administration to all state trial and appellate courts and judges, the State Court Administrator, and OSCA divisions and programs. Services include the following:

- Legal advice, research, and analysis on issues involving court administration;
- Litigation and tort claim management and representation coordination;
- Negotiation, review and development of legal contract terms for state court system contracts;
- Circuit court civil fee schedule and related Chief Justice Orders;
- Legal policy research and analysis for the state court system;
- OJD legislative bill review, analysis and implementation; and

ADMINISTRATION AND CENTRAL SUPPORT

- Judge and employee education on legal topics.

The purpose of OJD's legal counsel services is to advance statewide uniformity in judicial administration through provision of consistent legal advice, minimize judicial branch liability risks, and enhance prudent resource management by assuring compliance with statutory and constitutional requirements and appropriate implementation of those directives.

Appellate Court Services Division: The State Court Administrator is the official "clerk of the court" for the Supreme Court and the Court of Appeals. This responsibility is overseen by the SCA but has been delegated by the SCA to an Appellate Court Administrator who manages this division and the related functions and duties. This division is housed in the Supreme Court Building and consists of the Appellate Court Records section (public clerk's office) for the Supreme Court and the Court of Appeals, the Publications section (appellate opinions), and the Supreme Court Law Library. See the Appellate and Tax Courts budget chapter ([Appellate Court Services Division](#)) for a greater description of its duties and functions.

Juvenile and Family Court Programs Division: This OSCA division includes the Citizen Review Board (CRB), Family Law Program, and Juvenile Court Improvement Program (JCIP). Through these programs, the Juvenile and Family Court Programs Division provides:

- Assistance to the courts by conducting legislatively mandated reviews of the cases of children and youth who are in substitute care (CRB);
- Education, support, and technical assistance to judges and court staff in the areas of domestic and sexual violence, elder and disabled abuse, and stalking through statewide management of Oregon's Violence Against Women Act (VAWA) grants;
- Education, support, and technical assistance to judges, court staff, and stakeholders on all child abuse and neglect and juvenile dependency case matters through statewide management of Oregon's JCIP grants;
- Consistent and accurate information and tools to help navigate the court system;
- Technical assistance and tools to improve the effectiveness, timeliness, and operation of the courts in the juvenile and family law areas;
- Education and training for judges, court staff, and stakeholders involved in juvenile and family court cases;
- Support for local juvenile court improvement and family law facilitation efforts;
- Strategic planning, performance measures, and statistical reports for juvenile and family court cases;
- Technical assistance and coordination of statewide efforts related to family law self-representation, child support liaison work, probate, guardianship, conservatorship and protective proceedings matters; and
- Support for statewide committees and task forces related to juvenile and family court matters.

ADMINISTRATION AND CENTRAL SUPPORT

A brief summary of each of the key program areas is provided below.

- **Citizen Review Board Program** – In 1985, Oregon’s legislature created a statewide foster care review program of citizen volunteers to help courts ensure that case plans and services are in place to meet the needs of children and families involved in the foster care system. The Legislature purposefully placed the CRB in the state judicial branch under the direction of the Chief Justice of the Oregon Supreme Court so it would operate independently of the state’s foster care system. Both federal and state law provide stringent timelines and policies for the state to meet in providing for the reunification or permanent placement of children, and these directives are incorporated in the timing of the reviews and protocols for plan reviews. Currently, there are 60 boards in 33 of Oregon’s 36 counties and approximately 300 volunteers serving on them statewide. CRB recruits and trains the local volunteers and coordinates the operation of the local boards. Oregon law requires the CRB to review the case plans of children and youth placed in substitute care to ensure that their placements and services are both appropriate and timely. CRB invites parents, foster parents, attorneys, caseworkers, court-appointed special advocates (CASAs), other interested parties, and the child, if appropriate, to attend the CRB review and discuss services for the family and plans for the child. The board then makes legal findings and recommendations (as required by both state and federal law) about the case. In addition to the board reviews, CRB makes recommendations to juvenile courts, the Department of Human Services, the Oregon Youth Authority, and the Legislature concerning services, policies, procedures, and laws that affect children, youth, and families. The annual reports from the CRB program is included in the [Special Reports](#) section of the budget document.
- **Family Law Program** – The statewide family law program provides technical assistance and support to family law facilitators who assist unrepresented parties involved in domestic relations proceedings in the trial courts. The program provides staffing support to the State Family Law Advisory Committee, also known as the SFLAC. The SFLAC is a statutorily-mandated committee created to advise the Chief Justice and the State Court Administrator on family law issues (ORS 3.436). The Chief Justice appoints members of the SFLAC. The family law program provides education, support, and assistance to judges and staff on family law matters including probate, guardianship, conservatorship and protective proceedings. The program evaluates policies, procedures, and laws and makes recommendations to improve access to court services for Oregon families.
- **Juvenile Court Improvement Program** – JCIP is a federally funded program that works to improve court practices in child abuse and neglect cases. The Chief Justice appoints an advisory committee to help the program define priority areas for compliance and quality improvement. Under the grants, JCIP activities require ongoing collaboration with the Department of Human Services, the Office of Public Defense Services, the Department of Justice, statewide CASA programs, and tribes. The goals and activities of JCIP are closely linked to the federal Child and Family Services Review. JCIP is responsible for collection and distribution of juvenile court statistics on a statewide basis and performing high-level liaison work to develop and evaluate policies, procedures, and laws affecting juvenile court operations statewide. JCIP develops and delivers education programs for judges, OJD staff, CRB volunteer board members, and stakeholders in the child welfare system. JCIP also supports local court improvement efforts and model court teams.
- **VAWA Grants Program** – The VAWA Grants Program is fully funded by a federal VAWA grant, allowing OJD to collaborate with many governmental and non-governmental agencies to better coordinate services to victims. This grant enables OJD to have a VAWA point of

ADMINISTRATION AND CENTRAL SUPPORT

contact within the SCA's office. This position represents OJD on several statewide multi-disciplinary groups, committees, or task forces related to domestic violence, sexual assault, elder/disabled abuse, and stalking. These collaborations result in improved coordination and joint efforts with the trial courts. The program provides educational and training programs and materials to courts and other stakeholders.

Security and Emergency Preparedness Office: Pursuant to ORS 1.177 and 1.180, and Chief Justice policy, the Judicial Marshal and the OJD Security and Emergency Preparedness Office (SEPO) manage:

- Personal and physical security, emergency preparedness, and business continuity plans for the Oregon Judiciary;
- Facility emergency operations for the Supreme Court, the Court of Appeals, the Oregon Tax Court, and the Office of the State Court Administrator;
- Identification and access cards and badges;
- Security training and threat assessment for court security officers, judges, and staff;
- OJD's emergency response trailers to maintain court and courtroom services; and
- Contracts with providers for security improvements to courthouse facilities in accordance with the Chief Justice's state security standards plan.

Court Language Access Services Program: Court Language Access Services (CLAS) coordinates interpreter services in Oregon state courts for parties, witnesses, victims, and court customers who do not speak English or have limited English skills. Oregon state courts use both staff and freelance interpreters to provide court interpreter services in more than 180 languages, including American Sign Language (ASL). CLAS schedules more than 30,000 requests per year for interpreter services for trial courts. CLAS has certified more than 204 interpreters in ASL, Cantonese, French, Korean, Mandarin, Somali, Tagalog, Spanish, Russian, and Vietnamese and has conditionally approved more than 600 interpreters of other languages. OJD's Interpreter Certification and Training Program provides training to more than 650 (based on 2015 data) interpreters, judicial officers, staff, and system partners each year.

Internal Audit Program: The Internal Audit (IA) function is an independent and objective assurance and consulting activity. IA helps promote accountability and is responsible for examining and evaluating OJD's internal control functions and activities. The IA function reports to the Chief Justice, the SCA, and the internal audit committee, which approves the annual audit plan and reviews quarterly progress and updates. IA performs change of management audits, financial-related audits, annual OJD-wide and specific area risk assessments, and reviews of internal controls of central administration and court operations. Audit scope frequently includes assessments and recommendations pertaining to opportunities for improving operational effectiveness, economy, and efficiency. IA provides a "hot line" number for reporting of fraud or misuse of funds. It is also called in on internal investigations as necessary. It further serves as an OJD liaison with external audit entities, such as the Secretary of State's Audit Division. An increasing role of IA is to provide consultative services to OJD to ensure that new programs are set up using best practices.

ADMINISTRATION AND CENTRAL SUPPORT

Current Service Level

The Current Service Level budget for Administration and Central Support totals \$63.0 million General Fund, \$15.7 million in Other Funds, and \$1.3 million in Federal Funds. This reflects a \$7.7 million increase in General Fund (13.9 percent), an \$80.2 million decrease in Other Funds (83.7 percent), and an \$0.1 million increase in Federal Funds (5.7 percent) over the 2015-17 Legislatively Approved Budget.

Chief Justice's Recommended Budget

The Chief Justice's Recommended Budget for the 2017-19 biennium totals \$85.3 million (All Funds). This amount includes policy option packages totaling \$5.3 million (All Funds):

- **Policy Option Package 404:** Technology Fund
- **Policy Option Package 408:** County Mediation and Conciliation Funding and Support

Administration and Central Support Budget Summary – All Funds

| | 2013-15 Actual Expenditures | 2015-17 Legislatively Approved Budget | 2017-19 Current Service Level (CSL) | 2017-19 Chief Justice's Recommended* |
|----------------------------------|--|--|--|---|
| General Fund | \$ 54,128,455 | \$ 55,256,265 | \$ 62,955,768 | \$ 63,127,688 |
| General Fund Debt Service | | | | |
| Other Funds Capital Construction | | | | |
| Other Funds Debt Service Ltd | | | | |
| Other Funds Ltd | \$ 7,869,282 | \$ 95,815,752 | \$ 15,658,160 | \$ 20,821,140 |
| Other Funds Non-Ltd | | | | |
| Federal Funds Ltd | \$ 1,000,399 | \$ 1,266,769 | \$ 1,339,352 | \$ 1,339,352 |
| TOTAL – ALL FUNDS | \$ 62,998,136 | \$ 152,338,786 | \$ 79,953,280 | \$ 85,288,180 |
| Positions | 163 | 186 | 179 | 187 |
| FTE | 160.87 | 177.28 | 175.95 | 183.83 |

* Includes CSL and all policy option packages

ADMINISTRATION AND CENTRAL SUPPORT

Essential Packages

Purpose

The essential packages present budget adjustments needed to bring the Legislatively Approved Budget to Current Service Level (CSL), the calculated cost of continuing legislatively approved programs into the 2017-19 biennium.

Staffing Impact

No staff is contained in Administration and Central Support for the essential packages.

Revenue Source

The essential packages increase the General Fund by \$4,745,257, decrease Other Funds by \$80,272,235, and increase Federal Funds by \$24,828.

010 Non-PICS Personal Service Adjustments

Non-PICS Personal Services adjustments for Administration and Central Support is \$167,467 General Fund, \$22,284 in Other Funds, and \$2,184 in Federal Funds. The primary components of the changes are Pension Obligation Bond increases of \$96,385 for General Fund, \$7,413 for Other Funds, and \$2,137 for Federal Funds.

021 Phase-In

The Administration and Central Support budget has no adjustment for phased-in programs.

022 Phase-Out Program and One-Time Costs

The Administration and Central Support budget has an Other Funds decrease of \$80,572,985 for phased-out programs or one-time costs.

031 Inflation and Price List Adjustments

The cost of goods and services increases totals by \$4,577,790 in General Fund, \$278,466 in Other Funds, and \$22,644 in Federal Funds. This reflects the standard inflation rate of 3.7 percent on goods and services and an increase of \$3,965,954 in state government service charges.

ADMINISTRATION AND CENTRAL SUPPORT

032 Above Standard Inflation

The Administration and Central Support budget has no adjustment for above standard inflation.

040 Mandated Caseload

The Administration and Central Support budget has no adjustment for mandated caseload.

050 Fund Shifts

The Administration and Central Support budget has no fund shifts within its CSL budget.

060 Technical Adjustments

The Administration and Central budget has no technical adjustments within its CSL budget.

ADMINISTRATION AND CENTRAL SUPPORT

Policy Option Package 404 – Technology Fund

Companion Package: No

Purpose

As statewide implementation of the Oregon eCourt system was concluded during the 2015-17 biennium, use of the State Court Technology Fund becomes more critical to support continued access for Oregonians to the increased suite of tools available for use. New functionality like eFile, ePay, and iForms has expanded access and provided new convenience options for people accessing the court system, but these options also come with operational, maintenance and transactional costs. This package seeks to retain resources added by the Legislature, increase the service and supplies budget for convenience transactional fees, and increase revenues into the fund to support those services.

How Achieved

The package would:

- Restore and make permanent seven positions authorized as Limited Duration (LD) during the 2015-17 biennium;
- Add \$6.8 million to pay projected transactional costs associated with eFile and ePay options;
- Add \$2.3 million for software maintenance fees, primarily for the Odyssey case management system, that begin in 2017-19; and,
- Increase revenues from user fees and filing fees by \$8.7 million for proposed changes to be presented to the Legislature by OJD.

Staff Impact

- | | | |
|---|-------------|----------|
| • OJD Information Technology Specialist 4 | 1 position | 1.00 FTE |
| • OJD Information Technology Specialist 2 | 1 position | 1.00 FTE |
| • OJD Information Technology Specialist 3 | 3 positions | 3.00 FTE |
| • OJD Analyst 3 | 2 positions | 2.00 FTE |

Revenue Source

\$10,690,190 – Other Funds (filing fees, user fees, fines)

ADMINISTRATION AND CENTRAL SUPPORT

Policy Option Package 408 – County Mediation and Conciliation Funding and Support

Companion Package: No

Purpose

The State of Oregon provides funds on a pass-through basis to counties for mediation/conciliation services covered under ORS Chapter 36 and ORS 107.755. Funding has remained relatively static during the last three biennia, and many counties have fully utilized their funding during a biennium and have pulled additional funding for services from county law library funding. Having mediation/conciliation services available to parties can reduce the number of cases that go before the courts, and further reduce the amount of time that the courts spend in hearings. This package provides additional funding for services and creates a statewide dedicated Alternative Dispute Resolution Coordinator.

How Achieved

The package will add one statewide position and \$2 million in new pass-through funding for mediation/conciliation services for counties.

Staffing Impact

- OJD Analyst 3 1.0 FTE 0.88 FTE (phased-in October 2017)

Revenue Source

\$2,171,920 – General Fund

ADMINISTRATION AND CENTRAL SUPPORT

ORBITS and PICS Reports

BPR013 – Essential and Policy Package Fiscal Impact Summary

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Cross Reference Name: Administration and Central Support

Pkg: 010 - Non-PICS Psnl Svc / Vacancy Factor

Cross Reference Number: 19800-102-00-00-00000

| Description | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------|------------------|---------------|-------------------|----------------|------------------------|--------------------------|-------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 167,467 | - | - | - | - | - | 167,467 |
| Federal Funds | - | - | - | 1,621 | - | - | 1,621 |
| Tsfr From Human Svcs, Dept of | - | - | 2,487 | - | - | - | 2,487 |
| Total Revenues | \$167,467 | - | \$2,487 | \$1,621 | - | - | \$171,575 |
| Personal Services | | | | | | | |
| Temporary Appointments | 17,313 | - | 1,109 | 41 | - | - | 18,463 |
| Overtime Payments | - | - | - | - | - | - | - |
| All Other Differential | 10,433 | - | 3,590 | - | - | - | 14,023 |
| Public Employees' Retire Cont | 1,992 | - | 1,370 | - | - | - | 3,362 |
| Pension Obligation Bond | 96,385 | - | 7,413 | 2,137 | - | - | 105,935 |
| Social Security Taxes | 2,122 | - | 805 | 6 | - | - | 2,933 |
| Unemployment Assessments | 27,106 | - | - | - | - | - | 27,106 |
| Mass Transit Tax | 12,116 | - | 7,997 | - | - | - | 20,113 |
| Total Personal Services | \$167,467 | - | \$22,284 | \$2,184 | - | - | \$191,935 |
| Total Expenditures | | | | | | | |
| Total Expenditures | 167,467 | - | 22,284 | 2,184 | - | - | 191,935 |
| Total Expenditures | \$167,467 | - | \$22,284 | \$2,184 | - | - | \$191,935 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | (19,797) | (563) | - | - | (20,360) |
| Total Ending Balance | - | - | (\$19,797) | (\$563) | - | - | (\$20,360) |

ADMINISTRATION AND CENTRAL SUPPORT

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Cross Reference Name: Administration and Central Support

Pkg: 022 - Phase-out Pgm & One-time Costs

Cross Reference Number: 19800-102-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|--------------|---------------|-----------------------|---------------|------------------------|--------------------------|-----------------------|
| Revenues | | | | | | | |
| General Fund Obligation Bonds | - | - | (38,917,985) | - | - | - | (38,917,985) |
| Other Revenues | - | - | (38,345,970) | - | - | - | (38,345,970) |
| Total Revenues | - | - | (\$77,263,955) | - | - | - | (\$77,263,955) |
| Services & Supplies | | | | | | | |
| Other COI Costs | - | - | (500,000) | - | - | - | (500,000) |
| Total Services & Supplies | - | - | (\$500,000) | - | - | - | (\$500,000) |
| Special Payments | | | | | | | |
| Dist to Counties | - | - | (80,072,985) | - | - | - | (80,072,985) |
| Total Special Payments | - | - | (\$80,072,985) | - | - | - | (\$80,072,985) |
| Total Expenditures | | | | | | | |
| Total Expenditures | - | - | (80,572,985) | - | - | - | (80,572,985) |
| Total Expenditures | - | - | (\$80,572,985) | - | - | - | (\$80,572,985) |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | 3,309,030 | - | - | - | 3,309,030 |
| Total Ending Balance | - | - | \$3,309,030 | - | - | - | \$3,309,030 |

ADMINISTRATION AND CENTRAL SUPPORT

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Cross Reference Name: Administration and Central Support

Pkg: 031 - Standard Inflation

Cross Reference Number: 19800-102-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|----------------------------------|--------------------|---------------|-------------|----------------|------------------------|--------------------------|--------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 4,577,790 | - | - | - | - | - | 4,577,790 |
| Federal Funds | - | - | - | 9,039 | - | - | 9,039 |
| Total Revenues | \$4,577,790 | - | - | \$9,039 | - | - | \$4,586,829 |
| Services & Supplies | | | | | | | |
| Instate Travel | 2,236 | - | 2,819 | 1,600 | - | - | 6,655 |
| Out of State Travel | 994 | - | - | 1 | - | - | 995 |
| Employee Training | 2,950 | - | 8,656 | 2,060 | - | - | 13,666 |
| Office Expenses | 40,371 | - | 4,076 | 709 | - | - | 45,156 |
| Telecommunications | 53,089 | - | 2,426 | 156 | - | - | 55,671 |
| State Gov. Service Charges | 3,965,954 | - | - | - | - | - | 3,965,954 |
| Data Processing | 37,438 | - | - | 23 | - | - | 37,461 |
| Publicity and Publications | - | - | - | - | - | - | - |
| Professional Services | 9,908 | - | 18,167 | 9,154 | - | - | 37,229 |
| IT Professional Services | 10,117 | - | 5,127 | 8,454 | - | - | 23,698 |
| Attorney General | 27,252 | - | - | - | - | - | 27,252 |
| Employee Recruitment and Develop | 149 | - | - | 16 | - | - | 165 |
| Dues and Subscriptions | 28,274 | - | 103 | 75 | - | - | 28,452 |
| Facilities Rental and Taxes | 250,692 | - | 2,427 | - | - | - | 253,119 |
| Fuels and Utilities | 9,025 | - | - | 2 | - | - | 9,027 |
| Facilities Maintenance | 5,853 | - | - | 5 | - | - | 5,858 |
| Agency Program Related S and S | 11,981 | - | - | 12 | - | - | 11,993 |
| Other Services and Supplies | 25,836 | - | 213,110 | 23 | - | - | 238,969 |
| Expendable Prop 250 - 5000 | 478 | - | 190 | 222 | - | - | 890 |

ADMINISTRATION AND CENTRAL SUPPORT

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Cross Reference Name: Administration and Central Support

Pkg: 031 - Standard Inflation

Cross Reference Number: 19800-102-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|--------------------|---------------|--------------------|-------------------|------------------------|--------------------------|--------------------|
| Services & Supplies | | | | | | | |
| IT Expendable Property | 8,793 | - | 1,258 | 132 | - | - | 10,183 |
| Total Services & Supplies | \$4,491,390 | - | \$258,359 | \$22,644 | - | - | \$4,772,393 |
| Capital Outlay | | | | | | | |
| Telecommunications Equipment | - | - | - | - | - | - | - |
| Industrial and Heavy Equipment | - | - | - | - | - | - | - |
| Data Processing Software | - | - | - | - | - | - | - |
| Data Processing Hardware | 86,400 | - | 20,107 | - | - | - | 106,507 |
| Total Capital Outlay | \$86,400 | - | \$20,107 | - | - | - | \$106,507 |
| Special Payments | | | | | | | |
| Dist to Counties | - | - | - | - | - | - | - |
| Total Special Payments | - | - | - | - | - | - | - |
| Total Expenditures | | | | | | | |
| Total Expenditures | 4,577,790 | - | 278,466 | 22,644 | - | - | 4,878,900 |
| Total Expenditures | \$4,577,790 | - | \$278,466 | \$22,644 | - | - | \$4,878,900 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | (278,466) | (13,605) | - | - | (292,071) |
| Total Ending Balance | - | - | (\$278,466) | (\$13,605) | - | - | (\$292,071) |

ADMINISTRATION AND CENTRAL SUPPORT

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 070 - Revenue Shortfalls

Cross Reference Name: Administration and Central Support

Cross Reference Number: 19800-102-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|--------------|---------------|---------------|---------------|------------------------|--------------------------|---------------|
| Services & Supplies | | | | | | | |
| Other Services and Supplies | - | - | (5,527,210) | - | - | - | (5,527,210) |
| Total Services & Supplies | - | - | (\$5,527,210) | - | - | - | (\$5,527,210) |
| Total Expenditures | | | | | | | |
| Total Expenditures | - | - | (5,527,210) | - | - | - | (5,527,210) |
| Total Expenditures | - | - | (\$5,527,210) | - | - | - | (\$5,527,210) |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | 5,527,210 | - | - | - | 5,527,210 |
| Total Ending Balance | - | - | \$5,527,210 | - | - | - | \$5,527,210 |

ADMINISTRATION AND CENTRAL SUPPORT

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Cross Reference Name: Administration and Central Support

Pkg: 404 - Technology Fund

Cross Reference Number: 19800-102-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|--------------|---------------|---------------------|---------------|------------------------|--------------------------|---------------------|
| Revenues | | | | | | | |
| State Court Fees | - | - | 4,000,000 | - | - | - | 4,000,000 |
| Charges for Services | - | - | 700,000 | - | - | - | 700,000 |
| Fines and Forfeitures | - | - | 4,000,000 | - | - | - | 4,000,000 |
| Total Revenues | - | - | \$8,700,000 | - | - | - | \$8,700,000 |
| Personal Services | | | | | | | |
| Class/Unclass Sal. and Per Diem | - | - | 1,019,040 | - | - | - | 1,019,040 |
| Empl. Rel. Bd. Assessments | - | - | 399 | - | - | - | 399 |
| Public Employees' Retire Cont | - | - | 194,535 | - | - | - | 194,535 |
| Social Security Taxes | - | - | 77,957 | - | - | - | 77,957 |
| Worker's Comp. Assess. (WCD) | - | - | 483 | - | - | - | 483 |
| Flexible Benefits | - | - | 257,208 | - | - | - | 257,208 |
| Total Personal Services | - | - | \$1,549,622 | - | - | - | \$1,549,622 |
| Services & Supplies | | | | | | | |
| IT Professional Services | - | - | 2,340,568 | - | - | - | 2,340,568 |
| Other Services and Supplies | - | - | 6,800,000 | - | - | - | 6,800,000 |
| Total Services & Supplies | - | - | \$9,140,568 | - | - | - | \$9,140,568 |
| Total Expenditures | | | | | | | |
| Total Expenditures | - | - | 10,690,190 | - | - | - | 10,690,190 |
| Total Expenditures | - | - | \$10,690,190 | - | - | - | \$10,690,190 |

