**Foreperson’s Administrative Checklist**

*These are typical tasks for the foreperson in most grand juries. Some of these may not apply in your county, or you might have tasks not mentioned here. Modify this checklist to meet your needs.*

1. **Getting Started**

* Before the jury is impaneled, meet with the outgoing foreperson
  + Get the PO box and mailroom keys
  + Get any passed-forward investigative files
  + Discuss the grand jury budget, financial record-keeping, and petty cash and purchasing procedures
  + Discuss office security, maintenance, and janitorial services
  + Discuss the outgoing foreperson’s suggestions for leading the jury
* Make sure the orientation program is ready
  + It may be presented by the local chapter of CGJA or court or county personnel
  + Confirm arrangements have been made for presentations from last year’s foreperson and committee chairs (but they must maintain secrecy), the grand jury’s legal advisors, the jury’s court liaison, and prominent local officials
* Meet with the judge and county counsel (see Item 7 below)
* At impaneling, hand out:
  + Foreperson’s contact info
  + The orientation program schedule
  + A brief agenda for the first meeting, and the proposed date
  + A map with the location of the grand jury office
* At the first grand jury meeting, distribute (and later follow up on):
  + ID badges, photo IDs, keys, etc.
* W-9s – turn in to auditor-controller
* Form 700 (see Item 6 below)
* Grand Juror Employment Recusal Report for jurors employed by local government within past three years
* Grand Jury Recusal Form for Bias or a Perceived Conflict of Interest
* Time sheets and claim forms for juror mileage and per diem
* Review the rules of procedure with the jurors and adopt the rules about how to conduct meetings. The remaining rules can be modified and adopted over the next few meetings
* Develop and adopt ground rules for juror conduct
* Develop and adopt a code of ethical conduct; have each juror sign it
* Conduct ice breakers or other team building activities
* Schedule one or more social events (special lunches, potlucks, field trips, etc.)
* Meet with county contacts such as the CAO, clerk of the Board of Supervisors, IT manager, and auditor/controller to introduce yourself
* CGJA training – ensure that all jurors (including holdovers) and alternates attend
* Appoint a “training officer” (perhaps the pro tem) to:
* lead reviews of the CGJA training materials and Penal Code sections
* arrange for additional training by County IT and the jury’s legal advisor
* arrange for jurors to view CGJA training videos on Continuity and Detention Facility Inspections (on CGJA’s website, under Training)
* arrange for participation in the California Special Districts Association’s webinar
* ensure attendance at CGJA’s Report Writing Workshop
* Follow the procedures manual for the appointment of officers, committee members, and committee chairs
* With the pro tem, prepare a timeline of grand jury activities; review the timeline every month at a plenary session

1. **Security**

* Confirm alarm company contact information and procedures
* Confirm police or Sheriff’s Department contact information
* Confirm after-hours (emergency) maintenance contact information
* Confirm emergency procedures are displayed in the jury’s meeting rooms

1. **Grand Jury Technology**

* Change the password for office computers and assigned laptops
* Learn or develop a protocol for computer backup
* Discuss with the panel voicemail and email protocols, computer access codes, the use of your videoconferencing service, and maintaining the grand jury website (County IT can help with this)
* Prepare or update a county contact list
* Prepare or update a media outlet contact list
* Develop or update a list of cities, special districts, school districts, and other agencies
* Review and update, as needed, an inventory of the grand jury’s office equipment

1. **Grand Jury Website**

* Arrange for all recent reports and responses to be posted on the grand jury’s website
* Confirm that the current grand juror application form and the complaint form are posted

1. **Finances**

* Contact the jury’s budget analyst to get a copy of the jury’s itemized budget; meet to get clarification if needed
* Contact the Auditor/Controller to get monthly balance sheets and expenditures lists
* Discuss the jury’s budget with jurors and provide monthly updates from the balance sheet
* Meet with jury’s budget analyst during county’s mid-year budget review in December or January to discuss ongoing funding and any major purchases
* Become familiar with the purchasing policy for supplies and other routine purchases
* Identify the purchasing agent who will help with any major purchases
* Review, approve, and submit expense reimbursement forms and invoices to county administration contact person for processing and payment

1. **Form 700**

* Go to the county website to get forms and instructions. Filings are required when assuming office, annually, and upon leaving office
* Ensure the forms are submitted on time

1. **Presiding or Supervising Judge and Legal Advisors**

* Schedule initial meetings with the judge and the jury’s legal advisor as soon as possible to discuss roles and expectations (meet with them together or separately)
* Schedule routine monthly meetings with the legal advisor to discuss operations, personnel issues (see Item 10), investigations, reports, and the laws related to local governments
* Schedule a presentation by the legal advisor regarding defamation and other legal issues
* Discuss with the legal advisor their contact protocols and recusal/ethical wall protocols
* Discuss document retention protocols

1. **Correspondence**

* Use the grand jury letterhead for all correspondence
* Consider using only a PO box, city, and zip code as the returrn address on envelopes to preserve confidentiality

1. **Distributing and Posting Reports**

* Review the report finalization and distribution process with entire grand jury
* Discuss the authorized use of social media by jurors to publicize the release of reports
* Update the media contact list; contact the media before each release
* Contact county IT to post the individual and consolidated final reports and responses on the website

1. **Personnel Issues**

* Juror resignation: inform the judge; have the juror submit a letter of resignation and fill out the Exit Form; request that an alternate be sworn in by the court
* Schedule meetings with officers and committee chairs as needed or establish a regular meeting schedule to discuss internal matters
* Monitor absences; meet with jurors who are not participating as expected
* Immediately address misconduct; always have the pro tem or another juror present
* Promptly inform the legal advisor and court of any significant personnel issue

1. **End of Year**

* Have jurors who wish to hold over make a written request
* Advise the judge of your recommendations for holdovers and the next foreperson; provide the reasons for your recommendations
* Ask jurors if they would be willing to have their names and contact information added to a Reserve List and be invited to join a later grand jury if the court runs out of alternates
* Review and follow the jury’s records retention policy
* Erase hard drives and request that jurors erase grand jury documents from their home computers
* Schedule a group photo (which may include the judge and the court liaison )
* Consider writing thank-you notes to contacts (the judge, legal advisors, and select boards or officials)
* Have jurors submit final time sheets and claim forms
* Meet with the auditor/controller representative to reconcile the petty cash account
* Have jurors complete the “leaving office” Form 700
* Have jurors complete and submit the Grand Juror Exit Form (available on CGJA’s website under Jury Resources, Sample Documents
* Collect keys, laptops, badges, and all other items
* Update this Administrative Checklist to reflect your experience as the foreperson
* Meet with the incoming foreperson to discuss procedures, encourage attendance at CGJA’s Foreperson and Pro Tem Workshop, and provide helpful advice