



## COURT REPORTERS BOARD

OF CALIFORNIA

2535 Capitol Oaks Drive, Suite 230, Sacramento, CA 95833  
 Phone (916) 263-3660 / Toll Free: 1-877-327-5272  
 Fax (916) 263-3664 / www.courtreportersboard.ca.gov



### MEETING OF THE COURT REPORTERS BOARD

Friday, June 26, 2015  
 10:00 a.m. to conclusion

Department of Consumer Affairs, HQ2  
 SOLID Training Center – First Floor Hearing Room  
 1747 North Market Boulevard  
 Sacramento, CA 95834

### AGENDA

**Board Members:** Toni O'Neill, Chair; Davina Hurt, Vice Chair; Rosalie Kramm; Elizabeth Lasensky; and John Liu

**CALL TO ORDER** –Toni O'Neill, Chair

#### ROLL CALL AND ESTABLISHMENT OF A QUORUM

- |      |  |    |
|------|--|----|
| I.   | <u>MINUTES OF FEBRUARY 6, 2014 MEETING</u> (Possible Action) .....   | 3  |
| II.  | <u>REPORT OF THE EXECUTIVE OFFICER</u> .....   | 15 |
|      | A. CRB Budget Report   |    |
|      | B. Transcript Reimbursement Fund   |    |
|      | C. Exam  |    |
|      | D. School Updates  |    |
|      | E. Education/Outreach  |    |
|      | F. Staffing  |    |
|      | G. BreEZe  |    |
| III. | <u>ENFORCEMENT REPORT</u> .....  | 19 |
| IV.  | <u>STRATEGIC PLAN UPDATE</u> (Possible Action).....  | 22 |
|      | A. Best Practice Pointers  |    |
|      | B. Review of Action Plan   |    |
| V.   | <u>LEGISLATION</u> (Possible Action) .....   | 46 |
|      | A. Update on licensee fee cap increase   |    |
|      | B. Discussion of legislation affecting the court reporting industry or the Court Reporters Board, including the following: AB 12 (Cooley), AB 19 (Chang), AB 85 (Wilk), AB 259 |    |

(Dababneh), AB 351 (Jones-Sawyer), AB 507 (Olsen), AB 611 (Dahle), AB 728 (Hadley), AB 749 (Bloom), AB 750 (Low), AB 804 (Hernandez), AB 964 (Chau), AB 1060 (Bonilla), AB 1197 (Bonilla), SB 270 (Mendoza), SB 467 (Hill), SB 570 (Jackson), SB 799 (Committee on Business, Professions and Economic Development) and other bills later discovered which are relevant to the Board's mission.

|       |  |    |
|-------|--|----|
| VI.   | <u>SCOPE OF PRACTICE REGULATION</u> (Possible Action) .....  | 65 |
|       | Discussion and possible action to amend proposed text at California Code of Regulations, Title 16, Section 2403(b)(3)                          |    |
| VII.  | <u>SUNSET REVIEW</u> (Possible Action) .....   | 66 |
|       | Update on upcoming Sunset Review process   |    |
| VIII. | <u>ELECTION OF OFFICERS</u> (Possible Action) .....  | 67 |
| IX.   | <u>FUTURE MEETING DATES</u> (Possible Action) .....  | 71 |
| X.    | <u>PUBLIC COMMENT</u> .....  | 73 |
| XI.   | <u>CLOSED SESSION</u> .....  | 74 |
|       | Personnel Matters, Disciplinary Matters, and Pending Litigation (As Needed) [Pursuant to Government Code sections 11126(a) and 11126(e)(2)(C)] |    |
| XII.  | <u>ADJOURNMENT</u>   |    |

Action may be taken on any item on the agenda. All times indicated and the order of business are approximate and subject to change. The meeting may be canceled or the ending time shortened without notice. For further information or verification of the meeting, call Paula Bruning at (877) 327-5272, email to [paula.bruning@dca.ca.gov](mailto:paula.bruning@dca.ca.gov), write to Court Reporters Board, 2535 Capitol Oaks Drive, Suite 230, Sacramento, CA 95833, or access the Board's web site at [www.courtreportersboard.ca.gov](http://www.courtreportersboard.ca.gov).

In accordance with the Bagley-Keene Open Meeting Act, all meetings of the CRB are open to the public. The CRB intends to webcast this meeting subject to availability of technical resources.

The meeting is accessible to the physically disabled. A person who needs disability-related accommodations or modifications in order to participate in the meeting may make a request by contacting Paula Bruning at (877) 327-5272 or emailing [paula.bruning@dca.ca.gov](mailto:paula.bruning@dca.ca.gov) or sending a written request to 2535 Capitol Oaks Drive, Suite 230, Sacramento, CA 95833. Providing your request at least five (5) business days before the meeting will help to ensure availability of the requested accommodation. Requests for further information should be directed to Yvonne Fenner at the same address and telephone number. If any member of the public wants to receive a copy of the supporting documents for the items on the agenda, please contact the Board within 10 days of the meeting. Otherwise, the documents, if any, will be available at the meeting.

The public may participate in the discussion of any item on this agenda. While not required, to more accurately memorialize public comments, staff requests that public commenters state their names and the name of the organization they represent, if any. Please respect time limits. The public may comment on items and issues not listed on the agenda, but board members may not discuss any issue or item that is not listed on the agenda.

COURT REPORTERS BOARD MEETING – JUNE 26, 2015

**AGENDA ITEM I – Minutes of February 6, 2015 Meeting**

=====  
Agenda Description: Review and approval of minutes.  
=====

Brief Summary:

Minutes from February 6, 2015 meeting in Sacramento  
=====

Support Document:

Attachment – Draft minutes  
=====

Fiscal Impact: None  
=====

Report Originator: Paula Bruning, 6/1/2015  
=====

Recommended Board Action: Approve minutes.



## COURT REPORTERS BOARD

OF CALIFORNIA

2535 Capitol Oaks Drive, Suite 230, Sacramento, CA 95833  
 Phone (916) 263-3660 / Toll Free: 1-877-327-5272  
 Fax (916) 263-3664 / www.courtreportersboard.ca.gov



Attachment  
 Agenda Item I

### COURT REPORTERS BOARD OF CALIFORNIA MINUTES OF OPEN SESSION FEBRUARY 6, 2014

**DRAFT**

#### CALL TO ORDER

Ms. Toni O'Neill, Chair, called the meeting to order at 10:33 a.m. at the Department of Consumer Affairs HQ2, 1747 North Market Boulevard, Hearing Room, Sacramento, California.

#### ROLL CALL

##### Board Members Present:

Toni O'Neill, Licensee Member, Chair  
 Davina Hurt, Public Member  
 Rosalie Kramm, Licensee Member  
 Elizabeth Lasensky, Public Member  
 John K. Liu, Public Member

##### Staff Members Present:

Yvonne K. Fenner, Executive Officer  
 Angelique Scott, Staff Counsel  
 Fred Chan-You, Staff Counsel  
 Paula Bruning, Executive Analyst  
 Melissa Davis, TRF Coordinator

A quorum was established, and the meeting continued.

#### I. MINUTES OF THE DECEMBER 4-5, 2014 MEETING

Ms. Lasensky moved to approve the minutes as presented. Second by Ms. Hurt.  
 Ms. O'Neill called for public comment. No comments were offered. A vote was conducted by roll call. **MOTION CARRIED UNANIMOUSLY.**

#### II. REPORT OF THE EXECUTIVE OFFICER

Ms. Fenner began by thanking the Board for accommodating the last-minute change to the Board meeting date from January 30, 2015, to February 6, 2015.

##### A. CRB Budget Report

Ms. Fenner referred to the corrected expenditure projection report, which was distributed at the meeting (see Attachment). She then invited Jennifer Jacinto, budget analyst, from the Department of Consumer Affairs (DCA) to speak to the Board regarding the changes. Cynthia Dines, budget manager, joined Ms. Jacinto.

Ms. Dines indicated that one line item, "438.00 Central Admin Svc-ProRata," was incorrectly projected. This item pays for statewide services such as the State Controller's Office, State Treasurer's Office, California Department of Human Resources, Department of General Services, and Department of Justice. The projection should be the same as the actual amount in the pro rate budget, but it was not. Once the pro rata budget was corrected from \$72,752 to \$36,375, the projection reflected a surplus of 2.4% instead of a deficit of -1.4%.

Ms. Kramm requested clarification in regards to the other projections listed in the report. Ms. Dines responded that she reviewed the other projections and determined they were accurate. She offered an apology for the error. She indicated that pro rata projections should be listed as what is budgeted; therefore, that number should not change from the budgeted amount.

Ms. O'Neill inquired how the correction might affect amounts listed in the fund condition. Ms. Dines indicated that the expenditures listed on the fund condition in the prior fiscal year are the actual amounts that were spent. The amounts listed in the current and future fiscal years are what have been appropriated.

Ms. Dines pointed out that the Board can only transfer funds to the Transcript Reimbursement Fund (TRF) if the Board has at least six months of reserve in its fund. Ms. O'Neill asked that if the revenue and expenditures remained the same, would the program no longer be able to fund TRF. Ms. Dines confirmed that as accurate. She further stated that the further out the projection, the less helpful they are. Adjustments are periodically made to revenue projections based on licensee base, expenditure projections based on projects, et cetera.

Mr. Liu inquired if the 4.2 months in reserve projected for budget year 2015/16 on the fund condition would mean the TRF could not be funded. Ms. Dines responded that it would require a reduced amount, potentially from \$300,000 to \$125,000 for fiscal year 2015/16 and then to nothing for the following year. Ms. O'Neill indicated that legislation for a fee cap increase would play into the amounts that could be distributed to the TRF down the line.

Ms. Fenner reiterated that the projected fund condition numbers are subject to change due to many variables. They are based on the current revenue and expenditure amounts, which can change from year to year.

Ms. Dines stated that there is some reserve in the TRF; therefore, a transfer may not be required for quite some time. Only \$100,000 is transferred at a time, but \$300,000 per year is the maximum. Ms. Bruning indicated that an amount closer to \$200,000 was being utilized annually for the TRF Pro Bono Program, but added that \$30,000 is also allocated to the Pro Per Program annually.

Ms. Hurt asked if the Overtime line item, number 083.00, was connected to a specific subject matter. Ms. Fenner responded that overtime is the cost of staff grading the dictation examinations. The staff that grade the tests are specially trained.

## B. Transcript Reimbursement Fund

Ms. Bruning reported that \$97,321 had been allocated to the Pro Bono Program thus far during the current fiscal year, covering 162 invoices. She added that there was nearly \$90,000 in applications pending; however, only 19 applications are pending review. More than 100 applications are deficient and pending additional information or documentation.

Ms. Kramm inquired if a cutoff time can be determined for the older deficient applications. Ms. Bruning responded that after making contact requesting the missing items, she places them in a pending file and moves on to the next application. Unlike the Pro Per Program, there is more flexibility in moving forward since the Pro Bono Program funding has not been limited. As time allows, she follows up with the applicants later.

Ms. Davis indicated that the \$30,000 funding for the Pro Per Program became available January 1, 2015. She therefore began processing applications from January of 2014. At the time of the meeting, she was processing application from June of 2014. She stated that she has approximately \$34,000 in requests, but less than \$20,000 left to allocate. The process is slow going due to missing information on applications. Letters are sent reminding the applicants of what is missing with a 15-day deadline to respond. Ms. Davis added that 141 requests were approved in 2014.

Ms. Hurt proposed an applicant database where status checks can be conducted. In addition, information can be posted once the funding is depleted to close the application window. Ms. Davis indicated that phone calls would probably always be a constant since many of the applicants do not have access to the Internet. Ms. Bruning added that consideration had been given to closing the application window; however, the law states that applications are processed in the order received. It would be difficult to determine which application of 20 was received first.

Ms. Davis indicated that some of the contact information on applications currently being processed is outdated due to the age of the application, making it difficult to reach them. An additional clause has been added to the initial contact letters requesting that the applicant withdraw their application if at any time they determine they no longer need assistance. Ms. Kramm suggested that a clause be added reminding the applicant to notify the Board of any change of address or phone number.

## C. Exam

Ms. Fenner referred to the historical examination report on page 22. She stated that the only change since the December 5, 2014 meeting was to the dictation examination.

Ms. Fenner added that based on the previous budget report that included the error to the Central Admin Services Pro Rata, the item writing workshop was canceled. An analysis will be conducted to determine if it can be added back into the schedule.

#### D. School Updates

Ms. Bruning stated that Irvine Valley College contacted Regal Court Reporting, the industry associations and the Board to inquire about starting a court reporting program. She has been invited to participate in a conference call on February 26, 2015, but has indicated that she will be a source of information regarding Board program requirements only.

#### E. Education/Outreach

Ms. Fenner reported that the MTFs webinar was posted to the Board's YouTube channel and has received positive feedback as to its usefulness to students and reporters. Ms. Bruning stated that the video had received 669 views in one month, and 19 individuals have subscribed to the channel.

Ms. Fenner indicated that the voluntary court reporters oath was rolled out to the associations and schools. Ms. O'Neill added that during a speaking engagement for the California Court Reporters Association's (CCRA) Boot Camp, she administered the oath to 20 new court reporters. She also invited the working licensees in the attendance to take the oath and they were excited to participate. She indicated that it was embraced and treated with seriousness. She hopes that the oath will become a regular part of the association meetings.

Ms. Fenner indicated that the oath was also sent to our subscriber list. Ms. Hurt expressed that it is important to market the oath and send it to the courts. Ms. O'Neill suggested that staff locate the code section regarding swearing in official reporters and attach it to the oath for the courts.

Ms. Lasensky asked who can give the oath. Ms. O'Neill responded that it is voluntary, so anyone could do it. Ms. Fenner stated that it was anticipated that it would be given by any officer of the court, such as another court reporter, an attorney or a judge.

### III. ENFORCEMENT REPORT

Ms. Fenner indicated that the enforcement statistics on pages 29 and 30 in the Board agenda packet were prepared by the enforcement analyst, Connie Conkle, who was staffing the Board office. She offered to answer any questions.

Ms. Hurt expressed her surprise in the long average number of days it takes for completion of the disciplinary orders. Ms. Fenner indicated that it is difficult to predict the processing time for the Attorney General's Office (AG). Sometimes a matter is assigned right away, and other times it is a month or more before being assigned. Another consideration is the budget. If the Board depleted its money for the AG line item, the AG's office may be asked to hold cases until the next fiscal year. This can impact the number of days it appears to take to process items. In addition, the licensee may have asked for continuances, further delaying the process. Ms. Fenner noted that hearings before the Office of Administrative Hearings do seem to be scheduled on a much quicker basis now; therefore, the timeframe has been shortened from a year to a month or two.

#### IV. STRATEGIC PLAN UPDATE

##### A. Task Forces

Ms. Bruning referred to the Best Practices for Exhibit Handling and Best Practices for Interpreted Depositions documents in the Board agenda packet. She reported that a request was made to the Publication, Design, and Editing (PD&E) Unit of DCA to make the best practices documents more visually appealing as requested by Ms. Hurt. PD&E worked to fulfill that request as well as bring the documents into uniformity with the other publications designed for the Board, such as the TRF trifold and student career brochure. The service was covered utilizing the DCA pro rata services available to the Board.

The Board members complimented the updated documents. Ms. O'Neill added that the documents are pdf files so they will be easily downloadable and available at the users' fingertips. She would like the Board to create more of these types of documents.

Ms. Lasensky asked how the documents would be distributed. Ms. O'Neill indicated that it will be distributed via the Board's subscriber list and posted to the Board's Web site. She also envisioned it would be used by the schools. Ms. Kramm added that the associations would likely disseminate the information as well. Ms. Bruning indicated that the Spring 2015 CRB Today Newsletter would also feature the Best Practices documents.

Ms. Hurt stated that the first Best Practice Pointers meeting is anticipated to meet on a weekend day in the spring. There are currently three volunteer members, and she welcomed more. Ms. Fenner invited ideas for practice pointers from the audience and associations.