ADMINISTRATION AND CENTRAL SUPPORT

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Cross Reference Name: Administration and Central Support

Pkg: 404 - Technology Fund

Cross Reference Number: 19800-102-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|----------------------|--------------|---------------|---------------|---------------|------------------------|--------------------------|---------------|
| Ending Balance | | | | | | | |
| Ending Balance | - | - | (1,990,190) | - | - | - | (1,990,190) |
| Total Ending Balance | - | - | (\$1,990,190) | - | - | - | (\$1,990,190) |
| Total Positions | | | | | | | |
| Total Positions | | | | | | | 7 |
| Total Positions | - | - | - | - | - | - | 7 |
| Total FTE | | | | | | | |
| Total FTE | | | | | | | 7.00 |
| Total FTE | - | - | - | - | - | - | 7.00 |

ADMINISTRATION AND CENTRAL SUPPORT

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Cross Reference Name: Administration and Central Support

Pkg: 408 - County Mediation & Conciliation Funding and Support

Cross Reference Number: 19800-102-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|------------------|---------------|-------------|---------------|------------------------|--------------------------|------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 171,920 | - | - | - | - | - | 171,920 |
| Total Revenues | \$171,920 | - | - | - | - | - | \$171,920 |
| Personal Services | | | | | | | |
| Class/Unclass Sal. and Per Diem | 105,483 | - | - | - | - | - | 105,483 |
| Empl. Rel. Bd. Assessments | 50 | - | - | - | - | - | 50 |
| Public Employees' Retire Cont | 20,137 | - | - | - | - | - | 20,137 |
| Social Security Taxes | 8,069 | - | - | - | - | - | 8,069 |
| Worker's Comp. Assess. (WCD) | 60 | - | - | - | - | - | 60 |
| Flexible Benefits | 32,151 | - | - | - | - | - | 32,151 |
| Total Personal Services | \$165,950 | - | - | - | - | - | \$165,950 |
| Services & Supplies | | | | | | | |
| Office Expenses | 1,750 | - | - | - | - | - | 1,750 |
| Telecommunications | 720 | - | - | - | - | - | 720 |
| Employee Recruitment and Develop | 500 | - | - | - | - | - | 500 |
| IT Expendable Property | 3,000 | - | - | - | - | - | 3,000 |
| Total Services & Supplies | \$5,970 | - | - | - | - | - | \$5,970 |
| Total Expenditures | | | | | | | |
| Total Expenditures | 171,920 | - | - | - | - | - | 171,920 |
| Total Expenditures | \$171,920 | - | - | - | - | - | \$171,920 |

ADMINISTRATION AND CENTRAL SUPPORT

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Cross Reference Name: Administration and Central Support

Pkg: 408 - County Mediation & Conciliation Funding and Support

Cross Reference Number: 19800-102-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|----------------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|-----------|
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |
| Total Positions | | | | | | | |
| Total Positions | | | | | | | 1 |
| Total Positions | - | - | - | - | - | - | 1 |
| Total FTE | | | | | | | |
| Total FTE | | | | | | | 0.88 |
| Total FTE | - | - | - | - | - | - | 0.88 |

ADMINISTRATION AND CENTRAL SUPPORT

PPDPFISCAL – PICS Package Fiscal Impact Report

08/05/16 REPORT NO.: PPDPFISCAL DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM PAGE 1
 REPORT: PACKAGE FISCAL IMPACT REPORT 2017-19 PROD FILE
 AGENCY:19800 JUDICIAL DEPARTMENT PICS SYSTEM: BUDGET PREPARATION
 SUMMARY XREF:102-00-00 Administration and Central Sup PACKAGE: 404 - Technology Fund

| POSITION NUMBER | CLASS | COMP | CLASS NAME | POS CNT | FTE | MOS | STEP | RATE | GF SAL/OPE | OF SAL/OPE | FF SAL/OPE | LF SAL/OPE | AF SAL/OPE |
|--------------------------------|-------|-------|------------------|------------|------|-------|------|----------|---------------|-------------------|---------------|---------------|-------------------|
| 6001954 | JM | J9645 | AA OJD ANALYST 3 | 1 | 1.00 | 24.00 | 06 | 6,107.00 | | 146,568 76,063 | | | 146,568 76,063 |
| 6001955 | JM | J9645 | AA OJD ANALYST 3 | 1 | 1.00 | 24.00 | 04 | 5,538.00 | | 132,912 72,411 | | | 132,912 72,411 |
| 6001956 | JM | J9566 | AA OJD ITS 4 | 1 | 1.00 | 24.00 | 09 | 8,596.00 | | 206,304 92,036 | | | 206,304 92,036 |
| 6001957 | JM | J9564 | AA OJD ITS 2 | 1 | 1.00 | 24.00 | 04 | 5,023.00 | | 120,552 69,105 | | | 120,552 69,105 |
| 6001958 | JM | J9565 | AA OJD ITS 3 | 1 | 1.00 | 24.00 | 02 | 5,274.00 | | 126,576 70,716 | | | 126,576 70,716 |
| 6001959 | JM | J9565 | AA OJD ITS 3 | 1 | 1.00 | 24.00 | 05 | 6,107.00 | | 146,568 76,063 | | | 146,568 76,063 |
| 6001960 | JM | J9565 | AA OJD ITS 3 | 1 | 1.00 | 24.00 | 04 | 5,815.00 | | 139,560 74,188 | | | 139,560 74,188 |
| TOTAL PICS SALARY | | | | | | | | | | 1,019,040 | | | 1,019,040 |
| TOTAL PICS OPE | | | | | | | | | | 530,582 | | | 530,582 |
| TOTAL PICS PERSONAL SERVICES = | | | | | | | | | | 1,549,622 | | | 1,549,622 |

ADMINISTRATION AND CENTRAL SUPPORT

08/05/16 REPORT NO.: PPDPFISCAL DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM PAGE 11
REPORT: PACKAGE FISCAL IMPACT REPORT 2017-19 PROD FILE
AGENCY:19800 JUDICIAL DEPARTMENT PICS SYSTEM: BUDGET PREPARATION
SUMMARY XREF:102-00-00 Administration and Central Sup PACKAGE: 408 - County Mediation & Conciliatio

| POSITION | | | POS | | | | | | GF | OF | FF | LF | AF |
|--------------------------------|-------|-------|------------------|-----|-----|-------|------|----------|---------|---------|---------|---------|---------|
| NUMBER | CLASS | COMP | CLASS NAME | CNT | FTE | MOS | STEP | RATE | SAL/OPE | SAL/OPE | SAL/OPE | SAL/OPE | SAL/OPE |
| 6001963 | JM | J9645 | AA OJD ANALYST 3 | 1 | .88 | 21.00 | 02 | 5,023.00 | 105,483 | | | | 105,483 |
| | | | | | | | | | 60,467 | | | | 60,467 |
| TOTAL PICS SALARY | | | | | | | | | 105,483 | | | | 105,483 |
| TOTAL PICS OPE | | | | | | | | | 60,467 | | | | 60,467 |
| TOTAL PICS PERSONAL SERVICES = | | | | 1 | .88 | 21.00 | | | 165,950 | | | | 165,950 |

ADMINISTRATION AND CENTRAL SUPPORT

BPR012 – Detail of Lottery Funds, Other Funds, and Federal Funds Revenue

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

| Judicial Dept 2017-19 Biennium | | | | | Agency Number: 19800 Cross Reference Number: 19800-102-00-00-00000 | |
|-----------------------------------|---------------------|-------------------------------|--------------------------------|----------------------------------|---|-------------------------------|
| Source | 2013-15 Actuals | 2015-17 Leg Adopted Budget | 2015-17 Leg Approved Budget | 2017-19 Agency Request Budget | 2017-19 Governor's Budget | 2017-19 Leg Adopted Budget |
| Other Funds | | | | | | |
| State Court Fees | 140,158,635 | - | - | 4,000,000 | - | - |
| Charges for Services | 4,289,171 | 3,561,000 | 3,561,000 | 5,499,529 | - | - |
| Fines and Forfeitures | 116,978,499 | - | - | 4,000,000 | - | - |
| General Fund Obligation Bonds | 14,625,000 | 37,472,985 | 38,917,985 | - | - | - |
| Interest Income | 86,856 | - | - | - | - | - |
| Sales Income | 7,305 | - | - | - | - | - |
| Other Revenues | 589,871 | 36,945,970 | 38,345,970 | - | - | - |
| Transfer In - Intrafund | 4,108,437 | 4,085,520 | 4,085,520 | 3,956,666 | - | - |
| Tsfr From Human Svcs, Dept of | 2,097,284 | 1,870,062 | 1,870,062 | 2,076,494 | - | - |
| Tsfr From Justice, Dept of | 166,842 | - | - | - | - | - |
| Tsfr From Public Def Svcs Comm | - | 101,265 | 101,265 | 124,825 | - | - |
| Transfer Out - Intrafund | (16,491,467) | - | - | - | - | - |
| Transfer to General Fund | (119,812,358) | - | - | - | - | - |
| Transfer to Cities | (24,565,707) | - | - | - | - | - |
| Transfer to Counties | (5,031,370) | - | - | - | - | - |
| Tsfr To Revenue, Dept of | (87,752,928) | - | - | - | - | - |
| Tsfr To Public Def Svcs Comm | (3,608,147) | - | - | - | - | - |
| Total Other Funds | \$25,845,923 | \$84,036,802 | \$86,881,802 | \$19,657,514 | - | - |
| Federal Funds | | | | | | |
| Federal Funds | 1,007,283 | 1,258,284 | 1,266,769 | 1,339,352 | - | - |
| Total Federal Funds | \$1,007,283 | \$1,258,284 | \$1,266,769 | \$1,339,352 | - | - |

ADMINISTRATION AND CENTRAL SUPPORT

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JUDICIAL COMPENSATION

Judicial Compensation

The Judicial Compensation budget reflects the resources necessary for the compensation of Oregon's elected judicial officers. Those salaries are set by statute and are constitutionally protected from being reduced during their elected term of office. The budget provides biennial resources for the 194 elected judicial officer positions, the number of which are specified in statute for each court¹.

The salary for elected judicial officers is established in ORS chapter 292, and now includes an annual cost-of-living increase linked to the increase authorized for management service employees in the Executive Branch.

The July 2016 judicial salary survey completed by the National Center for State Courts (NCSC) showed that Oregon's judicial salaries remain in the bottom 20 percent of judicial salaries nationwide. Salary rankings in that survey for Oregon judges were: Supreme Court – 47th of 51 jurisdictions, including the District of Columbia; Court of Appeals – 36th of the 40 jurisdictions having such a court; and Circuit Court – 48th of 51 jurisdictions, including the District of Columbia.

The Legislature, in the 2016 Regular Session, increased judicial salaries by \$5,000 per year, effective January 1, 2017. That increase, if in place for the 2016 NCSC survey, would have kept judicial salaries in the bottom 20 percent of judicial salaries nationwide.

The Chief Justice's Recommended Budget includes Policy Option Package 402, which requests \$2,778,606 to fund two of three equal salary increases on January 1st of 2018, 2019 and 2020 that would fall within the 2017-19 biennium. These salary increases would increase judicial compensation to the median level of the 13 western states, and would close the gap between judicial salaries and the salaries of senior assistant attorneys general and other high-level public lawyers who appear before Oregon judges. It also would recognize the responsibility vested in judicial positions, the demands placed on judges' time, and help recruit and retain highly qualified lawyers with diversified practice backgrounds to serve on the bench.

¹ ORS 2.010 (Supreme Court – 7); ORS 2.540 (Court of Appeals – 13); ORS 3.012 (Circuit Court – 173); and ORS 305.452 (Tax Court – 1)

JUDICIAL COMPENSATION

Current Service Level

The Current Service Level budget for Judicial Compensation totals \$78.1 million General Fund, a \$4.8 million increase (6.6 percent) over the 2015-17 Legislatively Approved Budget.

Chief Justice's Recommended Budget

The Chief Justice's Recommended Budget for the 2017-19 biennium totals \$82.0 million (All Funds). This amount includes policy option packages totaling \$3.9 million (All Funds):

- **Policy Option Package 401:** New Judgeships and Support Staff
- **Policy Option Package 402:** Judicial Compensation

Judicial Compensation Budget Summary – All Funds

| | 2013-15 Actual Expenditures | 2015-17 Legislatively Approved Budget | 2017-19 Current Service Level (CSL) | 2017-19 Chief Justice's Recommended* |
|----------------------------------|--|--|--|---|
| General Fund | \$ 68,584,824 | \$ 73,257,556 | \$ 78,105,091 | \$ 81,995,930 |
| General Fund Debt Service | | | | |
| Other Funds Capital Construction | | | | |
| Other Funds Debt Service Ltd | | | | |
| Other Funds Ltd | | | | |
| Other Funds Non-Ltd | | | | |
| Federal Funds Ltd | | | | |
| TOTAL – ALL FUNDS | \$ 68,684,824 | \$ 73,257,556 | \$ 78,105,091 | \$ 81,995,930 |
| Positions | 194 | 194 | 194 | 203 |
| FTE | 193.64 | 194 | 194 | 196.25 |

* Includes CSL and all policy option packages

JUDICIAL COMPENSATION

Essential Packages

Purpose

The essential packages present budget adjustments needed to bring the Legislatively Approved Budget to Current Service Level (CSL), the calculated cost of continuing legislatively approved programs into the 2017-19 biennium.

Staffing Impact

No staff is contained in Judicial Compensation for the essential packages.

Revenue Source

The essential packages increase the General Fund by \$39,275.

010 Non-PICS Personal Service Adjustments

Non-PICS Personal Services adjustments for Judicial Compensation is \$131,584 General Fund.

021 Phase-In

The Judicial Compensation budget has no adjustment for phased-in programs.

022 Phase-Out Program and One-Time Costs

The Judicial Compensation budget has a General Fund decrease of \$92,309 for phased-out programs or one-time costs.

031 Inflation and Price List Adjustments

The Judicial Compensation budget has no adjustment for inflation and price list adjustments.

032 Above Standard Inflation

The Judicial Compensation budget has no adjustment for above standard inflation.

JUDICIAL COMPENSATION

040 Mandated Caseload

The Judicial Compensation budget has no adjustment for mandated caseload.

050 Fund Shifts

The Judicial Compensation budget has no fund shifts within its CSL budget.

060 Technical Adjustments

The Judicial Compensation budget has no technical adjustments within its CSL budget.

JUDICIAL COMPENSATION

Policy Option Package 401 – New Judgeships and Support Staff

Companion Package: No. Legislative Concept 819 introduced in the 2017 legislative session will provide the statutory vehicle to make the changes in ORS 3.012.

Purpose

The package adds new circuit court judgeships and support staff in Marion, Washington (two), Multnomah, Clackamas, Deschutes, Douglas, Jackson, and Josephine counties. The last increase in elected circuit court judicial positions was during the 2001-03 biennium. Most of these counties have undergone significant population growth and/or experienced increases in judge time intensive cases. This package seeks to increase judicial resources in order to reduce the case backlog and improve timely case disposition performance for the courts.

How Achieved

The package provides funding for permanent personnel increases, including one judicial clerk, one judicial assistant, and one general clerk for each of nine judges in eight counties, and associated Services and Supplies budget. Positions are phased in based upon judicial elections in 2018 with support positions starting in November 2018.

Staffing Impact

- | | | |
|---------------------------------|--------------|---------------------------------------|
| • Circuit Court Judge | 9 positions | 2.25 FTE (phased in January 1, 2019) |
| • Judicial Support Specialist 3 | 27 positions | 9.00 FTE (phased in November 1, 2018) |

Revenue Source

\$2,778,606 – General Fund

JUDICIAL COMPENSATION

Policy Option Package 402 – Judicial Compensation

Companion Package: No. Legislative Concept 824 introduced in the 2017 legislative session will provide the statutory vehicle to make the judicial compensation increases.

Purpose

In 2008, the Public Official Compensation Commission (POCC) recommended increasing judicial compensation in order to compensate elected judges in accordance with their responsibilities and to attract and retain a diversified and experienced bench. The 2015 Legislature approved cost of living (COLA) increases tied to state management/unrepresented classification increases and in 2016 approved a \$5,000 total yearly increase, to be implemented in January 2017. While judicial salary increases have taken place the last two biennia, judicial salaries continue to lag behind salaries in other states. Judicial salary increases proposed in this package are intended to meet medium salary levels for judges published in the National Center for State Courts (NCSC) 2016 report.

How Achieved

The package provides funding for salary increases for judges, assuming three equal increases implemented January 2018, January 2019 and January 2020. The total cumulative increase by level:

- Chief Justice – \$19,428 (12.9 percent)
- Supreme Court Justice – \$20,590 (14.0 percent)
- Chief Judge, Court of Appeals – \$20,590 (14.0 percent)
- Tax Court Judge – \$19,273 (13.8 percent)
- Circuit Court Judge – \$17,074 (12.6 percent)

Staffing Impact

None.

Revenue Source

\$2,992,360 – General Fund

JUDICIAL COMPENSATION

ORBITS and PICS Reports

BPR013 – Essential and Policy Package Fiscal Impact Summary

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 010 - Non-PICS Psnl Svc / Vacancy Factor

Cross Reference Name: Judicial Compensation

Cross Reference Number: 19800-010-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------|------------------|---------------|-------------|---------------|------------------------|--------------------------|------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 131,584 | - | - | - | - | - | 131,584 |
| Total Revenues | \$131,584 | - | - | - | - | - | \$131,584 |
| Personal Services | | | | | | | |
| Mass Transit Tax | 131,584 | - | - | - | - | - | 131,584 |
| Total Personal Services | \$131,584 | - | - | - | - | - | \$131,584 |
| Total Expenditures | | | | | | | |
| Total Expenditures | 131,584 | - | - | - | - | - | 131,584 |
| Total Expenditures | \$131,584 | - | - | - | - | - | \$131,584 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

JUDICIAL COMPENSATION

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 022 - Phase-out Pgm & One-time Costs

Cross Reference Name: Judicial Compensation

Cross Reference Number: 19800-010-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------|-------------------|---------------|-------------|---------------|------------------------|--------------------------|-------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | (92,309) | - | - | - | - | - | (92,309) |
| Total Revenues | (\$92,309) | - | - | - | - | - | (\$92,309) |
| Personal Services | | | | | | | |
| Other OPE | (92,309) | - | - | - | - | - | (92,309) |
| Total Personal Services | (\$92,309) | - | - | - | - | - | (\$92,309) |
| Total Expenditures | | | | | | | |
| Total Expenditures | (92,309) | - | - | - | - | - | (92,309) |
| Total Expenditures | (\$92,309) | - | - | - | - | - | (\$92,309) |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

JUDICIAL COMPENSATION

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept
Pkg: 031 - Standard Inflation

Cross Reference Name: Judicial Compensation
Cross Reference Number: 19800-010-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|-----------|
| Services & Supplies | | | | | | | |
| Instate Travel | - | - | - | - | - | - | - |
| Total Services & Supplies | - | - | - | - | - | - | - |
| Total Expenditures | | | | | | | |
| Total Expenditures | - | - | - | - | - | - | - |
| Total Expenditures | - | - | - | - | - | - | - |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

JUDICIAL COMPENSATION

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 401 - New Judgeships & Support Staff

Cross Reference Name: Judicial Compensation

Cross Reference Number: 19800-010-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|---------------------------------|------------------|---------------|-------------|---------------|------------------------|--------------------------|------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 898,479 | - | - | - | - | - | 898,479 |
| Total Revenues | \$898,479 | - | - | - | - | - | \$898,479 |
| Personal Services | | | | | | | |
| Class/Unclass Sal. and Per Diem | 610,992 | - | - | - | - | - | 610,992 |
| Public Employees' Retire Cont | 153,117 | - | - | - | - | - | 153,117 |
| Social Security Taxes | 46,737 | - | - | - | - | - | 46,737 |
| Worker's Comp. Assess. (WCD) | 153 | - | - | - | - | - | 153 |
| Flexible Benefits | 87,480 | - | - | - | - | - | 87,480 |
| Total Personal Services | \$898,479 | - | - | - | - | - | \$898,479 |
| Total Expenditures | | | | | | | |
| Total Expenditures | 898,479 | - | - | - | - | - | 898,479 |
| Total Expenditures | \$898,479 | - | - | - | - | - | \$898,479 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |
| Total Positions | | | | | | | |
| Total Positions | | | | | | | 9 |
| Total Positions | - | - | - | - | - | - | 9 |

JUDICIAL COMPENSATION

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 401 - New Judgeships & Support Staff

Cross Reference Name: Judicial Compensation

Cross Reference Number: 19800-010-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|-----------|
| Total FTE | | | | | | | |
| Total FTE | | | | | | | 2.25 |
| Total FTE | - | - | - | - | - | - | 2.25 |

JUDICIAL COMPENSATION

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept
Pkg: 402 - Judicial Compensation

Cross Reference Name: Judicial Compensation
Cross Reference Number: 19800-010-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------|--------------------|---------------|-------------|---------------|------------------------|--------------------------|--------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 2,992,360 | - | - | - | - | - | 2,992,360 |
| Total Revenues | \$2,992,360 | - | - | - | - | - | \$2,992,360 |
| Personal Services | | | | | | | |
| Other OPE | 2,992,360 | - | - | - | - | - | 2,992,360 |
| Total Personal Services | \$2,992,360 | - | - | - | - | - | \$2,992,360 |
| Total Expenditures | | | | | | | |
| Total Expenditures | 2,992,360 | - | - | - | - | - | 2,992,360 |
| Total Expenditures | \$2,992,360 | - | - | - | - | - | \$2,992,360 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

JUDICIAL COMPENSATION

PPDPFISCAL – PICS Package Fiscal Impact Report

07/29/16 REPORT NO.: PPDPFISCAL DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM PAGE 1
 REPORT: PACKAGE FISCAL IMPACT REPORT 2017-19 PROD FILE
 AGENCY:19700 JUDICIAL DEPT-JUDGES IN PERS PICS SYSTEM: BUDGET PREPARATION
 SUMMARY XREF:010-00-00 Judicial Compensation PACKAGE: 401 - New Judgeships & Support Staff

| POSITION NUMBER CLASS COMP CLASS NAME | POS CNT | FTE | MOS | STEP | RATE | GF SAL/OPE | OF SAL/OPE | FF SAL/OPE | LF SAL/OPE | AF SAL/OPE |
|--|------------|------|-------|------|-----------|------------------|---------------|---------------|---------------|------------------|
| 6001989 JE Y9724 AB JUDGE CIRCUIT COURT | 1 | .25 | 6.00 | 01 | 11,314.66 | 67,888 31,943 | | | | 67,888 31,943 |
| 6001990 JE Y9724 AB JUDGE CIRCUIT COURT | 1 | .25 | 6.00 | 01 | 11,314.66 | 67,888 31,943 | | | | 67,888 31,943 |
| 6001991 JE Y9724 AB JUDGE CIRCUIT COURT | 1 | .25 | 6.00 | 01 | 11,314.66 | 67,888 31,943 | | | | 67,888 31,943 |
| 6001992 JE Y9724 AB JUDGE CIRCUIT COURT | 1 | .25 | 6.00 | 01 | 11,314.66 | 67,888 31,943 | | | | 67,888 31,943 |
| 6001993 JE Y9724 AB JUDGE CIRCUIT COURT | 1 | .25 | 6.00 | 01 | 11,314.66 | 67,888 31,943 | | | | 67,888 31,943 |
| 6001994 JE Y9724 AB JUDGE CIRCUIT COURT | 1 | .25 | 6.00 | 01 | 11,314.66 | 67,888 31,943 | | | | 67,888 31,943 |
| 6001995 JE Y9724 AB JUDGE CIRCUIT COURT | 1 | .25 | 6.00 | 01 | 11,314.66 | 67,888 31,943 | | | | 67,888 31,943 |
| 6001996 JE Y9724 AB JUDGE CIRCUIT COURT | 1 | .25 | 6.00 | 01 | 11,314.66 | 67,888 31,943 | | | | 67,888 31,943 |
| 6001997 JE Y9724 AB JUDGE CIRCUIT COURT | 1 | .25 | 6.00 | 01 | 11,314.66 | 67,888 31,943 | | | | 67,888 31,943 |
| TOTAL PICS SALARY | | | | | | 610,992 | | | | 610,992 |
| TOTAL PICS OPE | | | | | | 287,487 | | | | 287,487 |
| TOTAL PICS PERSONAL SERVICES = | 9 | 2.25 | 54.00 | | | 898,479 | | | | 898,479 |

JUDICIAL COMPENSATION

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TECHNOLOGY FUND

Technology Fund

The State Court Technology Fund (SCTF, or Fund) was established in 2013 to support Oregon Judicial Department (OJD) technology services. The Fund consists of user fee revenue from OJD technology systems and applications, and 4.75 percent of statutory filing fees. That revenue is statutorily dedicated for:

- Developing, maintaining and supporting state court electronic applications, services and systems;
- Providing access to and use of those applications, services and systems; and
- Providing electronic service and filing services.

