



**STATE OF CALIFORNIA - GOVERNOR EDMOND G. BROWN JR.
LABOR AND WORKFORCE DEVELOPMENT AGENCY**
**CALIFORNIA UNEMPLOYMENT INSURANCE APPEALS BOARD
EXECUTIVE DIRECTOR/CHIEF ADMINISTRATIVE LAW JUDGE**

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January 6, 2012

To: Board Members

**January 2012 Summary Report of Executive Director and
Chief Administrative Law Judge Alberto Roldan**

**SNAPSHOT OF FIELD OPERATIONS THROUGH DECEMBER 2011 AND AN ANNUAL
REPORT**

December 2011 Workload and Performance:

Productivity in December 2011 was greater than in November but remained below the average for the year. The number of new cases that came into CUIAB [33,369] was 12% below the average. The number of cases closed by ALJs and staff [34,301] were 7% below the average. However, this was the second consecutive month in which there was a substantial reduction in the number of open cases [55,563], which ended 2011 at the lowest level of open cases since August 2008.

Annual Summary:

For the year, there were 453,336 new cases generated from appeals from all EDD programs. This is down 2% from 2011 but it is still one-third greater than the intake in 2008. Similarly, the agency decided 467,229 cases last year. This is only 2% fewer than in 2010. This total represents the significant increase in capacity achieved by CUIAB because it is almost 50% more cases than were issued just three years ago. More importantly, this was the second straight year in which the number of open cases was reduced. Since the high water mark in September 2009, the open inventory of outstanding cases has fallen by 38,846 cases, or 41%.

Case Aging and Time Lapse: Average case age [36 days] rose slightly for the third straight month after the achievement of 31 days in September. Nevertheless, for the entire year, it fell from 45 to 36 days, or 20%. 90-day time lapse [96%] met Federal standards for the 6th consecutive month, and was 23 percentage points higher than was true at the end of 2010. Although still far below the Federal standards, 30-day time lapse rose from 2% to 4% and 45-day time lapse increased from 12% to 21% during the 2011 calendar year.

Unemployment Insurance (UI) for December: New UI cases [31,449 cases; 17,957 appellants] were 12% below the monthly average. Closed cases [34,301 cases; 19,586 appellants], were the most in three months and reduced the open inventory [45,715 cases; 26,103 appellants] by almost 3,000 cases. For the year, there were 428,874 new UI cases [244,887 appellants]. While this is down 2% from 2011, it is still 35% greater than the intake in 2008. Similarly, the agency closed 441,043 UI cases [251,836 appellants] last year, which is also 2% below the 2010 numbers. However, this total represents 50% more cases than were issued three years ago. This was the second straight year in which the number of open cases was reduced. Since the high water mark in September 2009, the open UI inventory has fallen by 37,070 cases, or 45%.

Disability Insurance (DI) for December: In DI, the number of new cases [1,268] and closed cases [1,270] were virtually identical. Both intake and outflow for disability was smaller in both November and December than in any other months this year. For the year, there were 17,301 new cases, or 3% fewer than the year before. CUIAB issued 17,684 DI decisions, which is down 5% from 2010. This was the third consecutive year in which the number of decisions outpaced the number of appeals. The open inventory [1,755 cases] is the smallest in recorded time and less than one-half its average magnitude in 2009.

Tax, Rulings, Other for December: While December was a relatively quiet month for rulings, the year had a relatively average number of new cases [4,287]. The number of closed cases [5,346] was substantially higher for the year, and the open inventory [3,546] is 31% smaller than was true in February 2010. Although the number of tax decisions [247] in December was 4% greater than average for the year, we received an extraordinary number of new petitions [402]. As a result, the open inventory [4,593] rose for only the third time this year. For the entire year, however, there were 2,566 new petitions and 2,844 decisions. This was the first time since 2005, in which we reduced the number of open tax cases.

DI TRENDS - FO
 Program Codes 7, 10, 11, 12, 16 & 20

NEW OPENED CASES

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg
2008	1,481	1,470	1,661	1,887	1,534	1,540	1,615	1,333	1,697	1,640	1,317	1,522	18,697	1,558		
2009	1,610	1,107	1,794	1,519	1,628	1,748	1,537	1,321	1,571	1,414	1,245	1,330	17,824	1,485	95%	-73
2010	1,446	1,437	1,775	1,957	1,371	1,232	1,763	1,609	1,366	1,372	1,159	1,414	17,901	1,492	100%	6
2011	1,537	1,651	1,411	1,691	1,360	1,428	1,405	1,575	1,489	1,392	1,094	1,266	17,301	1,442	97%	-50
DI registrations Dec to date are down 3% from 2010, down 3% from 2009, and down 7% from 2008													2010	97%	97%	
DI registration monthly average is down 3% from 2010, down 3% from 2009, and down 7% from 2008													2009	97%	97%	
													2008	93%	93%	
													chg to '11 avg		chg to '11 YTD	

CLOSED CASES

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg
2008	1,579	1,477	1,506	1,368	1,884	1,720	1,601	1,385	1,579	1,920	1,049	1,277	18,345	1,529		
2009	1,217	1,269	1,451	1,465	1,129	1,463	1,823	1,644	1,648	1,753	1,527	1,701	18,090	1,508	99%	-21
2010	1,283	1,557	1,967	1,852	1,276	1,581	1,494	1,511	1,581	1,552	1,372	1,565	16,591	1,549	103%	42
2011	1,295	1,576	1,925	1,512	1,441	1,567	1,365	1,462	1,426	1,579	1,266	1,270	17,684	1,474	95%	-76
DI dispositions Dec to date are down 5% from 2010, down 2% from 2009, and down 4% from 2008													2010	95%	95%	
DI disposition monthly average is down 5% from 2010, down 2% from 2009, and down 4% from 2008													2009	98%	98%	
													2008	96%	96%	
													chg to '11 avg		chg to '11 YTD	

BALANCE OPEN CASES

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Avg.	% Chg of Avg	Yr-Yr AvgChg	
2008	2,590	2,586	2,738	3,257	2,907	2,728	2,742	2,692	2,810	2,525	2,790	3,034	2,783			
2009	3,426	3,264	3,613	3,684	4,197	4,478	4,204	3,895	3,819	3,476	3,203	2,836	3,675	132%	891	
2010	2,997	2,876	2,882	2,789	2,891	2,541	2,808	2,908	2,691	2,513	2,299	2,148	2,679	73%	-996	
2011	2,390	2,465	1,951	2,126	2,046	1,905	1,943	2,054	2,117	1,930	1,757	1,755	2,037	76%	-642	
Open Balance DI Dec to date is down 24% from 2010, down 45% from 2009, and down 27% from 2008													2010	76%	76%	
Open Balance monthly average down 24% from 2010, down 45% from 2009, and down 27% from 2008													2009	55%	55%	
													2008	73%	73%	
													chg to '11 avg		chg to '11 YTD	

