**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 list to meet your needs of your grand jury.*

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, 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
	+ Make sure arrangements have been made to receive 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 8 below)
* Meet with county contacts and offices (such as the CAO, clerk of the Board of Supervisors, IT, and auditor/controller) to introduce yourself
* Consider having a short plenary meeting to be held soon after impaneling (perhaps the same day); make sure the room is available
* At impaneling, pass 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 7 below)
* Report forms for jurors employed by local government within past three years
* Time sheets and claim forms for juror mileage and per diem
* Over the first few meetings, review the procedures manual with the jurors, starting with how to conduct meetings, and approve the manual, chapter by chapter (with any modifications), by a supermajority. The rules can be modified later as needed.
* Develop and adopt ground rules
* Develop and adopt a code of ethics
* Schedule one or more social events (special lunches, potlucks, field trips, etc.)
* 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. **Grand Jury Office**
* Change the password for office computers and assigned laptops
* Learn or develop a protocol for computer back up
* 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. **Security**
* Confirm alarm company contact info and procedures
* Police or Sheriff Department contact info
* County Admin – after-hours (emergency) maintenance contact information
1. **Budget**
* Contact the jury’s budget analyst in the CAO’s office and get a copy of the jury’s itemized budget; get clarification if needed
* Contact 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 major purchases (pre-approved by CAO’s office)

1. **Invoices**
* Review, co-sign, and submit invoices to county administration contact person for processing and payment
1. **Form 700**
* Go to the county website to get forms and instructions
* The Form 700 filer for the grand jury is the chief clerk of the board of supervisors
* Three filings are required: assuming office, annual, and leaving office
1. **Presiding or Supervising Judge/Legal Advisor**
* Schedule an initial meeting with the judge and the jury’s civil legal advisor ASAP to discuss roles and expectations
* Set routine monthly meetings with the legal advisor to discuss operations, personnel issues (see Item 11), investigations, reports, and the laws related to local governments
* Discuss with legal advisor investigation of matters under possible or pending litigation
* Schedule a presentation by the legal advisor regarding defamation and other legal issues
* Discuss the legal advisor’s contact protocols and recusal/ethical wall protocols
* Discuss document retention

**9. Final Report Distribution and Posting**

* 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
* County IT posts the individual and consolidated final reports and responses on the website; prepare or update the confidentiality agreement

**10. Correspondence**

* Use the grand jury letterhead for all correspondence
* Consider, in some instances, not using “XX County Grand Jury” for the return address on an envelope; you might just use the PO box, city and zip code

**11. 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 (the executive committee) as needed or establish a regular meeting schedule to discuss internal matters
* Monitor absences; meet with jurors who are not performing 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 fill out a Request to Hold Over form
* Advise the judge of your recommendations for holdovers and the next foreperson, and 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
* Have the jury determine by a supermajority vote which if any civil investigative files, complaints, or materials to pass forward to next jury; seal the remaining confidential investigative materials to be stored for one year; shred all meeting minutes
* Erase hard drives and have 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 rep to reconcile the petty cash account
* Have jurors complete the “leaving office” Form 700 and the Grand Juror Exit Form
* Collect keys (except from holdovers), laptops, badges, and all other items
* Update this Administrative Guide
* Meet with the incoming foreperson to discuss this guide; encourage attendance at CGJA’s Foreperson and Pro Tem Workshop, and provide other information and suggestions to your successor