

# 2022 CGJA Annual Standing Committee Reports

**ANNUAL CONFERENCE (ACC)** - strives to present a challenging, inspiring and informative program each year in a convenient yet popular location that will entice attendees to come early or stay after our meetings to enjoy the locale.  
**Chair, Lloyd Bell**



After a very successful 2019 Annual Conference in Sacramento, the Covid 19 pandemic intervened, disrupting in-person meetings. Since our bylaws require certain information be reported to our members on an annual basis, the CGJA Board elected to utilize virtual technology to keep our members up to date. As a result, the 2020 and 2021 annual membership meeting was conducted via the internet. Both meetings were resounding successes, attended by about 100 people, challenging and informing members who comfortably participated while in their homes.

With the easing of the pandemic and subsequent return to the new post-Covid normal, planning once again began in earnest earlier this year. We are happy that we are able to once again gather together to celebrate local successes and renew acquaintances at the Embassy Suites, San Rafael, on October 23-24, 2022, with a full complement of award presentations, informative panel discussions, renowned speakers, an update from the CGJA President, and a gala dinner on the evening of October 23.

Our committee is always seeking new volunteers who wish to volunteer their time and talents in planning and executing our annual conference. If you know of someone who would enjoy working on such an event, or if you would find it fulfilling, please let us know by sending a note to [annualconference@cgja.org](mailto:annualconference@cgja.org).

**AWARDS (AC)** - establishes and administers all CGJA awards and recognition, with the exception of the Lifetime Achievement Award that falls within the purview of the Board of Directors. **Chair, Joann Landi**



This year the CGJA will present **Excellence in Reporting Awards (EIR)** for best grand jury report and best media coverage.

We urge our colleagues to consider presenting awards locally. While certain awards must be presented at the annual meeting, i.e., the EIR and Rolando awards, **Certificates of Special Recognition** can be presented at a chapter or regional meeting. This may permit more local people to be present to enjoy the proceedings and congratulate the honoree(s). Details are on the website at [cgja.org/awards](http://cgja.org/awards).

**BYLAWS AND POLICY REVIEW COMMITTEE (BPRC)** - works with other standing committees and the board of directors to ensure that the association's governing documents are updated as needed, compliant with state law and internally consistent. **Chair, Karen Jahr**



This committee reviews any proposed amendment to the CGJA Bylaws or Policy Manual and makes recommendations regarding the amendment's content, format, and placement within the bylaws or manual. We also review newly adopted or revised committee procedures for consistency with state law, CGJA's Bylaws, and the Policy Manual and report our conclusion to the referring committee. We conduct other reviews as requested.

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## **Bylaws and Policy Review** *continued*

This past year, BPRC reviewed several proposed amendments to the policy manual, including those related to memorial funds donated to CGJA. The policy amendments were reviewed and approved by the board at its June meeting.

The committee also reviewed and provided comments on the revised procedures for the Annual Conference Committee, the Finance Committee, and the Training Committee.



**FINANCE (FC)** - works with the president, treasurer and committee chairs to develop the annual budget and provide oversight of other finance-related information and activities of the association. The committee actively recruits for new members familiar with financial management principles, the nonprofit legal environment, accounting software, and administration. **Chair, Richard Rogers**

This year the Finance Committee

- Conducted a monthly review of CGJA financial records and transactions, including adherence to budget.
  - Compiled and facilitated approval of the 2022 CGJA budget.
  - Provided timely reminders to chapters concerning their tax-filing obligations.
- Filed IRS CP 119 Form to update subsidiary CGJA chapter nonprofit status.
  - Filed updated Entity Numbers for Subordinates to CGJA with the California Franchise Tax Board.
  - Successfully managed finance-related issues with the assistance of the CGJA Treasurer.
  - Conducted a successful search to replace retiring CPA firm.
  - Forwarded financial information for 2021 to the CPA for preparation of the federal and state tax returns.
  - Prepared and submitted the annual sales tax payment to the Board of Equalization.
  - Prepared and submitted the odd-year Corporate Statement of Information (S-100) to the Secretary of State.
  - Prepared and submitted an Annual Financial Report for the CGJA Board and membership.
  - Conducted a thorough review of insurance coverages.
  - Reviewed and suggested updates to Financial Committee Procedures.

**LEGAL AND LEGISLATIVE RESOURCES (LLRC)** - comprised of active and retired members of the California State Bar and answers questions submitted by grand juries, individual grand jurors, CGJA chapter members, legal advisors to grand juries, and court personnel. **Chair, Karen Jahr**

As the members of LLRC are not in an attorney/client relationship with any grand jury or juror, the committee does not provide legal advice in response to the questions we receive. Instead, we make “best practices” suggestions based on the information submitted to us and on the collective experience of the members of LLRC. We always inform grand juries and jurors that they should consult with their legal advisors when they need legal advice about the grand jury or local government entities.