RULING - OTHER TRENDS - FO
 Program Codes 9, 13, 14, 19, 21, 22, 40, 44

NEW OPENED CASES

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg
2008	221	364	396	475	530	286	516	621	616	184	94	138	4,441	370		
2009	175	92	203	456	567	340	304	206	170	710	923	275	4,421	368	100%	-2
2010	486	609	709	598	441	424	468	1,359	201	239	229	214	5,977	498	135%	130
2011	64	97	92	739	526	510	426	454	207	982	247	251	4,595	383	77%	-115
													2010	77%	77%	
													2009	104%	104%	
													2008	103%	103%	
																chg to '11 avg chg to '11 YTD

Other registrations Dec to date are down 23% from 2010, up 4% from 2009, and up 3% from 2008
 Other registration monthly average is down 23% from 2010, up 4% from 2009, and up 3% from 2008

CLOSED CASES

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg
2008	296	412	199	189	347	397	426	329	342	460	332	142	3,871	323		
2009	236	333	238	209	179	208	273	264	315	192	260	357	3,064	255	79%	-67
2010	335	392	500	682	465	716	421	631	484	804	303	415	6,148	512	201%	257
2011	442	399	728	390	424	631	384	397	530	593	389	351	5,658	472	92%	-41
													2010	92%	92%	
													2009	185%	185%	
													2008	146%	146%	
																chg to '11 avg chg to '11 YTD

Other dispositions Dec to date are down 8% from 2010, up 85% from 2009, and up 46% from 2008
 Other disposition monthly average is down 8% from 2010, up 85% from 2009, and up 46% from 2008

BALANCE OPEN CASES

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg	
2008	2,804	2,761	2,957	3,244	3,430	3,320	3,411	3,701	3,975	3,700	3,465	3,461		3,352			
2009	3,399	3,158	3,123	3,374	3,763	3,894	3,925	3,860	3,715	4,232	4,896	4,809		3,846	115%	493	
2010	4,965	5,182	5,394	5,312	5,287	4,996	5,048	5,781	5,494	4,931	4,857	4,658		5,159	134%	1,313	
2011	4,281	3,977	3,340	3,692	3,792	3,672	3,716	3,772	3,453	3,842	3,698	3,590		3,735	72%	-1,423	
														2010	72%	72%	
														2009	97%	97%	
														2008	111%	111%	
																chg to '11 avg chg to '11 YTD	

Other balance of open cases Dec to date is down 28% from 2010, down 3% from 2009, and up 11% from 2008
 Other balance monthly average is down 28% from 2010, down 3% from 2009, and up 11% from 2008

ALL PROGRAM TRENDS - FO

NEW OPENED CASES

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	TOTAL	Avg.	% Change	Yr-Yr AvgChg
2008	25,938	23,093	27,702	31,537	27,015	26,199	27,234	27,027	32,412	33,831	30,926	31,245	344,159	28,680		
2009	34,115	30,306	33,645	34,018	34,720	36,687	34,412	33,610	35,623	38,035	29,542	39,222	413,935	34,495	120%	5,815
2010	39,381	36,310	40,820	45,037	39,399	38,140	41,563	43,324	33,493	37,396	31,757	37,369	463,989	38,666	112%	4,171
2011	40,411	36,315	41,141	38,210	38,185	37,903	34,470	40,374	41,888	36,682	32,388	33,369	453,338	37,778	98%	-888
													2010	98%		
													2009	110%		
													2008	132%		
																chg to '11 avg
																chg to '11 YTD

Registrations Dec to date are down 2% from 2010, up 10% from 2009, and up 32% from 2008
 Registration monthly average is down 2% from 2010, up 10% from 2009, and up 32% from 2008

CLOSED CASES

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	TOTAL	Avg.	% Change	Yr-Yr AvgChg
2008	22,962	24,939	31,377	27,534	29,082	26,725	26,640	21,783	26,305	29,943	23,065	27,989	318,334	26,528		
2009	27,273	26,451	30,253	32,388	31,481	34,471	36,722	32,474	34,290	41,893	36,461	38,969	403,128	33,594	127%	7,066
2010	34,404	40,009	46,641	42,106	37,589	39,101	37,848	41,243	40,987	39,872	36,622	38,452	474,874	39,573	118%	5,979
2011	35,905	40,146	52,970	37,208	34,144	40,592	35,714	39,116	44,083	36,128	35,054	36,169	467,229	38,936	98%	-637
													2010	98%		
													2009	116%		
													2008	147%		
																chg to '11 avg
																chg to '11 YTD

Dispositions Dec to date are down 2% from 2010, up 16% from 2009, and up 47% from 2008
 Disposition monthly average is down 2% from 2010, up 16% from 2009, and up 47% from 2008

BALANCE OPEN CASES

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	TOTAL	Avg.	% Change	Yr-Yr AvgChg
2008	50,735	48,851	45,085	48,985	46,870	46,297	46,811	51,973	58,005	61,773	69,574	72,712		53,973		
2009	79,459	83,239	86,674	88,675	91,984	94,025	91,932	93,231	94,499	90,583	83,671	83,874		88,487	164%	34,515
2010	88,772	84,920	78,808	81,554	83,171	81,997	85,167	86,889	79,188	76,889	71,857	70,783		80,831	91%	-7,656
2011	75,183	71,225	59,203	60,086	64,024	61,203	60,107	61,211	58,886	61,349	56,553	55,653		62,224	77%	-18,608
													2010	77%		
													2009	70%		
													2008	115%		
																chg to '11 avg
																chg to '11 YTD

Open Balance Dec to date is down 23% from 2010, down 30% from 2009, and up 15% from 2008
 Open Balance monthly average is down 23% from 2010, down 30% from 2009, and up 15% from 2008

TAX TRENDS - FO
Program Codes 15, 17, 18, 32

NEW OPENED CASES

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg
2008	187	277	202	191	183	281	199	171	201	303	170	254	2,619	218		
2009	166	93	219	174	258	164	252	256	169	292	224	229	2,496	208	95%	-10
2010	142	139	164	233	140	163	94	137	148	181	188	232	1,959	163	78%	-45
2011	134	168	144	261	140	180	112	268	364	147	248	402	2,586	214	131%	51
													2010	131%	131%	
													2009	103%	103%	
													2008	98%	98%	