With the new capabilities of the Oregon eCourt system, the Fund pays for services that expand access to the courts for litigants and access to court information by a larger group of entities, but in many cases adds new costs not experienced before. These costs include vendor charges for eFiling, new maintenance charges for the Odyssey system, and ongoing costs for technology support, testing upgrades and patches, developing interview-based forms to assist self-represented litigants, and business process reviews to promote consistency and efficiency among the courts.

Revenues

A variety of sources provide revenue to the SCTF. Statutory filing fees, subscription and access fees paid by users of the Oregon Judicial Case Information Network (OJCIN), and transaction fees make up the bulk of revenues into the Fund. Projected revenues will not be sufficient to maintain current services in 2017-19.

Filing Fees: The Oregon eCourt system allows litigants to electronically file court documents for cases instead of appearing at a courthouse with physical documents. OJD is charged a \$5 eFile transaction fee for most non-criminal eFilings as an alternative to having litigants pay the eFile transaction fees directly. Court stakeholders and the Legislature agreed to increase filing fees by 5 percent, directing 4.75 percent of the filing fees to the SCTF instead of being transferred to the General Fund. Since implementation, filing fee revenue into the Fund has been \$3,641,633 in 2013-15 and \$3,270,000 in 2015-17 (projected).

OJCIN User Fees: OJD provides electronic access to court information by external (non-OJD) users through OJCIN. Instead of obtaining hard copies of case documents from court staff and obtaining limited information from the electronic case register, the public has free access to a more complete electronic case register and OJCIN subscribers have remote electronic access to case documents in case types designated as “public.” Examples of the types of data available through OJCIN include:

- Case details – case number, case type, case status

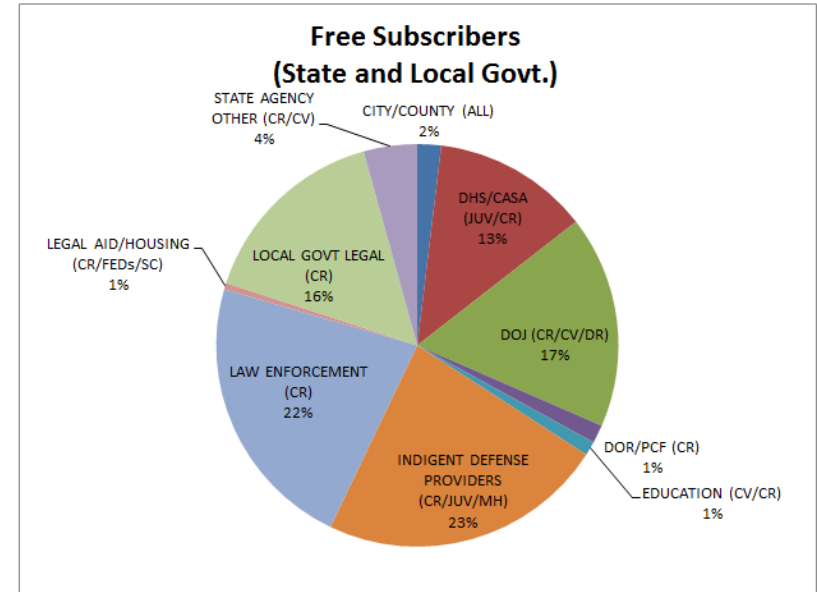
TECHNOLOGY FUND

- Party details – name, address, attorney
- Hearing dates/times
- Criminal dispositions
- Civil and domestic judgment details
- Case documents – orders, motions, affidavits in public case types
- Conditions of pre-trial release (in criminal cases)
- Sentencing details – incarceration, release dates, probation conditions, no contact orders (in criminal cases)
- Protective orders – Family Abuse Prevention Act (FAPA), elder abuse, sexual abuse, stalking (access limited to law enforcement users due to federal law)

OJCIN has both public- and private-sector users, and OJD has established approximately 10,600 sign-ons for external (non-OJD) users. Users are grouped by paying subscribers and free subscribers.

Most public-sector users receive OJCIN access at no charge, and constitute about three-fourths of OJCIN subscribers. Almost half of these “free subscribers” are publicly-funded entities involved in criminal or juvenile justice, such as law enforcement agencies, adult and juvenile parole/probation offices, jails, district attorney offices, and lawyers providing state-paid criminal defense for indigent defendants. Other public users include the Department of Human Services and the Department of Justice, both of which have hundreds of users and access OJCIN information daily in juvenile dependency and other case types. Court Appointed Special Advocates are better able to advocate for children in dependency matters because OJD provides them with free access to OJCIN. Other state and local government entities also are able to electronically access court documents, which creates efficiencies both for them and for court staff. The two largest OJCIN user groups use the system primarily to access criminal case types.

Paying subscribers include Oregon State Bar members (other than those providing indigent defense or working for public entities), news media



TECHNOLOGY FUND

organizations, title companies, housing providers, employment agencies, and background and private investigators, all using OJCIN information daily to facilitate their work. Paying subscribers primarily consist of private-sector attorneys and law firms, as well as financial institutions, data brokers, real estate entities, news media, and other approved business users.

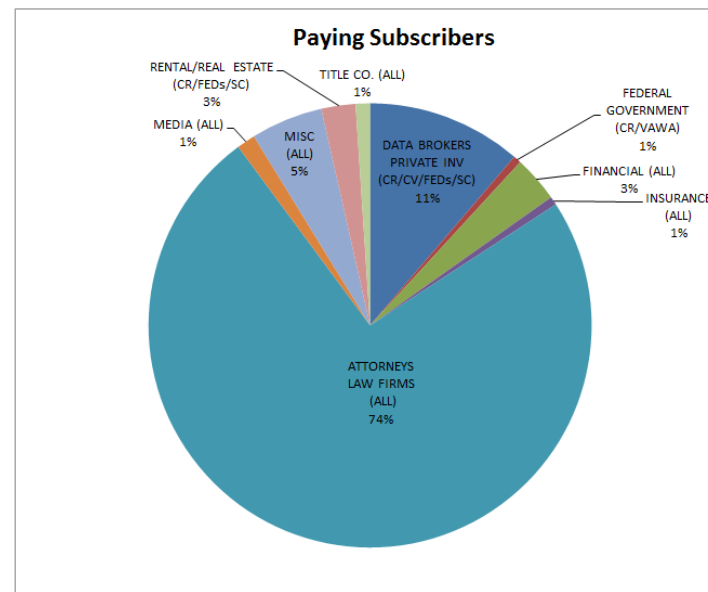
OJD currently is not able to measure the volume or types of usage by OJCIN subscribers. Fees for OJIN Online subscribers who transferred to OJCIN were billed at the average of the previous six months' worth. New OJCIN subscribers are billed at \$35 per month, and most bulk data purchasers pay an additional \$575 per month. User fee revenues for 2013-15 were \$4,289,171 and are projected at \$4,828,000 for the 2015-17 biennium.

ePay Transaction Fees: Oregon eCourt allows people to pay fines and fees online with a credit or debit card. This avoids a trip to the county courthouse or mailing in payment. During 2015, more than 350,000 payments were made via ePay, representing 27 percent of all receipts. To provide this service, OJD is charged \$1.50 per transaction, which OJD charges to the person making the payment. Revenue from these ePay fees was \$478,934 in 2013-15 and is projected to be \$480,000 in 2015-17.

Expenditures

eFiling Transaction Fees: Implementing Oregon eCourt allows litigants to electronically file pleadings. The first circuit court opened to eFiling in April 2013 and now all OJD courts – circuit, tax, and appellate – require attorneys to eFile. To provide this service, OJD is charged \$5.00 per eFile envelope (excluding eFilings in criminal cases, filings by public entities, or indigent filers who have been granted a fee waiver). In an effort to reduce eFiling costs, multiple documents in the same case may be filed in one envelope. However, most cases have multiple filing events that take place over the life of the case.

In September 2016, more than 124,000 filings (51.5 percent of all Odyssey filings) were eFiled. As eFiling has become available in more courts, both the number of eFilings and the amount of eFiling charges have increased. Costs for the service in 2013-15 were \$995,117 and are projected to be \$4,903,895 in 2015-17. Due to increasing usage of eFiling, the current 4.75 percent of filing fee revenues will no longer be sufficient to finance the cost of the program.



TECHNOLOGY FUND

ePay Transaction Fees: When using the online ePay system to pay fines, OJD is charged \$1.50 (plus credit card fees billed separately) per transaction. These charges are offset by a usage fee charged to the payee. Expenditures in this category in 2013-15 were \$478,394 and are projected to be \$480,000 in 2015-17.

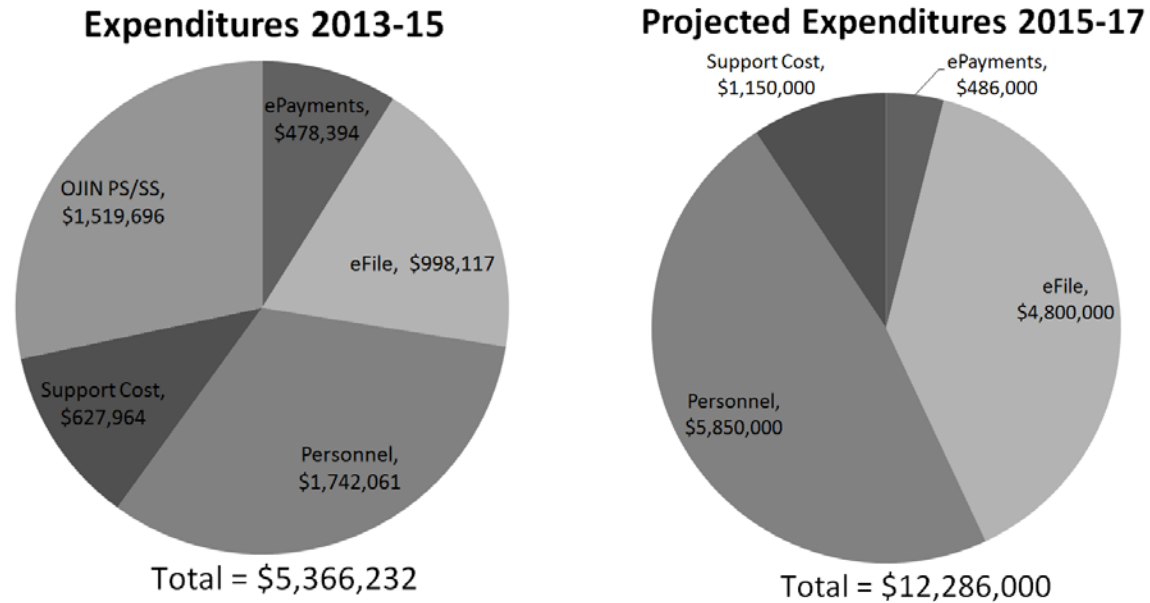
System Support: The SCTF pays for variety of personnel and systems costs associated with maintenance, support, and system access for Oregon eCourt. Prior to establishment of the SCTF, OJD provided limited support for the older legacy Oregon Judicial Information Network (OJIN) system from an Other Funds limitation by the same name. The support costs and revenue from OJIN were transferred into the SCTF in the 2013-15 biennium. The 2015 Legislature approved an OJD policy option package that reduced overall Oregon eCourt staffing levels but added positions and resources needed to move from system implementation to operations. Resources affected in the 2013-15 policy option package were:

- New centralized accounting functionality – 5 positions
- System maintenance, testing, and support (including help desk) – 7 positions, 5 of which were limited duration
- Business process review, forms for self-represented litigants, eFiling support, training and public outreach and accessibility – 10 positions, 2 of which were limited duration

For the 2015-17 biennium, the SCTF support in whole or part of the salary costs of 37 OJD positions, seven of which are limited duration.

TECHNOLOGY FUND

Total Expenditures by Type for SCTF: Expenditures for the 2013-15 biennium and total projected expenditures for the 2015-17 biennium are shown below:



TECHNOLOGY FUND

SCTF projections for 2017-19, including the requested policy option package, are detailed in the table below.

| SCTF 2017-19 | Current Service Level | POP #404 | TOTAL |
|-----------------------------|-----------------------------|----------------------------|-----------------------------|
| <i>Expenditures:</i> | | | |
| Personal Services | \$ 5,555,681 | \$ 1,549,622 | \$ 7,105,303 |
| Services and Supplies | \$ 1,696,483 | | \$ 1,696,483 |
| eFile/ePay costs | \$ 5,527,210 | \$ 1,272,790 | \$ 6,800,000 |
| Odyssey Maintenance | | \$ 2,340,568 | \$ 2,340,568 |
| <i>TOTAL</i> | <i>\$ 12,779,374</i> | <i>\$ 5,162,980</i> | <i>\$ 17,942,354</i> |
| <i>Revenue:</i> | | | |
| Filing Fees and ePay | \$ 3,956,666 | | \$ 3,956,666 |
| User Fees | \$ 4,799,529 | | \$ 4,799,529 |
| Filing Fee increase | | \$ 4,000,000 | \$ 4,000,000 |
| Fines increase | | \$ 4,000,000 | \$ 4,000,000 |
| User Fees increase | | \$ 700,000 | \$ 700,000 |
| <i>TOTAL</i> | <i>\$ 8,576,195</i> | <i>\$ 8,700,000</i> | <i>\$ 17,456,195</i> |

TECHNOLOGY FUND

Policy Option Package 404 – Technology Fund

Companion Package: No

Purpose

As statewide implementation of the Oregon eCourt system was concluded during the 2015-17 biennium, use of the State Court Technology Fund becomes more critical to support continued access for Oregonians to the increased suite of tools available for use. New functionality like eFile, ePay, and iForms has expanded access and provided new convenience options for people accessing the court system, but these options also come with operational, maintenance and transactional costs. This package seeks to retain resources added by the Legislature, increase the service and supplies budget for convenience transactional fees, and increase revenues into the fund to support those services.

How Achieved

The package would:

- Restore and make permanent seven positions authorized as Limited Duration (LD) during the 2015-17 biennium;
- Add \$6.8 million to pay projected transactional costs associated with eFile and ePay options;
- Add \$2.3 million for software maintenance fees, primarily for the Odyssey case management system, that begin in 2017-19; and,
- Increase revenues from user fees and filing fees by \$8.7 million for proposed changes to be presented to the Legislature by OJD.

Staff Impact

- | | | |
|---|-------------|----------|
| • OJD Information Technology Specialist 4 | 1 position | 1.00 FTE |
| • OJD Information Technology Specialist 2 | 1 position | 1.00 FTE |
| • OJD Information Technology Specialist 3 | 3 positions | 3.00 FTE |
| • OJD Analyst 3 | 2 positions | 2.00 FTE |

Revenue Source

\$10,690,190 – Other Funds (filing fees, user fees, fines)

TECHNOLOGY FUND

ORBITS and PICS Reports

BPR013 – Essential and Policy Package Fiscal Impact Summary

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 010 - Non-PICS Psnl Svc / Vacancy Factor

Cross Reference Name: eCourt Program

Cross Reference Number: 19800-500-00-00-00000

| Description | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|-----------|
| Personal Services | | | | | | | |
| Temporary Appointments | - | - | - | - | - | - | - |
| Overtime Payments | - | - | - | - | - | - | - |
| All Other Differential | - | - | - | - | - | - | - |
| Public Employees' Retire Cont | - | - | - | - | - | - | - |
| Social Security Taxes | - | - | - | - | - | - | - |
| Total Personal Services | - | - | - | - | - | - | - |
| Total Expenditures | | | | | | | |
| Total Expenditures | - | - | - | - | - | - | - |
| Total Expenditures | - | - | - | - | - | - | - |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

TECHNOLOGY FUND

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 022 - Phase-out Pgm & One-time Costs

Cross Reference Name: eCourt Program

Cross Reference Number: 19800-500-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|--------------|---------------|-----------------------|---------------|------------------------|--------------------------|-----------------------|
| Personal Services | | | | | | | |
| Pension Obligation Bond | - | - | (156,498) | - | - | - | (156,498) |
| Other OPE | - | - | (320,340) | - | - | - | (320,340) |
| Total Personal Services | - | - | (\$476,838) | - | - | - | (\$476,838) |
| Services & Supplies | | | | | | | |
| Instate Travel | - | - | (505,632) | - | - | - | (505,632) |
| Office Expenses | - | - | (15,000) | - | - | - | (15,000) |
| Telecommunications | - | - | (15,000) | - | - | - | (15,000) |
| Data Processing | - | - | - | - | - | - | - |
| IT Professional Services | - | - | (8,664,738) | - | - | - | (8,664,738) |
| Facilities Rental and Taxes | - | - | (300,230) | - | - | - | (300,230) |
| IT Expendable Property | - | - | (1,461,111) | - | - | - | (1,461,111) |
| Total Services & Supplies | - | - | (\$10,961,711) | - | - | - | (\$10,961,711) |
| Capital Outlay | | | | | | | |
| Data Processing Software | - | - | (1,321,719) | - | - | - | (1,321,719) |
| Total Capital Outlay | - | - | (\$1,321,719) | - | - | - | (\$1,321,719) |
| Total Expenditures | | | | | | | |
| Total Expenditures | - | - | (12,760,268) | - | - | - | (12,760,268) |
| Total Expenditures | - | - | (\$12,760,268) | - | - | - | (\$12,760,268) |

TECHNOLOGY FUND

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 022 - Phase-out Pgm & One-time Costs

Cross Reference Name: eCourt Program

Cross Reference Number: 19800-500-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|----------------------|--------------|---------------|--------------|---------------|------------------------|--------------------------|--------------|
| Ending Balance | | | | | | | |
| Ending Balance | - | - | 12,760,268 | - | - | - | 12,760,268 |
| Total Ending Balance | - | - | \$12,760,268 | - | - | - | \$12,760,268 |

TECHNOLOGY FUND

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept
Pkg: 031 - Standard Inflation

Cross Reference Name: eCourt Program
Cross Reference Number: 19800-500-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|-----------------|---------------|-------------|---------------|------------------------|--------------------------|-----------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 90,287 | - | - | - | - | - | 90,287 |
| Total Revenues | \$90,287 | - | - | - | - | - | \$90,287 |
| Services & Supplies | | | | | | | |
| Instate Travel | - | - | - | - | - | - | - |
| Out of State Travel | - | - | - | - | - | - | - |
| Employee Training | - | - | - | - | - | - | - |
| Office Expenses | - | - | - | - | - | - | - |
| Telecommunications | - | - | - | - | - | - | - |
| Data Processing | 16,661 | - | - | - | - | - | 16,661 |
| Publicity and Publications | - | - | - | - | - | - | - |
| Professional Services | - | - | - | - | - | - | - |
| IT Professional Services | 73,626 | - | - | - | - | - | 73,626 |
| Employee Recruitment and Develop | - | - | - | - | - | - | - |
| Facilities Rental and Taxes | - | - | - | - | - | - | - |
| Agency Program Related S and S | - | - | - | - | - | - | - |
| Other Services and Supplies | - | - | - | - | - | - | - |
| Expendable Prop 250 - 5000 | - | - | - | - | - | - | - |
| IT Expendable Property | - | - | - | - | - | - | - |
| Total Services & Supplies | \$90,287 | - | - | - | - | - | \$90,287 |
| Capital Outlay | | | | | | | |
| Data Processing Software | - | - | - | - | - | - | - |

TECHNOLOGY FUND

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 031 - Standard Inflation

Cross Reference Name: eCourt Program

Cross Reference Number: 19800-500-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|-----------------------------|-----------------|---------------|-------------|---------------|------------------------|--------------------------|-----------------|
| Capital Outlay | | | | | | | |
| Data Processing Hardware | - | - | - | - | - | - | - |
| Total Capital Outlay | - | - | - | - | - | - | - |
| Total Expenditures | | | | | | | |
| Total Expenditures | 90,287 | - | - | - | - | - | 90,287 |
| Total Expenditures | \$90,287 | - | - | - | - | - | \$90,287 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

TECHNOLOGY FUND

BPR012 – Detail of Lottery Funds, Other Funds, and Federal Funds Revenue

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

| Judicial Dept 2017-19 Biennium | | | | Agency Number: 19800 Cross Reference Number: 19800-500-00-00-00000 | | |
|-----------------------------------|-----------------|-------------------------------|--------------------------------|---|------------------------------|-------------------------------|
| Source | 2013-15 Actuals | 2015-17 Leg Adopted Budget | 2015-17 Leg Approved Budget | 2017-19 Agency Request Budget | 2017-19 Governor's Budget | 2017-19 Leg Adopted Budget |
| Other Funds | | | | | | |
| General Fund Obligation Bonds | 14,300,000 | 14,500,000 | 14,500,000 | - | - | - |
| Other Revenues | - | - | 291,501 | - | - | - |
| Total Other Funds | \$14,300,000 | \$14,500,000 | \$14,791,501 | - | - | - |

TECHNOLOGY FUND

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DEBT SERVICE

Debt Service

The Oregon Judicial Department presently has three programs that roll into the debt service appropriation for the 2017-19 biennium. These programs are the Oregon eCourt Program, capital projects for the Oregon Supreme Court building, and Oregon Courthouse Capital Construction and Improvement Fund.