Most of the questions posed to us can be answered informally by a committee member by reference to CGJA’s training materials or website. We have seen a steady decrease over time in the number of questions that require the consideration of the full committee.

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## Legal and Legislative Resources Committee – *continued*

This past year, LLRC or its members provided responses to questions on a number of topics, including document retention policies, whether compliance reports need findings, grand jurors' conflicts, whether a grand jury can hold a public forum to discuss local concerns, the court's ability to quash a report, when supermajority votes are needed, how the grand jury could address an apparent violation of a witness admonition, removal of a grand juror for cause, when a grand jury's term ends, and limitations on the investigation of policy decisions.

LLRC also revised the *Frequently Asked Questions* page on CGJA's website.

Another function of the committee is to monitor legislation that could affect the grand jury system and provide an analysis of the bills to the CGJA Board of Directors. This year, we provided the board our analysis of AB 1972, a bill which would have raised grand jurors' per diem. The board took an "oppose unless amended" position on the bill due to its lack of funding. The bill did not pass.



**MEMBERSHIP AND CHAPTER RELATIONS (MCRC)** – responsible for recruitment and retention of CGJA members, manages the CGJA membership and introductory member database, provides guidance to grand jurors in each county who wish to form a chapter, supports ongoing chapters, and maintains a resource information database for both chapters and the general membership. **Chair, Diane Lloyd**

There are 28 CGJA chapters representing 30 counties. The announcement of the Monterey County Chapter's Certificate of Affiliation was made at last year's virtual Annual Membership Conference, held in October 2021.

In March 2022, another round of Chapter Officers' Get-Togethers was kicked off, continuing to strengthen the bond between CGJA and the participating chapters and associations. A follow-up meeting came about in April, with all attendees agreeing that quarterly Get-Togethers would be welcomed. Many topics were covered that month as well as at the July 2022 meeting – topics of such interest that several of them have been included in this year's Annual Membership Conference.

Almost 600 "Welcome to CGJA!" personalized emails have been sent to introductory members and new regular members. New regular members received a regionalized letter, noting the contact names and emails of each region's Directors, as well as congratulating them on their new status as voting members of CGJA. Letters to introductory members included links to some of the most popular resources on the CGJA website for the use of these new grand jurors.

MCRC is currently in the process of automating many of these tasks, freeing up valuable volunteer hours for the committee to devote to recruiting even more new members in addition to providing value to current members.

**PUBLIC RELATIONS (PRC)** – has taken an aggressive role at building awareness of the grand jury system through communications with our members, chapters, and the media. The use of social media to communicate grand jury work has increased substantially. In addition, the committee has been charged with identifying media contacts friendly to grand jury work and cleaning up our contact lists to reflect that effort. **Chair, Juliana Olinka Jones**



This year, the updated grand jury system book, *California's Civil Grand Juries*, was completed and placed in a high visibility position on the CGJA website to remain during the training season for easy access.

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## **Public Relations – continued**

The committee has also taken a position of identifying opportunities to issue press releases of importance regarding both the state’s various grand juries, as well as the efforts of CGJA. This will assist CGJA’s efforts to build awareness of grand jury work and attract a more diverse and educated grand jury pool.

PRC is also working on expanding the Osher Lifelong Learning Institutes (OLLIs) that offer educational and cultural enrichment classes. Two dozen California colleges and universities currently host them. Each OLLI is an opportunity for grand juries and California Grand Jurors’ Association chapters to create classes to educate the public about our unique civil grand jury system. It also is an efficient and effective way to recruit grand jurors from among citizens who are demonstrably curious and have time to invest reviewing local government. The CGJA Public Relations Committee, in consultation with the Training Team, plans to develop class-proposal suggestions, talking points and a script outline, which also could shape presentations to community groups, service clubs, churches and schools outside of the OLLI system.

PRC is also creating a master template for press releases that can be adapted by juries and chapters to use to issue their announcements. This is in addition to the creating a template for Grand Jury Awareness Month.

## **CGJA Blog**

PRC continues to be responsible for the news blog postings on the website. The committee has asked the Technology Committee to investigate creating a more user-friendly blog tool to live on the website that will expedite posting. It is anticipated this will happen in the next year. The blog shares news stories related to California grand juries.