Tax registrations Dec to date are up 31% from 2010, up 3% from 2009, and down 2% from 2008
Tax registration monthly average is up 31% from 2010, up 3% from 2009, and down 2% from 2008

CLOSED CASES

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg
2008	82	147	117	78	414	145	174	139	118	167	68	87	1,736	145		
2009	92	97	172	149	72	97	126	111	162	70	149	288	1,585	132	91%	-13
2010	48	109	107	91	117	124	135	101	174	130	99	235	1,470	123	93%	-10
2011	139	173	193	252	176	277	188	278	325	293	323	247	2,844	237	193%	115
													2010	193%	193%	
													2009	179%	179%	
													2008	164%	164%	

Tax dispositions Dec to date are up 93% from 2010, up 79% from 2009, and up 64% from 2008
Tax disposition monthly average is up 93% from 2010, up 79% from 2009, and up 64% from 2008

BALANCE OPEN CASES

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg
2008	2,739	2,869	2,953	3,066	2,833	2,969	2,994	3,026	3,109	3,243	3,344	3,511		3,055		
2009	3,585	3,580	3,627	3,649	3,836	3,903	4,029	4,174	4,180	4,402	4,477	4,416		3,988	131%	934
2010	4,509	4,539	4,596	4,738	4,759	4,796	4,754	4,790	4,758	4,801	4,890	4,885		4,735	119%	746
2011	4,880	4,874	4,824	4,833	4,797	4,700	4,643	4,630	4,666	4,520	4,445	4,593		4,700	99%	-34
													2010	99%	99%	
													2009	118%	118%	
													2008	154%	154%	

Tax balance of open cases Dec to date is down 1% from 2010, up 18% from 2009, and up 54% from 2008
Tax balance monthly average is down 1% from 2010, up 18% from 2009, and up 54% from 2008

2010	99%	99%
2009	118%	118%
2008	154%	154%
chg to '11 avg		chg to '11 YTD

FIELD OPERATIONS - REPORT SUMMARY

STATEWIDE	2011												Average	Current Mo. % of Avg.	Total	Appellants			
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec				Current Mo.	Average		
WORKLOAD																			
New Opened Cases																			
UI TL	38,676	34,399	39,494	35,519	36,189	35,785	32,527	38,079	39,828	30,181	30,799	31,448	35,740	88%	17,301	17,957	20,407	244,987	
Of	1,537	1,851	1,411	1,691	1,360	1,428	1,405	1,575	1,489	1,392	1,094	1,288	1,442	88%	4,287				
Ruling & T-R	46	64	61	693	504	492	411	431	190	957	217	221	357	62%	4,287				
Tax	134	168	144	281	140	180	112	268	364	147	248	402	214	182%	2,586				
Other	18	33	31	46	22	18	15	23	17	25	30	30	26	117%	308				
Total	40,411	36,315	41,141	39,210	38,185	37,903	34,470	40,374	41,888	38,682	32,388	33,369	37,778	88%	453,336				
Multi-Cases	47	28	7	8	4	8	8	8	2	5									
Closed Cases																			
UI TL	34,029	37,998	50,124	35,054	32,103	36,117	33,797	38,979	41,802	33,663	33,076	34,301	36,754	93%	441,043	19,586	20,986	251,636	
Of	1,296	1,578	1,925	1,512	1,441	1,567	1,386	1,462	1,426	1,579	1,288	1,270	1,474	86%	17,684				
Ruling & T-R	413	380	693	381	385	596	367	381	506	576	369	319	446	72%	5,346				
Tax	139	173	193	252	176	277	168	278	325	293	323	247	237	104%	2,844				
Other	29	19	35	29	39	35	17	16	24	17	20	32	26	123%	312				
Total	35,905	40,146	52,970	37,208	34,144	40,592	35,714	39,116	44,063	36,126	35,064	36,169	38,936	93%	467,229				
Multi-Cases	47	28	7	8	4	8	8	2	5										
Balance - Open Cases																			
UI TL	63,632	59,909	49,088	49,438	63,389	50,926	49,805	50,755	49,850	51,057	48,663	45,745	51,751	89%	26,103	29,550			
Of	2,390	2,465	1,961	2,126	2,046	1,905	1,943	2,054	2,117	1,930	1,757	1,755	2,037	86%	3,694				
Ruling & T-R	4,243	3,926	3,293	3,627	3,744	3,641	3,686	3,736	3,425	3,806	3,662	3,546	3,694	96%	4,700				
Tax	4,880	4,874	4,924	4,653	4,797	4,700	4,643	4,630	4,668	4,520	4,445	4,593	4,700	98%	4,224				
Other	36	61	47	65	48	31	30	36	28	36	48	44	42	106%	42				
Total	76,183	71,225	59,203	60,086	64,024	51,203	60,107	61,211	58,986	61,349	58,553	55,663	62,224	89%	26,103	29,550			
Multi-Cases	15	60	78	52	12	8	2	9	18	24	12	12	12						
Time Lapse																			
30 TL %	3	3	3	4	4	3	3	4	3	3	4	4	4	4	4	4	4	4	
45 TL %	12	18	22	31	27	28	28	27	25	23	22	21	23	23	21	21	21	21	
90 TL %	76	73	82	93	94	94	95	95	95	97	96	96	91	91	91	91	91	91	
CASE AGE																			
Average Days UI (mean)	47	44	35	35	36	34	36	33	31	34	35	38	36	36	36	36	36	36	
Average Days UI (median)	42	39	31	32	32	30	33	30	30	32	34	33	33	33	33	33	33	33	
>90 Days Old UI	10%	8%	3%	2%	2%	2%	2%	2%	1%	1%	1%	1%	1%	1%	1%	1%	1%	1%	
>90 Days Old (w/ol Murs)	16%	15%	9%	4%	5%	5%	4%	4%	4%	4%	3%	4%	4%	4%	4%	4%	4%	4%	
PY USAGE	200,651	203,051	205,982	208,372	172,556	189,330	185,800	195,400	196,655	189,611	174,622	193,819	193,819	90%	202,919				
Field Offices	204,291	212,442	210,844	206,055	192,448	204,300	192,150	204,700	207,599	214,599	182,050	202,919	202,919	90%	202,919				
Net PYS	404,984	415,474	416,824	414,422	365,014	393,600	377,950	400,100	404,224	414,600	356,657	396,737	396,737	90%	396,737				
Ratio 1/1	1.02	1.05	1.02	0.99	1.12	1.08	1.03	1.05	1.06	1.08	1.04	1.04	1.05	99%	1.05				
W/PROGRASU	206,934	209,837	212,568	214,742	176,932	186,311	191,743	201,033	203,266	207,400	179,488	200,000	200,000	90%	200,000				
SS w/EDD	240,633	265,844	252,448	248,000	229,226	240,980	223,439	228,999	244,779	254,112	212,999	240,111	240,111	89%	240,111				
EDD 0	447,574	485,511	465,068	482,722	406,188	437,277	415,222	440,022	448,055	461,522	382,477	440,111	440,111	89%	440,111				
Ratio 1/1	1.16	1.22	1.19	1.15	1.30	1.23	1.17	1.19	1.20	1.23	1.19	1.19	1.20	99%	1.20				
PRODUCTIVITY																			
Weekly Dispos per ALJ (w/ol)	42.7	49.6	65.6	40.5	45.1	45.9	45.8	41.6	50.6	40.5	50.4	46.2	46.2	108%	46.2				
Weekly Dispos per ALJ	43.4	50.3	56.6	41.3	46.0	47.0	46.6	42.3	51.6	41.5	51.4	47.1	47.1	109%	47.1				
Weekly Dispos (Non-ALJ)	37.3	41.3	47.7	35.7	35.5	38.3	40.0	35.6	42.9	33.8	43.3	39.2	39.2	110%	39.2				