Oregon eCourt Program

The first bonding to support implementation of the Oregon eCourt Program took place in June 2008. A bond sale will take place in March of 2017 to cover final costs for implementation activities, which ended in December 2016. With the final sale, the program will have been funded in eight separate bond sales totaling \$80.2 million in principal and cost of issuance. Each bond sale targeted five-year term bonds; many of the bonds that were sold will have already been paid off by the end of the 2015-17 biennium.

| | |
|--|------------------------|
| 2008 Certificates of Participation | \$ 8.0 million |
| 2009 Certifications of Participation (2 sales) | \$ 13.5 million |
| 2010 Certificates of Participation | \$ 6.5 million |
| 2011 XI-Q Bonds | \$ 5.4 million |
| 2012 XI-Q Bonds | <u>\$ 17.7 million</u> |
| Total | \$ 51.1 million |

The remaining and planned bond sales are the 2015 XI-Q Bonds at \$14.3 million and the 2017 planned XI-Q Bonds at \$14.8 million. For the two remaining bond series, the following table summarizes the biennial payment schedule.

| Bond | 2017-19 Biennium | | 2019-21 Biennium | | 2021-23 Biennium | |
|----------------------------------|----------------------|---------------------|---------------------|-------------------|---------------------|-------------------|
| | Principal | Interest | Principal | Interest | Principal | Interest |
| 2015 XI-Q | \$ 5,260,000 | \$ 680,750 | \$ 2,830,000 | \$ 141,500 | | |
| 2017 XI-Q (planned) | \$ 5,445,000 | \$ 1,348,051 | \$ 6,050,000 | \$ 795,350 | \$ 3,260,000 | \$ 161,766 |
| Total | \$10,705,000 | \$ 2,028,801 | \$ 8,880,000 | \$ 936,850 | \$ 3,260,000 | \$ 161,766 |
| Debt Service per biennium | \$ 12,773,801 | | \$ 9,816,850 | | \$ 3,421,766 | |

DEBT SERVICE

Oregon Courthouse Capital Construction and Improvement Fund

During the 2013 legislative session, the Oregon Courthouse Capital Construction and Improvement Fund (OCCCIF) was established. The first bonds were issued in March 2015 and were sold to support new courthouses in Jefferson and Multnomah counties. The following shows present and planned 2017 bond sales. The bonds shown are 20-year bonds.

| | |
|--|-----------------|
| 2015 XI-Q Bonds – Jefferson | \$ 4.0 million |
| 2015 XI-Q Bonds – Multnomah | \$ 15.1 million |
| 2017 XI-Q Bonds – Jefferson | \$ 2.6 million |
| 2017 XI-Q Bonds – Multnomah | \$ 14.8 million |
| 2017 XI-Q Bonds – Tillamook ² | \$ 8.0 million |
| 2017 XI-Q Bonds – Lane | \$ 1.5 million |

The table below outlines required debt service for all sold or planned (authorized by the Legislature) through the 2015-17 biennium.

| Bond | 2017-19 Biennium | | 2019-21 Biennium | | 2021-23 Biennium | |
|--|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| | Principal | Interest | Principal | Interest | Principal | Interest |
| 2015 XI-Q Jefferson | \$ 235,000 | \$ 312,750 | \$ 255,000 | \$ 288,750 | \$ 280,000 | \$ 262,750 |
| 2015 XI-Q Multnomah | \$ 870,000 | \$ 1,170,750 | \$ 955,000 | \$ 1,081,750 | \$ 1,055,000 | \$ 983,750 |
| 2017 XI-Q Jefferson (planned) | \$ 145,000 | \$ 270,752 | \$ 168,200 | \$ 246,398 | \$ 185,020 | \$ 226,674 |
| 2017 XI-Q Multnomah (planned) | \$ 640,000 | \$ 1,921,053 | \$ 742,400 | \$ 1,748,158 | \$ 816,640 | \$ 1,608,306 |
| 2017 XI-Q Tillamook (planned) ² | \$ 445,000 | \$ 850,235 | \$ 516,200 | \$ 773,714 | \$ 567,820 | \$ 711,817 |
| 2017 XI-Q Lane (planned) | \$ 80,000 | \$ 153,404 | \$ 92,800 | \$ 139,598 | \$ 102,080 | \$ 128,430 |
| Total | \$ 2,415,000 | \$ 4,678,944 | \$ 2,729,600 | \$ 4,278,368 | \$ 3,006,560 | \$ 3,921,727 |
| Debt Service per biennium | \$ 7,093,944 | | \$ 7,007,968 | | \$ 6,928,287 | |

Planned sales may be delayed if required sales criteria are not met by the deadline for participation in the March 2017 State of Oregon debt sale.

² After agency completion of its 2017-19 requested budget, Tillamook County withdrew its courthouse replacement project

DEBT SERVICE

While many of the bond sales are targeted for the last bond sale in the current biennium to reduce required General Fund debt service requirements, due to construction planning and scheduled payments associated with continuing work on the new Multnomah County courthouse, a debt sale is being planned for May 2018 for \$16.26 million in bonds.

To support this sale and to address all costs of issuance for OCCIF program in the 2017-19 biennium, Policy Option Package 411 is being introduced to cover debt service and cost of issuance payments.

Oregon Supreme Court Building

In 2013, the Legislature approved the sale of \$4.4 million in XI-Q bonding to support emergency repairs to the Oregon Supreme Court Building. The funds were used to stabilize the exterior terra cotta facing of the building and address dry rot and deterioration of the original wooden windows. The bonds have a 20-year term, with the following principal and interest payments scheduled through the 2021-23 biennium.

| Bond | 2017-19 Biennium | | 2019-21 Biennium | | 2021-23 Biennium | |
|----------------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| | Principal | Interest | Principal | Interest | Principal | Interest |
| 2015 XI-Q Supreme Court Bldg | \$ 255,000 | \$ 343,750 | \$ 280,000 | \$ 317,750 | \$ 310,000 | \$ 289,000 |
| <i>Total</i> | <i>\$ 255,000</i> | <i>\$ 343,750</i> | <i>\$ 280,000</i> | <i>\$ 317,750</i> | <i>\$ 310,000</i> | <i>\$ 289,000</i> |
| <i>Debt Service per biennium</i> | <i>\$ 598,750</i> | | <i>\$ 597,750</i> | | <i>\$ 599,000</i> | |

DEBT SERVICE

Current Service Level

The Current Service Level budget for OJD Debt Service totals \$20.4 million General Fund, a \$1.9 million increase in General Fund (10.4 percent) over the 2015-17 Legislatively Approved Budget. This amount includes the debt service set out in agreements between the Department of Administrative Services and OJD for all active bond sales to date.

Chief Justice's Recommended Budget

The Chief Justice's Recommended Budget for the 2017-19 biennium totals \$22.7 million (All Funds). This amount includes policy option packages totaling \$2.3 million (All Funds):

- **Policy Option Package 411:** Oregon Courthouse Capital Construction and Improvement Fund Debt Service

OJD Debt Service Budget Summary – All Funds

| | 2013-15 Actual Expenditures | 2015-17 Legislatively Approved Budget | 2017-19 Current Service Level (CSL)* | 2017-19 Chief Justice's Recommended** |
|----------------------------------|--|--|---|--|
| General Fund | | | | |
| General Fund Debt Service | \$ 18,133,375 | \$ 18,508,525 | \$ 20,426,495 | \$ 21,480,003 |
| Other Funds Capital Construction | | | | |
| Other Funds Debt Service Ltd | | | | |
| Other Funds Ltd | \$ 0 | \$ 292,900 | \$ 0 | \$ 1,245,000 |
| Other Funds Non-Ltd | | | | |
| Federal Funds Ltd | | | | |
| TOTAL – ALL FUNDS | \$ 18,133,375 | \$ 18,801,425 | \$ 20,426,495 | \$ 22,725,003 |
| Positions | - | - | - | - |
| FTE | - | - | - | - |

* 2017-19 CSL includes approx. \$1.3 million in debt service on bond sales for the Tillamook Courthouse, a project that has now been suspended.

** Includes CSL and all policy option packages

DEBT SERVICE

Essential Packages

Purpose

The essential packages present budget adjustments needed to bring the Legislatively Approved Budget to Current Service Level (CSL), the calculated cost of continuing legislatively approved programs into the 2017-19 biennium.

Staffing Impact

No staff is contained in OJD Debt Service for the essential packages.

Revenue Source

The essential packages decrease Other Funds by \$292,900.

010 Non-PICS Personal Service Adjustments

The Debt Service budget has no adjustment for non-PICS Personal Services adjustments.

021 Phase-In

The Debt Service budget has no adjustment for phased-in programs.

022 Phase-Out Program and One-Time Costs

The Debt Service budget has an Other Funds decrease of \$292,900 for phased-out programs or one-time costs.

031 Inflation and Price List Adjustments

The Debt Service budget has no adjustment for inflation and price list adjustments.

032 Above Standard Inflation

The Debt Service budget has no adjustment for above standard inflation.

DEBT SERVICE

040 Mandated Caseload

The Debt Service budget has no adjustment for mandated caseload.

050 Fund Shifts

The Debt Service budget has no fund shifts within its CSL budget.

060 Technical Adjustments

The Debt Service budget has no technical adjustments within its CSL budget.

DEBT SERVICE

Policy Option Package 411 – Oregon Courthouse Capital Construction and Improvement Fund Debt Service

Companion Package: No

Purpose

The Oregon Courthouse Capital Construction and Improvement Fund provides assistance to counties by providing matching funds up to 50 percent for replacement of courthouses that are deemed seismically deficient and not cost effective to renovate. For the 2017-19 biennium, three projects have been proposed for funding. Total required financing needs for the projects is \$106.2 million.

How Achieved

The package was calculated based upon \$106.2 million in required matching funds, with the estimated cost of issuance calculated by the Department of Administrative Services. Most of the bonds are targeted for March 2019 sales; \$16.26 million to support continued work on the Multnomah County Courthouse replacement project will need to be sold at the May 2018 sale based on planned project spending schedules.

Staffing Impact

None.

Revenue Source

\$1,053,508 – General Fund Debt Service

\$1,245,000 – Other Funds

DEBT SERVICE

ORBITS and PICS Reports

BPR013 – Essential and Policy Package Fiscal Impact Summary

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 022 - Phase-out Pgm & One-time Costs

Cross Reference Name: OJD Debt Service

Cross Reference Number: 19800-087-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|--------------|---------------|--------------------|---------------|------------------------|--------------------------|--------------------|
| Revenues | | | | | | | |
| General Fund Obligation Bonds | - | - | (292,900) | - | - | - | (292,900) |
| Total Revenues | - | - | (\$292,900) | - | - | - | (\$292,900) |
| Services & Supplies | | | | | | | |
| Other COI Costs | - | - | (292,900) | - | - | - | (292,900) |
| Total Services & Supplies | - | - | (\$292,900) | - | - | - | (\$292,900) |
| Total Expenditures | | | | | | | |
| Total Expenditures | - | - | (292,900) | - | - | - | (292,900) |
| Total Expenditures | - | - | (\$292,900) | - | - | - | (\$292,900) |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

DEBT SERVICE

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 411 - OCCCIF Debt Service and Cost of Issuance

Cross Reference Name: OJD Debt Service

Cross Reference Number: 19800-087-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|--------------------|---------------|--------------------|---------------|------------------------|--------------------------|--------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 1,053,508 | - | - | - | - | - | 1,053,508 |
| General Fund Obligation Bonds | - | - | 1,245,000 | - | - | - | 1,245,000 |
| Total Revenues | \$1,053,508 | - | \$1,245,000 | - | - | - | \$2,298,508 |
| Services & Supplies | | | | | | | |
| Other COI Costs | - | - | 1,245,000 | - | - | - | 1,245,000 |
| Total Services & Supplies | - | - | \$1,245,000 | - | - | - | \$1,245,000 |
| Debt Service | | | | | | | |
| Principal - Bonds | 400,000 | - | - | - | - | - | 400,000 |
| Interest - Bonds | 653,508 | - | - | - | - | - | 653,508 |
| Total Debt Service | \$1,053,508 | - | - | - | - | - | \$1,053,508 |
| Total Expenditures | | | | | | | |
| Total Expenditures | 1,053,508 | - | 1,245,000 | - | - | - | 2,298,508 |
| Total Expenditures | \$1,053,508 | - | \$1,245,000 | - | - | - | \$2,298,508 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

DEBT SERVICE

BPR012 – Detail of Lottery Funds, Other Funds, and Federal Funds Revenue

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

| Judicial Dept 2017-19 Biennium | | Agency Number: 19800 Cross Reference Number: 19800-087-00-00-00000 | | | | |
|-----------------------------------|-----------------|---|--------------------------------|----------------------------------|------------------------------|-------------------------------|
| Source | 2013-15 Actuals | 2015-17 Leg Adopted Budget | 2015-17 Leg Approved Budget | 2017-19 Agency Request Budget | 2017-19 Governor's Budget | 2017-19 Leg Adopted Budget |
| Other Funds | | | | | | |
| General Fund Obligation Bonds | - | 292,900 | 292,900 | 1,245,000 | - | - |
| Total Other Funds | - | \$292,900 | \$292,900 | \$1,245,000 | - | - |

MANDATED PAYMENTS

Mandated Payments

The Mandated Payments program includes the resources necessary to finance all costs associated with the administration of the trial and grand jury systems as governed by chapter 10 of the Oregon Revised Statutes, and federally mandated and other legislatively mandated costs found in ORS chapters 21, 36, 40, 45, 132, 133, 135, and 419.

Costs associated with the Mandated Payments program generally include, but are not limited to, the following:

- Creation of master jury lists and other jury lists;
- Summoning and qualifying jurors;
- Providing juror orientation programs and materials;
- Per diem paid to jurors at the statutory rate;
- Mileage reimbursements to jurors at the statutory rate;
- Payment of juror meals, lodging, and commercial transportation at the actual cost;
- Payment of waived fees and costs for arbitrators related to court-annexed mandatory arbitration in civil actions;
- Payment of waived appellate transcript costs for a civil proceeding when a party is indigent;
- State-paid sign interpreters or real-time reporters for hearing-impaired jurors or other persons participating in court proceedings and department activities or programs as mandated by the Americans with Disabilities Act (ADA);
- Providing assistive devices and other equipment or supplies required to provide reasonable accommodation to disabled persons as mandated by the ADA; and,
- State-paid foreign language interpreters for court proceedings or department activities where the court or department is required by statute to provide an interpreter to uphold a non-English speaking person's constitutional rights and to provide access to basic court services.

The majority of funding for Mandated Payments falls into four categories: interpreter services, jury payments, arbitrators, and ADA compliance. The graph below outlines the 2015-17 biennium percentages spent by category.

MANDATED PAYMENTS

The Mandated Payments program is an important part of our heritage of government by the people and serves as a vital function within the justice system by helping to ensure the continuance of our democratic process through maintenance of the jury system and access to courts by all persons.

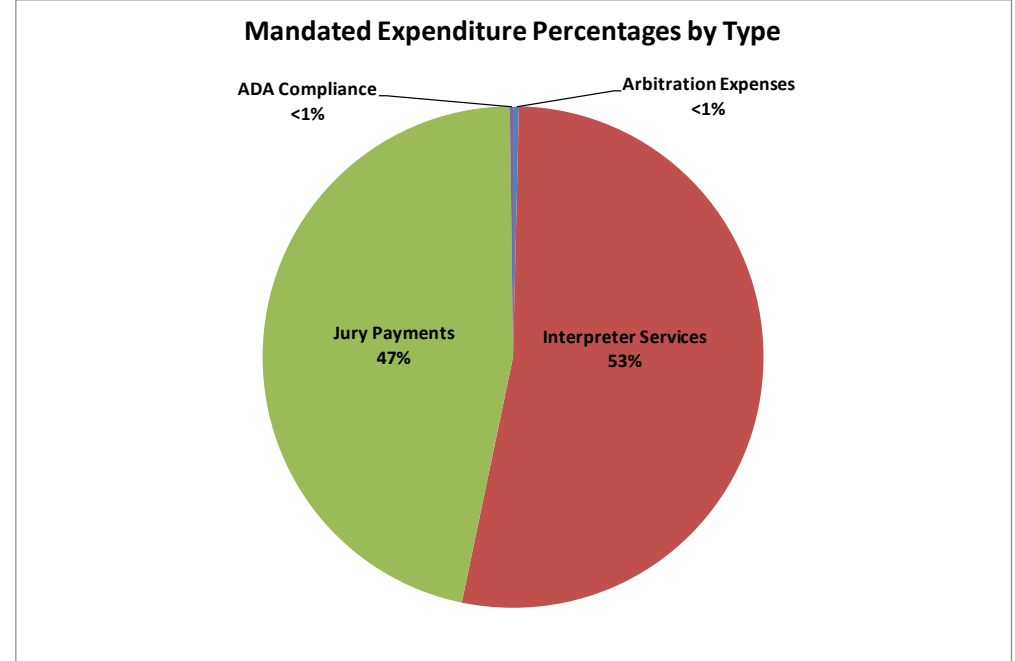
Interpreter Services

ORS 43.273 Policy. (1) *It is declared to be the policy of this state to secure the constitutional rights and other rights of persons who are unable to readily understand or communicate in the English language because of a non-English-speaking cultural background or a disability, and who as a result cannot be fully protected in administrative and court proceedings unless qualified interpreters are available to provide assistance.*

Interpreter services in the courts are vital. Children cannot be protected without the use of interpreters. Interpreting services are required to process criminal cases that involve non-English speaking witnesses and to litigate civil actions. As the population of Oregon residents who speak limited or no English continues to rise, the use of interpreting services in the courts must increase as well. The diversity of Oregon's population increased significantly in recent years along with the entire United States. According to the US Census Bureau American Fact Finder, in 2014, 6.1 percent of Oregon's population identified themselves as limited English proficient (LEP) individuals. Over 60 percent of all Oregon LEP individuals reside in just five counties: Marion, Multnomah, Washington, Clackamas, and Lane.

During the 2015-17 biennium, the Oregon Judicial Department (OJD) provided interpreter services in almost 60,000 court proceedings in over 118 languages and dialects (including hearing impaired). The top ten requested languages were Spanish, Russian, Chuukese, Vietnamese, Arabic, Mandarin, Somali, Korean, Cantonese, and American Sign Language. During the 2016 legislative session, language access services were expanded to include victims of crimes (HB 2339). Victims receive interpreting services in all stages of their proceedings. Costs for providing this new service during fiscal year July 2015 through June 2016 was \$76,330.

Interpreter services are delivered by OJD staff or by contract court interpreters. These activities are managed and scheduled by the Court Language Access Services (CLAS) office to minimize state expenses and effectively manage resources. CLAS supports 22 positions with a majority of



MANDATED PAYMENTS

personnel focused on interpretation, translation, and scheduling services, management of interpreter certification and education programs, and implementation of language access programs.

Court interpreting is a high-level skill requiring over 15 cognitive abilities applied simultaneously. Being bilingual, even at a high level of fluency, is not sufficient qualification for legal court interpreting. OJD requires certification of interpreters to ensure access to justice through a rigorous testing process administered by the department. The Oregon court interpreting examination pass rate is less than 19 percent, confirming this demanding skill set.

The lack of an increase to the hourly contract rate for professional, certified interpreters in the legal interpreting market had caused attrition in the number of skilled legal interpreters available for use by OJD. Many contract interpreters were choosing higher paying opportunities with other courts, the private sector, and other career fields in a bilingual society. At the beginning of the 2013-15 biennium, the hourly rate for contracted interpreter services was set at \$40 per hour. In January 2017, the contracted rate will increase by \$3.50 per hour to reflect CPI-based inflation increases since 2013.

Comparison of Interpreter Hourly Rates

| Organization | Hourly Rate | Since | Comments |
|--|------------------------------------|-------|---|
| Oregon Courts | \$43.50 | 2017 | Current Oregon Certified and Contract Interpreter rate |
| Oregon Agencies (DAS Cooperative Purchasing Program) | \$ 45.00 | 2001 | Workers' Compensation, municipalities, administrative hearings, counties, school districts, special districts, Department of Human Services contracts, Oregon University System, Native American tribes, etc. |
| Freelance legal interpreting work | \$ 80.00 - \$140.00 | 2015 | Private attorney depositions, investigators, attorney-client |
| Washington Courts | \$ 50.00 | 2008 | Ten counties, including Clark County, Vancouver, Washington |
| King County, Seattle Courts | \$ 45.00 | 2013 | |
| California Courts | \$ 39.14 | 2011 | Paid in full or half days |
| Federal Courts | \$ 52.50 (overtime pay \$55.00) | 2010 | Paid in full or half days |
| 36 states, National Consortium of Certified Court Interpreters Member-states with established compensation plans for contracted freelance interpreters | \$ 45.46 (average) | 2014 | 2014 voluntary survey of consortium members |

MANDATED PAYMENTS

Jury Payments

Juror fees are fixed by the Legislature. In a circuit court, a juror is entitled to \$10 per day for the first and second day of service, then \$25 for a third and subsequent days of service. Mileage reimbursement is \$0.20 per mile to travel to jury service in the circuit court. Juror pay is subject to income tax but need not be reported for Social Security purposes. A juror is entitled to receive payment for a full day when the juror arrives at the court to begin service under the summons, even if that person does not actually participate in a trial or is excused immediately after answering the roll call. If necessary during jury deliberations, the judge may order that food, drink, lodging, or transportation be provided to a jury depending upon the circumstances of the case.

Overall expenditures in this area are impacted by the number and length of jury trials and grand juries. For the 2013-15 biennium, over 163,000 Oregonians received compensation for jury duty, with an average payment \$23.73 per individual. Approximately 23,000 donated money back to OJD for Jury Access and Experience Improvement funding.

Arbitrators

Two kinds of cases go into arbitration under state law: some civil actions involving claims for damages or money; and some family law matters.

In a civil case, one person or business sues another person or business, usually for monetary damages. A civil case might be about costs and injuries from an accident or a disagreement about a contract. All civil cases filed in state court involving less than \$50,000, except small claims cases, must go to arbitration. In some courts, parties can go to mediation instead of arbitration.

State law also requires arbitration in domestic relations or family law cases where the parties only disagree about what to do with their property and their debts. In some counties, the parties can also agree to arbitrate disagreements about child or spousal support.

If a party cannot afford to pay for the cost of arbitration, the State of Oregon pays the expenses.

ADA Compliance

Mandated payments also include the costs for providing the public access to state court facilities and adherence to the Americans with Disabilities Act of 1990 (amended 2008). Expenditures in this area can vary greatly from biennium to biennium. Amendments to existing laws may require significant modifications to existing facilities to meet required specifications. Also, accommodation and access items, such as listening devices, periodically must be replaced due to damage or when the items reach the end of their useful life.

MANDATED PAYMENTS

Current Service Level

The Current Service Level budget for Mandated Payments totals \$16.2 million General Fund and \$0.7 million in Other Funds, an \$0.6 million increase (3.5 percent), over the 2015-17 Legislatively Approved Budget.

Chief Justice's Recommended Budget

The Chief Justice's Recommended Budget for the 2017-19 biennium totals \$16.9 million (All Funds).