## **Grand Jurors’ Journal and Newsletter**

The bimonthly *Grand Jurors’ Journal* continues to be an information vehicle to reach our members, current grand jurors, and court and county staffs. Barbara Sommer continues as its outstanding editor. Each journal contains announcements, chapter news, training information and other topics of interest to our audience. In addition, PRC attempts to issue a newsletter on months when the journal is not issued to continue awareness among our constituency. While not consistently produced yet, the effort is being addressed. Watch for it.



**TECHNOLOGY (Tech)** – oversees and supports the technical, data, and communications resources and deploys a cohesive technology strategy across the association ensuring the security and privacy of its financial, legal, and membership information. **Chair, Larry Herbst**

The Technology Committee’s area of focus for 2022 has been the continued technical support for CGJA primarily in regard to the website, Dropbox file maintenance, and Zoom.

For the website, new and updated sample documents were added, newly released examples of well-written grand jury reports were uploaded, and additional chapter resource documents are now available. A new webform was implemented to allow empaneled jurors to join CGJA as Introductory Members online and free of charge without using paper forms. We hope this will lead to full automation of this process in the future.

Although many counties have returned to in-person grand jury training given local relaxation of Covid-19 guidelines, Zoom continues to be used when needed and across the board for CGJA’s Foreperson and Pro Tem workshops, Legal Advisors’ workshops, and Report Writing workshops in 2022.

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**Technology – continued**

Technical support of the CGJA Blog continues to be managed by the Tech Committee while its content is managed by the Public Relations Committee.

On the new and exciting front, work is just beginning to convert the Content Management System (CMS) from Drupal to WordPress which has become the de-facto standard for websites, thus ensuring the long-term maintainability of the CGJA website, while protecting our investment. This underlying change will be transparent to our users and the existing valuable content will be maintained as is.

The Tech Committee will take advantage of this conversion to achieve a couple of long-term objectives which includes the automation of our membership database using the information provided by our members while joining or renewing their membership as well as the incorporation of the California Grand Jury News blog into the website, eliminating the need maintain a separate archive for articles.

**TRAINING (TC)** – develops and conducts annual training programs presented at statewide locations for new grand jurors. **Chair, Marsha Caranci**



CGJA’s Training Committee completed an almost back to “normal” training season this summer with record-breaking attendance at all of our programs – the regular two-day training seminars for all grand jurors and alternates, the Foreperson and Pro Tem Workshops, and the Legal Advisors’ Workshops. And we are also looking forward to working with almost all of the grand jurors again at our Report Writing Workshops this fall.

Time period covered	Regular seminars in person or on Zoom (some multi-county)	Foreperson and Pro Tem Workshops on Zoom	Legal Advisor Workshops on Zoom	Report Writing Workshops in per-son or on Zoom
Jan - Feb	6	1	1	
April - May			1	5
June - Sept	39	6	1	
Oct – Dec				Approx. 35 expected
Total attendees	Approx. 1100	97	47	Nearly 700 expected

Every California county except Alpine (the one that is too small to impanel a grand jury) will have participated in one or more of our programs in 2022.

The Program and Administration Subcommittee does all the work to set up and support these seminars and workshops – scheduling the venues, making hotel reservations for the training teams, arranging for the delivery of materials and equipment, etc.

The Curriculum Subcommittee reviewed and revised the training materials for all of the seminars and workshops again this year and was in charge of getting all materials printed.

The Trainer Subcommittee identified grand jurors during our training seminars and workshops that would make good CGJA Trainers. The process of inviting them to apply, reviewing their applications, and conducting interviews takes place over the fall and winter months. In 2022, we successfully recruited six new trainers who were approved by the Training Committee and participated in our 2022 summer training season. Our full roster of CGJA trainers is included as part of the volunteer list produced in the Annual Conference Program.

The Trainer Subcommittee conducted our New Trainer Orientation program virtually again this year, but we plan to get everyone together for an in-person Train-the-Trainer workshop in 2023.

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**Training – *continued***

Our Finance Subcommittee keeps us in the black – paying for expenses as they roll in during the busy training season. Our Technology Subcommittee maintains our computers and audio and video equipment, as well as our Zoom account. And our Public Relations Subcommittee keeps the jurors and CGJA members informed by assisting with the monthly communications that go out from the training team, either through Eblasts or the Journal.

Like the rest of the world, we have adapted to training remotely when needed – showing our PowerPoint slides, playing our mock interview demonstration videos, conducting interactive sessions using breakout rooms, and making the learning experience as interactive as possible. But we found that many grand juries wanted to return to in-person training in 2022, especially at the beginning of their term when they are just getting to know each other. Our talented and hardworking team of trainers were able to accommodate them.

A big thanks to all of our trainers and support volunteers for their dedication to CGJA’s important mission of providing training to California’s civil grand juries, and to the CGJA members and chapters who support our efforts.