NEW OPENED CASES

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg
2008	24,049	20,982	25,443	28,984	24,768	24,092	24,904	24,902	29,898	31,704	29,345	29,331	318,402	26,534		
2009	32,164	29,014	31,429	31,889	32,267	34,435	32,319	31,827	33,713	35,619	27,150	37,388	369,194	32,433	122%	5,899
2010	37,307	34,125	38,172	42,249	37,447	36,321	39,238	40,219	31,780	35,604	30,181	35,509	438,152	36,513	113%	4,080
2011	38,676	34,399	39,494	35,519	36,159	35,785	32,527	36,079	39,828	36,161	30,799	31,448	428,874	35,740	98%	-773

UI registrations Dec to date are down 2% from 2010, up 10% from 2009, and up 35% from 2008
 UI registration monthly average is down 2% from 2010, up 10% from 2009, and up 35% from 2008

CLOSED CASES

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg
2008	21,005	22,903	29,555	25,899	26,437	24,463	24,439	19,930	24,286	27,396	21,606	26,483	294,382	24,532		
2009	25,728	24,752	28,392	30,565	30,101	32,703	34,500	30,455	32,165	39,878	34,525	36,623	380,387	31,699	129%	7,167
2010	32,738	37,951	44,067	39,481	35,731	36,680	35,799	39,000	36,748	37,386	34,848	36,237	448,665	37,389	118%	5,690
2011	34,029	37,998	50,124	35,054	32,103	38,117	33,797	36,979	41,802	33,663	33,076	34,301	441,043	36,754	98%	-635

UI dispositions Dec to date are down 2% from 2010, up 16% from 2009, and up 50% from 2008
 UI disposition monthly average is down 2% from 2010, up 16% from 2009, and up 50% from 2008

BALANCE OPEN CASES

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Yr-Yr AvgChg
2008	42,602	40,835	36,437	39,418	37,700	37,280	37,664	42,554	48,111	52,305	59,975	62,706		44,782		
2009	69,049	73,237	76,311	77,968	80,188	81,750	79,774	81,302	82,785	78,473	71,095	71,813		76,979	172%	32,197
2010	76,301	72,323	66,136	68,715	70,234	69,664	72,557	73,410	66,243	64,624	59,811	59,075		68,258	89%	-8,721
2011	63,632	59,909	49,088	49,435	53,389	50,926	49,805	50,755	48,650	51,057	48,653	46,715		51,751	76%	-16,507

UI balance of open cases Dec to date is down 24% from 2010, down 33% from 2009, and up 16% from 2008
 UI balance monthly average down 24% from 2010, down 33% from 2009, and up 16% from 2008

	2010	2009	2008
76%	67%	116%	
76%	67%	116%	
chg to '11 avg	chg to '11 avg	chg to '11 YTD	

AO REPORT TO BOARD—MONTH OF December 2011

	# Cases	# Appellants	Calendar Yr Ave
REGISTRATIONS	2,561	1,707(est.)	15% below
DISPOSITIONS	3,006	2,004 (est.)	0% above
OPEN BALANCE	3,792	2,528 (est.)	25% below
PENDING REG (1/1/12)	1,242		
APPEAL RATE	7.3%		

CASE AGING 39 Days **MET DOL STANDARD (40 days or less)**

TIME LAPSE	DOL Standard	
	Actual % for December 2011	Expected
45 Days	17%	50%
75 Days	89%	80%
150 Days	99%	95%

2011 CALENDAR YEAR:	REGISTRATIONS	35,992 TOTAL
	DISPOSITIONS	36,090 TOTAL
	OPEN BALANCE	5,047 MONTHLY AVERAGE
	APPEAL RATE	7.7% MONTHLY AVERAGE

ADDITIONAL INFORMATION

FO to AO Monthly Report-3.73 days Statewide Average

FO ALJs working in AO

**California Unemployment Insurance Appeals Board
Board Appeal Summary Report**

	December, 2011	November, 2011	October, 2011	September, 2011
	Average Days in Transfer			
	Case Count	Case Count	Case Count	Case Count
Fresno	2.63	3.62	3.34	3.47
Inglewood	6.07	6.17	4.54	4.15
Inland	3.17	4.62	4.74	4.22
Los Angeles	3.72	5.15	5.15	3.97
Oakland	4.76	4.99	3.74	4.05
Orange County	3.19	3.34	3.10	3.52
Oxnard	2.73	3.97	4.54	4.80
Pasadena	7.59	10.36	11.61	8.55
Sacramento	3.82	6.05	5.73	5.09
San Diego	4.12	4.66	3.86	4.70
San Francisco	2.99	4.91	3.43	3.64
San Jose	3.00	6.10	5.88	13.59
Tax Office	3.54	2.74	7.10	5.14
Total	3.73	5.17	4.80	4.95