Ms. O'Neill indicated that members had been selected for the Electronic Signature Task Force; however, budgetary issues prevented the group from meeting. Moving forward, the Task Force will have a huge task ahead of them, including determining what qualifies as a certified signature, how it is created and the legality of electronic signatures. The use of electronic signatures is already common in the court; however, it may only be because no one has challenged them to this point. Since the court reporters tend to look to the Board for direction, Ms. O'Neill expressed a desire to be proactive on this front versus reactive to a complaint. She directed staff to contact the members to meet in the near future.

Ms. Kramm agreed that guidelines were needed. She stated that it is an ever-changing practice where attorneys may ask reporters to do one thing today and another tomorrow. Structure would be desirable to facilitate everyone doing the same thing, and the Board is a perfect place to accomplish that.

Ms. Hurt inquired if the Board could coordinate with the State Bar Association to gain their perspective on the best practices. Ms. Fenner responded that a committee might be warranted specific to attorney outreach. There are many areas where educating the attorneys could benefit them as consumers. Ms. Hurt agreed that it could be beneficial to highlighting the legitimacy and importance of court reporters. Ms. O'Neill concurred that such a committee could act as an umbrella to several subtopics.

The Board took a break at 11:26 a.m. and reconvened into open session at 11:41 a.m.

#### B. 2015-2018 Strategic Plan

Ms. Fenner referred to the Strategic Plan in the Board agenda packet.

Ms. O'Neill invited the Board to offer comments and corrections.

Mr. Liu stated that he liked the plan and thought it was descriptive of the collaborative work the Board did. He suggested that it be formatted to match the other documents recently put forth by the Board to bring uniformity to it. Ms. Fenner agreed that it could be updated to reflect the same look.

Ms. Fenner indicated that changes could be made to the plan if deemed necessary. Ms. O'Neill expressed that she did not find anything missing. Ms. Hurt stated that she compared the plan to her notes, and it appeared to be accurate. Ms. Fenner credited the SOLID Training and Planning facilitators for the quality of the plan.

Ms. Lasensky moved to approve the Strategic Plan as presented. Second by Ms. Kramm. Ms. O'Neill called for public comment. No comments were offered. A vote was conducted by roll call. **MOTION CARRIED UNANIMOUSLY.**

Ms. Fenner reported that she and Ms. Bruning would be meeting with the facilitator to develop an action plan, which will enable staff to update the Board on the progress of the plan goals.

#### V. REPORT ON LEGISLATION

Ms. Fenner described the license fee increase that took effect in 2010 to the statutory cap of \$125. Upon reviewing the long-term projections, it has been determined that the Board's fund condition will be in a deficit within a couple of years. To increase revenue, the Board will need to either increase testing or renewal fees or reduce expenditures. Ms. Fenner referred to the expenditures pie chart on page 49(c) in the Board agenda packet. A corrected copy was distributed at the meeting with a change to the fiscal year title to 2013-14.

Ms. Fenner explained that the only area that expenditures could be reduced is in the number of examinations offered from three to two annually. The savings would only be approximately \$10,000, which is relatively small. Examination fees could be increased from \$25 per exam portion to \$75 each; however, it would only net approximately \$10,000. One other area that could impact the budget is by not funding the TRF; however, the TRF has proved to be a selling point of the Board to the Legislature in years past.

Ms. Fenner referred to scenarios listed on the Summary of Proposed Fee Revenue on page 49(d) of the Board agenda packet, which detail how a license fee increase would affect the fund. If the Board elected to increase the license fee, a legislative change would be required.

Ms. O'Neill called for discussion from the Board.

Ms. Lasensky expressed that she would like to see the least amount of damage to the public. Ms. Hurt inquired if the Board's fees have been compared to other states. Ms. Fenner indicated that staff is currently researching that information. A cursory review indicated that Idaho's fee is less at \$80; however, the results of the other states thus far are higher. Ms. Hurt stated that the comparison is important, especially since the fees have remained low for many years. An increase would be deemed appropriate to keep the Board solvent.

Ms. O'Neill added that although our fees are on the low end, California is the only board known to have a reimbursement fund. She echoed Ms. Lasensky's expression of protecting the TRF.

Ms. Hurt indicated that reducing the number of examinations would lessen the opportunity for court reporters to enter the industry; therefore, she would not be in favor of cutting examinations. Mr. Liu agreed that either reducing examinations or increasing examination fees would burden the student population. The amount of time between examinations could actually cost them more money by not having the ability to obtain gainful employment as a court reporter. Ms. Kramm added that cutting an examination would go against the newly adopted Strategic Plan, which has a goal of adding more court reporters to the market. Ms. Lasensky added that having the test is a promotion of the Board by keeping it in front of the court reporting world, including the schools and students.

Ms. O'Neill called for comments from the public.

Brooke Henrikson, speaking on her own behalf, commented that the license fees remained low for 25 years. She suggested the Board increase the license fee cap higher than proposed to allow a leeway in the future. Ms. Fenner appreciated her input and put before the Board the option to increase the fee cap. The current cap of \$125 was set in 1951.

Ms. O'Neill expressed that setting a cap versus setting a specific fee would allow the Board more flexibility to increase the fee as needed. As a consumer protection agency, the Board needs funding to accomplish its mission.

Mr. Liu inquired how durable the proposed \$225 cap would be taking into consideration the upcoming BreEZe expenses. Ms. Fenner stated that the scenarios were taken from the projections received from the Budgets Office and did not include BreEZe expenses. A two percent cost of living increase has been built into the expenditures but nothing more.

Mr. Liu asked how much BreEZE has affected the budget of the boards that are now on the program. Ms. Fenner responded that there has been a significant impact including direct costs and staff time. Based on the size of this Board, it may not be extreme; however, it is difficult to predict without a contract in place.

Ms. O'Neill suggested the Board determine what the cap should be taking into consideration that changing it requires legislation. Therefore, the Board may want to avoid needing to initiate further legislation in a short time frame to increase it again.

Ms. Lasensky questioned how the Board would make the determination reflecting that it took many years for the Board to reach the current cap. Ms. Kramm asked how the proposed change to \$225 was reached. Ms. Fenner responded that staff made an effort to

increase the fee cap enough to avoid returning to the Legislature in less than 10 years. The BreEZe expenses were not taken into consideration.

Mr. Liu inquired about the projected timeframe for the Board going live with BreEZe. Ms. Fenner responded that without a contract, she anticipated it would be more than five years. She expects that a meeting will be held in the near future to discuss those details.

Ms. Fenner referred to scenario 2, which would increase the fee to \$175. That increase would extend the Board's budget to fiscal year 2021-22 before another increase would be needed. However, BreEZe could shorten that timeline significantly. She estimated that increasing the license fee cap to \$225 would allow the Board 10 years before needing to request another statutory increase through the Legislature.

Ms. Fenner reminded the Board that they are not setting the fee at this time. Instead, they have the opportunity to request legislation to raise the licensing fee cap so that future fee increases can be made by resolution.

Ms. O'Neill asked the Board if they wanted to raise the cap to \$225 or another amount. Mr. Liu responded that it should be no less than \$225.

Ms. Kramm inquired if the Board could authorize staff to decide the license fee cap amount based on additional data. Ms. Fenner commented that it would be considered a substantive change, not a technical correction; therefore, the Board would need to meet about it.

Ms. O'Neill stated that the legislative deadline for finding an author was quickly approaching.

Ms. Kramm expressed that an increase to the cap to \$250 made sense. She added that going to states where there is no licensing reveals how delicate the industry is. She finds a value to the cost of licensing and asserted that the Board will only charge what is necessary.

Ms. O'Neill inferred that a cap of more than \$250 may be necessary. Based on their past dealings to the Legislature, Ms. Fenner requested feedback from Ms. Lasensky and Ms. Hurt on how a higher increase might be received by the Legislature. Ms. Hurt responded that an increase to \$300 might be alarming; however, doubling it from 1951 may have a more positive reception.

Ms. Lasensky moved to accept the proposed language to Business and Professions Code 8031(d) as reflected in the Board agenda packet, but with a licensing fee cap of \$250.

**MOTION RESCINDED.**

Ms. Hurt moved to adopt the proposed legislative language with an increase to \$250 and delegate to the executive officer the authority to make technical or non-substantive changes and direct staff to take all steps necessary to seek an author and pursue legislation for the proposed fee cap increase for the current legislative year. Second by Ms. Lasensky. Ms. O'Neill called for public comment. No comments were offered. A vote was conducted by roll call. **MOTION CARRIED UNANIMOUSLY.**

Ms. Fenner reported that staff anticipated the Board's vote to move forward with legislation and contacted the industry associations. Based on the proposed \$225 fee cap increase, the associations indicated that they would not oppose a bill to do so. In addition, staff set up meetings in the next week with consultants in the Assembly and Senate committees that will most likely hear such a bill. Ms. Hurt inquired if Board member presence was necessary for the upcoming meetings. Ms. Fenner indicated the Board members were certainly welcome, but if time was limited, it might be better spent down the road when searching for an author and visiting legislators' offices. There will also be an educational component to gain votes.

#### VI. SCOPE OF PRACTICE REGULATION

Ms. Fenner recounted that at its last meeting, the Board directed staff to work with the industry associations to develop language that would address the concerns raised at that meeting. As a result, the newly proposed language was developed and is presented to the Board for approval.

Ms. O'Neill called for comments and questions.

Ms. Hurt complimented the Board staff and industry associations for their collaboration. Mr. Liu also expressed his appreciation for those who worked to create the language.

Mr. Liu moved to adopt the proposed change to CCR 2403(b)(3) for a 45-day comment period and delegate to the executive officer the authority to adopt the proposed regulatory changes as modified if there are no adverse comments received during the public comment period and also delegate to the executive officer the authority to make any technical or non-substantive changes that may be required in completing the rulemaking file. Second by Ms. Hurt. Ms. O'Neill called for public comment. No comments were offered. A vote was conducted by roll call. **MOTION CARRIED UNANIMOUSLY.**

#### VII. FUTURE MEETING DATES

Ms. Fenner indicated that it was not anticipated that the Board would meet again until after the new fiscal year based on the incorrect budget expenditure projections; however, if there is a need, a meeting could be scheduled sooner. She proposed the Board meet in conjunction with the upcoming dictation examination in Los Angeles on July 3, 2015.

Mr. Liu indicated that he would have a schedule conflict for July 2 and 3, 2015. Ms. O'Neill indicated that driving to Los Angeles during a holiday weekend would be too difficult.

Ms. Fenner offered to poll the Board via e-mail to set a date. She reminded the Board that a minimum of one meeting per year must be in Southern California. Ms. Kramm offered to host a meeting of the Board in San Diego.

#### VIII. PUBLIC COMMENT

Diane Freeman, Deposition Reporters Association, expressed her gratitude for the work the Board is accomplishing.

IX. CLOSED SESSION

This item was deferred. The Board did not have a need to meet in closed session.

X. ADJOURNMENT

Ms. O'Neill adjourned the meeting at 12:26 p.m.