Mandated Payments Budget Summary – All Funds

| | 2013-15 Actual Expenditures | 2015-17 Legislatively Approved Budget | 2017-19 Current Service Level (CSL) | 2017-19 Chief Justice's Recommended* |
|----------------------------------|--|--|--|---|
| General Fund | \$ 15,292,854 | \$ 15,663,869 | \$ 16,216,686 | \$ 16,216,686 |
| General Fund Debt Service | | | | |
| Other Funds Capital Construction | | | | |
| Other Funds Debt Service Ltd | | | | |
| Other Funds Ltd | \$ 634,515 | \$ 662,740 | \$ 662,667 | \$ 662,667 |
| Other Funds Non-Ltd | | | | |
| Federal Funds Ltd | | | | |
| TOTAL – ALL FUNDS | \$ 15,927,369 | \$ 16,326,609 | \$ 16,879,353 | \$ 16,879,353 |
| Positions | 23 | 23 | 23 | 23 |
| FTE | 22.61 | 22.61 | 22.61 | 22.61 |

* Includes CSL and all policy option packages

MANDATED PAYMENTS

Essential Packages

Purpose

The essential packages present budget adjustments needed to bring the Legislatively Approved Budget to Current Service Level (CSL), the calculated cost of continuing legislatively approved programs into the 2017-19 biennium.

Staffing Impact

No staff is contained in Mandated Payments for the essential packages.

Revenue Source

The essential packages increase General Fund by \$437,787 and Other Funds by \$20,192.

010 Non-PICS Personal Service Adjustments

Non-PICS Personal Services adjustments for Mandated Payments is \$5,370 General Fund and (\$1,013) in Other Funds. The primary component of the change is Pension Obligation Bond increases of \$3,693 for General Fund.

021 Phase-In

The Mandated Payments budget has no adjustment for phased-in programs.

022 Phase-Out Program and One-Time Costs

The Mandated Payments budget has no adjustment for phased-out programs or one-time costs.

031 Inflation and Price List Adjustments

The cost of goods and services increases totals by \$432,417 in General Fund and \$21,205 in Other Funds. This reflects the standard inflation rate of 3.7 percent on goods and services.

032 Above Standard Inflation

MANDATED PAYMENTS

The Mandated Payments budget has no adjustment for above standard inflation.

040 Mandated Caseload

The Mandated Payments budget has no adjustment for mandated caseload.

050 Fund Shifts

The Mandated Payments budget has no fund shifts within its CSL budget.

060 Technical Adjustments

The Mandated Payments budget has no technical adjustments within its CSL budget.

MANDATED PAYMENTS

ORBITS and PICS Reports

BPR013 – Essential and Policy Package Fiscal Impact Summary

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 010 - Non-PICS Psnl Svc / Vacancy Factor

Cross Reference Name: Mandated Payments

Cross Reference Number: 19800-200-00-00-00000

| Description | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------|----------------|---------------|------------------|---------------|------------------------|--------------------------|----------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 5,370 | - | - | - | - | - | 5,370 |
| Total Revenues | \$5,370 | - | - | - | - | - | \$5,370 |
| Personal Services | | | | | | | |
| Temporary Appointments | - | - | - | - | - | - | - |
| All Other Differential | 1,056 | - | - | - | - | - | 1,056 |
| Public Employees' Retire Cont | - | - | - | - | - | - | - |
| Pension Obligation Bond | 3,693 | - | (922) | - | - | - | 2,771 |
| Social Security Taxes | - | - | - | - | - | - | - |
| Mass Transit Tax | 621 | - | (91) | - | - | - | 530 |
| Total Personal Services | \$5,370 | - | (\$1,013) | - | - | - | \$4,357 |
| Total Expenditures | | | | | | | |
| Total Expenditures | 5,370 | - | (1,013) | - | - | - | 4,357 |
| Total Expenditures | \$5,370 | - | (\$1,013) | - | - | - | \$4,357 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | 1,013 | - | - | - | 1,013 |
| Total Ending Balance | - | - | \$1,013 | - | - | - | \$1,013 |

MANDATED PAYMENTS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 031 - Standard Inflation

Cross Reference Name: Mandated Payments

Cross Reference Number: 19800-200-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|----------------------------------|------------------|---------------|-------------|---------------|------------------------|--------------------------|------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 432,417 | - | - | - | - | - | 432,417 |
| Total Revenues | \$432,417 | - | - | - | - | - | \$432,417 |
| Services & Supplies | | | | | | | |
| Instate Travel | 978 | - | 710 | - | - | - | 1,688 |
| Out of State Travel | - | - | 17 | - | - | - | 17 |
| Employee Training | 674 | - | 1,259 | - | - | - | 1,933 |
| Office Expenses | 270 | - | - | - | - | - | 270 |
| Telecommunications | 2,428 | - | - | - | - | - | 2,428 |
| Data Processing | 4,204 | - | 682 | - | - | - | 4,886 |
| Publicity and Publications | - | - | - | - | - | - | - |
| Professional Services | 215,745 | - | - | - | - | - | 215,745 |
| IT Professional Services | - | - | - | - | - | - | - |
| Employee Recruitment and Develop | - | - | - | - | - | - | - |
| Dues and Subscriptions | 607 | - | - | - | - | - | 607 |
| Facilities Rental and Taxes | - | - | - | - | - | - | - |
| Fuels and Utilities | - | - | - | - | - | - | - |
| Facilities Maintenance | - | - | - | - | - | - | - |
| Agency Program Related S and S | 204,271 | - | 18,537 | - | - | - | 222,808 |
| Intra-agency Charges | - | - | - | - | - | - | - |
| Other Services and Supplies | 408 | - | - | - | - | - | 408 |
| Expendable Prop 250 - 5000 | 1,416 | - | - | - | - | - | 1,416 |

MANDATED PAYMENTS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 031 - Standard Inflation

Cross Reference Name: Mandated Payments

Cross Reference Number: 19800-200-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|------------------|---------------|-------------------|---------------|------------------------|--------------------------|-------------------|
| Services & Supplies | | | | | | | |
| IT Expendable Property | 1,416 | - | - | - | - | - | 1,416 |
| Total Services & Supplies | \$432,417 | - | \$21,205 | - | - | - | \$453,622 |
| Capital Outlay | | | | | | | |
| Telecommunications Equipment | - | - | - | - | - | - | - |
| Technical Equipment | - | - | - | - | - | - | - |
| Data Processing Software | - | - | - | - | - | - | - |
| Total Capital Outlay | - | - | - | - | - | - | - |
| Total Expenditures | | | | | | | |
| Total Expenditures | 432,417 | - | 21,205 | - | - | - | 453,622 |
| Total Expenditures | \$432,417 | - | \$21,205 | - | - | - | \$453,622 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | (21,205) | - | - | - | (21,205) |
| Total Ending Balance | - | - | (\$21,205) | - | - | - | (\$21,205) |

MANDATED PAYMENTS

BPR012 – Detail of Lottery Funds, Other Funds, and Federal Funds Revenue

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

| Judicial Dept 2017-19 Biennium | | | | | Agency Number: 19800 Cross Reference Number: 19800-200-00-00-00000 | |
|-----------------------------------|------------------|-------------------------------|--------------------------------|----------------------------------|---|-------------------------------|
| Source | 2013-15 Actuals | 2015-17 Leg Adopted Budget | 2015-17 Leg Approved Budget | 2017-19 Agency Request Budget | 2017-19 Governor's Budget | 2017-19 Leg Adopted Budget |
| Other Funds | | | | | | |
| Business Lic and Fees | 105,050 | 70,416 | 70,416 | 85,000 | - | - |
| Sales Income | 85 | - | - | - | - | - |
| Donations | 529,565 | 496,248 | 496,248 | 550,000 | - | - |
| Grants (Non-Fed) | 50,000 | - | - | - | - | - |
| Total Other Funds | \$684,700 | \$566,664 | \$566,664 | \$635,000 | - | - |

MANDATED PAYMENTS

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STATE COURT FACILITIES AND SECURITY

State Court Facilities and Security

During the 2011 legislative session, HB 2012 established the Criminal Fine Account and modified the State Court Facilities and Security Account (SCFSA). The bill also made major changes to ORS 1.178, which was further modified in the 2012 legislative session by SB 1579 and SB 49 in the 2013 legislative session. These changes created four discrete, allowable expense categories, funded through a biennial allocation from the Criminal Fine Account to the SCFSA. These expenditures categories are as follows:

- Developing or implementing the plan for state court security emergency preparedness business continuity and physical security adopted under ORS 1.177
- Statewide training on court security
- Distributions to court facilities security accounts maintained under ORS 1.182
- Capital improvements for courthouses and other state court facilities.

Expenditures under the first two areas fall under the Security and Emergency Preparedness Office (SEPO), located in the Office of the State Court Administrator (OSCA) and under the direction of the Chief Judicial Marshal. The third area is funding to increase courthouse security that is provided by counties. The final area includes funding for capital improvements to courthouse buildings, which are owned and operated by counties.

Security and Emergency Preparedness Office

SEPO is responsible for implementation of security standards for state court security adopted by ORS 1.177. The priority for the programs of the office reflects protection of judges, staff, and clients across the continuum of security threats, emergency incidents, and long-term events that require activation of business continuity plans. Since its creation in 2007, SEPO has evolved from managing activities around creation of security requirements and standards to implementation of required standards throughout the state court system. Examples of program components for SEPO include the following:

- Security of the Supreme Court and Justice buildings
- Security of the Chief Justice of the Oregon Supreme Court / judicial branch
- Identification and access control card program for the department
- Emergency response trailer operations and maintenance
- Emergency communications devices that include satellite and smart phones

STATE COURT FACILITIES AND SECURITY

- Maintenance of existing security systems
- Supplemental funding for sheriff offices providing security for high-risk cases in the circuit courts
- Training for deputy sheriffs providing security for circuit courts of the state
- Emergency operations funds for security, emergency preparedness, or business continuity events impacting the circuit or appellate courts or OSCA
- Security and emergency preparedness training for judges, court staff, and OSCA
- Business continuity exercise program, which tests court and OSCA continuity plans in accordance with Chief Justice Order 10-048

In addition to the above duties, SEPO is responsible for standardization of security systems for courthouses around the state. In 2008, SEPO, with the assistance of the National Center for State Courts, developed court security standards for the appellate courts, tax court, circuit courts, and OSCA. Using the developed standards, a five-year implementation plan was proposed for circuit courts to adhere to the standards published in Chief Justice Order 10-048. The plan involves installing, where absent, or upgrading existing court systems to meet the new standards. Areas being addressed are as follows:

- | | |
|--|--|
| • Access control systems | • Armoring of benches for ballistic resistance |
| • Magnetometers (stationary and portable) | • Intrusion Detection Systems (IDS) |
| • Security camera systems | • Exterior lighting of court facilities |
| • Duress alarm systems | • External barriers |
| • Court Security Officer (CSO) screening stations | • Emergency equipment |
| • Transparent barriers (especially where monetary transactions are taking place) | |

Due to the size of the project, the circuit courts were grouped by area into five geographically related regions. Since 2009, safety upgrades to county courthouse facilities will have been completed in four (Eastern Oregon, Central Oregon, Mid-Willamette Valley, Southwest) of the five regions. For the 2017-19 biennium, SEPO budgeted funding levels will be sufficient to fully complete security upgrades to the remaining courthouses in the Northwest region, with the exception of Multnomah County, which is presently in the process of replacing the courthouse.

STATE COURT FACILITIES AND SECURITY

ORS 1.182 Distributions to Local Courts Security Accounts

ORS 1.182 authorizes distributions under ORS 1.178 into court facilities security accounts maintained by county treasurers in each county. These funds are intended to assist counties, who are responsible for courthouse security, and are not intended to replace local funds. For most counties, the local court security account provides less than 20 percent of the total security budget, the remaining 80 percent being provided by the county. County justice and municipal courts are also required by law to make payments to the local security account from statutory fines processed through their locations.

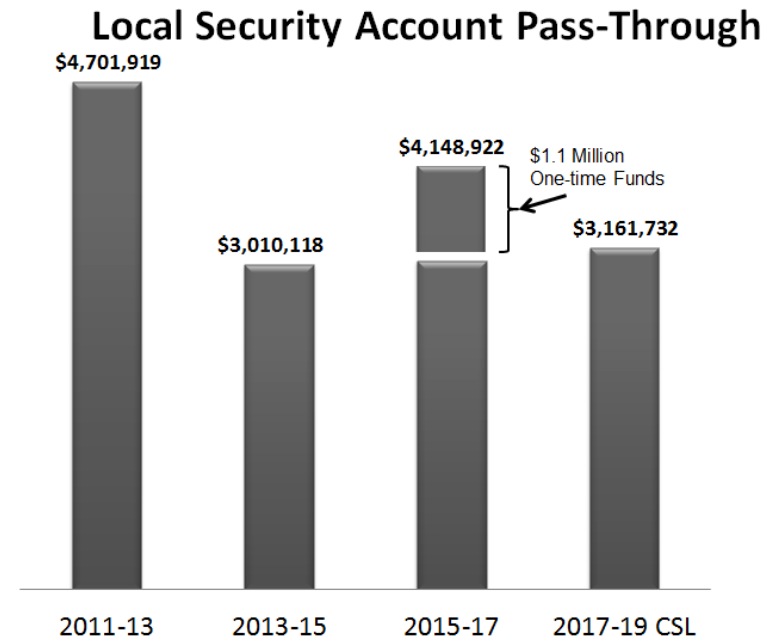
With the passage of HB 2712 during the 2011 legislative session, changes were made concerning distribution of fine revenues. Prior to 2011, counties received direct payments from the fines collected in circuit courts and were not part of the Other Funds budget for the Oregon Judicial Department (OJD). With the passage of HB 2712, these fines are deposited into the Criminal Fine Account (CFA). OJD receives a biennial allocation from the CFA, which must be passed through to local security accounts and expenditure limitation is reflected in Other Funds to account for this pass-through. This process was initiated six months after the start of the 2011-13 biennium, which only required an 18-month allocation.

For the 2015-17 biennium, with standard inflation, the Current Service Level (CSL) budget level for security distributions was established at \$3.05 million. During the 2015 legislative session, \$1.1 million was added to the budget through a policy option package for the purpose of providing emergency funding for those counties that were negatively impacted by modifications in the distribution formula used by justice and municipal courts in providing funding to the local security accounts. The funding changes were passed in the 2013 legislative session in HB 2562.

OJD is required by law to survey local court security accounts and spending each year. The report for fiscal year 2016 will be completed during the second half of 2016. This report will indicate if local security account funding has improved since the passage of HB 2562, and if additional funding is needed for the 2017-19 biennium to avoid security reductions in impacted counties.

Capital Improvements for Courthouses

During 2008, a statewide assessment was performed for courthouses in all Oregon counties. The study highlighted over \$843 million in needed upgrades and repairs to the existing state court system to deal with the serious issues found during the assessment. ORS 1.185 requires counties



STATE COURT FACILITIES AND SECURITY

To provide courtrooms, offices and jury rooms.

(1) The county in which a circuit court is located or holds court shall:

(a) Provide suitable and sufficient courtrooms, offices and jury rooms for the court, the judges, other officers and employees of the court and juries in attendance upon the court, and provide maintenance and utilities for those courtrooms, offices and jury rooms.

(b) Pay expenses of the court in the county other than those expenses required by law to be paid by the state.

(2) Except as provided in subsection (1) of this section, all supplies, materials, equipment and other property necessary for the operation of the circuit courts shall be provided by the state under ORS 1.187. *[Formerly 1.165]*

With continued budgetary constraints, including reduced federal timber payments for many rural Oregon counties, and the overall scope of the issue associated with courthouses around the state, local county governments continue to have difficulty addressing this issue independently.

Funding provided during prior biennia has been utilized for a variety of projects which have delivered access, safety and improved courthouse facilities – especially in rural parts of Oregon.

Union County Courthouse replacement – A partnership with Union County resulted in a replacement project for one of the worst courthouse locations in the state. The old courthouse was a former repurposed hospital built in 1937, with major safety and operational issues. Court operations and courtrooms were spread over multiple floors. Security was an extreme concern due to multiple entrances and limited waiting areas, and access to courtrooms required inmates to be transported through office areas. Rooms used for courtrooms had issues around line-of-sight due to support columns, which also could create audio recording problems.

For the 2013-15 biennium, \$2.0 million in capital funds were provided for a joint project between the state and Union County to replace the courthouse. Using existing land own by the county, in close proximity to the county jail, site preparation and ground breaking took place in spring of 2015. Construction was completed and a courthouse dedication was conducted in March of 2016.



STATE COURT FACILITIES AND SECURITY



STATE COURT FACILITIES AND SECURITY



STATE COURT FACILITIES AND SECURITY

The new courthouse has improved security, with a single point of entry. Jury and waiting rooms help reduce congestion experienced in the previous location. Inmates no longer need to be walked through offices and common areas; there is a dedicated inmate holding area and access corridor. Courtrooms now have improved line-of-sight, and are large enough to include all parties in cases.



Curry County Courthouse roof replacement – The old Curry County courthouse roof was installed in 1991. Due to deterioration, the roof needed to be replaced, not just repaired. Capital improvement funding totaling \$150,000 from the SCFSA was provided for the project, which was completed in 2015.

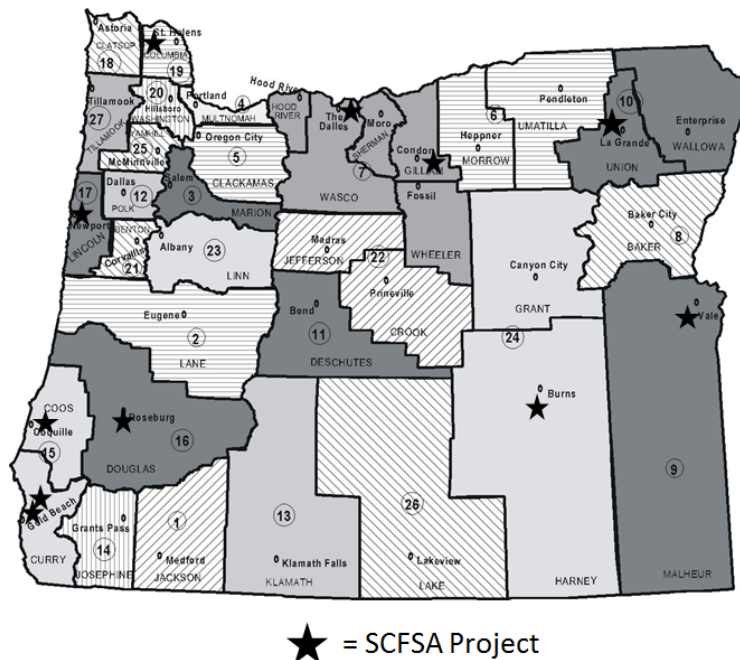
Columbia County Courthouse elevator replacement – During the 2015-17 biennium, the courthouse building in Columbia County lost the single elevator in the facility. Due to difficulties in the county budget, replacing the elevator would have been problematic, impacting accessibility in the facility for Oregonians, especially those individuals with disabilities. With funding available in the SCFSA, \$190,000 was allocated to the county for a new elevator, which was installed in 2015.

Curry and Gilliam Counties life safety projects – House Bill 2331 (2007), directed OJD to make an assessment of all state court facilities. During the assessment, courthouses in Curry and Gilliam counties were found to be deficient in terms of life/safety safeguards like fire suppression and

STATE COURT FACILITIES AND SECURITY

alarm systems. In conjunction with county efforts, \$623,838 was provided from the SCFSA account to upgrade fire alarm and fire suppression systems in these counties.

Since the 2013-15 biennium, SCFSA projects have been executed in multiple courthouses located across the state. Below is a chart highlighting counties where completed projects have taken place.



Proposed Capital Improvement Projects for the 2017-19 Biennium

For the 2017-19 biennium, funding for capital improvements for the SCFSA were phased-out in the CSL budget. OJD has proposed a policy option package for \$3.6 million, which is 2.9 percent higher than 2015-17 funding levels. OJD has worked with an Association of Oregon Counties (AOC) Court Facilities Task Force (CFTF) on a list of recommended projects for the 2017-19 biennium. The CFTF identified over \$20 million in potential projects, far exceeding the level of funding OJD is requesting for the 2017-19 biennium. To assist the Chief Justice in selecting which projects to fund, the task force prepared the following ranking of proposed projects. Project costs are budget estimates and may change based as engineering work is performed in each courthouse.

STATE COURT FACILITIES AND SECURITY

Proposed Projects – top ranked projects

| County | Amount Requested | Project Summary |
|--------------|---------------------|---|
| Douglas | \$ 500,000 | Plumbing and water systems |
| Benton | \$ 210,000 | Roofing project for 128 year-old courthouse |
| Jackson | \$ 95,000 | HVAC |
| Columbia | \$ 150,000 | Structural project – dry rot damage |
| Wheeler | \$ 550,000 | Roofing, facility work |
| Clatsop | \$ 100,000 | Security upgrades |
| Columbia | \$ 75,000 | Safety/alert systems |
| Grant | \$ 250,000 | Window replacement |
| Benton | \$ 120,000 | HVAC |
| Columbia | \$ 250,000 | Emergency back-up generator |
| Columbia | \$ 200,000 | HVAC |
| Wasco | \$ 250,000 | Security and window replacement |
| Clatsop | \$ 56,000 | Courtroom audio/video improvement |
| Clatsop | \$ 150,000 | Elevator upgrade |
| Jackson | \$ 52,000 | Emergency back-up generator/switch |
| Jackson | \$ 220,000 | HVAC |
| Polk | \$ 1,000,000 | Projects with matching local bonds |
| Total | \$ 4,228,000 | |

The selection of which projects and the number of projects that will be completed will be based on the priority recommendations by AOC, but will be adjusted to accommodate project readiness, efficiencies of combining related projects in a single county, and county matching funds will be considered so as to accomplish as much good as possible with these limited funds.

STATE COURT FACILITIES AND SECURITY

Current Service Level

The Current Service Level budget for State Court Facilities Security totals \$6.8 million in Other Funds, a \$4.3 million decrease (39.2 percent) over the 2015-17 Legislatively Approved Budget.

Chief Justice's Recommended Budget

The Chief Justice's Recommended Budget for the 2017-19 biennium totals \$10.4 million (All Funds). This amount includes a policy option package totaling \$3.6 million (All Funds):

- **Policy Option Package 412:** Local Court Facilities Infrastructure

State Court Facilities Security Budget Summary – All Funds

| | 2013-15 Actual Expenditures | 2015-17 Legislatively Approved Budget | 2017-19 Current Service Level (CSL) | 2017-19 Chief Justice's Recommended* |
|----------------------------------|--|--|--|---|
| General Fund | | | | |
| General Fund Debt Service | | | | |
| Other Funds Capital Construction | | | | |
| Other Funds Debt Service Ltd | | | | |
| Other Funds Ltd | \$ 9,703,960 | \$ 11,094,924 | \$ 6,750,477 | \$ 10,350,477 |
| Other Funds Non-Ltd | | | | |
| Federal Funds Ltd | | | | |
| TOTAL – ALL FUNDS | \$ 9,703,960 | \$ 11,094,924 | \$ 6,750,477 | \$ 10,350,477 |
| Positions | 4 | 4 | 4 | 4 |
| FTE | 4.00 | 4.00 | 4.00 | 4.00 |

* Includes CSL and all policy option packages

STATE COURT FACILITIES AND SECURITY

Essential Packages

Purpose

The essential packages present budget adjustments needed to bring the Legislatively Approved Budget to Current Service Level (CSL), the calculated cost of continuing legislatively approved programs into the 2017-19 biennium.

Staffing Impact

No staff is contained in State Court Facilities and Security for the essential packages.

Revenue Source

The essential packages decrease Other Funds by \$4,385,148.

010 Non-PICS Personal Service Adjustments

The State Court Facilities and Security budget has an increase to Other Funds for \$1,649 consisting primarily of an adjustment for Pension Obligation Bond expenses in the amount of \$1,553.

021 Phase-In

The State Court Facilities and Security budget has no adjustment for phased-in programs.