APPELLATE OPERATIONS ~ REPORT SUMMARY

APPELLATE	Jan	Feb	March	April	May	June	July	Aug	Sep	Oct	Nov	Dec	Average	AO Current Mo. % of Avg.	TOTAL	Appellants Current Mo.
WORKLOAD																
Registrations																
UI TL	2,389	2,509	3,616	2,882	3,165	2,850	2,858	3,104	3,115	3,121	2,223	2,405	2,853	84%	34,237	
DI	91	94	135	114	105	112	131	130	124	118	87	108	112	98%	1,349	
Ruling & T-R	0	2	5	13	12	6	8	9	13	13	6	3	8	40%	90	
Tax	25	18	21	33	32	2	23	23	6	43	25	41	24	188%	292	
Other	1	2	2	4	4	1	1	1	1	3	0	4	2	200%	24	
Total	2,506	2,625	3,779	3,046	3,318	2,971	3,021	3,267	3,259	3,298	2,341	2,561	2,999	85%	35,992	2,561
Mud Cases		11	65					2								
Dispositions																
UI TL	2,476	2,459	2,464	2,442	2,859	3,265	2,252	2,722	3,951	3,595	2,976	2,884	2,862	101%	34,345	
DI	100	128	93	91	95	132	86	100	133	162	118	111	112	89%	1,349	
Ruling & T-R	8	2	2	0	6	16	6	4	11	13	17	8	8	103%	93	
Tax	15	34	21	12	34	30	16	31	19	33	19	17	23	73%	281	
Other	2	3	3	1	0	4	1	3	2	1	0	2	2	109%	22	
Total	2,601	2,626	2,583	2,546	2,994	3,447	2,361	2,860	4,116	3,804	3,130	3,022	3,008	100%	36,090	3,022
Mud Cases			971		168							2				
Balance - Open Cases																
UI TL	3,619	3,668	4,738	5,237	5,489	5,090	5,700	6,077	5,243	4,766	4,009	3,518	4,763	74%		
DI	167	133	175	198	208	188	234	265	254	210	180	177	199	89%		
Ruling & T-R	2	2	5	18	24	15	16	21	23	23	12	7	14	50%		
Tax	82	66	66	87	86	59	66	58	45	55	61	85	68	125%		
Other	2	1	0	3	7	4	4	2	1	3	3	5	3	171%		
Total	3,872	3,870	4,984	5,543	5,814	5,356	6,020	6,423	5,566	5,057	4,265	3,792	5,047	75%		2,446
Plus Mud Cases			99	87	2	2	2	4	4	4	4	2				
FO to AO Appeal Rate																
UI TL	6.6%	7.4%	9.5%	5.7%	9.0%	8.9%	7.5%	9.2%	8.4%	7.5%	6.6%	7.3%	7.8%	93%		
DI	5.6%	7.3%	8.6%	5.9%	6.9%	7.8%	8.4%	9.5%	8.5%	8.3%	5.5%	8.5%	7.6%	113%		
Ruling & T-R	0.0%	0.5%	1.3%	1.9%	3.3%	1.6%	1.3%	2.5%	3.4%	2.6%	1.0%	0.8%	1.7%	48%		
Tax	10.6%	12.9%	12.1%	17.1%	12.7%	1.1%	8.3%	13.7%	2.2%	13.2%	8.5%	12.7%	10.4%	122%		
Other	3.8%	6.9%	10.5%	11.4%	13.8%	2.6%	2.9%	5.9%	6.3%	12.5%	0.0%	20.0%	8.0%	249%		
Overall Rate	6.5%	7.3%	9.4%	5.8%	8.9%	8.7%	7.4%	9.1%	8.3%	7.5%	6.5%	7.3%	7.7%	94%		

APPELLATE OPERATIONS ~ REPORT SUMMARY

APPELLATE		2011												AO		
		Jan	Feb	March	April	May	June	July	Aug	Sep	Oct	Nov	Dec	Average	Current Mo.	
TIME LAPSE																
	45 Day- 50 %	29	11	13	5	7	5	10	11	10	12	12	17	12	145%	
	75 Day- 80 %	89	88	90	89	88	61	44	40	43	73	86	89	73	122%	
	150 Day- 95 %	100	100	100	100	99	99	97	99	99	99	99	99	99	100%	
CASE AGE																
	Avg Days-UI (mean)	38	36	34	39	45	43	47	48	44	39	38	39	41	96%	
	Avg Days-UI (median)	34	34	31	38	46	41	45	44	42	35	36	36	39	98%	
Over 120 days old																
	UI Cases	12	10	2	27	50	48	31	39	67	42	31	23	32	72%	
	UI %	0%	0%	0%	1%	1%	1%	1%	1%	2%	1%	1%	1%	1%	122%	
	UI % want Mails	0%	0%	0%	1%	1%	1%	1%	1%	2%	1%	1%	1%	1%	122%	
NET PYS USED																
	ALL	18.61	17.18	17.93	17.39	15.42	18.13	21.15	24.29	26.77	26.77			20.4	131%	
	AO Non ALL	25.12	31.70	33.49	34.20	31.39	33.89	33.72	38.48	36.80	39.48			33.8	117%	
	CTU Non ALL	5.46	5.36	5.40	5.12	4.89	5.36	4.84	4.86	5.17	5.44			5.2	105%	
	Net Pys	49.19	54.24	56.82	56.71	51.70	57.38	59.71	67.63	68.74	71.69	0.00	0.00	59.4	121%	
RATIOS																
	AO w/c transcribers	1.35	1.85	1.87	1.97	2.04	1.87	1.59	1.58	1.37	1.47			1.66	89%	
	AO with transcribers	1.64	2.16	2.17	2.26	2.35	2.16	1.82	1.78	1.57	1.68			1.92	88%	
TRANSCRIPTS																
	AVG PGS Per TIS	134	92	143	102	164	163	124	106	163	127	84	144	129	112%	1,546
		9,784	6,637	10,433	7,124	11,504	10,878	9,492	7,593	11,689	9,142	7,070	10,269	9,303	111%	111,635
		73	72	73	70	70	67	77	72	72	72	84	71	73	98%	
PRODUCTIVITY																
	ALL Disptk	34.9	40.2	32.7	34.9	46.2	43.2	26.6	26.8	36.6	33.8			35.6	95%	
	Trans Post/day	89.60	65.17	87.82	66.26	112.03	92.25	93.39	71.02	107.66	80.02			86.5	92%	

ALL PROGRAM TRENDS-AO

REGISTRATIONS

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Number Change
2008	1,437	1,080	1,620	1,573	1,598	1,516	1,639	1,266	1,385	1,879	1,402	1,689	18,084	1,507		
2009	1,588	1,326	1,964	1,835	1,717	1,956	2,368	2,026	2,187	2,158	2,056	2,225	23,406	1,951	129%	444
2010	2,470	2,136	3,081	2,779	2,362	2,691	2,518	2,957	3,089	2,658	2,796	2,721	32,258	2,688	138%	738
2011	2,506	2,625	3,779	3,046	3,318	2,971	3,021	3,267	3,259	3,298	2,341	2,561	35,992	2,999	112%	311
													2010	112%	112%	
													2009	154%	154%	
													2008	199%	199%	
																chg to 11 avg
																chg to 11 YTD

Registrations Jan to date up 12% from 2010, up 54% from 2009, and up 99% from 2008.
 Registration monthly average up 12% from 2010, up 54% from 2009, and up 99% from 2008.