\_\_\_\_\_  
TONI O'NEILL, Board Chair

\_\_\_\_\_  
DATE

\_\_\_\_\_  
YVONNE K. FENNER, Executive Officer

\_\_\_\_\_  
DATE

2/5/2015

**COURT REPORTERS OF CALIFORNIA - 0771**  
**BUDGET REPORT**  
**FY 2014-15 EXPENDITURE PROJECTION**  
**Dec-2014**

| OBJECT DESCRIPTION  | FY 2013-14                 |                           | FY 2014-15                      |   |                  |                            |                         |
|---|----------------------------|---------------------------|---------------------------------|---|------------------|----------------------------|-------------------------|
|   | ACTUAL                     | PRIOR YEAR                | 2014-15<br>Governor's<br>Budget | CURRENT YEAR<br>EXPENDITURES<br>(MONTH 6) | PERCENT<br>SPENT | PROJECTIONS<br>TO YEAR END | UNENCUMBERED<br>BALANCE |
|   | EXPENDITURES<br>(MONTH 13) | EXPENDITURES<br>(MONTH 6) |                                 |   |                  |                            |                         |
| <b>PERSONNEL SERVICES</b>                                     |                            |                           |                                 |   |                  |                            |                         |
| 003 Salary & Wages (Staff)                                    | 225,414                    | 107,562                   | 244,036                         | 120,681                                   | 50%              | 242,346                    | 1,690                   |
| 063 Statutory Exempt (EO)                                     | 84,989                     | 42,090                    | 84,180                          | 42,930                                    | 50%              | 85,860                     | (1,680)                 |
| 033.04 Temp Help Reg (Seasonals)                              | 1,913                      | 833                       | 11,000                          | 1,526                                     | 61%              | 2,500                      | 8,500                   |
| 033.05/15/16 Temp Help (Exam Proctors)                        |                            |                           |                                 |   |                  | 0                          | 0                       |
| 063.01 Board Member Per Diem                                  | 2,100                      | 1,000                     | 7,310                           | 100                                       | 4%               | 2,800                      | 4,510                   |
| 083.00 Overtime   | 8,485                      | 5,959                     | 6,000                           | 3,305                                     | 35%              | 9,500                      | (3,500)                 |
| 103-137 Staff Benefits  | 169,517                    | 79,959                    | 153,685                         | 95,668                                    | 50%              | 192,000                    | (39,315)                |
| <b>TOTALS, PERSONNEL SVC</b>                                  | <b>492,418</b>             | <b>237,403</b>            | <b>506,211</b>                  | <b>284,210</b>                            | <b>49%</b>       | <b>535,006</b>             | <b>(28,795)</b>         |
| <b>OPERATING EXPENSE AND EQUIPMENT</b>                        |                            |                           |                                 |   |                  |                            |                         |
| 201.00 General Expense  | 7,589                      | 1,920                     | 4,784                           | 841                                       | 42%              | 2,000                      | 2,784                   |
| 213.04 Fingerprint Reports                                    | 510                        | 294                       | 1,449                           | 392                                       | 56%              | 700                        | 749                     |
| 226.00 Minor Equipment  |                            |                           | 7,800                           |   |                  | 0                          | 7,800                   |
| 241.00 Printing (General)                                     | 3,171                      | 1,020                     | 915                             | 320                                       | 11%              | 2,850                      | (1,934)                 |
| 251.00 Communication  | 5,211                      | 1,668                     | 1,160                           | 1,919                                     | 37%              | 5,200                      | (4,040)                 |
| 261.00 Postage (General)                                      | 10,461                     | 4,982                     | 5,516                           | 4,919                                     | 45%              | 11,000                     | (5,484)                 |
| 291.00 Travel In State  | 20,414                     | 12,643                    | 22,941                          | 8,489                                     |                  | 20,000                     | 2,941                   |
| 311.00 Travel, Out-of-State                                   |                            |                           |                                 |   |                  | 0                          | 0                       |
| 331.00 Training   |                            |                           | 2,517                           |   |                  | 0                          | 2,517                   |
| 343.00 Facilities Operations (rent only)                      | 43,647                     | 42,804                    | 28,745                          | 43,173                                    |                  | 43,173                     | (14,428)                |
| 341.00-347.00 Facilities Operations (lease surcharge & other) |                            | 351                       |                                 |   |                  | 6                          | (6)                     |
| 361.00 Utilities  |                            |                           |                                 |   |                  | 0                          | 0                       |
| 382.00 C & P Services - Interdept.                            |                            |                           | 1,883                           |   |                  | 0                          | 1,883                   |
| 402.00 C & P Services - External (General)                    |                            | 1,000                     | 27,042                          |   |                  | 0                          | 27,042                  |
| 404.00 C & P Services - External (PSI Servcs LLC)             |                            |                           |                                 |   |                  | 0                          | 0                       |
| <b>DEPARTMENTAL SERVICES:</b>                                 |                            |                           |                                 |   |                  |                            |                         |
| 424.03 OIS Pro Rata   | 90,017                     | 46,076                    | 86,099                          | 42,284                                    | 49%              | 86,099                     | 0                       |
| 427.00 Admin/Exec   | 45,925                     | 22,680                    | 57,096                          | 27,536                                    | 48%              | 57,096                     | 0                       |
| 427.01 Interagency Services                                   |                            |                           | 83                              |   |                  | 0                          | 83                      |
| 427.10 C & P Services (OPES IACs #77178-79)                   |                            | 33,900                    |                                 | 38,226                                    |                  | 38,226                     | (38,226)                |
| 427.30 DOI-ProRata Internal                                   | 1,467                      | 726                       | 1,782                           | 860                                       | 48%              | 1,782                      | 0                       |
| 427.34 Public Affairs Office                                  | 1,696                      | 1,022                     | 1,742                           | 840                                       | 48%              | 1,742                      | 0                       |
| 427.35 CCED   | 1,675                      | 870                       | 1,897                           | 920                                       | 48%              | 1,897                      | 0                       |
| <b>INTERAGENCY SERVICES:</b>                                  |                            |                           |                                 |   |                  |                            |                         |
| 428.00 Consolidated Data Center (TEALE)                       | 43                         | 22                        | 3,251                           | 19  | 19%              | 100                        | 3,151                   |
| 432.00-449.00 DP Maintenance & Supply                         | 280                        |                           | 1,578                           | 1,538                                     | 51%              | 3,000                      | (1,422)                 |
| 438.00 Central Admin Svc-ProRata                              | 28,819                     | 14,410                    | 36,375                          | 18,188                                    | 50%              | 36,375                     | 0                       |
| <b>EXAM EXPENSES:</b>   |                            |                           |                                 |   |                  |                            |                         |
| 206.20 Exam Supplies  |                            |                           | 751                             |   |                  | 0                          | 751                     |
| 207.20 Exam Freight   |                            |                           |                                 |   |                  | 0                          | 0                       |
| 343.20 Exam Site Rental                                       | 24,752                     | 44,648                    | 7,680                           | 36,972                                    | 117%             | 31,500                     | (23,820)                |
| 404.00 C/P Svcs-External (PSI Servcs LLC)                     | 14,662                     | 14,160                    |                                 | 14,160                                    |                  | 15,500                     | (15,500)                |
| 404.01 C/P Svcs-External Expert Examiners                     | 18,047                     | 12,159                    | 30,479                          | 7,643                                     | 35%              | 22,000                     | 8,479                   |
| 404.03 C/P Svcs-External Subject Matter                       |                            |                           |                                 |   |                  | 0                          | 0                       |
| <b>ENFORCEMENT:</b>   |                            |                           |                                 |   |                  |                            |                         |
| 394.00 Legal fees (excluding AG)                              |                            |                           |                                 |   |                  | 0                          | 0                       |
| 396.00 Attorney General                                       | 33,015                     | 37,065                    | 127,172                         | 18,330                                    | 43%              | 43,000                     | 84,172                  |
| 397.00 Office Admin. Hearings                                 | 19,287                     | 4,227                     | 15,573                          |   | 0%               | 6,000                      | 9,573                   |
| 418.97 Court Reporters  | 1,300                      | 450                       |                                 |   |                  | 1,000                      | (1,000)                 |
| 414.31/33/34 Evidence/Witness Fees                            | 7,875                      | 3,625                     | 25,793                          | 3,250                                     |                  | 8,000                      | 17,793                  |
| 427.31-.32 DOI - Investigations                               |                            |                           |                                 |   |                  | 0                          | 0                       |
| 452-472 Major Equipment                                       |                            |                           | 0                               |   |                  | 0                          | 0                       |
| 545.00 Special Items of Expense                               |                            |                           |                                 |   |                  | 0                          | 0                       |
| 501.00 Other Items of Expense                                 |                            |                           | 1,125                           |   |                  | 0                          | 1,125                   |
| 609.00 Tort Payments  |                            |                           | 0                               |   |                  | 0                          | 0                       |
| <b>TOTALS, OE&amp;E</b>                                       | <b>379,863</b>             | <b>302,722</b>            | <b>503,229</b>                  | <b>270,819</b>                            | <b>62%</b>       | <b>438,246</b>             | <b>64,983</b>           |
| <b>TOTAL EXPENSE</b>  | <b>872,281</b>             | <b>540,125</b>            | <b>1,009,440</b>                | <b>535,029</b>                            | <b>111%</b>      | <b>973,252</b>             | <b>36,188</b>           |
| 991937 00 Sched. Reimb. - External/Private                    |                            |                           |                                 |   |                  |                            | 0                       |
| 991937 01 Sched. Reimb. - Fingerprints                        |                            | (98)                      | (17,000)                        | (245)                                     |                  | (900)                      | (16,100)                |
| 991937 02 Sched. Reimb. - Other                               | (4,551)                    | (235)                     | (1,000)                         | (470)                                     |                  | (500)                      | (500)                   |
| 995988 01 Unsched. Reimb. - Other                             |                            | (1,140)                   |                                 | (3,089)                                   |                  | (2,500)                    | 2,500                   |
| <b>NET APPROPRIATION</b>                                      | <b>867,730</b>             | <b>538,652</b>            | <b>991,440</b>                  | <b>531,225</b>                            | <b>55%</b>       | <b>969,352</b>             | <b>22,088</b>           |
| <b>SURPLUS/(DEFICIT):</b>                                     |                            |                           |                                 |   |                  |                            | <b>2.2%</b>             |

COURT REPORTERS BOARD MEETING – JUNE 26, 2015

**AGENDA ITEM II – Report of the Executive Officer**

=====  
Agenda Description: Report on:

- A. CRB Budget Report
- B. Transcript Reimbursement Fund
- C. Exam
- D. School Updates
- E. Education/Outreach
- F. Staffing
- G. BreEZe

=====  
Support Documents:

- Attachment 1, Item A – Budget Report, Fiscal Month 11 Projection (2014/15)
- Attachment 2, Item A – Fund Condition Analysis for Fund 0771, CRB
- Attachment 3, Item A – Fund Condition Analysis for Fund 0410, TRF

=====  
Fiscal Impact: None.

=====  
Report Originator: Yvonne Fenner, 6/15/2015

=====  
Recommended Board Action: (Informational)

6/15/2015

COURT REPORTERS OF CALIFORNIA - 0771  
BUDGET REPORT  
FY 2014-15 EXPENDITURE PROJECTION  
May-2015

| OBJECT DESCRIPTION                              | FY 2013-14     |                | FY 2014-15     |                |                           |                 |
|---|----------------|----------------|----------------|----------------|---------------------------|-----------------|
|   | ACTUAL         | PRIOR YEAR     | 2014-15        | CURRENT YEAR   | PROJECTIONS               | UNENCUMBERED    |
|   | EXPENDITURES   | EXPENDITURES   | Governor's     | EXPENDITURES   | TO YEAR END               | BALANCE         |
|   | (MONTH 13)     | (MONTH 11)     | Budget         | (MONTH 11)     |                           |                 |
| <b>PERSONNEL SERVICES</b>                       |                |                |                |                |                           |                 |
| Salary & Wages (Staff)                          | 225,414        | 205,695        | 244,036        | 221,990        | 242,346                   | 1,690           |
| Statutory Exempt (EO)                           | 84,989         | 77,165         | 84,180         | 80,356         | 87,661                    | (3,481)         |
| Temp Help Reg (Seasonals)                       | 1,913          | 1,913          | 11,000         | 2,581          | 2,650                     | 8,350           |
| Temp Help (Exam Proctors)                       |                |                |                |                | 0                         | 0               |
| Board Member Per Diem                           | 2,100          | 2,100          | 7,310          | 2,700          | 3,500                     | 3,810           |
| Overtime  | 8,485          | 8,485          | 6,000          | 9,357          | 11,500                    | (5,500)         |
| Staff Benefits                                  | 189,517        | 154,503        | 153,685        | 176,726        | 193,000                   | (39,315)        |
| <b>TOTALS, PERSONNEL SVC</b>                    | <b>492,418</b> | <b>449,861</b> | <b>506,211</b> | <b>493,710</b> | <b>540,657</b>            | <b>(34,446)</b> |
| <b>OPERATING EXPENSE AND EQUIPMENT</b>          |                |                |                |                |                           |                 |
| General Expense                                 | 7,589          | 6,841          | 4,784          | 2,781          | 3,260                     | 1,534           |
| Fingerprint Reports                             | 510            | 490            | 1,449          | 588            | 800                       | 649             |
| Minor Equipment                                 |                |                | 7,800          |                | 0                         | 7,800           |
| Printing (General)                              | 3,171          | 2,871          | 916            | 1,230          | 2,850                     | (1,934)         |
| Communication                                   | 5,211          | 3,883          | 1,160          | 3,983          | 4,400                     | (3,240)         |
| Postage (General)                               | 10,461         | 9,235          | 5,516          | 8,130          | 9,000                     | (3,484)         |
| Travel In State                                 | 20,414         | 19,715         | 22,941         | 17,905         | 21,000                    | 1,941           |
| Travel, Out-of-State                            |                |                |                |                | 0                         | 0               |
| Training  |                |                | 2,517          |                | 0                         | 2,517           |
| Facilities Operations (rent only)               | 43,647         | 42,804         | 28,745         | 42,804         | 42,804                    | (14,059)        |
| Facilities Operations (lease surcharge & other) |                | 703            |                | 738            | 805                       | (805)           |
| Utilities                                       |                |                |                |                | 0                         | 0               |
| C & P Services - Interdept.                     |                |                | 1,883          |                | 0                         | 1,883           |
| C & P Services - External (General)             |                |                | 27,042         |                | 0                         | 27,042          |
| C & P Services - External (PSI Servcs LLC)      |                |                |                |                | 0                         | 0               |
| <b>DEPARTMENTAL SERVICES:</b>                   |                |                |                |                |                           |                 |
| OIS Pro Rata                                    | 90,017         | 90,966         | 73,099         | 72,531         | 73,099                    | 0               |
| Admin/Exec                                      | 45,925         | 46,200         | 57,096         | 57,025         | 57,096                    | 0               |
| Interagency Services                            |                |                | 83             |                | 0                         | 83              |
| C & P Services (OPES IACs #77178-79)            |                | 33,900         |                | 38,226         | 38,226                    | (38,226)        |
| DOI-ProRata Internal                            | 1,467          | 1,474          | 1,782          | 2,062          | 1,782                     | 0               |
| Public Affairs Office                           | 1,696          | 2,073          | 1,742          | 2,083          | 1,742                     | 0               |
| CCED  | 1,675          | 1,778          | 1,897          | 2,058          | 1,897                     | 0               |
| <b>INTERAGENCY SERVICES:</b>                    |                |                |                |                |                           |                 |
| Consolidated Data Center (TEALE)                | 43             | 38             | 3,251          | 52             | 100                       | 3,151           |
| DP Maintenance & Supply                         | 280            | 280            | 1,578          | 2,364          | 3,000                     | (1,422)         |
| Central Admin Svc-ProRata                       | 28,819         | 28,819         | 36,375         | 36,375         | 36,375                    | 0               |
| <b>EXAM EXPENSES:</b>                           |                |                |                |                |                           |                 |
| Exam Supplies                                   |                |                | 751            |                | 0                         | 751             |
| Exam Freight                                    |                |                |                |                | 0                         | 0               |
| Exam Site Rental                                | 24,752         | 44,648         | 7,680          | 36,972         | 20,000                    | (12,320)        |
| C/P Svcs-External (PSI Servcs LLC)              | 14,662         | 14,160         |                | 14,160         | 18,160                    | (18,160)        |
| C/P Svcs-External Expert Examiners              | 18,047         | 16,597         | 30,479         | 18,299         | 20,000                    | 10,479          |
| C/P Svcs-External Subject Matter                |                |                |                |                | 0                         | 0               |
| <b>ENFORCEMENT:</b>                             |                |                |                |                |                           |                 |
| Legal fees (excluding AG)                       |                |                |                |                | 0                         | 0               |
| Attorney General                                | 33,015         | 88,015         | 127,172        | 36,855         | 45,000                    | 82,172          |
| Office Admin. Hearings                          | 19,287         | 19,207         | 15,573         | 718            | 1,000                     | 14,573          |
| Court Reporters                                 | 1,300          | 1,200          |                |                | 500                       | (500)           |
| Evidence/Witness Fees                           | 7,875          | 6,031          | 26,793         | 3,500          | 5,000                     | 20,793          |
| DOI - Investigations                            |                |                |                |                | 0                         | 0               |
| Major Equipment                                 |                |                | 0              |                | 0                         | 0               |
| Special Items of Expense                        |                |                |                |                | 0                         | 0               |
| Other Items of Expense                          |                |                | 1,125          |                | 0                         | 1,125           |
| Tort Payments                                   |                |                | 0              |                | 0                         | 0               |
| <b>TOTALS, OE&amp;E</b>                         | <b>379,863</b> | <b>482,226</b> | <b>490,229</b> | <b>401,419</b> | <b>407,886</b>            | <b>82,343</b>   |
| <b>TOTAL EXPENSE</b>                            | <b>872,281</b> | <b>932,087</b> | <b>996,440</b> | <b>895,129</b> | <b>948,543</b>            | <b>47,897</b>   |
| Sched. Reimb. - External/Private                |                |                |                |                |                           | 0               |
| Sched. Reimb. - Fingerprints                    |                | (480)          | (17,000)       | (441)          | (480)                     | (16,520)        |
| Sched. Reimb. - Other                           | (4,551)        |                | (1,000)        | (705)          | (750)                     | (250)           |
| Unsched. Reimb. - Other                         |                | (2,518)        |                | (6,438)        | (7,000)                   | 7,000           |
| <b>NET APPROPRIATION</b>                        | <b>867,730</b> | <b>929,090</b> | <b>978,440</b> | <b>887,645</b> | <b>940,313</b>            | <b>38,127</b>   |
|   |                |                |                |                | <b>SURPLUS/(DEFICIT):</b> | <b>3.9%</b>     |

**0771 - Court Reporters Board**  
**Analysis of Fund Condition**

6/2/2015

(Dollars in Thousands)

| 2015-16 Governor's Budget w/ BreEZe SPR 3.1 (Assembly)              | ACTUAL<br>2013-14 | CY<br>2014-15 | BY<br>2015-16 |
|---|-------------------|---------------|---------------|
| <b>BEGINNING BALANCE</b>  | \$ 1,370          | \$ 1,133      | \$ 789        |
| Prior Year Adjustment   | \$ -39            | \$ -          | \$ -          |
| Adjusted Beginning Balance  | \$ 1,331          | \$ 1,133      | \$ 789        |
| <br><b>REVENUES AND TRANSFERS</b>                                   |                   |               |               |
| Revenues:   |                   |               |               |
| 125600 Other regulatory fees  | \$ 19             | \$ -          | \$ -          |
| 125700 Other regulatory licenses and permits                        | \$ 40             | \$ 39         | \$ 39         |
| 125800 Renewal fees   | \$ 892            | \$ 875        | \$ 875        |
| 125900 Delinquent fees  | \$ 18             | \$ 18         | \$ 18         |
| 141200 Sales of documents   | \$ -              | \$ -          | \$ -          |
| 142500 Miscellaneous services to the public                         | \$ -              | \$ -          | \$ -          |
| 150300 Income from surplus money investments                        | \$ 4              | \$ 3          | \$ 2          |
| 150500 Interest Income From Interfund Loans                         | \$ -              | \$ -          | \$ -          |
| 160400 Sale of fixed assets   | \$ -              | \$ -          | \$ -          |
| 161000 Escheat of unclaimed checks and warrants                     | \$ -              | \$ -          | \$ -          |
| 161400 Miscellaneous revenues                                       | \$ 1              | \$ -          | \$ -          |
| Totals, Revenues  | \$ 974            | \$ 935        | \$ 934        |
| <br>Transfers to Other Funds  |                   |               |               |
| FO0001 GF loan repayment  |                   |               |               |
| <br>Transfers to Other Funds  |                   |               |               |
| T00001 GF loan per Item 1520-011-0771, BA of 2003                   | \$ -              | \$ -          | \$ -          |
| T00410 TRF per B&P Code Section 8030.2                              | \$ -300           | \$ -300       | \$ -          |
| <br>Totals, Revenues and Transfers                                  | \$ 674            | \$ 635        | \$ 934        |
| <br>Totals, Resources   | \$ 2,005          | \$ 1,768      | \$ 1,723      |
| <br><b>EXPENDITURES</b>   |                   |               |               |
| Disbursements:  |                   |               |               |
| 0840 State Controller (State Operations)                            | \$ -              | \$ -          | \$ -          |
| 1110 Program Expenditures (State Operations)                        | \$ 868            | \$ 991        | \$ 1,040      |
| 2014-15 BreEZe CY Adjustment  | \$ -              | \$ -13        | \$ -          |
| 2015-16 BreEZe SFL (Assembly)                                       | \$ -              | \$ -          | \$ 59         |
| 8880 Financial Information System for California (State Operations) | \$ 4              | \$ 1          | \$ 2          |
| Total Disbursements   | \$ 872            | \$ 979        | \$ 1,101      |
| <br><b>FUND BALANCE</b>   |                   |               |               |
| Reserve for economic uncertainties                                  | \$ 1,133          | \$ 789        | \$ 622        |
| <br><b>Months in Reserve</b>  | 13.9              | 8.6           | 6.7           |

