COURT REPORTERS BOARD OF CALIFORNIA

STRATEGIC PLAN 2015-2018

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Court Reporters Board of California Members

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

Edmund G. Brown Jr., Governor
Anna M. Caballero, Secretary, Business, Consumer Services and Housing Agency
Awet Kidane, Director, Department of Consumer Affairs
Yvonne K. Fenner, Executive Officer, Court Reporters Board of California

Message from the Board Chair

The Court Reporters Board (CRB) is pleased to present the latest edition of its strategic plan. The following pages detail how the CRB worked with internal and external stakeholders to outline our strategic initiatives for the next four years. We are especially pleased to have generated such a response from licensees and interested parties who were quick to respond and forthright in their assessment of the state of the industry.

Before you is our roadmap for the coming years. With the helpful guidance of the SOLID facilitators, the CRB was able to identify the most critical tasks to fulfill its consumer protection mission. Setting out these specific goals will help us measure our success as we work toward setting and maintaining the standards for court reporting, the keystone to a fair judicial system.

As the industry struggles to navigate the choppy waters left in the wake of the privatization of many of California's civil courtrooms, the CRB has taken on a strong role in helping licensees and litigants alike. We look forward to maintaining a strong presence on behalf of consumers as we face the challenges of the future.

Toni O'Neill
Chairperson

About the Board

The Court Reporters Board (CRB) was established in 1951 by an act of the Legislature. The Board's mandate is to protect the consumers of the State by: 1) administering a minimum competency test to determine entry-level abilities, 2) regulating the minimum curriculum which court reporting schools and programs must offer, and 3) disciplining licensees when necessary.

In addition, the Board administers the Transcript Reimbursement Fund (TRF), which reimburses licensed court reporters for providing transcripts to indigent civil litigants. All the Board's activities, including the TRF, are funded from licensing and examination fees. Thus, the Board is considered a "special fund" or self-funded agency because no tax dollars from the General Fund support the Board.

The Board is composed of three public members and two licensees. The Governor appoints one public member and the two licensees. The Speaker of the Assembly and the Senate Rules Committee each appoint one public member. All Board members serve staggered, four-year terms.

Since its inception, the Board has licensed 13,984 people. Of those, approximately 6,900 have current licenses. In the profession, licensees are known as either "officials," who work in court, or "freelance," who work through court reporting agencies and report mostly depositions.

The CRB's office is in Sacramento. The executive officer oversees a staff of three full-time and two part-time employees consisting of an enforcement analyst, an exam/licensing analyst, a school compliance/pro bono TRF analyst, an analyst for the pro per TRF, and a licensing technician.

Accomplishments from the 2014 Strategic Plan

As a part of strategic planning, the Court Reporters Board reviewed its previous strategic plan goals and identified which objectives were accomplished. The following are among the significant Board accomplishments since the 2012–2014 Strategic Plan was adopted:

Enforcement: In November 2013, the Board approved revised Disciplinary Guidelines, the original version of which having been approved in 1989 and not reviewed in detail since. These guidelines are intended for everyone involved in and affected by the disciplinary process—the general public, attorneys, courts, administrative law judges, licensees, Board staff, along with Board members who review and vote on proposed decisions and stipulations.

Consumer Information and Outreach: The Board was successful in meeting its goal of developing a voluntary professional pledge for new licensees. The creation of a professional oath reinforces to the licensees the core ethical duties set out in the statutes and regulations that are enforced by the Board.

Practice Standards: To further its mission to protect the consumer, the Board approved and published for use by licensees a Best Practices for Exhibit Handling and Best Practices for Interpreted Depositions. In addition, a task force has been appointed to develop best practices that will address the integrity of electronic records by exploring such things as electronic and digital signatures. In a world where "wet ink" signatures are almost obsolete, the Board looks forward to the challenge of ensuring that the consumer of reporting services can be confident that the electronic transcript that he or she receives has neither been tampered with or altered in any way.

The Board also produced its first webinar, specifically on the topic of the regulations setting out the Minimum Transcript Format Standards (MTFS). The information contained in this presentation not only educates consumers so that they receive full value for their transcript dollar but also increases the licensees' knowledge in applying the standards of the MTFS along with gaining an appreciation for the potential consequences of a violation. In addition, students are also using the MTFS as an educational aid in preparation for the certification examination and their entry into the profession of court reporting.

MISSION

To protect the public by ensuring the integrity of the judicial record and maintaining the standard of competency through oversight of the court reporting profession.

VISION

Consumers hiring a California licensed court reporter engage the highest quality, most knowledgeable, and ethical professional.

VALUES

Consumer Protection
We make effective and informed decisions in the best interest and for the safety of Californians.

Excellence
We have a passion for quality and strive for continuous improvement of our programs, services, and processes through employee empowerment and professional development.

Integrity
We are committed to honesty, ethical conduct, and responsibility.

Service
We are professional and responsive to the needs of our stakeholders.

Collaboration
We value partnerships. We foster the public's trust through open communication and work in a cooperative, respectful, and courteous manner.

Strategic Goals

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.

1.2 Conduct exam development workshops to produce a robust bank of test questions to safeguard the integrity of the exam.

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

1.4 Educate the Governor's Office on the importance of mandatory continuing education to gain support for legislative change.

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.

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

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.

2.4 Expand compliance education for licensees to prevent enforcement issues.

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.

3.2 Increase court reporter school site visits to more effectively monitor compliance with applicable laws and regulations.

Consumer Information

The Board increases public and professional awareness of its mission, activities, and services, with a 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 websites, schools, and legal nonprofits) to educate consumers about the Board's services and standards.

Organizational Effectiveness

The Board enhances organizational effectiveness and strives to improve the quality of customer service.

5.1 Cross-train staff to protect continuity of effective and efficient service.

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

Strategic Planning Process

To understand the environment in which the Board operates and identify factors that could impact the Board's success, the California Department of Consumer Affairs' SOLID unit conducted an environmental scan of the internal and external environments by collecting information through the following methods:

- Interviews conducted with all five members of the Board completed during the month of October 2014 to assess the strengths, challenges, opportunities, and threats the Board is currently facing or will face in upcoming years.
- Interviews conducted with Board staff, including the executive officer, completed in the month of October 2014 to identify the strengths and weaknesses of the Board from an internal perspective. All six Board staff participated.
- An online survey sent to 6,000 randomly selected external Board stakeholders in October 2014 to identify the strengths and weaknesses of the Board from an external perspective. Just over 1,000 stakeholders completed the survey.

The most significant themes and trends identified from the environmental scan were discussed by the Board during a strategic planning session facilitated by SOLID on December 4, 2014. This information guided the Board in the development of its mission, vision and values while directing the strategic goals and objectives outlined in this 2015–2018 Strategic Plan.

COURT REPORTERS BOARD
OF CALIFORNIA

2535 Capitol Oaks Drive, Suite 230
Sacramento, CA 95833

Phone: (916) 263-3660 / Fax: (916) 263-3664
www.courtreportersboard.ca.gov

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 strategic plan is based on stakeholder information and discussions facilitated by SOLID for the Court Reporters Board of California in December 2014. Subsequent amendments may have been made after Board adoption of this plan.

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