DISPOSITIONS

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Number Change
2008	1,147	1,190	1,542	1,598	1,353	1,573	1,558	1,217	1,505	1,510	1,386	1,705	17,284	1,440		
2009	1,609	1,599	1,780	1,556	1,533	1,780	1,827	1,867	1,919	2,354	2,005	2,991	22,820	1,902	132%	461
2010	2,210	2,634	2,764	2,707	2,534	2,949	2,352	2,657	2,647	2,853	2,565	2,360	31,232	2,603	137%	701
2011	2,601	2,626	2,583	2,546	2,994	3,447	2,361	2,860	4,116	3,804	3,130	3,022	36,090	3,008	116%	405
													2010	116%	116%	
													2009	158%	158%	
													2008	209%	209%	
																chg to 11 avg
																chg to 11 YTD

Dispositions Jan to date up 16% from 2010, up 58% from 2009, and up 109% from 2008.
 Disposition monthly average up 16% from 2010, up 58% from 2009, and up 109% from 2008.

BALANCE OPEN CASES

	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec	Total	Avg.	% Chg of Avg	Number Change
2008	1,900	1,783	1,862	1,838	2,083	2,028	2,110	2,156	2,036	2,402	2,417	2,404	26,019	2,085		
2009	2,379	2,093	2,270	2,555	2,734	2,906	3,446	3,599	3,849	3,649	3,703	2,918	36,101	3,008	144%	924
2010	3,177	2,668	3,000	3,058	2,886	2,635	2,837	3,135	3,591	3,387	3,626	3,973	37,973	3,164	105%	156
2011	3,872	3,870	4,984	5,543	5,814	5,356	6,020	6,423	6,566	5,057	4,265	3,792	60,562	5,047	159%	1,882
													2010	159%	159%	
													2009	168%	168%	
													2008	242%	242%	
																chg to 11 avg
																chg to 11 YTD

Open Balance Jan to date up 59% from 2010, up 68% from 2009, and up 142% from 2008.
 Open Balance monthly average up 59% from 2010, up 68% from 2009, and up 142% from 2008.

Board Member	1st	2nd	3rd	UI	DI	Ruling	Tax	1 Party	2 Party	Total
Alberto Torrico										
Sum	540	625	15	1086	77	4	13	475	705	1180
Percent	30%	34%	16%	31%	32%	33%	34%	33%	31%	
Bonnie Garcia										
Sum	205	200	14	386	27	1	5	154	265	419
Percent	11%	11%	15%	11%	11%	8%	13%	11%	12%	
Dennis Hollingsworth										
Sum	216	214	3	401	27	1	4	172	261	433*
Percent	12%	12%	3%	12%	11%	8%	11%	12%	11%	
Kathleen Howard										
Sum	72	27	0	99	0	0	0	7	92	99
Percent	4%	1%	0%	3%	0%	0%	0%	0%	4%	
Robert Dresser										
Sum	226	162	55	410	26	2	5	161	282	443
Percent	13%	9%	58%	12%	11%	17%	13%	11%	12%	
Roy Ashburn										
Sum	540	620	8	1070	83	4	11	473	695	1168
Percent	30%	34%	8%	31%	35%	33%	29%	33%	30%	
Total Cases Reviewed:	1799	1848	95	3452	240	12	38	1442	2300	

*Off Calendar

Monthly Board Meeting Litigation Report - December 2011

AGENDA ITEM 9

<u>LITIGATION CASES PENDING</u>	TOTAL = 293
SUPERIOR COURT: Claimant Petitions.....	243
Employer Petitions.....	22
EDD Petitions.....	3
Non-benefit Court Cases	7
APPELLATE COURT: Claimant Appeals.....	12
Employer Appeals.....	4
EDD Appeals.....	0
Non-benefit Court Cases	1
ISSUES: UI.....	253
DI.....	17
Tax.....	14
Non-benefit Court Cases	9

2011 CALENDAR YEAR ACTIVITY - Benefit & Tax Cases

<u>LITIGATION CASES FILED</u>	<u>YTD</u>	<u>December</u>
SUPERIOR COURT: Claimant Petitions.....	117	4
Employer Petitions.....	7	1
EDD Petitions.....	0	0
APPELLATE COURT: Claimant Appeals.....	11	2
Employer Appeals.....	0	0
EDD Appeals.....	0	0
<u>LITIGATION CASES CLOSED</u>	<u>YTD</u>	<u>December</u>
SUPERIOR COURT: Claimant Petitions.....	70	0
Employer Petitions.....	14	0
EDD Petitions.....	1	0
APPELLATE COURT: Claimant Appeals.....	4	0
Employer Appeals.....	0	0
EDD Appeals.....	0	0

2011 Decision Summary

<u>Claimant Appeals</u>		<u>Employer Appeals</u>		<u>CUIAB Decisions</u>		
Win: 21	Loss: 52	Win: 3	Loss: 10	Affirmed: 62	Reversed: 21	Remanded: 4

CUJAB 11/12 Fiscal Year Overtime/Lump Sum Payout - SCO Report
July 2011 through November 2011

Branch	FY Y-T-D Decision Typing		FY Y-T-D CTU Typing		FY Y-T-D Registration		FY Y-T-D Other	
	Hours	Pay	Hours	Pay	Hours	Pay	Hours	Pay
Appellate	489.80	\$12,969.13	1,037.50	\$30,985.23	740.30	\$20,282.13	1,015.90	\$25,100.71
Admin	40.75	\$1,604.34	0.00	\$0.00	0.00	\$0.00	710.75	\$30,775.85
IT	0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	1,099.00	\$44,735.04
Exec	20.00	\$872.82	0.00	\$0.00	251.50	\$11,228.29	85.00	\$2,696.89
Field	353.00	\$10,829.40	0.00	\$0.00	4,523.45	\$132,611.51	4,706.25	\$139,376.88
Total	903.55	\$26,275.69	1,037.50	\$30,985.23	5,515.25	\$164,121.93	7,616.90	\$242,685.37