## 0410 - Transcript Reimbursement Fund

### Analysis of Fund Condition

(Dollars In Thousands)

12/23/2014

|   | ACTUAL<br>2013-14 | CY<br>2014-15 | BY<br>2015-16 |
|---|-------------------|---------------|---------------|
| <b>BEGINNING BALANCE</b>  | \$ 319            | \$ 422        | \$ 408        |
| Prior Year Adjustment   | \$ -2             | \$ -          | \$ -          |
| Adjusted Beginning Balance  | \$ 317            | \$ 422        | \$ 408        |
| <br><b>REVENUES AND TRANSFERS</b>                                   |                   |               |               |
| Revenues:   |                   |               |               |
| 125600 Other regulatory fees  | \$ -              | \$ -          | \$ -          |
| 125700 Other regulatory licenses and permits                        | \$ -              | \$ -          | \$ -          |
| 125800 Renewal fees   | \$ -              | \$ -          | \$ -          |
| 125900 Delinquent fees  | \$ -              | \$ -          | \$ -          |
| 141200 Sales of documents   | \$ -              | \$ -          | \$ -          |
| 142500 Miscellaneous services to the public                         | \$ -              | \$ -          | \$ -          |
| 150300 Income from surplus money investments                        | \$ 1              | \$ 1          | \$ 1          |
| 160400 Sale of fixed assets   | \$ -              | \$ -          | \$ -          |
| 161000 Escheat of unclaimed checks and warrants                     | \$ -              | \$ -          | \$ -          |
| 161400 Miscellaneous revenues                                       | \$ -              | \$ -          | \$ -          |
| Totals, Revenues  | \$ 1              | \$ 1          | \$ 1          |
| <br>Transfers from Other Funds                                      |                   |               |               |
| F00771  |                   |               |               |
| Court Reporters Fund per B&P Code Section 8030.2                    | \$ 300            | \$ 300        | \$ 300        |
| Totals, Revenues and Transfers                                      | \$ 301            | \$ 301        | \$ 301        |
| <br>Totals, Resources   | \$ 618            | \$ 723        | \$ 709        |
| <br><b>EXPENDITURES</b>   |                   |               |               |
| Disbursements:  |                   |               |               |
| 0840 State Controller (State Operations)                            | \$ -              | \$ -          | \$ -          |
| 1110 Program Expenditures (State Operations)                        | \$ 195            | \$ 315        | \$ 315        |
| 8880 Financial Information System for California (State Operations) | \$ 1              | \$ -          | \$ 1          |
| Total Disbursements   | \$ 196            | \$ 315        | \$ 316        |
| <br><b>FUND BALANCE</b>   |                   |               |               |
| Reserve for economic uncertainties                                  | \$ 422            | \$ 408        | \$ 393        |
| <br>Months in Reserve   | 16:1              | 15.5          | 15.0          |

COURT REPORTERS BOARD MEETING – JUNE 26, 2015

**AGENDA ITEM III – Enforcement Report**

=====

Agenda Description: Update of Enforcement Activity.

=====

Brief Summary:

Enforcement Reports – Monthly reports indicating complaint, investigation and enforcement action statistics

=====

Support Document:

Attachment – July 2014 – May 2015 Enforcement Report

=====

Fiscal Impact: None

=====

Report Originator: Connie Conkle, 6/12/2015

=====

Recommended Board Action: Informational

Consumer Protection Enforcement Initiative  
Fiscal Year 2014-2015 Enforcement Report  
July 2014 - May 2015

**Complaint Intake**

| Complaints  | July | August | Sept. | Oct. | Nov. | Dec. | January | Feb. | March | April | May | June | Total |
|---|------|--------|-------|------|------|------|---------|------|-------|-------|-----|------|-------|
| Received  | 7    | 10     | 10    | 11   | 7    | 14   | 9       | 4    | 7     | 7     | 11  |      | 97    |
| Closed without Assignment for Investigation       | 0    | 0      | 0     | 0    | 0    | 0    | 0       | 0    | 0     | 0     | 0   |      | 0     |
| Assigned for Investigation                        | 7    | 10     | 10    | 11   | 7    | 14   | 9       | 4    | 7     | 7     | 11  |      | 97    |
| Average Days to Close or Assign for Investigation | 1    | 1      | 1     | 1    | 1    | 1    | 1       | 1    | 1     | 1     | 1   |      | 1     |
| Pending   | 0    | 0      | 0     | 0    | 0    | 0    | 0       | 0    | 0     | 0     | 0   |      | 0*    |

| Convictions/Arrest Reports | July | August | Sept. | Oct. | Nov. | Dec. | January | Feb. | March | April | May | June | Total |
|----------------------------|------|--------|-------|------|------|------|---------|------|-------|-------|-----|------|-------|
| Received                   | 0    | 0      | 2     | 2    | 0    | 0    | 0       | 0    | 0     | 0     | 0   |      | 4     |
| Closed                     | 0    | 0      | 0     | 2    | 0    | 0    | 0       | 0    | 1     | 2     | 0   |      | 5     |
| Average Days to Close      | 0    | 0      | 0     | 110  | 0    | 0    | 0       | 0    | 182   | 195   | 0   |      | 162   |
| Pending                    | 1    | 1      | 3     | 3    | 3    | 3    | 3       | 3    | 2     | 0     | 0   |      | 2*    |

**Investigation**

| Desk Investigation                        | July | August | Sept. | Oct. | Nov. | Dec. | January | Feb. | March | April | May | June | Total |
|---|------|--------|-------|------|------|------|---------|------|-------|-------|-----|------|-------|
| Initial Assignment for Desk Investigation | 7    | 10     | 10    | 11   | 7    | 14   | 9       | 4    | 7     | 7     | 11  |      | 97    |
| Closed                                    | 3    | 18     | 11    | 16   | 5    | 5    | 12      | 10   | 2     | 4     | 7   |      | 93    |
| Average Days to Close                     | 25   | 78     | 81    | 42   | 38   | 33   | 60      | 34   | 44    | 146   | 56  |      | 58    |
| Pending                                   | 25   | 17     | 16    | 11   | 13   | 22   | 19      | 13   | 18    | 21    | 25  |      | 18*   |

| Field Investigation (Sworn)              | July | August | Sept. | Oct. | Nov. | Dec. | January | Feb. | March | April | May | June | Total |
|--|------|--------|-------|------|------|------|---------|------|-------|-------|-----|------|-------|
| Assignment for Sworn Field Investigation | 0    | 0      | 0     | 0    | 0    | 0    | 0       | 0    | 0     | 0     | 0   |      | 0     |
| Closed                                   | 0    | 0      | 0     | 0    | 0    | 0    | 0       | 0    | 0     | 0     | 0   |      | 0     |
| Average Days to Close                    | 0    | 0      | 0     | 0    | 0    | 0    | 0       | 0    | 0     | 0     | 0   |      | 0     |
| Pending                                  | 0    | 0      | 0     | 0    | 0    | 0    | 0       | 0    | 0     | 0     | 0   |      | 0     |

| All Investigation     | July | August | Sept. | Oct. | Nov. | Dec. | January | Feb. | March | April | May | June | Total |
|-----------------------|------|--------|-------|------|------|------|---------|------|-------|-------|-----|------|-------|
| Closed                | 3    | 18     | 11    | 16   | 5    | 5    | 12      | 10   | 2     | 4     | 7   |      | 93    |
| Average Days to Close | 25   | 78     | 81    | 42   | 38   | 33   | 60      | 34   | 44    | 146   | 56  |      | 58    |
| Pending               | 25   | 17     | 16    | 11   | 13   | 22   | 19      | 13   | 18    | 21    | 25  |      | 18*   |

\*Average number of cases pending per month

**Enforcement Actions**

| AG Cases   | July | August | Sept. | Oct. | Nov. | Dec. | January | Feb. | March | April | May | June | Total |
|--|------|--------|-------|------|------|------|---------|------|-------|-------|-----|------|-------|
| AG Cases Initiated   | 0    | 0      | 0     | 1    | 0    | 0    | 0       | 0    | 2     | 2     | 0   |      | 5     |
| AG Cases Pending   | 9    | 9      | 9     | 9    | 9    | 8    | 6       | 6    | 5     | 7     | 8   |      | 8*    |
| SOIs/Accusations   | July | August | Sept. | Oct. | Nov. | Dec. | January | Feb. | March | April | May | June | Total |
| SOIs Filed   | 1    | 0      | 0     | 0    | 0    | 0    | 0       | 0    | 0     | 0     | 0   |      | 1     |
| SOIs Withdrawn   | 0    | 0      | 0     | 0    | 0    | 0    | 0       | 0    | 0     | 0     | 0   |      | 0     |
| SOIs Dismissed   | 0    | 0      | 0     | 0    | 0    | 0    | 0       | 0    | 0     | 0     | 0   |      | 0     |
| SOIs Declined  | 0    | 0      | 0     | 0    | 0    | 0    | 0       | 0    | 0     | 0     | 0   |      | 0     |
| Average Days to Complete SOIs  | 147  | 0      | 0     | 0    | 0    | 0    | 0       | 0    | 0     | 0     | 0   |      | 147   |
| Accusations Filed  | 1    | 0      | 0     | 2    | 0    | 2    | 0       | 0    | 0     | 0     | 0   |      | 5     |
| Accusations Withdrawn  | 0    | 0      | 0     | 0    | 0    | 0    | 0       | 0    | 0     | 0     | 0   |      | 0     |
| Accusations Dismissed  | 0    | 0      | 0     | 0    | 0    | 0    | 0       | 0    | 0     | 0     | 0   |      | 0     |
| Accusations Declined   | 0    | 0      | 0     | 0    | 0    | 0    | 0       | 0    | 0     | 0     | 0   |      | 0     |
| Average Days to Complete Accusations                                       | 511  | 0      | 0     | 157  | 0    | 147  | 0       | 0    | 0     | 0     | 0   |      | 272   |
| Decisions/Stipulations   | July | August | Sept. | Oct. | Nov. | Dec. | January | Feb. | March | April | May | June | Total |
| Proposed/Default Decisions   | 0    | 0      | 0     | 1    | 0    | 0    | 0       | 0    | 0     | 1     | 1   |      | 3     |
| Stipulations   | 0    | 0      | 0     | 0    | 1    | 2    | 0       | 0    | 0     | 0     | 2   |      | 5     |
| Disciplinary Orders  | July | August | Sept. | Oct. | Nov. | Dec. | January | Feb. | March | April | May | June | Total |
| Final Orders (Proposed Decisions Adopted, Default Decisions, Stipulations) | 0    | 0      | 0     | 0    | 1    | 1    | 2       | 0    | 1     | 0     | 1   |      | 6     |
| Average Days to Complete   | 0    | 0      | 0     | 0    | 710  | 611  | 643     | 0    | 359   | 0     | 798 |      | 624   |
| Interim Suspension Orders  | 0    | 0      | 0     | 0    | 0    | 0    | 0       | 0    | 0     | 0     | 0   |      | 0     |
| Citations  | July | August | Sept. | Oct. | Nov. | Dec. | January | Feb. | March | April | May | June | Total |
| Final Citations  | 0    | 2      | 3     | 1    | 2    | 0    | 0       | 1    | 0     | 1     | 0   |      | 10    |
| Average Days to Complete   | 0    | 108    | 182   | 23   | 63   | 0    | 0       | 125  | 0     | 138   | 0   |      | 107   |

\*Average number of cases pending per month

**AGENDA ITEM IV – Strategic Plan Update**

=====  
Agenda Description: Status updates on the Board’s Strategic Plan objectives

- A. Best Practice Pointers Task Force
1. Interrupting Proceedings
  2. How to Go On and Off the Record
  3. Videotaped Depositions
  4. Rough Draft Transcripts

=====  
Brief Summary:

The Best Practice Pointers Task Force has completed drafts of four best practices, which are attached for Board review and approval.

=====  
Support Documents:

- Attachment 1 – Best Practices for Interrupting Proceedings
- Attachment 2 – Best Practices for How to Go On and Off the Record
- Attachment 3 – Best Practices for Videotaped Depositions
- Attachment 4 – Best Practices for Rough Draft Transcripts

=====  
Fiscal Impact: None

=====  
Report Originator: Yvonne Fenner, 6/2/2015

=====  
Recommended Board Action: Staff recommends the Board adopt the proposed Best Practice Pointers.

=====  
B. Review of Action Plan

=====  
Brief Summary:

AT the February 6, 2015 Board meeting, the 2015-2018 Strategic Plan was approved. Staff worked with our facilitator Elisa Chohan from SOLID to develop an action plan to be used to update the Board on the progress of achieving the strategic plan goals.

=====  
Support Documents:

- Attachment 5 – Action Plan
- Attachment 6 – Action Plan Timeline

=====  
Fiscal Impact: None

=====  
Report Originator: Yvonne Fenner, 6/2/2015

=====  
Recommended Board Action: Staff recommends the Board review Action Plan and provide feedback as needed.

## Best Practice Pointer No. 1 - DRAFT

### How to Interrupt Proceedings

#### **Why:**

The fundamental duty of a court reporter is to protect the record, including interrupting if the accuracy of the record is jeopardized. California Code of Regulations Title 16, Division 24, Article 8, section 2475 requires the reporter to promptly notify the parties present or the presiding officer upon determining that one is not competent to continue an assignment. Business and Professions Code 8017 defines shorthand reporting as the making of a verbatim record.

Some common reasons include:

- Speaking too quickly
- Reporter didn't understand a word or phrase
- Overlapping speakers
- Attorneys resume question while reporter is still marking exhibit

#### **How:**

Timing is important. If possible, wait for a natural pause in the proceedings, such as marking an exhibit or changing topics.

Be polite, but firm and loud.

Raise your hands shoulder height (so clearly away from the machine) and say, "Stop. We are off the record."

#### **Returning back to the record:**

One way is to say, "This is what I have right now," and read back the last clear portion you have in your notes.

Another way is to simply ask the speaker to repeat the last thing that was said.

#### **In court:**

All requests for clarification of the record should be addressed to the judge. For example: "Your Honor, could we have Ms. Smith repeat what she just said?"

#### **Transcript production:**

When the reporter interrupts, a parenthetical may be included similar to (Reporter interrupts for clarification of the record.)

In the alternative, the reporter may add himself/herself as a speaker, but as it's extremely difficult if not impossible to write while speaking, this only works when what is said is short, such as, "Excuse me?"

#### **Note:**

The stenographic notes are the official record. If a complaint were received as to the accuracy of the transcript, the Board looks to the transcript and the stenographic notes,

not an audio file that may exist. In other words, do NOT rely upon your backup audio recording for transcript production.

Never use the parenthetical (Inaudible) because that is only used when transcribing audio recordings. A live court reporter is required to interrupt to protect the record.