022 Phase-Out Program and One-Time Costs

The State Court Facilities and Security budget has an Other Funds decrease of \$4,600,000 for one-time costs.

031 Inflation and Price List Adjustments

The cost of goods and services increases totals by \$213,203 in Other Funds. This reflects the standard inflation rate of 3.7 percent on goods and services.

032 Above Standard Inflation

STATE COURT FACILITIES AND SECURITY

The State Court Facilities and Security budget has no adjustment for above standard inflation.

040 Mandated Caseload

The State Court Facilities and Security budget has no adjustment for mandated caseload.

050 Fund Shifts

The State Court Facilities and Security budget has no fund shifts within its CSL budget.

060 Technical Adjustments

The State Court Facilities and Security budget has no technical adjustments within its CSL budget.

STATE COURT FACILITIES AND SECURITY

Policy Option Package 412 – Local Court Facilities Infrastructure

Companion Package: No

Purpose

For the last two biennia, the Legislature has authorized funding through the State Court Facilities and Security Account from the Criminal Fines Account, authorized through ORS 1.178 2(d), for capital improvements for courthouses and other state court facilities. This funding allowed OJD to target needed improvement and replacement projects around the state and specifically in many rural counties where county funding may be limited.

How Achieved

Allocation from the Criminal Fine Account to finance proposed critical projects in the several counties, as prioritized by the Association of Oregon Counties and approved by the Chief Justice. Projects include improvements for Americans with Disabilities Act access and other accessibility issues, security, seismic, roof, building deterioration, elevators, plumbing, electrical, and HVAC.

Staffing Impact

None.

Revenue Source

\$3.6 million – Other Funds (Criminal Fine Account allocation)

STATE COURT FACILITIES AND SECURITY

ORBITS and PICS Reports

BPR013 – Essential and Policy Package Fiscal Impact Summary

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Cross Reference Name: State Court Facilities Security Account

Pkg: 010 - Non-PICS Psnl Svc / Vacancy Factor

Cross Reference Number: 19800-400-00-00-00000

| Description | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------|--------------|---------------|----------------|---------------|------------------------|--------------------------|----------------|
| Revenues | | | | | | | |
| Tsfr From Revenue, Dept of | - | - | 1,649 | - | - | - | 1,649 |
| Total Revenues | - | - | \$1,649 | - | - | - | \$1,649 |
| Personal Services | | | | | | | |
| Temporary Appointments | - | - | - | - | - | - | - |
| All Other Differential | - | - | - | - | - | - | - |
| Public Employees' Retire Cont | - | - | - | - | - | - | - |
| Pension Obligation Bond | - | - | 1,553 | - | - | - | 1,553 |
| Social Security Taxes | - | - | - | - | - | - | - |
| Mass Transit Tax | - | - | 96 | - | - | - | 96 |
| Total Personal Services | - | - | \$1,649 | - | - | - | \$1,649 |
| Total Expenditures | | | | | | | |
| Total Expenditures | - | - | 1,649 | - | - | - | 1,649 |
| Total Expenditures | - | - | \$1,649 | - | - | - | \$1,649 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

STATE COURT FACILITIES AND SECURITY

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Cross Reference Name: State Court Facilities Security Account

Pkg: 022 - Phase-out Pgm & One-time Costs

Cross Reference Number: 19800-400-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|-------------------------------|--------------|---------------|----------------------|---------------|------------------------|--------------------------|----------------------|
| Revenues | | | | | | | |
| Tsfr From Revenue, Dept of | - | - | (4,600,000) | - | - | - | (4,600,000) |
| Total Revenues | - | - | (\$4,600,000) | - | - | - | (\$4,600,000) |
| Capital Outlay | | | | | | | |
| Professional Services | - | - | (3,500,000) | - | - | - | (3,500,000) |
| Total Capital Outlay | - | - | (\$3,500,000) | - | - | - | (\$3,500,000) |
| Special Payments | | | | | | | |
| Dist to Counties | - | - | (1,100,000) | - | - | - | (1,100,000) |
| Total Special Payments | - | - | (\$1,100,000) | - | - | - | (\$1,100,000) |
| Total Expenditures | | | | | | | |
| Total Expenditures | - | - | (4,600,000) | - | - | - | (4,600,000) |
| Total Expenditures | - | - | (\$4,600,000) | - | - | - | (\$4,600,000) |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

STATE COURT FACILITIES AND SECURITY

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 031 - Standard Inflation

Cross Reference Name: State Court Facilities Security Account

Cross Reference Number: 19800-400-00-00-00000

| Description | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|--------------|---------------|------------------|---------------|------------------------|--------------------------|------------------|
| Revenues | | | | | | | |
| Tsfr From Revenue, Dept of | - | - | 213,203 | - | - | - | 213,203 |
| Total Revenues | - | - | \$213,203 | - | - | - | \$213,203 |
| Services & Supplies | | | | | | | |
| Instate Travel | - | - | - | - | - | - | - |
| Out of State Travel | - | - | - | - | - | - | - |
| Employee Training | - | - | - | - | - | - | - |
| Office Expenses | - | - | - | - | - | - | - |
| Telecommunications | - | - | - | - | - | - | - |
| Publicity and Publications | - | - | - | - | - | - | - |
| Professional Services | - | - | - | - | - | - | - |
| IT Professional Services | - | - | 100,057 | - | - | - | 100,057 |
| Employee Recruitment and Develop | - | - | - | - | - | - | - |
| Dues and Subscriptions | - | - | - | - | - | - | - |
| Facilities Rental and Taxes | - | - | - | - | - | - | - |
| Facilities Maintenance | - | - | - | - | - | - | - |
| Agency Program Related S and S | - | - | - | - | - | - | - |
| Intra-agency Charges | - | - | - | - | - | - | - |
| Other Services and Supplies | - | - | - | - | - | - | - |
| Expendable Prop 250 - 5000 | - | - | - | - | - | - | - |
| IT Expendable Property | - | - | - | - | - | - | - |
| Total Services & Supplies | - | - | \$100,057 | - | - | - | \$100,057 |

STATE COURT FACILITIES AND SECURITY

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Cross Reference Name: State Court Facilities Security Account

Pkg: 031 - Standard Inflation

Cross Reference Number: 19800-400-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|-------------------------------|--------------|---------------|------------------|---------------|------------------------|--------------------------|------------------|
| Capital Outlay | | | | | | | |
| Technical Equipment | - | - | - | - | - | - | - |
| Data Processing Software | - | - | 336 | - | - | - | 336 |
| Professional Services | - | - | - | - | - | - | - |
| Total Capital Outlay | - | - | \$336 | - | - | - | \$336 |
| Special Payments | | | | | | | |
| Dist to Counties | - | - | 112,810 | - | - | - | 112,810 |
| Dist to Other Gov Unit | - | - | - | - | - | - | - |
| Total Special Payments | - | - | \$112,810 | - | - | - | \$112,810 |
| Total Expenditures | | | | | | | |
| Total Expenditures | - | - | 213,203 | - | - | - | 213,203 |
| Total Expenditures | - | - | \$213,203 | - | - | - | \$213,203 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

STATE COURT FACILITIES AND SECURITY

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Cross Reference Name: State Court Facilities Security Account

Pkg: 412 - Local Court Facilities Infrastructure

Cross Reference Number: 19800-400-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|-----------------------------|--------------|---------------|--------------------|---------------|------------------------|--------------------------|--------------------|
| Revenues | | | | | | | |
| Transfer In Other | - | - | 3,600,000 | - | - | - | 3,600,000 |
| Tsfr From Revenue, Dept of | - | - | - | - | - | - | - |
| Total Revenues | - | - | \$3,600,000 | - | - | - | \$3,600,000 |
| Capital Outlay | | | | | | | |
| Professional Services | - | - | 3,600,000 | - | - | - | 3,600,000 |
| Total Capital Outlay | - | - | \$3,600,000 | - | - | - | \$3,600,000 |
| Total Expenditures | | | | | | | |
| Total Expenditures | - | - | 3,600,000 | - | - | - | 3,600,000 |
| Total Expenditures | - | - | \$3,600,000 | - | - | - | \$3,600,000 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

STATE COURT FACILITIES AND SECURITY

BPR012 – Detail of Lottery Funds, Other Funds, and Federal Funds Revenue

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

| Judicial Dept 2017-19 Biennium | | Agency Number: 19800 Cross Reference Number: 19800-400-00-00-00000 | | | | |
|-----------------------------------|--------------------|---|--------------------------------|----------------------------------|------------------------------|-------------------------------|
| Source | 2013-15 Actuals | 2015-17 Leg Adopted Budget | 2015-17 Leg Approved Budget | 2017-19 Agency Request Budget | 2017-19 Governor's Budget | 2017-19 Leg Adopted Budget |
| Other Funds | | | | | | |
| Interest Income | 11,680 | - | - | - | - | - |
| Other Revenues | 1,301 | - | - | - | - | - |
| Transfer In Other | - | - | - | 3,600,000 | - | - |
| Tsfr From Revenue, Dept of | 9,415,927 | 11,071,244 | 11,094,924 | 6,750,477 | - | - |
| Total Other Funds | \$9,428,908 | \$11,071,244 | \$11,094,924 | \$10,350,477 | - | - |

STATE COURT FACILITIES AND SECURITY

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THIRD-PARTY COLLECTIONS

Third-Party Collections

During the 2011-13 biennium, a new General Fund appropriation was established for the cost of paying third-party collection fees associated with the collection of fees, fines, and restitution. The types of expenditures that are included in this appropriation are as follows:

- Credit Card Fees – Payments to US Bank for credit card payments made directly to the Oregon Judicial Department (OJD) or through the File and Serve system.
- State Treasury Fees – Charges for banking services.
- Other State Agency Fees – Charges for Department of Justice services for foreclosure complaints and garnishments. Charges for Department of Administrative Services printing services for collection notices.
- Department of Revenue (DOR) – Fees related to the tax offset program and collection activities.
- Private Collection Firms (PCFs) – Fees related to collection activities.

Any time a fee or fine must be referred to a third party for collection, ORS 1.202(2) requires courts to assess a fee to the debtor to pay for the costs of collection. The system reference for this fee is called the Collection Referral Assessment Fee (referred to as CRAS). OJD sets the CRAS rate to cover expected collection costs. The current CRAS rate is 28 percent of the outstanding balance referred to DOR or a PCF.

Third-party collection costs for 2015-17 are projected to be \$14.1 million. For the same period, collection referral fees charged to debtors, which will then be deposited into the General Fund, are projected to be \$14.6 million. For 2017-19 OJD expects to spend \$16.3 million on third party collection costs and collection referral fees deposited into the General Fund in 2017-19 are expected to be \$16.5 million.

Background

State courts collect revenue from a variety of sources, such as fees for civil cases and fines for offenses. In civil cases, state law imposes filing fees and some additional fees for settlement conferences, filing some motions, and other activities. Civil fees comprise a small part of OJD's liquidated and delinquent debt (debt resulting from a judgment that is not paid on time). These fees are collected at the time of filing or the activity. However, judges have the authority to waive (not impose) or defer (allow payment at a later date or over time). Where these actions are taken, fee deferrals are more likely to be granted than waivers.

Courts also impose and collect fines for offenses (crimes and noncriminal violations) that are sent to state-level funds and accounts and to local governments. Courts can impose and collect restitution and compensatory fines that go to individual crime victims. Monetary obligations in offense cases can remain valid for up to fifty years.

THIRD-PARTY COLLECTIONS

Budget Changes

During the 2011 legislative session, modifications were made to the process of how collections activities are funded. Prior to the 2011-13 biennium, revenue management and collection functions were self-funding within OJD and paid with the CRAS fees, ORS 1.202(2). As long as the CRAS rate was set properly, OJD's collections costs were in balance with the CRAS revenue.

Beginning in 2011-13, the Legislature directed the CRAS fee revenue to the General Fund and paid for revenue management activities from the General Fund through a specific appropriation for third-party collections activities. The 2015-17 LAB General Fund appropriation for third-party collections was approximately \$12.2 million, which is \$2.4 million lower than the expected CRAS fees that will be deposited into the General Fund.

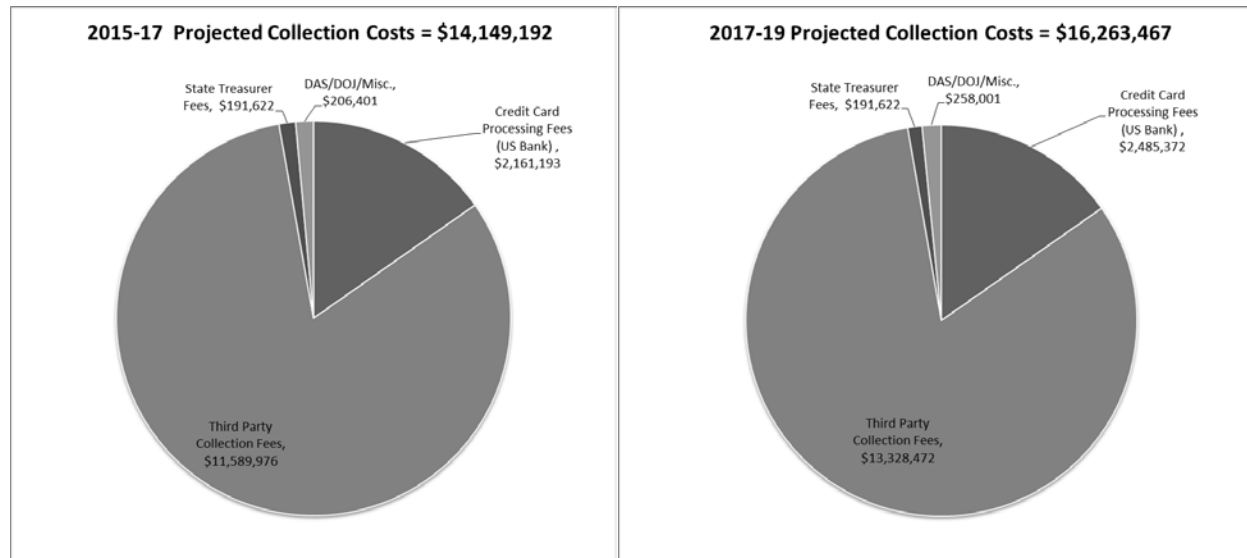
With the new structure, there is disparity between the CRAS revenue received from debtors deposited into the General Fund and the appropriation for third-party collection activities. If collection activities are more successful than budgeted, meaning that revenues from collections are higher, then OJD must request additional General Fund appropriation. When an increase is not possible, the other option for staying within budget is to reduce collections activities, which will impact state revenues.

Collection Cost Projections

The 2015-17 General Fund allocation is \$12.2 million. Collection expenditures for 2015-17 are projected to be \$14.1 million, which includes a DOR rebate of \$1.4 million. In 2015-17, collections costs and credit card processing fees have increased 32 percent and revenue collected by third parties is expected to increase by \$21.8 million, or 38.7 percent for the biennium.

Collection expenditures for 2017-19 are expected to increase 15 percent, to \$16.3 million. Revenue collected by third parties is expected to increase by 18 percent or \$14 million in 2017-19.

THIRD-PARTY COLLECTIONS



Projections of collection costs are based on the 2015-17 Office of Economic Analysis revenue forecast, current referral rates of court debt, current third-party collection rates, and the most recent trends in DOR rebates of collection fees.

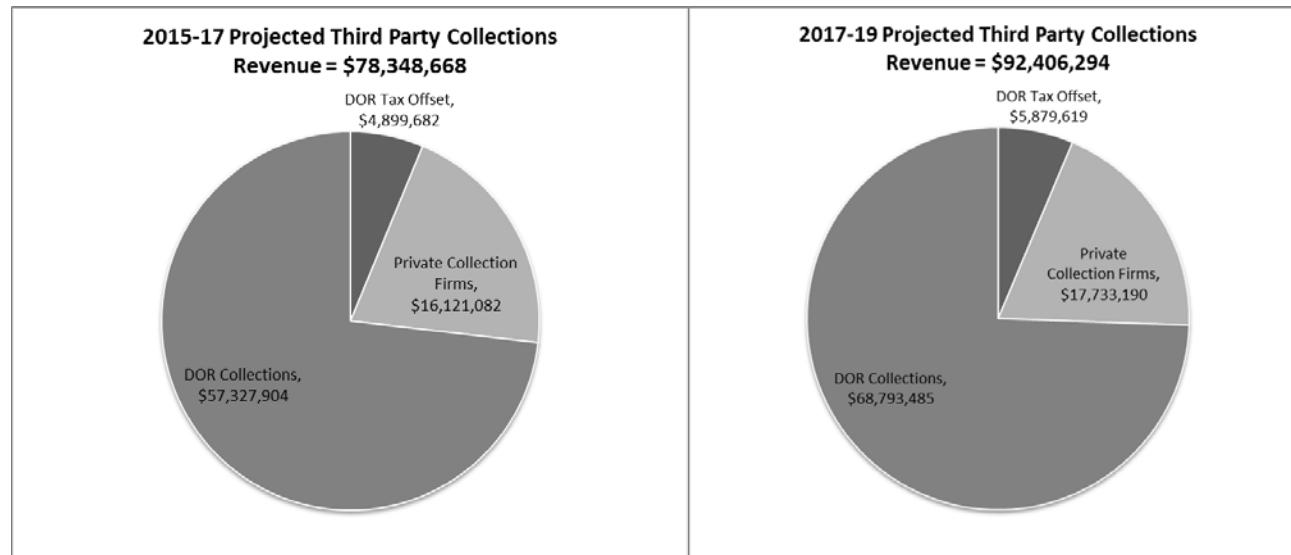
Due to the level of uncertainty that exists with fluctuating collections and external factors (third-party rate increases, third-party performance, case filings, economic downturns, future changes in staffing levels), OJD cannot predict the accuracy of our cost projection with a high degree of assurance. Changes in any of these external factors will impact collection revenues and the resulting actual costs.

2015-17 Third-Party Collections Revenue

Third-party revenue collections include restitution owed to victims, fines, assessments, and deferred civil filings. This revenue is distributed to victims of crime, the General Fund, the Criminal Fine Account, and to counties, cities, and local agencies. DOR has a larger percentage of OJD's delinquent accounts and is usually the first agency where new debt is referred; therefore, they are able to collect more money than the PCFs.

In 2015-17, revenue collected by third parties is expected to be \$78.3 million and increase by 18 percent in 2017-19 to \$92.4 million.

THIRD-PARTY COLLECTIONS



The following table is an itemization of third-party collection revenue since 2009-11. Since 2009, OJD has made efforts to balance the volume of referrals by age and case type at DOR and each PCF to maximize collections and to track performance in each category (felony, misdemeanor, violation).

| Biennium | DOR Tax Offset | DOR Regular Collections | Alliance One | Municipal Services Bureau | Linebarger | TOTAL |
|-------------------|----------------|-------------------------|--------------|---------------------------|--------------|---------------|
| 2009-11 Actual | \$ 2,408,105 | \$ 47,594,581 | \$ 8,017,035 | \$ 352,345 | \$ 103,974 | \$ 58,476,040 |
| 2011-13 Actual | \$ 6,153,318 | \$ 47,155,892 | \$ 7,017,494 | \$ 2,347,079 | \$ 1,894,350 | \$ 64,568,131 |
| 2013-15 Actual | \$ 5,110,986 | \$ 43,056,102 | \$ 3,788,320 | \$ 2,288,757 | \$ 2,255,897 | \$ 56,500,062 |
| 2015-17 Projected | \$ 4,899,682 | \$ 57,327,904 | \$ 6,569,020 | \$ 4,584,492 | \$ 4,967,570 | \$ 78,348,668 |
| 2017-19 Projected | \$ 5,879,619 | \$ 68,793,485 | \$ 7,225,922 | \$ 5,042,942 | \$ 5,464,326 | \$ 92,406,294 |

In 2015-17, the state is expected to recover \$5.54 for each \$1.00 spent on third-party collection activities. This represents total third-party revenue of \$78.3 million divided by total third-party costs of \$14.1 million. In 2017-19, the state is expected to recover \$5.68 for each \$1.00 spent. This represents total third-party revenue of \$92.4 million and total third-party costs of \$16.3 million.

THIRD-PARTY COLLECTIONS

Current Service Level

The Current Service Level budget for Third-Party Collections totals \$12.6 million General Fund, an \$0.5 million increase (3.7 percent) over the 2015-17 Legislatively Approved Budget.

Chief Justice's Recommended Budget

The Chief Justice's Recommended Budget for the 2017-19 biennium totals \$16.0 million (All Funds). This amount includes a policy option package totaling \$3.3 million (All Funds):

- **Policy Option Package 413:** Debt Collection Funding

Third-Party Collections Budget Summary – All Funds

| | 2013-15 Actual Expenditures | 2015-17 Legislatively Approved Budget | 2017-19 Current Service Level (CSL) | 2017-19 Chief Justice's Recommended* |
|----------------------------------|--|--|--|---|
| General Fund | \$ 10,696,641 | \$ 12,191,808 | \$ 12,642,905 | \$ 15,950,000 |
| General Fund Debt Service | | | | |
| Other Funds Capital Construction | | | | |
| Other Funds Debt Service Ltd | | | | |
| Other Funds Ltd | | | | |
| Other Funds Non-Ltd | | | | |
| Federal Funds Ltd | | | | |
| TOTAL – ALL FUNDS | \$ 10,696,641 | \$ 12,191,808 | \$ 12,642,905 | \$ 15,950,000 |
| Positions | - | - | - | - |
| FTE | - | - | - | - |

* Includes CSL and all policy option packages

THIRD-PARTY COLLECTIONS

Essential Packages

Purpose

The essential packages present budget adjustments needed to bring the Legislatively Approved Budget to Current Service Level (CSL), the calculated cost of continuing legislatively approved programs into the 2017-19 biennium.

Staffing Impact

No staff is contained in Third-Party Collections for the essential packages.

Revenue Source

The essential packages increase General Fund by \$451,097.

010 Non-PICS Personal Service Adjustments

The Third-Party Collections budget has no adjustment for non-PICS Personal Service adjustments.

021 Phase-In

The Third-Party Collections budget has no adjustment for phased-in programs.

022 Phase-Out Program and One-Time Costs

The Third-Party Collections budget has no adjustment for phased-out programs or one-time costs.

031 Inflation and Price List Adjustments

The cost of goods and services increases totals by \$451,097 in General Fund. This reflects the standard inflation rate of 3.7 percent on goods and services.

032 Above Standard Inflation

THIRD-PARTY COLLECTIONS

The Third-Party Collections budget has no adjustment for above standard inflation.

040 Mandated Caseload

The Third-Party Collections budget has no adjustment for mandated caseload.

050 Fund Shifts

The Third-Party Collections budget has no fund shifts within its CSL budget.

060 Technical Adjustments

The Third-Party Collections budget has no technical adjustments within its CSL budget.

THIRD-PARTY COLLECTIONS

Policy Option Package 413 – Third-Party Debt Collection Funding

Companion Package: No

Purpose

The Oregon Judicial Department pays fees for

- Credit card fees when a card is used to pay filing fees or pay for fines
- Successful debt collection by the Department of Revenue (DOR)
- Successful debt collection by outside collection firms
- Collection and notice mailings by the Department of Administrative Services

Due to collection activities and the increased use of credit cards, additional funds are needed to pay for these services. Fees are only paid after successful collection or payment of fees. Collections through DOR and outside collection firms are projected to exceed \$70 million in the 2015-17 biennium (24.4 percent higher than the prior biennium). Payments to DOR are approximately 59 percent of the expenditures in this area.