11/12 Fiscal Year-to-Date Total Overtime Expenditures						FY 11/12 FY Projections	
Branch	11/12 FY Allocation	Year-to-Date Hours	Year-to-Date Position Equivalent	Year-to-Date Pay	Allocation Balance	Estimated Expenditures Over-/Under	
Appellate	\$52,599.00	3,283.50	1.58	\$89,337.20	-\$36,738.20	-\$161,810.28	
Admin	\$90,306.00	751.50	0.36	\$32,380.19	\$57,925.81	\$12,593.54	
IT	\$123,050.00	1,099.00	0.53	\$44,735.04	\$78,314.96	\$15,685.90	
Exec	\$21,977.00	356.50	0.17	\$14,798.00	\$7,179.00	-\$13,538.20	
Field Operations	\$864,113.00	9,582.70	4.61	\$282,817.79	\$581,295.21	\$185,350.30	
Total	1,152,045.00	15,073.20	7.25	\$464,068.22	\$687,976.78	\$38,281.27	
Actual Monthly Average Personnel Year							17.40

11/12 Fiscal Year-to-Date Lump Sum Payout July 2011 through November 2011				
Branch	Year-to-Date Hours	Year-to-Date Position Equivalent	Year-to-Date Pay	
Appellate	477.70	0.23	\$12,940.82	
Admin	774.80	0.37	\$21,777.87	
IT	0.00	0.00	\$0.00	
Exec	783.00	0.38	\$48,283.51	
Field Operations	2,118.30	1.02	\$92,450.52	
Total	4,153.80	2.00	\$175,452.72	



CALIFORNIA UNEMPLOYMENT INSURANCE APPEALS BOARD
SPECIAL PROJECTS MATRIX
January 2012

California's economy is globally ranked with approximately 1.0 million business owners and 15.9 million workers. Currently, California, along with the nation, is experiencing an immense economic downturn with 2.1 million California workers out of work. These are unprecedented numbers for California and the nation. Given this current economic situation, we strive to better serve California's workers and business owners during a time when more than ever, they are in need of our services. Since January 2009, the Board has been focused on the appeal backlog and identifying work solutions that will help address the workload.

WORK PROCESS IMPROVEMENTS

Project & Description	Lead	Priority	Milestones	Goals	Status
<p>EDD/CUIAB Appeal Co-Location Pilot Exploring the co-location of four CUIAB staff at EDD's LA PAC to streamline appeals registration processing.</p>		High	Developed scope with EDD 07/2010 Connectivity established 08/2010 Equip installed 08/2010 Train staff 09/20/2010 Launch Pilot 09/27/2010 Suspended due to freeze 10/04/2010 Relaunch 06/13/2011	<ul style="list-style-type: none"> - Reduce claimants' & employers' wait time for hearing decisions. - Resolve appeal registration issues in a timely manner. 	Scanning for 2 FOs - Pasadena & LA. IT provided cost estimate to potentially expand sites. Recommend staffing up LA Pilot for statewide evaluation. Expansion pending hiring freeze exemptions.
<p>US Department of Labor Taskforce For nine years, CUIAB has failed to meet US DOL timeliness standards for UI appeals. California is ranked 51st among 53 states and US territories on time lapse and case aging standards. In late 2008, US DOL placed CUIAB under a corrective action plan with oversight by a taskforce of US DOL, EDD & CUIAB representatives.</p>	Rafael Placencia	High	Appeal program review 07/27-31/2009 DOL report 02/05/2010 LWDA response 03/10/2010 Two yr At Risk CAP 07/15/2010 Site visit 07/27/2011	<ul style="list-style-type: none"> - Meet DOL time lapse measures. - Meet DOL case age measures. - Reduce processing time for appeals data flow and document saving. 	Meeting with EDD IT to explore options & alignment with Agency network consolidation efforts. Design plans are completed.

TECHNOLOGY

Project & Description	Lead	Priority	Milestones	Goals	Status
<p>Digital Imaging EDD mails hard copy documents to CUIAB when an appeal is filed. CUIAB will collaborate with EDD to image documents and records relating to all appeals and design an electronic exchange.</p>	Lori Kurosaka	High	<p>Kick off 11/2010 FSR completion 02/2011 Potential BCP 02/2011 Procurement 04/2011 FSR in review 03/14/2011 FSR in review 11/30/2011</p>	<ul style="list-style-type: none"> - Reduce paper files prepared & sent by EDD. - Increase information security. - Reduce paper file storage space needs & costs at CUIAB. - Reduce postage costs. - Increase federal performance. 	<p>DOL approved funding at \$354,000 for planning phase only. Project and procurement strategy approved by LWDA & EDD. Six week start delay due to OCIO approval. Request to EDD programs for estimated project costs in 01/2011. Narrative revisions completed per Agency comments in May 2011. EDD cost estimates received 09/09/2011. Project team met with EDD 10/24 to review and clarify assumptions for their costs. Validated EDD overestimated on their costs.</p>
<p>Electronic Appeal Decisions CUIAB field staff manually sort and prepare appeal decisions for mailing to the appellants and EDD. CUIAB and EDD are jointly developing electronic solutions for the transfer of appeal decisions to all EDD programs.</p>	Lori Kurosaka	High	<p>EDD/CUIAB workgroup launched 08/18/2009 Unisys contract award 01/2010 Phase I implementation 04/14/2010 (second level) Phase II design 05/03/2010 (first level) Phase II implementation 09-10/2010 Phase III tax implementation 10/21/2011 Phase IV DI/PFL implementation 12/21/2011</p>	<ul style="list-style-type: none"> - Reduce claimants' & employers' wait times for benefits and adjustments. - Reduce postage and paper costs. - Increase information security for claimants & employers. 	<p>Phase III delayed due to EDD's ACES implementation and DI staffing constraints on 11/2010, 01/2011, 03/2011, 04/2011 & 05/2011. Participated in three design sessions 07-08/2011 with EDD Tax, DI & IT. DI/PFL testing completed 12/19/2011.</p>
<p>Electronic Case Management CUIAB's case tracking database is 10 years old and cumbersome to manage the current workload volume. CUIAB is collaborating with LWDA & EDD to develop an integrated case management system.</p>	Lori Kurosaka	On Hold	<p>LWDA, EDD & CUIAB approved FSR & project strategy in 10/2010. Kick off 05/2011.</p>	<ul style="list-style-type: none"> - Receive appeals case documents electronically from EDD. - Eliminate internal mailing of case documents 	<p>DOL approved funding at \$40,000 for the planning phase only. EDD is too busy to participate in FSR development. FSR is complete and on-hold to complete imaging project first as of 09/2011.</p>
<p>Expand Auto Dialer Hearing Reminder Adding email and cell phone text features for supplemental hearing notifications.</p>	Rafael Placencia	High	<p>Updated software. Final testing 08/2010. Implemented 09/2010. Implemented email reminders 04/2011. Revised 10/2011.</p>	<ul style="list-style-type: none"> - Increase hearing attendance rate & productivity. 	
<p>Field Office Technology Enhancements Investing and testing use of larger sized monitors for hearing rooms. Provide second monitors for support staff to toggle into SCDB without interrupting their CATS.</p>	Rafael Placencia	Medium	<p>Complete procurement 02/2011.</p>	<ul style="list-style-type: none"> - Improve readability of documents on screen. 	<p>Hardware deployment continues.</p>

TECHNOLOGY cont.