## **Best Practice Pointer No. 2 - DRAFT**

### **How to Go On and Off the Record**

#### **Reasons to go off the record:**

Some common reasons include:

- All parties agree (pursuant to CCP 2025.470)
- Someone states his/she is going to move for a protective order (pursuant to CCP 2025.420)
- Marking exhibits
- Steno machine malfunction
- Personal safety (physical fight between parties)
- Deal with noise (outside distractions)

#### **Pointers:**

CCP 2025.470 requires all parties present to agree to go off the record. Get the agreement on the record.

There is no code dealing with going back on the record. Since the reporter is present to report the record, if any single person wants to put something on the record, the reporter should go back on.

Be clear when you're on and off the record using the following techniques:

- State clearly "We are off the record" or "We are on the record."
- Move away from the machine
- Stand up
- Raise hands to shoulder level

If unsure that a speaker's comments should be on or off the record, clarify. For instance, if the attorneys start talking about where to go for lunch, say "Counsel, is this for the record?"

**When in doubt, KEEP WRITING**

--o0o--

#### **Scenarios for vignettes:**

- Attorney tells reporter to stop writing, opposing counsel tells reporter to continue
- One attorney leaves mid-proceeding
- Noticing attorney insists on stopping after he's done with his questioning and doesn't want opposing counsel to ask any
- Notice attorney doesn't show and opposing counsel wants to go on the record
- Video continues after steno machine malfunctions, and attorneys ask reporter to leave the room to fix machine and fill in the transcript from the videotape

**Videotaped Depositions**

**REMINDER:**

You, the court reporter, are creating the official record via your stenographic notes. It doesn't matter what the videographer is doing or not doing. You may go off the record while the video continues, as in the case of marking an exhibit. You may remain on the record while the video has stopped, as in the case of getting attorneys' orders at the end of the deposition.

## Rough Draft Transcripts

### Why:

Rough drafts are provided as a litigation support tool to litigants, their counsel and the court to aid in the administration of justice.

### The Law (Emphasis added):

- California Code of Civil Procedure section 273(b) states: The report of the official reporter, or official reporter pro tempore, of any court, duly appointed and sworn, when prepared as a rough draft transcript, shall not be certified and cannot be used, cited, distributed, or transcribed as the official certified transcript of the proceedings. **A rough draft transcript shall not be cited or used in any way or at any time to rebut or contradict the official certified transcript of the proceedings as provided by the official reporter or official reporter pro tempore. The production of a rough draft transcript shall not be required.**
- California Code of Civil Procedure section 2025.540(b) states: When prepared as a rough draft transcript, the transcript of the deposition may not be certified and may not be used, cited, or transcribed as the certified transcript of the deposition proceedings. **The rough draft transcript may not be cited or used in any way or at any time to rebut or contradict the certified transcript of deposition proceedings as provided by the deposition officer.**
- California Code of Civil Procedure section 2025.320(b) states: Services and products offered or provided by the deposition officer or the entity providing the services of the deposition officer to any party or to any party's attorney or third party who is financing all or part of the action shall be offered to all parties or their attorneys attending the deposition. No service or product may be offered or provided by the deposition officer or by the entity providing the services of the deposition officer to any party or any party's attorney or third party who is financing all or part of the action unless the service or product is offered or provided to all parties or their attorneys attending the deposition. **All services and products offered or provided shall be made available at the same time to all parties or their attorneys.**

### Differentiation Techniques:

When a rough draft is provided, two versions of a transcript will result from one proceeding – the unofficial, uncertified rough draft and the official, certified transcript. As the rough draft may not be used in lieu of the certified transcript, it is important that every effort is made to eliminate any confusion as to whether the reader has the rough draft or the certified transcript. Following are several ways to prevent any confusion on the part of the reader.

1. Include a cover page or introductory paragraph to the effect:

## "UNCERTIFIED ROUGH DRAFT TRANSCRIPT"

### REPORTER'S STATEMENT

The following transcript represents a real-time version of the [deposition of *deponent name* taken on *date*] or [proceedings taken in *court name* on *date*].

The realtime/rough draft text is unedited and uncertified and may contain untranslated stenographic symbols, an occasional reporter's note, a misspelled proper name, and/or nonsensical word combinations. All such entries will be corrected on the final certified transcript which we will deliver to you in accordance with our standard delivery terms, or on an expedited basis, should you desire faster delivery. This will serve to also notify that the final certified transcript will have differences from the realtime/rough draft version, including differing page and line number references. Due to the need to proof and correct entries prior to certification, you agree to use this realtime/rough draft text only for the purpose of augmenting counsel's notes and not to use or cite it in any court proceeding or to distribute it to any other parties.

2. Include a header or footer on each page stating "uncertified rough draft transcript only." The header and/or footer may be placed inside the page box.
3. Change the number of lines per page. Line numbers are optional.
4. A rough draft should never include a completed title page, appearance page, certification page, any mention of swearing in of a witness by name, a footer with the firm name, reporter's name or license number.
5. Include a "Draft" watermark.
6. Insert randomly throughout the transcript a paragraph to the effect: "This is an uncertified rough draft transcript and may not be used, cited, or distributed as the certified transcript of the proceedings."
7. If the rough draft is provided via electronic media, the media should be clearly labeled as a rough draft using a label of a different color than the official transcript.
8. Where possible, all untranslated steno strokes and conflicts should be resolved before delivery of a rough draft.

# **Court Reporters Board**

## **Action Plan**

**2015-2018**

# GOAL 1: Professional Qualifications

*The Board promotes the professional qualifications of those practicing court reporting by establishing examination standards and requirements.*

1.1 Perform a new occupational analysis to confirm that tested knowledge, skills and abilities are relevant to the industry

Start: March 2015                      End: June 2017

| Success Measure: A current exam is developed | Responsibility |
|--|----------------|
|--|----------------|

|       |  |                            |
|-------|--|----------------------------|
| 1.1.1 | Write Budget Change Proposal (BCP) for funding authority for occupational analysis. <sup>1</sup> | Executive Officer          |
| 1.1.2 | Write and enter into a contract with Office of Professional Examination Services (OPES).         | Executive Officer and OPES |
| 1.1.3 | Set up focus group to get background information for survey creation.                            | Executive Officer and OPES |
| 1.1.4 | OPES develops and distributes survey and compiles results for Executive Officer review.          | OPES                       |
| 1.1.5 | Develop an exam plan.  | Executive Officer and OPES |
| 1.1.6 | Exam plan published on Web site.   | Licensing Analyst          |

<sup>1</sup> The Budget Change Proposal process is listed in Appendix A

# GOAL 1: Professional Qualifications

*The Board promotes the professional qualifications of those practicing court reporting by establishing examination standards and requirements.*

|   |                            |
|---|----------------------------|
| 1.2 Conduct exam development workshops to produce a robust bank of test questions to safeguard the integrity of the exam. |                            |
| Start: July 2017    End: December 2018 (ongoing)  |                            |
| Success Measure: Pass rates of written exams are evaluated  | Responsibility             |
| *1.2 action items are pending the completion of objective 1.1.  |                            |
| 1.2.1 Write and enter into a contract with OPES.  | Executive Officer and OPES |
| 1.2.2 Arrange expert consultants for workshops, including travel accommodations and contract.                             | Licensing Analyst          |
| 1.2.3 OPES facilitates a series of four types <sup>2</sup> of workshops.  | OPES                       |

<sup>2</sup> Item Writing, Item Review, Exam Construction and Passing Score.

# GOAL 1: Professional Qualifications

*The Board promotes the professional qualifications of those practicing court reporting by establishing examination standards and requirements.*

1.3 Research realtime captioning standards and assess industry practices for the Board to evaluate the need for consumer protection.

Start: July 2016                      End: September 2018

Success Measure: Board determines whether to pursue creating licensing regulations for captioning.

Responsibility

1.3.1 Research National Court Reporter Association's (NCRA) standards and certification of captioning.                      Licensing Analyst

1.3.2 Partner with SOLID to develop and conduct online survey targeting consumers and public and private universities, to learn about the quality of captioning services and determine if there is a consumer protection issue.                      Licensing Analyst

1.3.3 Partner with SOLID to conduct statewide (north, south and central California) town hall meetings to learn about the quality of captioning services.                      Licensing Analyst

1.3.4 Evaluate survey and town hall meeting results to determine if consumer protection issue exists.                      Licensing Analyst

1.3.5 If no consumer harm is determined, report results to Board.                      Licensing Analyst

1.3.6 If consumer harm is determined, report results to Board and recommend action.                      Licensing Analyst

1.3.7 Research sunrise process for new license and report to Board.                      Licensing Analyst and Executive Officer

# GOAL 1: Professional Qualifications

*The Board promotes the professional qualifications of those practicing court reporting by establishing examination standards and requirements.*

1.4 Educate the Governor's Office on the importance of mandatory continuing education.

Start: April 2015

End: December 2016

Success Measure: Outreach to Governor's Office is complete.

Responsibility

\*Timeframe is based on a current bill being introduced within the first few months of 2015. If the bill is not introduced, time frame of objective 1.4 will be extended.

- |       |   |                   |
|-------|---|-------------------|
| 1.4.1 | Develop talking points for participants.  | Executive Officer |
| 1.4.2 | Partner with DCA Division of Legislative and Regulatory Review and professional associations to gather support for a uniform message. | Executive Officer |
| 1.4.3 | Take uniform message to Governor's Office.  | Executive Officer |

## GOAL 2: Enforcement

*The Board protects consumers by preventing violations and effectively enforcing laws, codes, and standards when violations occur.*

2.1 Identify entities providing court reporting services in California that are violating applicable laws and take corrective action to effect compliance

Start: September 2015      End: December 2018

| Success Measure: Gain universal compliance of applicable laws   | Responsibility                            |
|---|---|
| 2.1.1 Collect complaint data to evaluate the level of consumer harm.  | Enforcement Analyst                       |
| 2.1.2 If consumer harm is actionable, research remedies, such as contacting Office of Attorney General with a Board member. | Enforcement Analyst and Executive Officer |
| 2.1.3 Present options to Board for decision.  | Enforcement Analyst and Executive Officer |
| 2.1.4 Implement Board decision.   | Enforcement Analyst and Executive Officer |

## GOAL 2: Enforcement

*The Board protects consumers by preventing violations and effectively enforcing laws, codes, and standards when violations occur.*

2.2 Conduct cross-training to protect the continuity and timeliness of the consumer complaint process

Start: January 2016      End: December 2016

Success Measure: Desk manual for enforcement desk is completed.      Responsibility

|       |   |                               |
|-------|---|-------------------------------|
| 2.2.1 | Identify staff member who will be cross-trained. (September 2015)                                   | Executive Officer             |
| 2.2.2 | Identify scope of training and job shadowing.   | Executive Officer             |
| 2.2.3 | Develop training and job shadowing schedule.  | Executive Officer             |
| 2.2.4 | Staff member to attend and/or view training on desk manual development. (SOLID webinar)             | Staff member                  |
| 2.2.5 | Staff member shadows enforcement analyst and documents procedures.                                  | Staff and Enforcement Analyst |
| 2.2.6 | Staff member to present draft of desk manual to Executive Officer.                                  | Staff member                  |
| 2.2.7 | Proofread desk manual and determine if outside user would understand the process utilizing the aid. | Executive Officer             |

## GOAL 2: Enforcement

*The Board protects consumers by preventing violations and effectively enforcing laws, codes, and standards when violations occur.*

|   |   |   |
|---|---|---|
| 2.3 Educate stakeholders (such as courts, the general public and legal community) on the Board's complaint process to prevent or proactively address consumer harm. |   |   |
| Start: April 2015      End: September 2018  |   |   |
| Success Measure: Seventy percent affirmative response rate from survey  |   | Responsibility                            |
| 2.3.1   | Contact Office of Public Affairs for assistance in developing a communication plan.   | Executive Analyst                         |
| 2.3.2   | Identify contacts and develop distribution list.  | Enforcement Analyst                       |
| 2.3.3   | Identify and develop content for message.   | Enforcement Analyst and Executive Officer |
| 2.3.4   | Determine methods for dissemination of message, such as PowerPoint.   | Executive Analyst                         |
| 2.3.5   | Implement communication plan.   | Executive Officer                         |
| 2.3.6   | Partner with SOLID to conduct customer satisfaction survey for identified stakeholders confirming knowledge of complaint process. | Executive Analyst                         |

## GOAL 2: Enforcement

*The Board protects consumers by preventing violations and effectively enforcing laws, codes, and standards when violations occur.*

|   |  |   |
|---|--|---|
| 2.4 Expand compliance education for licensees to prevent enforcement issues.  |  |   |
| Start: April 2015      End: December 2018 (ongoing)   |  |   |
| Success Measure: First Best Practice Pointer completed by December 2015. Two additional Best Practice Pointers completed each calendar year thereafter. |  | Responsibility                          |
| 2.4.1   | Convene Best Practices Task Force.   | Executive Officer and Executive Analyst |
| 2.4.2   | Identify topics for Best Practice Pointers.  | Task Force                              |
| 2.4.3   | Develop content for Best Practice Pointers.  | Task Force                              |
| 2.4.4   | Partner with SOLID and DCA's Office Publications, Design and Editing (PDE) to produce content such as: PowerPoint, Fact Sheets, newsletter, mail outs with renewals, videos. | Executive Analyst                       |
| 2.4.5   | Disseminate Best Practice Pointers via YouTube, Web posting and e-mail.  | Licensing Analyst                       |

## GOAL 3: Educational Oversight

*The Board advances higher education standards through educational oversight to increase the quality of education and safeguard consumer protection.*

3.1 Support schools' recruitment efforts to preserve the integrity and continuity of the court reporter workforce for consumer protection.

Start: April 2015

End: September 2018

Success Measure: Ninety percent satisfaction rate from survey.

Responsibility

|       |  |   |
|-------|--|---|
| 3.1.1 | Contact DCA Office of Public Affairs for assistance in developing a communication plan.  | Executive Analyst                       |
| 3.1.2 | Update student brochure.   | Executive Analyst                       |
| 3.1.3 | Develop Web site content on viability of a career in court reporting (testimonials, statistics, etc.)                                | Executive Analyst and Executive Officer |
| 3.1.4 | Partner with SOLID to develop customer satisfaction survey for schools, asking if Board has met expectation for recruitment efforts. | SOLID and Executive Analyst             |

## GOAL 3: Educational Oversight

*The Board advances higher education standards through educational oversight to increase the quality of education and safeguard consumer protection.*

|  |   |                        |
|--|---|------------------------|
| 3.2 Increase court reporter school site visits to more effectively monitor compliance with applicable laws and regulations |   |                        |
| Start: August 2015      End: December 2018 (ongoing)   |   |                        |
| Success Measure: Conduct all school site visits by end of strategic plan period.   |   | Responsibility         |
| 3.2.1  | Recruit and contract with an education consultant (i.e., Betty Sundberg.)         | Executive Officer      |
| 3.2.2  | Coordinate school site visits with dictation exam dates to minimize travel costs. | Executive Analyst      |
| 3.2.3  | Develop and train school site visit team.   | Executive Analyst      |
| 3.2.4  | Update school site visit and phase two processes.                                 | Executive Analyst      |
| 3.2.5  | Conduct school site visits.   | School site visit team |

## GOAL 4: Consumer Information

*The Board increases public and professional awareness of their mission, activities, and services, with a special focus on practice standards.*

|   |   |                   |
|---|---|-------------------|
| 4.1 Launch a strategic awareness campaign in collaboration with external stakeholders (such as state bar, industry associations, law libraries, self-help centers, court Web sites, schools and legal non-profits) to educate consumers about the Board's services and standards. |   |                   |
| Start: April 2015                      End: December 2018 (ongoing)   |   |                   |
| Success Measure: Seventy percent affirmative response rate from survey  |   | Responsibility    |
| 4.1.1   | Contact DCA's Office of Public Affairs for assistance in developing a communication plan.   | Executive Analyst |
| 4.1.2   | Identify contacts and develop distribution list.  | Executive Officer |
| 4.1.3   | Identify and develop content for message.   | Executive Officer |
| 4.1.4   | Determine methods for dissemination of message such as PowerPoint.  | Executive Analyst |
| 4.1.5   | Implement communication plan.   | Executive Officer |
| 4.1.6   | Partner with SOLID to conduct customer satisfaction survey to identified stakeholders confirming knowledge of Board services and standards. | Executive Analyst |

## GOAL 5: Organizational Effectiveness

*The Board increases public and professional awareness of their mission, activities, and services, with a special focus on practice standards.*

| 5.1 Cross-train staff to protect continuity of effective and efficient service |   |                   |
|--|---|-------------------|
| Start: July 2015      End: January 2017  |   |                   |
| Success Measure: Desk manual for all desks are completed                       | Responsibility  |                   |
| 5.1.1  | Conduct workload analysis of all staff.   | Executive Officer |
| 5.1.2  | Identify staff members who will be cross-trained.   | Executive Officer |
| 5.1.3  | Identify scope of training and job shadowing.   | Executive Officer |
| 5.1.4  | Develop training and job shadowing schedule.  | Executive Officer |
| 5.1.5  | Staff members attend and/or view training on desk manual development (SOLID webinar).                   | Staff members     |
| 5.1.6  | Staff members shadow assigned back-up desk and take notes.  | Staff members     |
| 5.1.7  | Staff members present draft or updated desk manual to Executive Officer.                                | Staff members     |
| 5.1.8  | Proofread desk manuals and determine if outside users would understand the processes utilizing the aid. | Executive Officer |

# GOAL 5: Organizational Effectiveness

*The Board increases public and professional awareness of their mission, activities, and services, with a special focus on practice standards.*

5.2 Investigate and implement strategies to increase Web site use to maximize efficiency in addressing consumer information requests.