How Achieved

This package would supply additional Services and Supply budget to be able to pay projected collection costs during the 2017-19 biennium.

Staffing Impact

None.

Revenue Source

\$3,307,095 – General Fund

THIRD-PARTY COLLECTIONS

ORBITS and PICS Reports

BPR013 – Essential and Policy Package Fiscal Impact Summary

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 031 - Standard Inflation

Cross Reference Name: 3rd Party Debt Collection

Cross Reference Number: 19800-210-00-00-00000

| Description | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|------------------|---------------|-------------|---------------|------------------------|--------------------------|------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 451,097 | - | - | - | - | - | 451,097 |
| Total Revenues | \$451,097 | - | - | - | - | - | \$451,097 |
| Services & Supplies | | | | | | | |
| Office Expenses | - | - | - | - | - | - | - |
| Other Services and Supplies | 451,097 | - | - | - | - | - | 451,097 |
| IT Expendable Property | - | - | - | - | - | - | - |
| Total Services & Supplies | \$451,097 | - | - | - | - | - | \$451,097 |
| Total Expenditures | | | | | | | |
| Total Expenditures | 451,097 | - | - | - | - | - | 451,097 |
| Total Expenditures | \$451,097 | - | - | - | - | - | \$451,097 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

THIRD-PARTY COLLECTIONS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept
Pkg: 413 - Debt Collection Funding

Cross Reference Name: 3rd Party Debt Collection
Cross Reference Number: 19800-210-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|--------------------|---------------|-------------|---------------|------------------------|--------------------------|--------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 3,307,095 | - | - | - | - | - | 3,307,095 |
| Total Revenues | \$3,307,095 | - | - | - | - | - | \$3,307,095 |
| Services & Supplies | | | | | | | |
| Other Services and Supplies | 3,307,095 | - | - | - | - | - | 3,307,095 |
| Total Services & Supplies | \$3,307,095 | - | - | - | - | - | \$3,307,095 |
| Total Expenditures | | | | | | | |
| Total Expenditures | 3,307,095 | - | - | - | - | - | 3,307,095 |
| Total Expenditures | \$3,307,095 | - | - | - | - | - | \$3,307,095 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

PASS-THROUGHS

Pass-Throughs

Beginning in the 2011-13 biennium, new General Fund appropriations were established for external pass-through payments to county law libraries, county mediation/conciliation programs, biennial funding for the Council on Court Procedures, and biennial funding for the Oregon Law Commission. During prior biennia, funding for these programs was provided through revenue transfers from court fees, surcharges, or appropriations from the Legislature. In the 2011 legislative session, changes were made and funding for these programs was added to the Oregon Judicial Department (OJD) budget.

Background

In 2011, the Oregon Legislature passed HB 2710 (chapter 585, Oregon Laws 2011). This bill revised the laws relating to court fees by establishing a standard filing fee for general civil proceedings and establishing other clearly delineated filing fees for special matters, including domestic relations cases and simple proceedings. These fees are flat and uniform across the state. The bill also eliminated add-ons, surcharges, and other variable fees.

Section 1 of HB 2710, codified in ORS 21.005, provides that all fees and charges collected by circuit courts must be deposited in the General Fund, effective July 1, 2011. Section 3 of the bill, codified in ORS 21.007, changed the way counties receive funding for the purposes of mediation/conciliation services and operating law libraries. These programs were previously funded by court fees prior to the 2011-13 biennium, and this section of the bill changed the funding for these programs to General Fund appropriations beginning July 1, 2011.

In the 2013-15 session, the \$11.9 million in Legal Aid payments in ORS 9.577(3), which in prior biennium had been pulled from court fees, was established as a separate Other Funds limitation in the OJD budget.

Law Libraries and Conciliation and Mediation Services

The legislative intent of HB 2710 was to provide a General Fund appropriation that was equivalent to the historical funding these programs received in prior years, to the extent possible given budget constraints, and exclude any temporary revenue increases due to the temporary HB 2287 (2009 session) surcharges. HB 5056 (2011 session) appropriated \$7.4 million to OJD for mediation/conciliation programs and directed the Chief Justice to consult with presiding judges before making any distributions to counties. HB 5056 also appropriated \$7.4 million to OJD for county law library operations and services and directed OJD to distribute monies appropriated to the counties based on revenue received from filing fees collected during the 2009-11 biennium in civil actions commenced in the circuit court for the county. These two appropriations were each reduced by 3.5 percent, or \$0.259 million, by SB 5701 (2012 session).

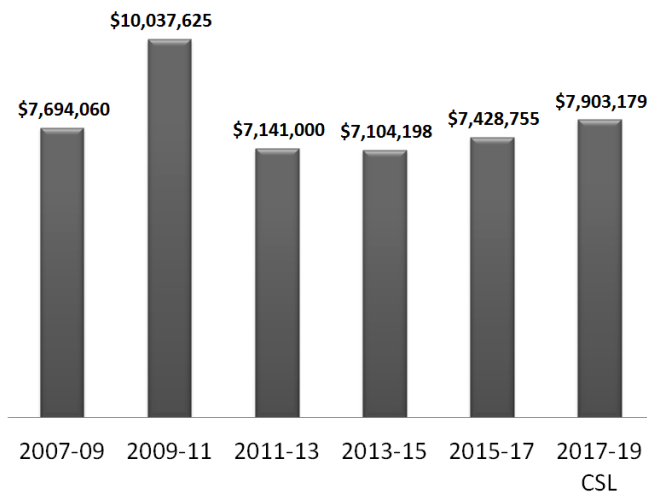
PASS-THROUGHS

Changes in the proportion of total law library revenue distributed to counties from 2007-09 to 2009-11 were driven by case filings and fees (the old system). The Legislature based the 2011-13 General Fund appropriation for law libraries on the 2007-09 funding level to exclude the one-time revenue increase from HB 2287 temporary surcharges received in 2009-11. OJD distributed the 2011-13 General Fund appropriation to each county based on its proportion of total law library revenue received in 2009-11. Overall law library program funding decreased from 2009-11 to 2011-13 by a total of 29 percent due to the sunset of the HB 2287 temporary surcharges (\$2.3 million) and budget shortfalls (\$0.553 million), and decreased from 2007-09 by 7 percent due to budget shortfalls.

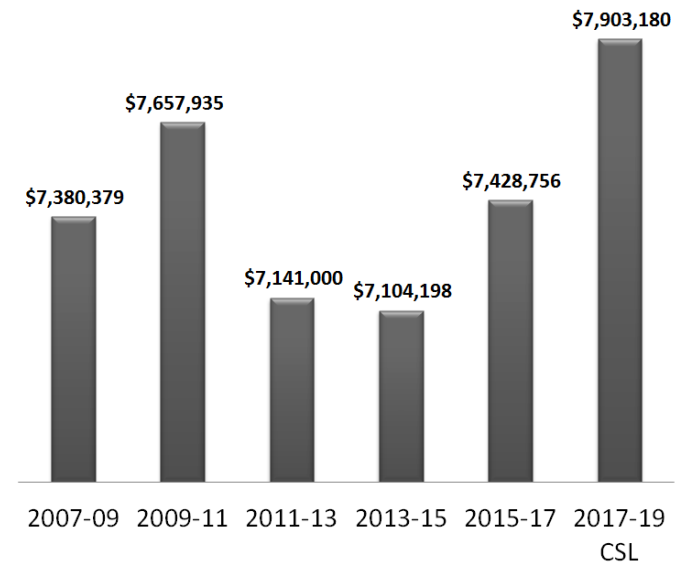
For the 2013-15 biennium, the initial distribution amount was set at \$7.2 million for law library funding and mediation/conciliation funding. HB 5008 reduced the amount by \$0.144 million for the two percent holdback. The 2014 legislative session returned \$0.036 million of that holdback. For the 2015-17 biennium, pass-through allocations to counties were calculated using the initial 2013-15 distribution amounts, adding in standard inflation.

Below are charts of the overall county law library and mediation/conciliation funding since the 2007-09 biennium, including the proposed 2017-19 Current Service Level amounts.

Mediation/Conciliation Funding



County Law Library Funding



PASS-THROUGHS

Council on Court Procedures

Established in 1977 by ORS 1.725 to 1.750, the Council on Court Procedures promulgates rules governing pleading, practice, and procedures in all civil proceedings in the circuit courts of the state. Proposed amendments to the rules are submitted to the Legislature in January of odd-numbered years and go into effect on January 1st of the following even-numbered year unless amended, repealed, or supplemented by the Legislature.

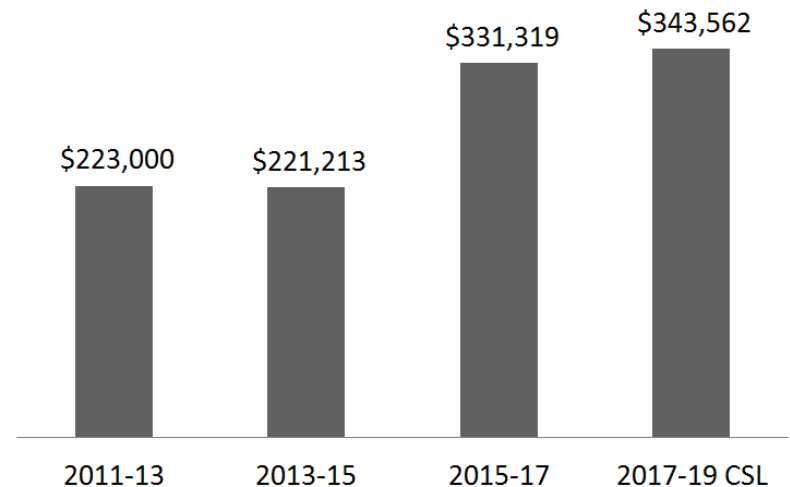
For the 2011-13 biennium, external pass-through funding was provided for the Council in the amount of \$52,000. Funding was not impacted by reductions in pass-through funding from the 2012 legislative session. For the 2013-15 biennium, the initial funding was established at \$52,000, but HB 5008 reduced the funding by \$1,040 for the two percent holdback. The 2014 legislative session returned \$260 in funding.

Oregon Law Commission

The 1997 Legislative Assembly adopted legislation creating the Oregon Law Commission (ORS 173.315). By statute, the Commission's function is to "conduct a continuous substantive law revision program ..." The Commission provides assistance to the Legislature in proposing modifications of statutes by:

- Identifying and selecting law reform projects;
- Researching the area of law at issue, including other states' laws to see how they deal with similar issues;
- Communicating with and educating those who may be affected by proposed reforms; and
- Drafting proposed legislation, comments, and reports for legislative consideration.

For the 2015-17 biennium, \$100,000 in General Fund appropriation was added for the Law Commission in SB 5507 and this figure was rolled into the 2017-19 Current Service Level budget. The chart to the right illustrates Law Commission funding since 2011-13.



Legal Aid

In 1996, the Legislative Assembly established the Legal Services Program (ORS 9.572) under the Oregon State Bar. This program offers legal aid to individuals for non-criminal cases. Over 98 percent of the yearly budget for the Legal Services Program comes from filing fees collected by OJD.

PASS-THROUGHS

OJD deposits filing fee revenues in the Legal Aid Account (ORS 9.577) and the State Court Administrator is required to fund \$11.9 million per biennium to the account in quarterly distributions per the statute.

Prior to the 2013-15 biennium, distributions to the Legal Aid Account were performed before normal General Fund distributions. For the 2013-15 biennium, the distributions were added to pass-throughs as an Other Funds payment to correctly account for the distributions. For the 2015-17 biennium, SB 5507 added a one-time \$0.6 million General Fund appropriation during the 2015 legislative session. During the 2016 legislative session, an additional \$0.2 million in one-time General Fund appropriation was added by SB 5701 to address services related to housing issues. These two additions pushed the total funding for Legal Aid to \$12.7 million for the biennium.

PASS-THROUGHS

Current Service Level

The Current Service Level budget for External Pass-Throughs totals \$15.8 million General Fund and \$11.9 million in Other Funds, an \$0.2 million decrease in General Fund (1.5 percent), over the 2015-17 Legislatively Approved Budget.

Chief Justice's Recommended Budget

The Chief Justice's Recommended Budget for the 2017-19 biennium totals \$29.9 million (All Funds). This amount includes policy option packages totaling \$2.2 million (All Funds):

- **Policy Option Package 408:** County Mediation and Conciliation Funding and Support
- **Policy Option Package 420:** Law Commission Full Funding
- **Policy Option Package 421:** Law Commission Additional Staff Attorney

External Pass-Throughs Budget Summary – All Funds

| | 2013-15 Actual Expenditures | 2015-17 Legislatively Approved Budget | 2017-19 Current Service Level (CSL) | 2017-19 Chief Justice's Recommended* |
|----------------------------------|--|--|--|---|
| General Fund | \$ 14,530,829 | \$ 16,042,390 | \$ 15,806,359 | \$ 17,994,276 |
| General Fund Debt Service | | | | |
| Other Funds Capital Construction | | | | |
| Other Funds Debt Service Ltd | | | | |
| Other Funds Ltd | \$ 11,900,000 | \$ 11,900,000 | \$ 11,900,000 | \$ 11,900,000 |
| Other Funds Non-Ltd | | | | |
| Federal Funds Ltd | | | | |
| TOTAL – ALL FUNDS | \$ 26,430,829 | \$ 27,942,390 | \$ 27,706,359 | \$ 29,894,276 |
| Positions | - | - | - | - |
| FTE | - | - | - | - |

* Includes CSL and all policy option packages

PASS-THROUGHS

Essential Packages

Purpose

The essential packages present budget adjustments needed to bring the Legislatively Approved Budget to Current Service Level (CSL), the calculated cost of continuing legislatively approved programs into the 2017-19 biennium.

Staffing Impact

No staff is contained in External Pass-Throughs for the essential packages.

Revenue Source

The essential packages decrease General Fund by \$236,031.

010 Non-PICS Personal Service Adjustments

The Pass-Throughs budget has no adjustment for non-PICS Personal Service adjustments.

021 Phase-In

The Pass-Throughs budget has no adjustment for phased-in programs.

022 Phase-Out Program and One-Time Costs

The Pass-Throughs budget has a decrease in General Fund of \$800,000 for phased-out programs and one-time costs.

031 Inflation and Price List Adjustments

The cost of goods and services increases totals by \$563,969 in General Fund. This reflects the standard inflation rate of 3.7 percent on goods and services.

032 Above Standard Inflation

PASS-THROUGHS

The Pass-Throughs budget has no adjustment for above standard inflation.

040 Mandated Caseload

The Pass-Throughs budget has no adjustment for mandated caseload.

050 Fund Shifts

The Pass-Throughs budget has no fund shifts within its CSL budget.

060 Technical Adjustments

The Pass-Throughs budget has no technical adjustments within its CSL budget.

PASS-THROUGHS

Policy Option Package 408 – County Mediation and Conciliation Funding and Support

Companion Package: No

Purpose

The State of Oregon provides funds on a pass-through basis to counties for mediation/conciliation services covered under ORS Chapter 36 and ORS 107.755. Funding has remained relatively static during the last three biennia, and many counties have fully utilized their funding during a biennium and have pulled additional funding for services from county law library funding. Having mediation/conciliation services available to parties can reduce the number of cases that go before the courts, and further reduce the amount of time that the courts spend in hearings. This package provides additional funding for services and creates a statewide dedicated Alternative Dispute Resolution Coordinator.

How Achieved

The package will add one statewide position and \$2 million in new pass-through funding for mediation/conciliation services for counties.

Staffing Impact

- OJD Analyst 3 1.0 FTE 0.88 FTE (phased-in October 2017)

Revenue Source

\$2,171,920 – General Fund

PASS-THROUGHS

Policy Option Package 420 – Law Commission Full Funding

Companion Package: No

Purpose

This package would close the gap between current baseline funding for the Oregon Law Commission and the direct expenses incurred by Willamette University to house and staff the Commission. With this package, Willamette student tuition dollars would not need to be used for funding the state work conducted by the Commission. Willamette would, however, continue to contribute space and overhead costs (currently valued at over \$100,000 per biennium) to support the continued operation of the Commission. Prior to the expanded base funding amount initially provided in 2015-17, Willamette was contributing not only those indirect costs, but over \$100K per biennium in direct expenses to the work of the Commission.

How Achieved

Increases General Fund appropriation pass-through by \$20,671 for the biennium.

Staffing Impact

None.

Revenue Source

\$20,671 – General Fund

PASS-THROUGHS

Policy Option Package 421 – Law Commission Additional Staff Attorney

Companion Package: No

Purpose

This package would fund one FTE staff attorney within the Oregon Law Commission, which would expand the Commission's ability to organize, coordinate, and staff projects for law reform in the state. Among the projects currently planned but on hold pending capacity is the Election Law Reform project, which is intended to update Oregon election law in order to address the shift to vote-by-mail as well as to address other areas of confusion and uncertainty that have been identified in Oregon election law. The additional staff attorney would permit the commission to begin work on that project while also expanding the Commission's capacity to consider and manage other projects suggested by the public, state agencies, and members of the Legislative Assembly.

How Achieved

The package would fund a base salary of \$60,000 plus benefits at Willamette University's standard benefit amount (38.7 percent), as well as a year two COLAs of 1.5 percent. Total length of hire would be two years through an increase in the pass-through General Fund appropriation.

Staffing Impact

None. Contracted position.

Revenue Source

\$167,246 – General Fund

PASS-THROUGHS

ORBITS and PICS Reports

BPR013 – Essential and Policy Package Fiscal Impact Summary

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 022 - Phase-out Pgm & One-time Costs

Cross Reference Name: External Pass-Throughs

Cross Reference Number: 19800-220-00-00-00000

| Description | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|-------------------------------|--------------------|---------------|-------------|---------------|------------------------|--------------------------|--------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | (800,000) | - | - | - | - | - | (800,000) |
| Total Revenues | (\$800,000) | - | - | - | - | - | (\$800,000) |
| Special Payments | | | | | | | |
| Dist to Non-Gov Units | (800,000) | - | - | - | - | - | (800,000) |
| Total Special Payments | (\$800,000) | - | - | - | - | - | (\$800,000) |
| Total Expenditures | | | | | | | |
| Total Expenditures | (800,000) | - | - | - | - | - | (800,000) |
| Total Expenditures | (\$800,000) | - | - | - | - | - | (\$800,000) |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

PASS-THROUGHS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 031 - Standard Inflation

Cross Reference Name: External Pass-Throughs

Cross Reference Number: 19800-220-00-00-00000

| Description | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|-------------------------------|------------------|---------------|-------------|---------------|------------------------|--------------------------|------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 563,969 | - | - | - | - | - | 563,969 |
| Transfer In - Intrafund | - | - | - | - | - | - | - |
| Total Revenues | \$563,969 | - | - | - | - | - | \$563,969 |
| Special Payments | | | | | | | |
| Dist to Counties | 549,728 | - | - | - | - | - | 549,728 |
| Dist to Other Gov Unit | - | - | - | - | - | - | - |
| Dist to Non-Gov Units | 14,241 | - | - | - | - | - | 14,241 |
| Total Special Payments | \$563,969 | - | - | - | - | - | \$563,969 |
| Total Expenditures | | | | | | | |
| Total Expenditures | 563,969 | - | - | - | - | - | 563,969 |
| Total Expenditures | \$563,969 | - | - | - | - | - | \$563,969 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

PASS-THROUGHS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept
Pkg: 408 - County Mediation & Conciliation Funding and Support

Cross Reference Name: External Pass-Throughs
Cross Reference Number: 19800-220-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|-------------------------------|--------------------|---------------|-------------|---------------|------------------------|--------------------------|--------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 2,000,000 | - | - | - | - | - | 2,000,000 |
| Total Revenues | \$2,000,000 | - | - | - | - | - | \$2,000,000 |
| Special Payments | | | | | | | |
| Dist to Counties | 2,000,000 | - | - | - | - | - | 2,000,000 |
| Total Special Payments | \$2,000,000 | - | - | - | - | - | \$2,000,000 |
| Total Expenditures | | | | | | | |
| Total Expenditures | 2,000,000 | - | - | - | - | - | 2,000,000 |
| Total Expenditures | \$2,000,000 | - | - | - | - | - | \$2,000,000 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

PASS-THROUGHS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 420 - Full Program Cost Funding

Cross Reference Name: External Pass-Throughs

Cross Reference Number: 19800-220-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|-------------------------------|-----------------|---------------|-------------|---------------|------------------------|--------------------------|-----------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 20,671 | - | - | - | - | - | 20,671 |
| Total Revenues | \$20,671 | - | - | - | - | - | \$20,671 |
| Special Payments | | | | | | | |
| Dist to Non-Gov Units | 20,671 | - | - | - | - | - | 20,671 |
| Total Special Payments | \$20,671 | - | - | - | - | - | \$20,671 |
| Total Expenditures | | | | | | | |
| Total Expenditures | 20,671 | - | - | - | - | - | 20,671 |
| Total Expenditures | \$20,671 | - | - | - | - | - | \$20,671 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

PASS-THROUGHS

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 421 - Added Staff Attorney

Cross Reference Name: External Pass-Throughs

Cross Reference Number: 19800-220-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|-------------------------------|------------------|---------------|-------------|---------------|------------------------|--------------------------|------------------|
| Revenues | | | | | | | |
| General Fund Appropriation | 167,246 | - | - | - | - | - | 167,246 |
| Total Revenues | \$167,246 | - | - | - | - | - | \$167,246 |
| Special Payments | | | | | | | |
| Dist to Non-Gov Units | 167,246 | - | - | - | - | - | 167,246 |
| Total Special Payments | \$167,246 | - | - | - | - | - | \$167,246 |
| Total Expenditures | | | | | | | |
| Total Expenditures | 167,246 | - | - | - | - | - | 167,246 |
| Total Expenditures | \$167,246 | - | - | - | - | - | \$167,246 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

PASS-THROUGHS

BPR012 – Detail of Lottery Funds, Other Funds, and Federal Funds Revenue

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

| Judicial Dept 2017-19 Biennium | | | | | Agency Number: 19800 Cross Reference Number: 19800-220-00-00-00000 | |
|-----------------------------------|-----------------|-------------------------------|--------------------------------|----------------------------------|---|-------------------------------|
| Source | 2013-15 Actuals | 2015-17 Leg Adopted Budget | 2015-17 Leg Approved Budget | 2017-19 Agency Request Budget | 2017-19 Governor's Budget | 2017-19 Leg Adopted Budget |
| Other Funds | | | | | | |
| Transfer In - Intrafund | 11,900,000 | 11,900,000 | 11,900,000 | 11,900,000 | - | - |
| Total Other Funds | \$11,900,000 | \$11,900,000 | \$11,900,000 | \$11,900,000 | - | - |

COURTHOUSE CAPITAL CONSTRUCTION AND IMPROVEMENT

Oregon Courthouse Capital Construction and Improvement Fund

The 2013 Legislature created the Oregon Courthouse Capital Construction and Improvement Fund (OCCCIF) to provide state matching funds to replace unsafe courthouses. Oregon law provides that the fund is intended to “... be used solely to finance costs related to acquiring, constructing, remodeling, repairing, equipping or furnishing land, improvements, courthouses or portions of courthouses that are owned by or operated by the State of Oregon.”

To be eligible for funding:

- The courthouse with respect to which the bonds will be issued has significant structural defects, including seismic defects, that present actual or potential threats to human health and safety;
- Replacing the courthouse, whether by acquiring and remodeling or repairing an existing building or by constructing a new building, is more cost-effective than remodeling or repairing the courthouse;
- Replacing the courthouse creates an opportunity for co-location of the court with other state offices; and,
- The Chief Justice and the Department of Administrative Services have approved the project for which the bonds will be used.