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Field Office Telephone Tree Field Operations will test the use of phone menu options to answer routine constituent calls. This will allow support staff to spend more time on the non-routine calls.	Rafael Placencia	Medium	Develop standard automated phone tree to be used for all FO's Pilot new phone tree in the Inland FO	<ul style="list-style-type: none"> - Reduce claimants & employers time on phones. - Standardize hearing information provided by phone. 	Standard phone tree design completed. Pilot began in the Inland FO. IT & Admin are developing evaluation tool to measure pilot effectiveness.
Hearing Scheduling System Currently, FO & AO support staff schedule or assign appeal hearings or cases using a hybrid manual process. Appellate, Field & IT staff observed an EDD demon on their UI Scheduling System.	Lori Kurosaka Faye Saunders	High	Charter & scope completed. Kick off 10/14/2010. Requirements 2/2011.	<ul style="list-style-type: none"> - Reduce claimants & employers wait time for hearing decisions. - Provide easier electronic process for staff to calendar hearings or schedule cases. 	AO requested a few more changes to interphase with their paperless pilot which results in implementation pushed to 03/2012. Testing will begin in late 01/2012.
LWDA Network Consolidation To comply with OCIO Policy Letter 10-14, the LWDA Departments & Boards are developing a network consolidation plan that must be completed by June 2013.	Rafael Placencia	Medium	LWDA Workgroup develops migration plan. Consensus on migration plan. Implementation	<ul style="list-style-type: none"> - Improve IT efficiency & effectiveness. - Improve security. - Reduce IT costs by using shared service models. - Reduce greenhouse gas emissions. 	The migration plan is completed and a cost model has been developed.
Personal Productivity & Mobility Pilot for Board Members, Appellate & Senior Staff Testing use of new mobile, paperless technology with Board Members, six Appellate ALJs, and Senior Staff.	Rafael Placencia	On Hold due to air card limitations	OCIO approval for procurement. Testing equipment with Board.	<ul style="list-style-type: none"> - Reduce the use of paper for board appeal processing and board meetings. 	Scoped down due to GO directive on cell phone (air card) reductions.
Printer Standardization Standardizes the use of printers throughout the organization as they are replaced. This will reduce maintenance and toner costs through the printers lives.	Rafael Placencia	Medium	Completed 01/2012	<ul style="list-style-type: none"> - Reduce maintenance & support costs. - Reduce toner costs. 	Researching feasible equipment. Standards are in place for light, heavy, color, and multi-function printers.
VOIP Telephony CUIAB is exploring use of Voice Over Internet technology to provide lower cost telecommunications.	Rafael Placencia Janet Maglente	On Hold	09/17/2011 Completed 23out station hearing facilities.	<ul style="list-style-type: none"> - Elimination of long distance toll calls - Consolidation of telecommunications support areas. 	On hold 07/2011. IT staff are preparing business analysis for feasibility of further implementation.

STAFFING, FACILITIES, EQUIPMENT & OTHER

Project & Description	Lead	Priority	Milestones	Goals	Status
<p>Archive File Document Conversion Each FO is retaining three years of completed paper appeal case files that are sitting in considerable real estate space. The file room space may be easily converted to ALJ offices or hearing rooms.</p>	Lori Kurosaka Pat Houston	High	M&A vendor contract executed 01/2010. OC, Inland, LA, Oxnard, San Jose, San Diego, LA, Sacto, SF, Appellate complete Vendor quality checks 04/05, 05/06, 08/19. Vendor quality check 05/09	<ul style="list-style-type: none"> - Recapture real estate space for ALJ offices and hearing rooms. - Priority conversion for OC, Inland, LA, San Jose & Oxnard. 	FO staff are prepping final conversion of files through 2011. Extended vendor contract to 12/31/2012.
<p>Judicial Advisory Council Established an advisory council of two Presiding Judges & three ALJs to seek input on major technology development.</p>	Lori Kurosaka Janet Maglirte	High	07/2011-Completed business requirements for case management system.	<ul style="list-style-type: none"> - Design comprehensive technology systems with input from judicial users. 	Conducting market research with software system demos. Identifying successful county court systems to tour and observe. Will revisit imaging requirements. Updated business requirements with judges input.
<p>Performance Management Tools for Board & Leadership Develop additional reporting tools that the Board & Leadership will use to monitor overall appellate performance and appeal process cycle times. These tools will also help to measure success with the large scale technology projects.</p>	Janet Maglirte	High	Business case metrics for imaging Business case metrics for case management Tested report template designs with IT.	<ul style="list-style-type: none"> - Design comprehensive technology systems with input from staff users. 	Designing & testing Appellate Operations cycle time and case aging reports. Field Operations performance indicator reports are complete.
<p>Staff Advisory Council Established an advisory council of six Field Operations staff and two Appellate staff to seek input on major technology development.</p>	Lori Kurosaka Janet Maglirte	High		<ul style="list-style-type: none"> - Design comprehensive technology systems with input from staff users. 	First meeting delayed due to new state travel restrictions. First assignment is to redesign appeal forms as smart forms.
<p>Transforming CUAB Engage a consultant to help plan and guide the leadership team through organizational change management. A consultant will assist with defining organizational structure, proactive communications with stakeholders, identify staff skill sets needed for new technology, etc. to maximize user acceptance of new technology.</p>	Rafael Piacencia Pam Boston Lori Kurosaka	High	Release RFO 03/18/2011 Rerelease RFO 05/12/2011 Bids due 05/31/2011. Intent to award 06/10/2011. Deliverable 1 completed 10/2011.	<ul style="list-style-type: none"> - Plan, design and implement organizational design for the large scale technology projects. - Plan and coordinate communications with all stakeholder groups. 	All other deliverables on hold pending travel exemption approval. Will develop mitigating strategies to work around.