Start: December 2015                      End: September 2016

|  |                 |
|--|-----------------|
| Success Measure: Report of a decreased number of consumer information requests via phone, based on anecdotal evidence. | Responsibility: |
|--|-----------------|

|       |   |  |
|-------|---|--|
| 5.2.1 | Create template/site map for staff to use while conducting analysis.  | Executive analyst                              |
| 5.2.2 | Conduct internal analysis of current Web site.  | All staff                                      |
| 5.2.3 | Evaluate analyses from staff to determine improvements.   | Executive Analyst                              |
| 5.2.4 | Make improvements to Web site based on analysis.  | Licensing Analyst                              |
| 5.2.5 | Partner with SOLID to develop Web site quiz for distribution to schools in order to assess ease of use of Web site. | Each staff to develop quiz questions from desk |
| 5.2.6 | Distribute quiz and analyze results.  | SOLID and Executive Analyst                    |
| 5.2.6 | Make additional improvements/refinements to Web site based on results from quiz.                                    | Licensing Analyst                              |

# Appendix A

## Budget Change Proposal Process

1. Draft BCP concept paper.
2. Obtain approval of BCP concept.
3. Submit BCP concept paper to DCA Budget Office.
4. Draft BCP and submit to DCA Budget Office.
5. Obtain Agency approval of BCP.
6. Submit BCP to Department of Finance.
7. Obtain administrative BCP approval from Department of Finance.
8. Obtain legislative approval for BCP.



**PREPARED BY:  
SOLID PLANNING SOLUTIONS  
DEPARTMENT OF CONSUMER AFFAIRS**

**1474 N. Market Blvd, Suite 270 Sacramento, CA 95834 • Phone: 916.574.8316 • Fax: 916.574.8386  
•SOLID@dca.ca.gov •**

*This action plan is based on stakeholder information and discussions facilitated by SOLID for the Court Reporters Board of California in February 2015. Subsequent amendments may have been made.*

**Court Reporters Board of California  
2015-2018 Action Plan Timeline**

| <b>Action Items</b>   | <b>Target Date</b> | <b>Status</b>                         |
|---|--------------------|---------------------------------------|
| <b>Perform new occupational analysis to confirm that tested knowledge, skills and abilities are relevant to the industry</b>  | June 2017          | BCP Concept Paper submitted           |
| <b>Conduct exam development workshops to produce a robust bank of test questions to safeguard the integrity of the exam</b>   | Dec 2018           | Contract with OPES with 2016 calendar |
| <b>Research realtime captioning standards and assess industry practices for the Board to evaluate the need for consumer protection</b>  | Sept 2018          |                                       |
| <b>Educate the Governor's Office on the importance of mandatory continuing education</b>  | Dec 2016           |                                       |
| <b>Identify entities providing court reporting services in California that are violating applicable laws and take correction action to effect compliance.</b>   | Dec 2018           |                                       |
| <b>Conduct cross-training to protect the continuity and timeliness of the consumer complaint process</b>  | Dec 2016           |                                       |
| <b>Educate stakeholders (such as courts, the general public and legal community) on the Board's complaint process to prevent or proactively address consumer harm</b>   | Sept 2018          |                                       |
| <b>Expand compliance and education for licensees to prevent enforcement issues.</b>   | Dec 2018           | Best Practice Pointers – developed 4  |
| <b>Support schools' recruitment efforts to preserve the integrity and continuity of the court reporter workforce for consumer protection</b>  | Sept 2018          |                                       |
| <b>Increase court reporter school site visits to more effectively monitor compliance with applicable laws and regulations</b>   | Dec 2018           |                                       |
| <b>Launch a strategic awareness campaign in collaboration with external stakeholders (such as state bar, industry associations, law libraries, self-help centers, court Web sites, schools and legal non-profits) to educate consumers about the Board's services and standards</b> | Dec 2018           |                                       |
| <b>Cross-train staff to protect continuity of effective and efficient service</b>   | Jan 2017           |                                       |
| <b>Investigate and implement strategies to increase Web site use to maximize efficiency in addressing consumer information requests</b>   | Sept 2016          |                                       |

**AGENDA ITEM V – Report on Legislation**

=====

Agenda Description:

- A. Update on licensee fee cap increase.

=====

Brief Summary:

At the February 6<sup>th</sup>, 2015 Board meeting, staff was directed to find an author for legislation to increase the cap for the license fee. Because that meeting was after the cutoff to get language to Leg Counsel, DRA via their lobbyist Ed Howard submitted language to Leg Counsel on the Board's behalf. Leg Counsel reviewed the language which mirrored what the Board approved with the exception of the upper limit of the authorization to increase and notified Mr. Howard that because of portion of the license fee goes to fund the TRF, a license fee cap increase would be a tax, and therefore the bill would be tagged as such and would require a two-thirds vote rather than a simple majority. Staff via Mr. Howard pushed back explaining that 100 percent of the TRF funds are returned to court reporters in the form of reimbursement as well as pointing out that the same decision was not made in the case of the Dental Board last year, which includes a diversion fund. At the end of the day, one week before the bill introduction deadline, Leg Counsel made its final decision that it would be termed as a tax bill.

Staff contacted every member of the Senate BP&Ed Committee as well as the Assembly Committee on Business and Professions, meeting with staff consultants for both committees. Interest was high until the tax tag was mentioned, and in the end, staff was unsuccessful in finding an author.

=====

Report Originator: Yvonne Fenner, 6/2/2015

=====

Recommended Action: Staff recommends addressing the issue during the upcoming Sunset Review process. The downside to waiting, however, is it places the TRF funding at risk. Business and Professions Code 8030.2(a) states in relevant part: "Notwithstanding any other provision of this article, a transfer to the Transcript Reimbursement Fund in excess of the fund balance established at the beginning of each fiscal year shall not be made by the board if the transfer will result in the reduction of the balance of the Court Reporters' Fund to an amount less than six months' operating budget."

=====

B. Briefing on current legislation related to the court reporting industry and/or the Court Reporters Board with discussion and possible action.

=====

Brief Summary:

**AB 12 (Cooley) - State government: administrative regulations: review**

(Senate Committee on Governmental Organization)

Existing law authorizes various state entities to adopt, amend, or repeal regulations for various specified purposes. This bill would until January 1, 2019, require each state agency to review and revise that agency's regulations to eliminate inconsistent, overlapping, duplicative and outdated provisions by January 1, 2018, and report to the Legislature and Governor as specified.

**AB 19 (Chang) – GoBiz: small business: regulations**

(Assembly Appropriations, held on suspense)

This bill would require the Governor's Office of Business and Economic Development, under the direction of the Small Business Advocate, to review all regulations affecting small business, which were adopted prior to January 1, 2016, in order to determine whether the regulations need to be amended in order to become more effective, less burdensome, or decrease the cost impact to the affected sectors.

**AB 85 (Wilk) – Open meetings**

(Senate Committee on Governmental Organization)

This urgency bill would require two-member advisory committees or panels of a state body to hold open, public meetings if at least one member of the advisory committee or panel is a member of the larger state body and the advisory committee is supported, in whole or in part, by state funds.

**AB 259 (Dababneh) – Personal information: privacy**

(Senate Committee on Rules for assignment)

This bill would require a public agency that is the source of a data breach and is required to give affected persons notice of the breach to offer to provide at least 12 months of appropriate identity theft prevention and mitigation services at no cost to the affected persons if the breach exposed unencrypted social security, driver's license, or California ID card numbers.

**AB 351 (Jones-Sawyer) – Public contracts: small business participation**

(Assembly Appropriations, held on suspense)

This bill would require all state agencies to establish an annual goal of 25 percent small business participation in contracting. This bill would provide that any agency not meeting that goal would be required to submit a corrective action plan to the Department of General Services within 45 days of the end of each fiscal year.

**AB 507 (Olsen) – Department of Consumer Affairs: BreEZe system: annual report**

(Senate Committee on Rules for assignment)

This bill would, on and after January 31, 2016, require the department to submit an annual report to the Legislature and the Department of Finance that includes, among other things, the department's plans for implementing the BreEZe system at specified regulatory entities included in the department's third phase of the BreEZe implementation project, including, but not limited to, a timeline for the implementation.

**AB 728 (Hadley) – State government: financial reporting**

(Senate appropriations)

This bill would require all state agencies to post biennial reviews of internal accounting, administrative control, and monitoring practices to the department Web site within five days of finalization. This report is already subject to Public Record Act requests as the report is currently submitted to the Governor, Legislature, State Controller, Treasurer, and others for inspection by the public.

**\*\*AB 749 (Bloom) – Superior courts: court reporters**

(Assembly Appropriations, held on suspense)

This bill would require an official court reporter for all child custody proceedings and proceedings under the Domestic Violence Prevention Act.

**AB 750 (Low) – Business and professions: licenses**

(Assembly Appropriations – held on suspense)

This bill would allow all programs within the department to issue a retired license.

**\*\*AB 804 (Hernandez) – Shorthand reporters: continuing education requirements**

(Senate Appropriations)

This bill would require the Court Reporters Board, on or before July 1, 2016, to adopt regulations to establish, for renewal of a shorthand reporter's certificate, minimum approved continuing education requirements, with certain exceptions, and would require the board to establish a procedure for approving providers of those continuing education courses, as specified. This bill would also authorize the board to establish a fee for approval of those continuing education providers, not to exceed the reasonable regulatory costs, if any, to the board of approving those providers.

**AB 964 (Chau) – Civil law: privacy**

(Senate Rules Committee for assignment)

This bill would require data breach notifications made by businesses and public agencies to include the date of discovery of the breach in the notice to the Attorney General.

**AB 1060 (Bonilla) – Professions and vocations: licensure**

(Senate Committee on Business, Professions and Economic Development)

This bill would authorize a board, upon suspension or revocation of a license, to provide the ex-licensee with certain information pertaining to rehabilitation, reinstatement, or penalty reduction through first-class mail or by electronic means.

**\*\*AB 1197 (Bonilla) – Deposition Notices**

(Senate Committee on Judiciary)

This bill would require the deposition notice governed by this section to include a statement disclosing the existence of a contractual relationship, if any, between the deposition officer or entity providing the services of the deposition officer and the party noticing the deposition or a third party who is financing all or part of the action, as specified. This bill would also require the deposition notice to contain a statement disclosing that the party noticing the deposition, or a third party financing all or part of the action, directed his or her attorney to use a particular officer or entity to provide services for the deposition, if applicable. This bill would permit any other party to object to the use of an officer or entity if the party noticing the deposition makes such a disclosure.

**\*\*SB 270 (Mendoza) – Court Reporters Board of California: civil actions: corporations**

(Assembly Committee on Business and Professions and Judiciary Committee)

This bill would require the court to impose specified monetary penalties against a person or corporation rendering services without a license or authorization. This bill would also authorize the court to order restitution.

**SB 467 (Hill) – Professions and vocations**

(Assembly, read first time)

This bill would require the Legislature to approve pro rata distributions at the department. This bill would also require the Attorney General to implement performance measures regarding case referrals.

**SB 570 (Jackson) – Personal information: privacy: breach**

(Assembly Committee on Privacy and Consumer Protection)

This bill would add certain notification requirements when an agency that owns or licenses computerized data, including personal information, discloses a security breach of its system. This bill would also require those disclosures to be written in "plain language."

**SB 799 (Committee on Business, Professions and Economic Development) – Professions and Vocations**

(Assembly Committee on Business and Professions)

This bill would make non-controversial, non-substantive, and technical changes to various provisions pertaining to non-hearing arts licensing programs of the department.

=====  
Support Documents:

- Attachment 1 – AB 749
- Attachment 2 – AB 804
- Attachment 3 – AB 1197
- Attachment 4 – SB 270

=====  
Report Originator: Yvonne Fenner, 6/12/2015  
=====

AMENDED IN ASSEMBLY APRIL 16, 2015  
AMENDED IN ASSEMBLY MARCH 26, 2015  
CALIFORNIA LEGISLATURE—2015–16 REGULAR SESSION

**ASSEMBLY BILL**

**No. 749**

---

**Introduced by Assembly Member Bloom**

February 25, 2015

---

An act to amend Section 269 of the Code of Civil Procedure, add Sections 3013 and 6230 to the Family Code, relating to courts.

LEGISLATIVE COUNSEL'S DIGEST

AB 749, as amended, Bloom. Superior courts: court reporters.

Existing law requires an official reporter or official reporter pro tempore of the superior court to take down in shorthand specified information regarding the testimony and proceedings before the court in civil cases, felony cases, and misdemeanor or infraction cases on order of the court, and in only civil cases or felony cases, at the request of a party or counsel.

This bill would extend this requirement to domestic violence cases and child custody proceedings, as specified: *require an official reporter or official reporter pro tempore to take down in shorthand all testimony and all of the statements and remarks of the judge and all persons appearing at any hearing at which testimony is received in child custody proceedings and proceedings under the Domestic Violence Prevention Act.*

Vote: majority. Appropriation: no. Fiscal committee: yes.  
State-mandated local program: no.

*The people of the State of California do enact as follows:*

1     SECTION 1. Section 3013 is added to the Family Code, to  
2 read:

3     3013. At any hearing in a proceeding under this division at  
4 which testimony is received, an official reporter or official reporter  
5 pro tempore shall take down in shorthand all testimony and all of  
6 the statements and remarks of the judge and all persons appearing  
7 at the hearing.

8     SEC. 2. Section 6230 is added to the Family Code, immediately  
9 following Section 6229, to read:

10     6230. At any hearing in a proceeding under this division at  
11 which testimony is received, an official reporter or official reporter  
12 pro tempore shall take down in shorthand all testimony and all of  
13 the statements and remarks of the judge and all persons appearing  
14 at the hearing.