State matching funds may be up to 50 percent of allowable project costs if the new courthouse also provides space for co-location opportunities with other state agencies. If co-location is not included, then the allowable match may not exceed 25 percent of project costs.

As of 2016, OCCCIF-funded courthouse replacement projects in Jefferson and Multnomah counties are completed or in the construction phase of the project.

Jefferson County Courthouse

The Jefferson County courthouse project is the first completed project financed in part through the OCCCIF. The old courthouse had major structural, safety and operational issues. Formal planning associated with funding through the OCCCIF started in 2013, with the first bond authorization taking place during the 2014 legislative session. The total cost of the project was \$15 million, with the state providing a planned \$6.5 million in matching funds (50 percent of allowable expenses). Bonding associated with the project included:

- 2015 XI-Q Series F 20-year bonds, \$4.02 million, expiration May 2035, total debt service (principal and interest) of \$5,439,512
- 2017 XI-Q 20-year bonds, \$2.55 million (planned)

COURTHOUSE CAPITAL CONSTRUCTION AND IMPROVEMENT

Ground breaking was held in April 2015 with the dedication held in September 2016.



Under construction



Completed Courthouse

COURTHOUSE CAPITAL CONSTRUCTION AND IMPROVEMENT



Interior

Multnomah County Courthouse

Major concerns around the seismic stability of the over 100 year-old, multi-floored Multnomah County courthouse led to significant replacement discussions that helped facilitate the creation of a state/county financing partnership like the OCCCF. During the 2013 legislative session, \$15 million of bonding was first approved to start the courthouse replacement project. The project is presently in the construction phase (ground breaking took place in October 2016), and bonding has been approved each of the last two biennia. Planned occupancy is scheduled to take place at the end of 2019 or early 2020.

Present bonding associated with the project:

- 2015 XI-Q Series F 20-year bonds, \$15 million, expiration May 2035, total debt service (principal and interest) of \$20,397,810
- 2017 XI-Q 20-year bonds, \$17.7 million (planned)
- 2018 XI-Q 20-year bonds, \$16.26 million (proposed)
- 2019 XI-Q 20-year bonds, \$85.6 million (proposed)
- Total state bonding for the project = \$134.56 million

COURTHOUSE CAPITAL CONSTRUCTION AND IMPROVEMENT



Architect/Artist Illustrations

Several additional projects, currently not under construction, received bonding authorization for sales during the 2015-17 biennium.

Tillamook County Courthouse (After agency completion of its 2017-19 requested budget, Tillamook County withdrew its courthouse replacement project.)

The Tillamook County courthouse was built in 1932, and was rated as one of the worst courthouse facilities in the state in a 2008 assessment of county courthouses, ranking 45th out of 48 facilities assessed. The 2015 Legislature approved the sale in 2017 of \$8.05 million in bonds, but limitation was not given for the project pending plan acceptance by the Chief Justice and presentation to the Legislature. An updated plan presentation to the Emergency Board in December 2016 will indicate that due to design changes, the bonding request will be reduced by \$2.3 million, requiring bonding of approximately \$5.74 million.

Present bonding associated with the project:

- 2017 XI-Q 20-year bonds, \$5.74 million (planned)

Ground breaking is planned for the summer of 2017 with planned occupancy in the fall of 2018.

COURTHOUSE CAPITAL CONSTRUCTION AND IMPROVEMENT

Lane County Courthouse

The 2016 Legislature approved the sale in 2017 of \$1.445 million in bonds for planning a replacement of the Lane County courthouse. The county will not request OCCIF funds in 2017-19, but will be requesting matching funds for construction in the 2019-21 biennium (estimated at \$50 million).

Present bonding associated with the project:

- 2017 XI-Q 20-year bonds, \$1.45 million (planned)

Additional projects are being proposed for the 2017-19 biennium (see Policy Option Package 410).

Hood River County Courthouse

The Hood River County courthouse was built in 1954 and ranked 46th (third-worst) in the 2008 assessment of state courthouses. In addition to being seismically vulnerable, its outdated design and space utilization create security issues for judges, staff, victims, witnesses, and the public. Details regarding the site and co-location with state agencies are being worked on by the county, and will be presented to the Legislature during the 2017-19 budget process. Hood River County was recommended as a priority by the Association of Oregon Counties in 2015-17, but later withdrew its funding request in order to more fully develop its planning efforts. A request of \$4.4 million in bonding is included in the 2017-19 Chief Justice's Recommended Budget.

Clackamas County Courthouse

The Clackamas County courthouse had two seismic studies conducted in 2015 that showed the building would experience significant damage in a “design-level” earthquake and that the subsurface conditions are susceptible to liquefaction (where the stress applied to the soil during an earthquake or other sudden change would cause the soil to behave like a liquid). The original facility was built in 1936 with one courtroom and has been expanded over the years, but reached its capacity for expansion some time ago. The county plans to build a new facility at its Red Soils campus, which already houses the juvenile department and service providers. The new facility would allow sufficient space for court operations, allow jurors to convene in the courthouse instead of in a separate building, and consolidate district attorney offices into one building. A request for \$1.25 million in state matching funds for planning in 2017-19 is included in the Chief Justice's Recommended Budget. Clackamas County anticipates future requests of matching funds from the OCCIF for construction, estimated at \$28.8 million in 2019-21 and \$48.2 million in 2021-23.

COURTHOUSE CAPITAL CONSTRUCTION AND IMPROVEMENT

Future OCCCIF Planning – 2019-2029

OJD was requested by budget note to report to the December 2016 Emergency Board with a prioritized list of courthouse replacement projects for which the Chief Justice might request OCCCIF funding between 2019 and 2029. The Chief Justice received recommendations from the Association of Oregon Counties and submitted a prioritized project list to the Emergency Board. Those projects, listed in priority order, are:

1. **Benton County:** The Benton County courthouse was built in 1888. The county completed a thorough seismic evaluation of the building, which is on the National Historic Register, and it was ranked 34th in the 2008 assessment. The county is conducting a public outreach effort and is looking to build a replacement courthouse as part of a justice center facility on land already owned by the county in downtown Corvallis. The county intends to ask the Chief Justice to request approximately \$1 million in planning funds in the 2019-21 biennium and an estimated \$5.7 million in construction funds in 2021-23.
2. **Columbia County:** The Columbia County courthouse consists of two buildings, the original 1905 building and an annex built in 1969. The courthouse ranked 29th in the 2008 assessment and did not meet state standards for seismic safety, fire alarms and fire sprinkler systems, or security. The county recently conducted a basic seismic assessment that identifies seismic and structural defects that would threaten safety in a major seismic event. The county intends to build a 34,000 square foot courthouse adjacent to its Justice Center (which includes the jail). Columbia County anticipates requesting \$9.16 million in state matching funds in the 2023-25 biennium.
3. **Linn County:** The Linn County courthouse was built in 1940 and expanded in 1967, before Oregon had a statewide building code. As with many other courthouse facilities, its age and design contribute to significant seismic issues as well as space limitations and security concerns. The 2008 assessment found the building needed “excessive” upgrades for seismic safety and defendant custody, as well as significant upgrades to security systems. The county has purchased land to build a public safety campus, of which the courthouse would be part. Linn County anticipates a one-time request of \$13.4 million in state matching funds in the 2019-21 biennium. The Linn County courthouse was ranked 13th in the 2008 study.
4. **Lincoln County:** The Lincoln County courthouse was built in 1954 and expanded in 1964. It ranked 20th in the 2008 assessment, which noted that a recent seismic survey was not available for that report. The assessment found the courthouse needed upgrades in fire alarms and sprinkler systems, security systems, and a “modest” seismic upgrade. The county’s seismic survey, not considered by the assessment, reported that the construction used low-strength concrete, that federal seismic hazard mapping expects “very large” ground motions at the site, and that the building contained several key deficiencies in the build’s structural systems. No cost estimate was provided, but the county intends to request state matching funds in the 2021-23 biennium after it completes other local capital projects.

Four additional counties did not provide specific information or requests relating to potential courthouse replacements, but expressed intent to apply for state funding during the budget note period.

COURTHOUSE CAPITAL CONSTRUCTION AND IMPROVEMENT

5. **Crook County:** This building ranked 40th in the 2008 assessment, which noted “excessive” upgrades needed in seismic safety and in-custody defendant areas, and “significant” upgraded needed in security systems. The county hopes to replace the existing courthouse with a multi-purpose, multi-agency justice center. No cost estimates or timeline were provided.
6. **Douglas County:** The Douglas County courthouse was built in 1974 and ranked 10th in the 2008 assessment, with “significant” upgrades needed in security systems and “moderate” seismic upgrades needed. The county will be conducting a seismic review in the near future. No cost estimate was provided and the earliest the county might seek state funding is in the 2023-25 biennium.
7. **Coos County:** The Coos County courthouse was originally built in the 1920s, with four subsequent additions ending in 1958. It ranked 33rd in the 2008 assessment, which showed needs for upgrades in fire alarm and sprinkler systems and security systems. No cost estimates or timeline were provided.
8. **Josephine County:** The Josephine County courthouse was originally built in 1915 and expanded in 1974. It ranked 30th in the 2008 assessment and needed significant improvements in fire alarm and sprinkler systems and seismic safety in order to meet state standards. No cost estimates or timeline were provided.

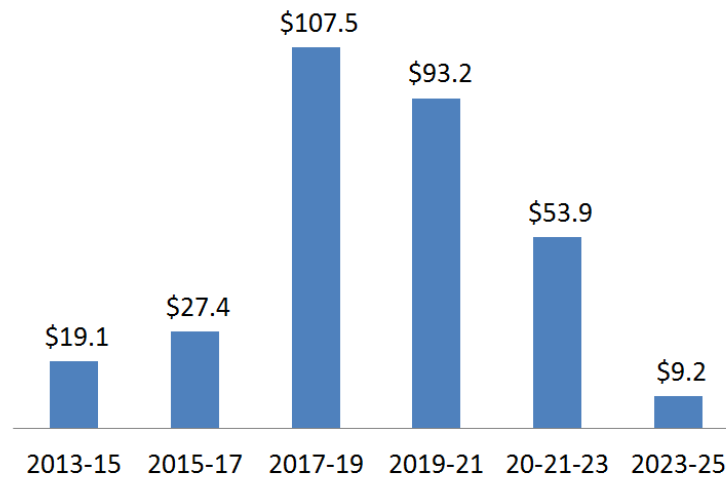
| Project | 2015 (Bonded) | 2017 (Planned) | 2018 (Proposed) | 2019 (Proposed) | 2017-19 Request | 2019-21 Request | 2021-23 Request | 2023-25 Request | Total |
|--|------------------|-------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|-----------------------|
| Currently Approved Projects: | | | | | | | | | |
| Jefferson | \$ 4,016,620 | \$ 2,550,000 | | | | | | | \$ 6,566,620 |
| Multnomah | \$ 15,074,038 | \$ 17,675,000 | \$ 16,260,000 | \$ 85,600,000 | | | | | \$ 134,609,038 |
| Lane | | \$ 1,445,000 | | | | | | | \$ 1,445,000 |
| Tillamook* | | \$ 5,740,000 | | | | | | | \$ 5,740,000 |
| Proposed Projects (with estimated amounts): | | | | | | | | | |
| Lane | | | | | | \$ 50,000,000 | | | \$ 50,000,000 |
| Hood River | | | | | \$ 4,400,000 | | | | \$ 4,400,000 |
| Clackamas | | | | | \$ 1,250,000 | \$ 28,800,000 | \$ 48,200,000 | | \$ 78,250,000 |
| Benton | | | | | | \$ 1,000,000 | \$ 5,700,000 | | \$ 6,700,000 |
| Columbia | | | | | | | | \$ 9,160,000 | \$ 9,160,000 |
| Linn | | | | | | \$ 13,400,000 | | | \$ 13,400,000 |
| Issued/Planned/Estimated State Bonding** | | | | | | | | | \$ 310,270,658 |

* After agency completion of its 2017-19 requested budget, Tillamook County withdrew its courthouse replacement project.

** Not included in the total: Crook, Douglas, Coos, Josephine (preliminary intent but no project estimates at this time).

COURTHOUSE CAPITAL CONSTRUCTION AND IMPROVEMENT

Current/Planned/Proposed OCCIF Bonding per Biennium



After agency completion of its 2017-19 requested budget, Tillamook County withdrew its courthouse replacement project. This will reduce 2015-17 planned bond sales by approximately \$8 million.

COURTHOUSE CAPITAL CONSTRUCTION AND IMPROVEMENT

Current Service Level

The Current Service Level budget for the Courthouse Capital Construction and Improvement Fund is set at \$0. All projects are approved through policy option packages.

Chief Justice's Recommended Budget

The Chief Justice's Recommended Budget for the 2017-19 biennium totals \$212.4 million (All Funds). This amount includes a policy option package totaling \$212.4 million (All Funds):

- **Policy Option Package 410:** Oregon Courthouse Capital Construction and Improvement Funds

Oregon Courthouse Capital Construction and Improvement Fund Budget Summary – All Funds

| | 2013-15 Actual Expenditures | 2015-17 Legislatively Approved Budget | 2017-19 Current Service Level (CSL) | 2017-19 Chief Justice's Recommended* |
|----------------------------------|-----------------------------------|---|---|--|
| General Fund | | | | |
| General Fund Debt Service | | | | |
| Other Funds Capital Construction | | | | |
| Other Funds Debt Service Ltd | | | | |
| Other Funds Ltd | \$ 527,015 | \$ 80,072,985 | \$ 0 | \$ 212,400,000 |
| Other Funds Non-Ltd | | | | |
| Federal Funds Ltd | | | | |
| TOTAL – ALL FUNDS | \$ 527,015 | \$ 80,072,985 | \$ 0 | \$ 212,400,000 |
| Positions | - | - | - | - |
| FTE | - | - | - | - |

* Includes CSL and all policy option packages

COURTHOUSE CAPITAL CONSTRUCTION AND IMPROVEMENT

Policy Option Package 410 – Oregon Courthouse Capital Construction and Improvement Funds

Companion Package: No

Purpose

The Oregon Courthouse Capital Construction and Improvement Fund (OCCCIF) provides matching funds for the replacement of county courthouses with significant structural defects that pose actual or potential risks to human health or safety. Matching funds are provided to projects up to 25 percent of the project costs, unless co-location opportunities are included in the project, then match levels are up to 50 percent of allowable project costs. Proposed projects include continued support of the construction and occupancy of a new Multnomah County courthouse, construction funding for a new courthouse in Hood River County, and planning funding for a courthouse replacement in Clackamas County.

How Achieved

Bonding requests utilizing XI-Q bonds:

- Multnomah – \$16.26 million in May 2018, \$85.6 million in March 2019
- Clackamas – \$1.25 million in March 2019
- Hood River – \$4.4 million in March 2019

Staffing Impact

None.

Revenue Source

Other Funds – XI-Q bonds

COURTHOUSE CAPITAL CONSTRUCTION AND IMPROVEMENT

ORBITS and PICS Reports

BPR013 – Essential and Policy Package Fiscal Impact Summary

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Cross Reference Name: OR Courthouse Cap Const & Improvement Fd

Pkg: 410 - Oregon Courthouse Capital Construction & Improvement Funds

Cross Reference Number: 19800-230-00-00-00000

| Description | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|-------------------------------|--------------|---------------|----------------------|---------------|------------------------|--------------------------|----------------------|
| Revenues | | | | | | | |
| General Fund Obligation Bonds | - | - | 106,200,000 | - | - | - | 106,200,000 |
| Other Revenues | - | - | 106,200,000 | - | - | - | 106,200,000 |
| Total Revenues | - | - | \$212,400,000 | - | - | - | \$212,400,000 |
| Special Payments | | | | | | | |
| Dist to Counties | - | - | 212,400,000 | - | - | - | 212,400,000 |
| Total Special Payments | - | - | \$212,400,000 | - | - | - | \$212,400,000 |
| Total Expenditures | | | | | | | |
| Total Expenditures | - | - | 212,400,000 | - | - | - | 212,400,000 |
| Total Expenditures | - | - | \$212,400,000 | - | - | - | \$212,400,000 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

COURTHOUSE CAPITAL CONSTRUCTION AND IMPROVEMENT

BPR012 – Detail of Lottery Funds, Other Funds, and Federal Funds Revenue

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

| Judicial Dept 2017-19 Biennium | | Agency Number: 19800 Cross Reference Number: 19800-230-00-00-00000 | | | | |
|-----------------------------------|-----------------|---|--------------------------------|----------------------------------|------------------------------|-------------------------------|
| Source | 2013-15 Actuals | 2015-17 Leg Adopted Budget | 2015-17 Leg Approved Budget | 2017-19 Agency Request Budget | 2017-19 Governor's Budget | 2017-19 Leg Adopted Budget |
| Other Funds | | | | | | |
| General Fund Obligation Bonds | - | - | - | 106,200,000 | - | - |
| Other Revenues | - | - | - | 106,200,000 | - | - |
| Total Other Funds | - | - | - | \$212,400,000 | - | - |

CAPITAL BUDGETING

Capital Budgeting

Supreme Court Building – Preservation and Seismic Retrofit

The Supreme Court Building is the oldest building located on the State Capitol Mall. Built in 1914, the 65,000 square foot building houses the Supreme Court offices and courtroom and the State of Oregon Law Library. While regular maintenance is performed on the building and some larger remediation projects have been performed, such as the roof replacement in 2010, no major remodel has taken place on the building or its infrastructure. Since the building is now more than 100 years old, many of the internal systems (HVAC, lighting, elevator, power, etc.) are reaching the end of their useful life. The building has not been seismically retrofitted, as other state-owned facilities on the Capitol Mall have been. The Oregon Judicial Department (OJD) proposed renovation policy option packages in prior budgets to address these issues.

During the 2013 Legislative Session, \$4.4 million in capital construction funds and bonding authority were authorized to address serious safety concerns that had arisen pertaining to the exterior façade and windows. Due to water penetration from a variety of sources, including dry-rotted windows and frames, the terracotta exterior was delaminating from the building, creating grave safety issues. Funding was used to address major safety concerns while trying to address the historic nature of the building and the materials used. Work started in 2014 and was completed in 2016. The work included:

- Terracotta tile exterior refacing – All exterior tiles cleaned and resealed, identified tiles repaired/replaced/refinished dependent on condition assessment. This included all flat field tile as well as columns, cornices, moldings and accent pieces. Structural supports checked and replaced.
- Windows – Wood windows stripped of old finish, and frames, sashes and hardware repaired/refurbished/refinished.
- Fire escape – West-side fire escape repaired and refinished.
- North entry canopy – Repaired.

Below are some examples of the work performed.

CAPITAL BUDGETING



Scaffolding and protective cover for work



Work on cornices, structural supports, tile, flashing

CAPITAL BUDGETING



Column repair



Tile replacement

CAPITAL BUDGETING



Windows, framing repair and replacement



Present exterior review

CAPITAL BUDGETING

Policy Option Package 414 – Supreme Court Building – Seismic Retrofit and Renovation

Companion Package: No

Purpose

While emergency repairs were made to the exterior of the 100 year-old Supreme Court Building, continued concerns exist around possible collapse of the building during a significant seismic event and the need to replace aging infrastructure in the building itself. Proposed funding would allow for seismic retrofit of the building to the same level as the proposed seismic retrofit to the Oregon State Capitol Building.

How Achieved

Sale of \$29.4 million in XI-Q Bonds to finance the project. Goals of the retrofit and renovation include:

- Seismically sound facility – Provide a seismically updated facility that could survive a major seismic event with the intent of use after the event with minor damage and repair required.
- Modern and energy efficient building systems – Provide modern and energy efficient mechanical, electrical, plumbing and fire sprinkler systems for the building.
- Life safety and code compliance – Make appropriate and/or required life safety, ADA, and code upgrades to bring the building into close compliance with current regulatory requirements.

Staffing Impact

None. Contracted position.

Revenue Source

\$29,410,000 – Other Funds

CAPITAL BUDGETING

ORBITS and PICS Reports

BPR013 – Essential and Policy Package Fiscal Impact Summary

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 031 - Standard Inflation

Cross Reference Name: Capital Construction

Cross Reference Number: 19800-089-00-00-00000

| Description | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|--------------|---------------|-------------|---------------|------------------------|--------------------------|-----------|
| Services & Supplies | | | | | | | |
| Professional Services | - | - | - | - | - | - | - |
| Facilities Maintenance | - | - | - | - | - | - | - |
| Total Services & Supplies | - | - | - | - | - | - | - |
| Capital Outlay | | | | | | | |
| Land and Improvements | - | - | - | - | - | - | - |
| Professional Services | - | - | - | - | - | - | - |
| Total Capital Outlay | - | - | - | - | - | - | - |
| Total Expenditures | | | | | | | |
| Total Expenditures | - | - | - | - | - | - | - |
| Total Expenditures | - | - | - | - | - | - | - |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

CAPITAL BUDGETING

ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY

Judicial Dept

Pkg: 414 - Supreme Court Building - Seismic Retrofit and Renovation

Cross Reference Name: Capital Construction

Cross Reference Number: 19800-089-00-00-00000

| <i>Description</i> | General Fund | Lottery Funds | Other Funds | Federal Funds | Nonlimited Other Funds | Nonlimited Federal Funds | All Funds |
|--------------------------------------|--------------|---------------|---------------------|---------------|------------------------|--------------------------|---------------------|
| Revenues | | | | | | | |
| General Fund Obligation Bonds | - | - | 29,410,000 | - | - | - | 29,410,000 |
| Total Revenues | - | - | \$29,410,000 | - | - | - | \$29,410,000 |
| Services & Supplies | | | | | | | |
| Other COI Costs | - | - | 410,000 | - | - | - | 410,000 |
| Total Services & Supplies | - | - | \$410,000 | - | - | - | \$410,000 |
| Capital Outlay | | | | | | | |
| Building Structures | - | - | 18,500,000 | - | - | - | 18,500,000 |
| Professional Services | - | - | 3,150,000 | - | - | - | 3,150,000 |
| Contingencies | - | - | 2,885,000 | - | - | - | 2,885,000 |
| Other Capital Outlay | - | - | 4,465,000 | - | - | - | 4,465,000 |
| Total Capital Outlay | - | - | \$29,000,000 | - | - | - | \$29,000,000 |
| Total Expenditures | | | | | | | |
| Total Expenditures | - | - | 29,410,000 | - | - | - | 29,410,000 |
| Total Expenditures | - | - | \$29,410,000 | - | - | - | \$29,410,000 |
| Ending Balance | | | | | | | |
| Ending Balance | - | - | - | - | - | - | - |
| Total Ending Balance | - | - | - | - | - | - | - |

CAPITAL BUDGETING

BPR012 – Detail of Lottery Funds, Other Funds, and Federal Funds Revenue

DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE

| Judicial Dept 2017-19 Biennium | | | | | Agency Number: 19800 Cross Reference Number: 19800-089-00-00-00000 | |
|-----------------------------------|-----------------|-------------------------------|--------------------------------|----------------------------------|---|-------------------------------|
| Source | 2013-15 Actuals | 2015-17 Leg Adopted Budget | 2015-17 Leg Approved Budget | 2017-19 Agency Request Budget | 2017-19 Governor's Budget | 2017-19 Leg Adopted Budget |
| Other Funds | | | | | | |
| General Fund Obligation Bonds | 4,400,000 | - | - | 29,410,000 | - | - |
| Total Other Funds | \$4,400,000 | - | - | \$29,410,000 | - | - |