15     SECTION 1. Section 269 of the Code of Civil Procedure is  
16 amended to read:

17     ~~269. (a) An official reporter or official reporter pro tempore~~  
18 ~~of the superior court shall take down in shorthand all testimony,~~  
19 ~~objections made, rulings of the court, exceptions taken,~~  
20 ~~arraignments, pleas, sentences, arguments of the attorneys to the~~  
21 ~~jury, and statements and remarks made and oral instructions given~~  
22 ~~by the judge or other judicial officer, in the following cases:~~

23     ~~(1) In a civil case, on the order of the court or at the request of~~  
24 ~~a party.~~

25     ~~(2) In a felony case, on the order of the court or at the request~~  
26 ~~of the prosecution, the defendant, or the attorney for the defendant.~~

27     ~~(3) In a misdemeanor or infraction case, on the order of the~~  
28 ~~court.~~

29     ~~(4) In a domestic violence case, on the order of the court or at~~  
30 ~~the request of the prosecution, the defendant, or the attorney for~~  
31 ~~the defendant. For purposes of this section, "domestic violence"~~  
32 ~~has the same meaning as set forth in Section 6211 of the Family~~  
33 ~~Code.~~

34     ~~(5) In a child custody proceeding, on the order of the court or~~  
35 ~~at the request of a party or the party's attorney. For purposes of~~  
36 ~~this section, "child custody proceeding" has the same meaning as~~  
37 ~~set forth in Section 3402 of the Family Code.~~

1 (b) If a transcript is ordered by the court or requested by a party,  
2 or if a nonparty requests a transcript that the nonparty is entitled  
3 to receive, regardless of whether the nonparty was permitted to  
4 attend the proceeding to be transcribed, the official reporter or  
5 official reporter pro tempore shall, within a reasonable time after  
6 the trial of the case that the court designates, write the transcripts  
7 out, or the specific portions thereof as may be requested, in plain  
8 and legible longhand, or by typewriter, or other printing machine,  
9 and certify that the transcripts were correctly reported and  
10 transcribed, and when directed by the court, file the transcripts  
11 with the clerk of the court.

12 (c) If a defendant is convicted of a felony, after a trial on the  
13 merits, the record on appeal shall be prepared immediately after  
14 the verdict or finding of guilt is announced unless the court  
15 determines that it is likely that no appeal from the decision will  
16 be made. The court's determination of a likelihood of appeal shall  
17 be based upon standards and rules adopted by the Judicial Council.

O

AMENDED IN ASSEMBLY MARCH 23, 2015

CALIFORNIA LEGISLATURE—2015—16 REGULAR SESSION

**ASSEMBLY BILL**

**No. 804**

---

**Introduced by Assembly Member Roger Hernández**

February 26, 2015

---

An act to amend Section 68086 of the Government Code, relating to ~~courts~~; amend Section 8031 of, and to add Section 8024.8 to, the Business and Professions Code, relating to shorthand reporters.

LEGISLATIVE COUNSEL'S DIGEST

AB 804, as amended, Roger Hernández. ~~Courts: superior court fees: official court reporters.~~ *Shorthand reporters: continuing education requirements.*

*Existing law provides for the certification and regulation of shorthand reporters by the Court Reporters Board of California in the Department of Consumer Affairs, and provides for the regulation of shorthand reporting schools by the board. Existing law provides for the renewal of a shorthand reporter's certificate if specified requirements are met. Existing law sets forth specified fees for the examination for, and the issuance and renewal of, a shorthand reporter's certificate.*

*This bill would require the board, on or before July 1, 2016, to adopt regulations to establish, for renewal of a shorthand reporter's certificate, minimum approved continuing education requirements, with certain exceptions, and would require the board to establish a procedure for approving providers of those continuing education courses, as specified. The bill would also authorize the board to, by regulation, establish a fee for approval of those continuing education providers, not to exceed the reasonable regulatory costs, if any, to the board of approving those providers.*

98

Existing law requires the charge of an official court reporter fee, in addition to any other fee required in civil actions or cases. For each proceeding lasting more than one hour, existing law imposes a fee equal to the actual cost of providing that service per ½ day of services to the parties, on a pro rata basis. For each proceeding anticipated to last one hour or less, existing law imposes a fee of \$30 for the reasonable cost of court reporting services provided at the expense of the court by an official court reporter.

This bill would make a technical, nonsubstantive change to these provisions:

Vote: majority. Appropriation: no. Fiscal committee: no-yes.  
State-mandated local program: no.

*The people of the State of California do enact as follows:*

- 1     SECTION 1. Section 8024.8 is added to the Business and  
2     Professions Code, to read:  
3     8024.8. (a) On or before July 1, 2016, the board shall adopt  
4     regulations to establish minimum continuing education  
5     requirements for renewal of a certificate issued pursuant to this  
6     chapter. No earlier than six months after the effective date of the  
7     regulations, to renew his or her certificate, a certificate holder  
8     shall, in addition to the requirements of Section 8024, submit to  
9     the board, on a form prescribed by the board, that he or she has  
10    completed the minimum continuing education requirements.  
11    (b) The board shall ensure that the continuing education  
12    required by this section is relevant to the practice of shorthand  
13    reporting.  
14    (c) The board shall also establish a procedure for approving  
15    providers of continuing education courses, and all providers of  
16    continuing education shall comply with procedures established by  
17    the board. The board may establish a fee for providers of  
18    continuing education courses pursuant to Section 8031. The board  
19    may revoke or deny the right of a provider to offer continuing  
20    education coursework pursuant to this section for failure to comply  
21    with the requirements of this section or any regulation adopted  
22    pursuant to this section.  
23    (d) The board may establish exceptions to the continuing  
24    education requirements of this section for a certificate holder who

1 cannot meet the continuing education requirements for reasons of  
2 health, military service, or undue hardship.

3 (e) The continuing education requirements of this section shall  
4 comply with the guidelines for mandatory continuing education  
5 established by the Department of Consumer Affairs pursuant to  
6 Section 166.

7 (f) The board may adopt regulations as necessary to implement  
8 this section.

9 SEC. 2. Section 8031 of the Business and Professions Code is  
10 amended to read:

11 8031. The amount of the fees required by this chapter is that  
12 fixed by the board in accordance with the following schedule:

13 (a) The fee for filing an application for each examination shall  
14 be no more than forty dollars (\$40).

15 (b) The fee for examination and reexamination for the written  
16 or practical part of the examination shall be in an amount fixed by  
17 the board, which shall be equal to the actual cost of preparing,  
18 administering, grading, and analyzing the examination, but shall  
19 not exceed seventy-five dollars (\$75) for each separate part, for  
20 each administration.

21 (c) The initial certificate fee is an amount equal to the renewal  
22 fee in effect on the last regular renewal date before the date on  
23 which the certificate is issued, except that, if the certificate will  
24 expire less than 180 days after its issuance, then the fee is 50  
25 percent of the renewal fee in effect on the last regular renewal date  
26 before the date on which the certificate is issued, or fifty dollars  
27 (\$50), whichever is greater. The board may, by appropriate  
28 regulation, provide for the waiver or refund of the initial certificate  
29 fee where the certificate is issued less than 45 days before the date  
30 on which it will expire.

31 (d) By a resolution adopted by the board, a renewal fee may be  
32 established in such amounts and at such times as the board may  
33 deem appropriate to meet its operational expenses and funding  
34 responsibilities as set forth in this chapter. The renewal fee shall  
35 not be more than one hundred twenty-five dollars (\$125) nor less  
36 than ten dollars (\$10) annually, with the following exception:

37 Any person who is employed full time by the State of California  
38 as a hearing reporter and who does not otherwise render shorthand  
39 reporting services for a fee shall be exempt from licensure while  
40 in state employment and shall not be subject to the renewal fee

1 provisions of this subdivision until 30 days after leaving state  
 2 employment. The renewal fee shall, in addition to the amount fixed  
 3 by this subdivision, include any unpaid fees required by this section  
 4 plus any delinquency fee.

5 (e) The duplicate certificate fee shall be no greater than ten  
 6 dollars (\$10).

7 (f) The penalty for failure to notify the board of a change of  
 8 name or address as required by Section 8024.6 shall be no greater  
 9 than fifty dollars (\$50).

10 (g) *The fee for approval of a continuing education provider*  
 11 *shall be fixed by the board through regulation in an amount to*  
 12 *cover the reasonable regulatory cost to the board of approving*  
 13 *those continuing education providers, but shall be no greater than*  
 14 *forty dollars (\$40).*

15 ~~SECTION 1. Section 68086 of the Government Code is~~  
 16 ~~amended to read:~~

17 ~~68086. The following provisions apply in superior court:~~

18 ~~(a) In addition to any other fee required in civil actions or cases:~~

19 ~~(1) For each proceeding anticipated to last one hour or less, a~~  
 20 ~~fee of thirty dollars (\$30) shall be charged for the reasonable cost~~  
 21 ~~of the court reporting services provided at the expense of the court~~  
 22 ~~by an official court reporter pursuant to Section 269 of the Code~~  
 23 ~~of Civil Procedure.~~

24 ~~(A) The fee shall be charged to the party, or parties if filing~~  
 25 ~~jointly, that filed the paper that resulted in the proceeding being~~  
 26 ~~scheduled. If no fee has been charged, and a party subsequently~~  
 27 ~~requests a court reporter, that party shall be charged the fee if a~~  
 28 ~~reporter is to be provided by the court.~~

29 ~~(B) All parties paying the fee shall deposit the fee with the clerk~~  
 30 ~~of the court as specified by the court, but not later than the~~  
 31 ~~conclusion of each day's court session.~~

32 ~~(C) The fee shall be charged once per case for all proceedings~~  
 33 ~~conducted within the same hour if the total time taken by those~~  
 34 ~~proceedings is one hour or less. If the total time taken exceeds one~~  
 35 ~~hour, the fee shall be charged and collected pursuant to paragraph~~  
 36 ~~(2).~~

37 ~~(D) The fee shall be deposited into the Trial Court Trust Fund~~  
 38 ~~and distributed back to the court from which the fee was collected~~  
 39 ~~on a dollar-for-dollar basis.~~

1 ~~(E) The fee shall be refunded as soon as practicable to the~~  
2 ~~remitting party or parties if no court reporting services were~~  
3 ~~provided.~~

4 ~~(2) For each proceeding lasting more than one hour, a fee equal~~  
5 ~~to the actual cost of providing that service shall be charged per~~  
6 ~~one-half day of services to the parties, on a pro rata basis, for the~~  
7 ~~services of an official court reporter on the first and each~~  
8 ~~succeeding judicial day those services are provided pursuant to~~  
9 ~~Section 269 of the Code of Civil Procedure.~~

10 ~~(A) All parties shall deposit their pro rata shares of these fees~~  
11 ~~with the clerk of the court as specified by the court, but not later~~  
12 ~~than the conclusion of each day's court session.~~

13 ~~(B) For purposes of this paragraph, "one-half day" means any~~  
14 ~~period of judicial time, in excess of one hour, but not more than~~  
15 ~~four hours, during either the morning or afternoon court session.~~

16 ~~(b) The fee shall be waived for a person who has been granted~~  
17 ~~a fee waiver under Section 68631.~~

18 ~~(c) The costs for the services of the official court reporter shall~~  
19 ~~be recoverable as taxable costs by the prevailing party as otherwise~~  
20 ~~provided by law.~~

21 ~~(d) The Judicial Council shall adopt rules to ensure all of the~~  
22 ~~following:~~

23 ~~(1) That the parties are given adequate and timely notice of the~~  
24 ~~availability of an official court reporter.~~

25 ~~(2) That if an official court reporter is not available, a party may~~  
26 ~~arrange for the presenee of a certified shorthand reporter to serve~~  
27 ~~as an official pro tempore reporter, the costs therefor recoverable~~  
28 ~~as provided in subdivision (c).~~

29 ~~(3) That if the services of an official pro tempore reporter are~~  
30 ~~utilized pursuant to paragraph (2), no other charge shall be made~~  
31 ~~to the parties.~~

32 ~~(e) The fees collected pursuant to this section shall be used only~~  
33 ~~to pay the cost for services of an official court reporter in civil~~  
34 ~~proceedings.~~

35 ~~(f) The Judicial Council shall report on or before February 1 of~~  
36 ~~each year to the Joint Legislative Budget Committee on the fees~~  
37 ~~collected by courts pursuant to this section and Section 68086.1~~  
38 ~~and on the total amount spent for services of official court reporters~~  
39 ~~in civil proceedings statewide in the prior fiscal year.~~

AMENDED IN ASSEMBLY APRIL 16, 2015

AMENDED IN ASSEMBLY APRIL 6, 2015

CALIFORNIA LEGISLATURE—2015–16 REGULAR SESSION

**ASSEMBLY BILL**

**No. 1197**

---

**Introduced by Assembly Member Bonilla**

February 27, 2015

---

An act to amend Section 2025.220 of the Code of Civil Procedure, relating to depositions.

LEGISLATIVE COUNSEL'S DIGEST

AB 1197, as amended, Bonilla. Deposition notices.

Existing law prescribes the procedure for taking oral depositions inside the state. Existing law requires that, unless the parties agree or the court orders otherwise, the testimony, as well as any stated objections, be taken stenographically. Existing law requires a party desiring to take the oral deposition of a person to give a notice in writing that provides specified information, including the address and date of the deposition.

This bill would require the deposition notice governed by this section to include a statement disclosing the existence of a contractual relationship, if any, between the deposition officer or entity providing the services of the deposition officer and the party noticing the deposition or a third party who is financing all or part of the action, as specified. This bill would also require the deposition notice to contain a statement disclosing that the party noticing the deposition, *or a third party financing all or part of the action*, directed his or her attorney to use a particular officer or entity to provide services for the deposition, if applicable. This bill would permit any other party to object to the use

97

of an officer or entity if the party noticing the deposition makes such a disclosure.

Vote: majority. Appropriation: no. Fiscal committee: no.  
State-mandated local program: no.

*The people of the State of California do enact as follows:*

1 SECTION 1. Section 2025.220 of the Code of Civil Procedure  
 2 is amended to read:  
 3 2025.220. (a) A party desiring to take the oral deposition of  
 4 any person shall give notice in writing. The deposition notice shall  
 5 state all of the following:  
 6 (1) The address where the deposition will be taken.  
 7 (2) The date of the deposition, selected under Section 2025.270,  
 8 and the time it will commence.  
 9 (3) The name of each deponent, and the address and telephone  
 10 number, if known, of any deponent who is not a party to the action.  
 11 If the name of the deponent is not known, the deposition notice  
 12 shall set forth instead a general description sufficient to identify  
 13 the person or particular class to which the person belongs.  
 14 (4) The specification with reasonable particularity of any  
 15 materials or category of materials, including any electronically  
 16 stored information, to be produced by the deponent.  
 17 (5) Any intention by the party noticing the deposition to record  
 18 the testimony by audio or video technology, in addition to  
 19 recording the testimony by the stenographic method as required  
 20 by Section 2025.330 and any intention to record the testimony by  
 21 stenographic method through the instant visual display of the  
 22 testimony. If the deposition will be conducted using instant visual  
 23 display, a copy of the deposition notice shall also be given to the  
 24 deposition officer. Any offer to provide the instant visual display  
 25 of the testimony or to provide rough draft transcripts to any party  
 26 which is accepted prior to, or offered at, the deposition shall also  
 27 be made by the deposition officer at the deposition to all parties  
 28 in attendance. Any party or attorney requesting the provision of  
 29 the instant visual display of the testimony, or rough draft  
 30 transcripts, shall pay the reasonable cost of those services, which  
 31 may be no greater than the costs charged to any other party or  
 32 attorney.

1 (6) Any intention to reserve the right to use at trial a video  
2 recording of the deposition testimony of a treating or consulting  
3 physician or of any expert witness under subdivision (d) of Section  
4 2025.620. In this event, the operator of the video camera shall be  
5 a person who is authorized to administer an oath, and shall not be  
6 financially interested in the action or be a relative or employee of  
7 any attorney of any of the parties.

8 (7) The form in which any electronically stored information is  
9 to be produced, if a particular form is desired.

10 (8) (A) A statement disclosing the existence of a contract, if  
11 any, ~~between the deposition officer or entity providing the services~~  
12 ~~of the deposition officer and the noticing party or a third party who~~  
13 ~~is financing all or part of the action requiring that party to use the~~  
14 ~~officer or entity and either of the following~~ for any service beyond  
15 the noticed ~~deposition.~~ *deposition:*

16 (i) *The deposition officer.*

17 (ii) *The entity providing the services of the deposition officer.*

18 (B) A statement disclosing that the party noticing the deposition,  
19 *or a third party financing all or part of the action*, directed his or  
20 her attorney to use a particular officer or entity to provide services  
21 for the deposition, if applicable.

22 (C) (i) If a party discloses a contractual relationship or directive  
23 pursuant to this paragraph, any other party may object in writing  
24 at least three calendar days before the deposition date to the use  
25 of that officer or entity.

26 (ii) A party shall personally serve an objection made pursuant  
27 to this paragraph in accordance with Section 1011.

28 (b) Notwithstanding subdivision (a), where under Article 4  
29 (commencing with Section 2020.410) only the production by a  
30 nonparty of business records for copying is desired, a copy of the  
31 deposition subpoena shall serve as the notice of deposition.

O

AMENDED IN SENATE MAY 5, 2015  
AMENDED IN SENATE APRIL 14, 2015  
AMENDED IN SENATE APRIL 6, 2015

**SENATE BILL**

**No. 270**

---

**Introduced by Senator Mendoza**

February 19, 2015

---

An act to add Section 8041 to the Business and Professions Code, relating to court reporters.

LEGISLATIVE COUNSEL'S DIGEST

SB 270, as amended, Mendoza. Court Reporters Board of California: civil actions: corporations.

Existing law provides for the certification and regulation of shorthand reporters and for the regulation of shorthand reporting corporations by the Court Reporters Board of California.

Under existing law, a shorthand reporting corporation is a corporation authorized to render professional services, as defined, as long as that corporation and all of its shareholders, officers, directors, and employees rendering professional services who are certified shorthand reporters are in compliance with specified provisions of law. Existing law defines a foreign professional corporation as a corporation organized under the laws of a state of the United States other than this state that is engaged in a profession of a type for which there is specified authorization for the performance of professional services by a foreign professional corporation. Under existing law, it constitutes unprofessional conduct and a violation of these provisions for any licensed person to violate, attempt to violate, assist in or abet the violation of, or conspire to violate any specified provisions of law, including regulations adopted

thereunder. Existing law prohibits a shorthand reporting corporation from not doing or failing to do any act the doing of which or the failure to do which would constitute unprofessional conduct under any statute, rule, or regulation pertaining to shorthand reporters or shorthand reporting.

This bill would authorize the board to bring a civil action in a superior court to enjoin any person, corporation, or corporation organized under the laws of a state of the United States other than this state, from rendering court reporter services in this state without ever being issued a license by the board or without authorization to render court reporter services in this state by satisfying specified requirements. The bill would authorize the board to request the Attorney General to bring such an action. The bill would require the court to, ~~among other things,~~ to impose specified monetary penalties against the person or corporation rendering services without a license or authorization. The bill would also authorize the court to, ~~among other things,~~ to order restitution and enjoin a person or corporation from taking any action constituting a violation of any law pertaining to impartiality, as provided. The bill would make it a misdemeanor for any person or corporation to knowingly render court reporter services in this state without ever being issued a license or authorized to render those services.

By creating a new crime, the bill would impose a state-mandated local program.

The California Constitution requires the state to reimburse local agencies and school districts for certain costs mandated by the state. Statutory provisions establish procedures for making that reimbursement.

This bill would provide that no reimbursement is required by this act for a specified reason.

Vote: majority. Appropriation: no. Fiscal committee: yes.  
State-mandated local program: yes.

*The people of the State of California do enact as follows:*

- 1 SECTION 1. Section 8041 is added to the Business and
- 2 Professions Code, to read:
- 3 8041. (a) In addition to any other authority or remedy, the
- 4 board may bring a civil action in a superior court to enjoin any
- 5 person, corporation, or corporation organized under the laws of a
- 6 state of the United States other than this state, from rendering court
- 7 reporter services in this state without ever being issued a license

1 by the board or authorization to render court reporter services in  
2 this state by satisfying the requirements of this article. The board  
3 may request the Attorney General to bring an action pursuant to  
4 this subdivision.

5 (b) If a civil action is brought pursuant to subdivision (a), the  
6 court, in addition to any other remedy authorized by law, shall  
7 impose a penalty of not less than one thousand dollars (\$1,000)  
8 and no more than two thousand five hundred dollars (\$2,500) per  
9 day against the person or corporation rendering services without  
10 a license or authorization, and the court may also order restitution  
11 and the return of any payments made to the person or corporation.

12 (c) In an action brought pursuant to subdivision (a), the court  
13 may also enjoin a person or corporation from taking any action  
14 that would otherwise constitute a violation of any statute or  
15 regulation of the board pertaining to impartiality, including, but  
16 not limited to, Section 2475 of Title 16 of the *California Code of*  
17 *Regulations*, and the court may impose a penalty of up to two  
18 thousand five hundred dollars (\$2,500) and *order* restitution for  
19 any acts undertaken by any person or corporation rendering court  
20 reporter services in this state. In determining the amount of the  
21 penalty, the court shall take into consideration the frequency of  
22 the violations and the impact of those violations, including a  
23 violation of Section 2475 of Title 16 of the *California Code of*  
24 *Regulations*.

25 (d) The court may designate that any transcript prepared by any  
26 person or corporation subject to an action brought under this section  
27 does not qualify as a certified transcript. However, the person or  
28 corporation shall be required to reimburse the certified shorthand  
29 reporter for the production of the transcript in accordance with  
30 transcript fees pursuant to existing law.

31 (e) It shall be a misdemeanor for any person or corporation to  
32 knowingly render court reporter services in this state without ever  
33 being issued a license by the board or being authorized to render  
34 court reporter services in this state pursuant to this article.

35 ~~(f) The court shall award reasonable investigation and~~  
36 ~~enforcement costs to the board or Attorney General responsible~~  
37 ~~for filing an action pursuant to subdivision (a). If the board or~~  
38 ~~Attorney General is granted an injunction pursuant to subdivision~~  
39 ~~(a), the court shall award reasonable investigation and~~  
40 ~~enforcement costs and may also award a portion of any unallocated~~

1 penalties collected pursuant to subdivision (c) to be used for future  
2 investigation and enforcement of this section by the board and the  
3 Attorney General. Any such award of penalties to the board shall  
4 be deposited in the Court Reporters' Fund and these penalties shall  
5 be subject to appropriation by the Legislature.

6 (g) This section shall not be construed to change, limit, or alter  
7 any existing authority of the board, including existing injunctive  
8 authority.

9 SEC. 2. No reimbursement is required by this act pursuant to  
10 Section 6 of Article XIII B of the California Constitution because  
11 the only costs that may be incurred by a local agency or school  
12 district will be incurred because this act creates a new crime or  
13 infraction, eliminates a crime or infraction, or changes the penalty  
14 for a crime or infraction, within the meaning of Section 17556 of  
15 the Government Code, or changes the definition of a crime within  
16 the meaning of Section 6 of Article XIII B of the California  
17 Constitution.

O

COURT REPORTERS BOARD MEETING – JUNE 26, 2015

**AGENDA ITEM VI – Scope of Practice Regulation**

**Title 16, California Code of Regulations, section 2403(b)(3)**

=====  
Agenda Description: Possible Action  
=====

Brief Summary:

At the February 6, 2015 Board meeting, the Board approved the following language for the proposed regulation.

Notifying all parties who attended a deposition of requests  
for expedited delivery made by other parties for either an  
original or copy of the transcript, or any portion thereof.

A public hearing will be held June 18, 2015, to receive public comment

=====  
Report Originator: Yvonne Fenner, 6/12/2015  
=====

Recommended Board Action: Staff recommends the Board move to adopt the proposed regulatory change and also delegate to the executive officer the authority to make any technical or non-substantive changes that may be required in completing the rulemaking file.

COURT REPORTERS BOARD MEETING – JUNE 26, 2015

**AGENDA ITEM VII – Sunset Review**

=====

Agenda Description: Possible Action

=====

Brief Summary:

The Court Reporters Board is slated for sunset January 1, 2017, and, therefore, is beginning the process of Sunset Review. On April 30, 2015, the Board received the report form and Oversight Review Questionnaire which is due to the Senate Committee on Business, Professions and Economic Development and the Assembly Committee on Business and Professions on December 1, 2015. Public hearings are anticipated to be held early in 2016.

=====

Report Originator: Yvonne Fenner, 6/3/2015

=====

Recommended Board Action: Staff recommends the Board appoint a task force to work with staff in preparing the Sunset Review Report to be submitted to the full Board before submission to the Legislature.

COURT REPORTERS BOARD MEETING – JUNE 26, 2015

**AGENDA ITEM VIII – Election of Officers**

=====  
Agenda Description: Election of Chair and Vice-Chair.  
=====

Brief Summary:

-----  
The election of Board officers shall occur on an annual basis at the first regular meeting of the Board after June 1 of each year. The purpose of this item is to conform to this policy.  
=====

Support Documents:

- Attachment 1 – Board policy on election of officers.
- Attachment 2 – Chair and Board member duties.

=====  
Report Originator: Paula Bruning, 6/3/2015  
=====

Recommended Board Action: Hold elections.

**ANNUAL MEETINGS**

The CSR Board shall hold an annual meeting for the purpose of electing a chairperson and a vice-chairperson in accordance with Business and Professions Code, Section 8003. Said annual meeting shall be held at the first regular meeting held after June 1 of each year.

Adopted: August 1987

## **CERTIFIED SHORTHAND COURT REPORTERS BOARD**

### **Board Members**

---

**Definition:** As Board members, the Board is responsible for good governance of the Board. Appointed as representatives of the public, the Board presses for realization of opportunities for service and fulfillment of its obligations to all constituencies. The Board meets fiduciary responsibility, guards against the taking of undue risks, determines priorities, and generally directs organizational activity. The Board delegates certain administrative duties and responsibilities to its executive officer, but remains involved through oversight and policy making. The Board members are ultimately accountable for all Board actions.

#### **Specific Duties and Responsibilities:**

- Develops and sets policy and procedures as a State licensing and law enforcement agency;
- Supports and articulates the Board's mission, values and policies and procedures;
- Serves as spokespersons;
- Reviews and assures the executive officer's performance in managing the implementation of Board policies and procedures;
- Ensures that staff implementation is prudent, ethical, effective and timely;
- Assures that management and staff training and succession is being properly provided;
- Assures the ongoing (quarterly) performance review of the executive officer by the Chairperson, with an annual written evaluation by the Board which is to be conducted at a public Board meeting;
- Assures that the executive officer effectively administers appropriate staff policies;
- Maximizes accountability to the public; and
- Ensures staff compliance with all laws applicable to the Board.

## **CERTIFIED SHORTHAND COURT REPORTERS BOARD**

### **Chairperson of the Board**

---

**Definition:** The Chairperson is responsible for the effective functioning of the Board, the integrity of the Board process, and assuring that the Board fulfills its responsibilities for governance. The Chairperson instills vision, values, and strategic planning in Board policy making. The Chairperson sets an example reflecting the Board's mission as a State licensing and law enforcement agency. The Chairperson optimizes the Board's relationship with its executive officer and the public.

#### **Specific Duties and Responsibilities:**

- Chairs meetings to ensure fairness, public input, and due process;
- Prepares Board meeting notices and agendas;
- Appoints Board committees;
- Supports the development and assists performance of Board colleagues;
- Obtains the best thinking and involvement of each Board member. Stimulates each Board member to give their best effort;
- Implements the evaluation of the executive officer to the Board;
- Continually focuses the Board's attention on policy making, governance, and monitoring of staff adherence to and implementation of written Board policies;
- Facilitates the Board's development and monitoring of sound policies that are sufficiently discussed and considered and that have majority Board support;
- Serves as a spokesperson; and
- Is open and available to all Board members, staff and governmental agencies, remaining careful to support and uphold proper management and administrative procedure.

COURT REPORTERS BOARD MEETING – JUNE 26, 2015

**AGENDA ITEM IX – Future Meeting Dates**

=====  
Agenda Description: Proposed Meeting Dates.  
=====

Support Documents:

Attachment – 2015 Board Calendar  
=====

Current scheduled activities:

Best Practice Pointers Task Force Meeting:

July 25, 2015 – Sacramento

Examination Workshops:

July 10-11, 2015 – Sacramento

July 17-18, 2015 – Sacramento

September 18-19, 2015 – Sacramento

October 9-10, 2015 – Sacramento

CSR Dictation Exam:

July 3, 2015 – Los Angeles

November 20, 2015 – Sacramento

March 11, 2016 – Los Angeles

July 15, 2016 – Los Angeles  
=====

Recommended Board Action: Information exchange

**A YEAR-AT-A-GLANCE CALENDAR 2015  
COURT REPORTERS BOARD OF CALIFORNIA**

**JANUARY 2015**

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
|    |    |    |    |    | 2  | 3  |
| 4  | 5  | 6  | 7  | 8  | 9  | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |

**FEBRUARY 2015**

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
| 1  | 2  | 3  | 4  | 5  | 6  | 7  |
| 8  | 9  | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |

**MARCH 2015**

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
| 1  | 2  | 3  | 4  | 5  | 6  | 7  |
| 8  | 9  | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 |    |    |    |    |

**APRIL 2015**

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
|    |    |    | 1  | 2  | 3  | 4  |
| 5  | 6  | 7  | 8  | 9  | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 |    |    |

**MAY 2015**

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
|    |    |    |    |    | 1  | 2  |
| 3  | 4  | 5  | 6  | 7  | 8  | 9  |
| 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| 17 | 18 | 19 | 20 | 21 | 22 | 23 |
| 24 | 25 | 26 | 27 | 28 | 29 | 30 |
| 31 |    |    |    |    |    |    |

**JUNE 2015**

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
|    | 1  | 2  | 3  | 4  | 5  | 6  |
| 7  | 8  | 9  | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 |    |    |    |    |

**JULY 2015**

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
|    |    |    | 1  | 2  | 3  | 4  |
| 5  | 6  | 7  | 8  | 9  | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 |    |

**AUGUST 2015**

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
|    |    |    |    |    |    | 1  |
| 2  | 3  | 4  | 5  | 6  | 7  | 8  |
| 9  | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 31 |    |    |    |    |    |

**SEPTEMBER 2015**

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
|    |    | 1  | 2  | 3  | 4  | 5  |
| 6  | 7  | 8  | 9  | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 |    |    |    |

**OCTOBER 2015**

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
|    |    |    |    | 1  | 2  | 3  |
| 4  | 5  | 6  | 7  | 8  | 9  | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |

**NOVEMBER 2015**

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
| 1  | 2  | 3  | 4  | 5  | 6  | 7  |
| 8  | 9  | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 |    |    |    |    |    |

**DECEMBER 2015**

| S  | M  | T  | W  | Th | F  | S  |
|----|----|----|----|----|----|----|
|    |    | 1  | 2  | 3  | 4  | 5  |
| 6  | 7  | 8  | 9  | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 31 |    |    |

| ACTIVITY  |                                       |
|---|---------------------------------------|
|  | BD - Board Meeting or Activity        |
|  | Exam - Dictation Exam                 |
|  | Workshop - Exam Workshop              |
|  | TF - Task Force Meeting               |
|  | Shaded Dates - Board Office Is Closed |

| CITY                   |                  |
|------------------------|------------------|
| LA-LOS ANGELES         | SAC-SACRAMENTO   |
| SD-SAN DIEGO           | SF-SAN FRANCISCO |
| GENERAL LOCATION       |                  |
| NC-NORTHERN CALIFORNIA |                  |
| SC-SOUTHERN CALIFORNIA |                  |

COURT REPORTERS BOARD MEETING – JUNE 26, 2015

**AGENDA ITEM X – Public Comment**

=====

Public members are encouraged to provide their name and organization (if any).  
The Board cannot discuss any item not listed on this agenda, but can consider  
items presented for future board agendas.

COURT REPORTERS BOARD MEETING – JUNE 26, 2015

**AGENDA ITEM XI – Closed Session**

=====

Agenda Description:

Personnel Matters, Disciplinary Matters and Pending Litigation (As needed)  
[Pursuant to Government Code, sections 11126(a), and 11126(e)(2)(C)]

=====

Fiscal Impact:       None

=====

Report Originator: Yvonne Fenner, 6/5/2015