

SAN MATEO COUNTY BAR ASSOCIATION

# PRIVATE DEFENDER PROGRAM

ANNUAL REPORT  
FISCAL YEAR 2025-2026



LISA M. MAGUIRE  
CHIEF DEFENDER

# FISCAL YEAR 2025-2026 PDP ANNUAL REPORT

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## GREETING FROM THE CHIEF DEFENDER



Chief Defender Lisa Maguire

Welcome to the San Mateo County Private Defender Program's 2025–2026 Annual Report. It is an honor to share the Program's accomplishments and reflect on the extraordinary work performed on behalf of our clients and community this past fiscal year.

The Private Defender Program remains committed to providing high-quality, client-centered representation. Our clients benefit from the collective efforts of dedicated attorneys, experienced investigators, social workers, immigration counsel, paralegals, client advocates, and administrative professionals. Together, they provide representation that addresses not only the legal issues presented in a case, but also the broader circumstances affecting our clients' lives.

During the past fiscal year, our attorneys represented clients in matters ranging from misdemeanor offenses to the most serious and complex felonies. In every case, our responsibility is to protect our clients' constitutional and statutory rights and to ensure that each client receives diligent, zealous, and compassionate representation.

Whenever possible, we work to create opportunities for clients to participate in diversion, treatment, collaborative courts, and other programs that may address underlying needs and avoid the lasting consequences of a conviction. At the same time, we never lose sight of the essential role of strong legal advocacy and litigation. During FY 2025–2026, Program attorneys litigated significant motions, challenged unlawful and inequitable practices, and achieved dismissals, acquittals, reduced charges, and other favorable outcomes for their clients. Our post-conviction efforts also continued to provide meaningful relief to individuals facing the lasting consequences of prior convictions and sentences.

This past fiscal year, we expanded training and mentorship opportunities and strengthened pathways for law students and newer attorneys interested in indigent defense. As workloads evolve, recruitment is essential to ensuring that every client receives the attention, preparation, and advocacy their case deserves. I am deeply grateful to our panel attorneys and staff for their dedication, professionalism, and unwavering commitment to our clients. I also extend my appreciation to the San Mateo County Bar Association's Board of Directors, the San Mateo County Board of Supervisors, the County Executive's Office, and our many justice and community partners for their continued support of this important work.

## INTRODUCTION

In 1963, the United States Supreme Court's landmark decision in *Gideon v. Wainwright* established that anyone charged with a crime who cannot afford an attorney has a constitutional right to counsel at public expense. In the years that followed, many of California's larger counties created public defender offices, while smaller and more rural counties adopted "contract systems," where private attorneys provided representation under agreements managed by the courts. San Mateo County took a different path.

In 1968, the Board of Supervisors began evaluating how best to provide representation for indigent defendants. Recognizing the wealth of criminal defense expertise among local solo practitioners and small firms, the San Mateo County Bar Association proposed creating and administering an assigned counsel program. The proposal was accepted, and in 1969 the Private Defender Program (PDP) began operations. Since then, the PDP has continuously provided indigent defense services through a managed assigned counsel system.

On June 8, 2023, the County of San Mateo and the San Mateo County Bar Association entered into a new five-year agreement to continue providing representation through the PDP. The Agreement extends a partnership that has now lasted more than half a century. This report, submitted under the terms of that agreement, provides information on PDP operations, benchmark data, and highlights from the past fiscal year, including the work of PDP attorneys, investigators, social workers and client advocates.

For the past 57 years, PDP attorneys have brought a wide range of experience and skill to cases ranging from low-level misdemeanors to capital murder. The Program also represents children who have been abused or neglected, individuals living with serious mental illness, and older adults unable to manage their own affairs. In addition, certain attorneys handle extraordinary writs in the Court of Appeal and the California Supreme Court to safeguard our clients' rights.

To provide the most comprehensive representation possible, the Program has grown steadily, adding services that reflect a more holistic model of defense. The management team has also expanded to provide greater guidance, training, and oversight, ensuring that every panel attorney is fully equipped to meet the highest standards of representation.

As the following pages will show, the PDP has evolved significantly since its first Annual Report in 1970, yet it has remained true to its founding commitment: delivering skilled advocacy while upholding the rigorous values and standards that define the Private Defender Program.

## THE PROGRAM STRUCTURE

For the fiscal year ending June 30, 2026, the Private Defender Program's 28 employees provided the leadership, operational support, and specialized expertise necessary to sustain high-quality, client-centered representation. As the demands of indigent defense continued to grow, the Program strengthened its staffing capacity to support the attorneys and related professionals serving our clients.

The management team included the Chief Defender, Assistant Chief Defender, Assistant Chief of the Juvenile & Civil Commitment Branch, three Managing Attorneys, the Head of Investigations, and the Head of Social Work, with specialized leadership and support provided by the Crim-Immigration Unit. Within their respective areas, Program leaders directed the recruitment, training, and oversight of independent contractors, ensuring that panel members had access to the expertise, guidance, and resources needed to meet the demands of their practice.

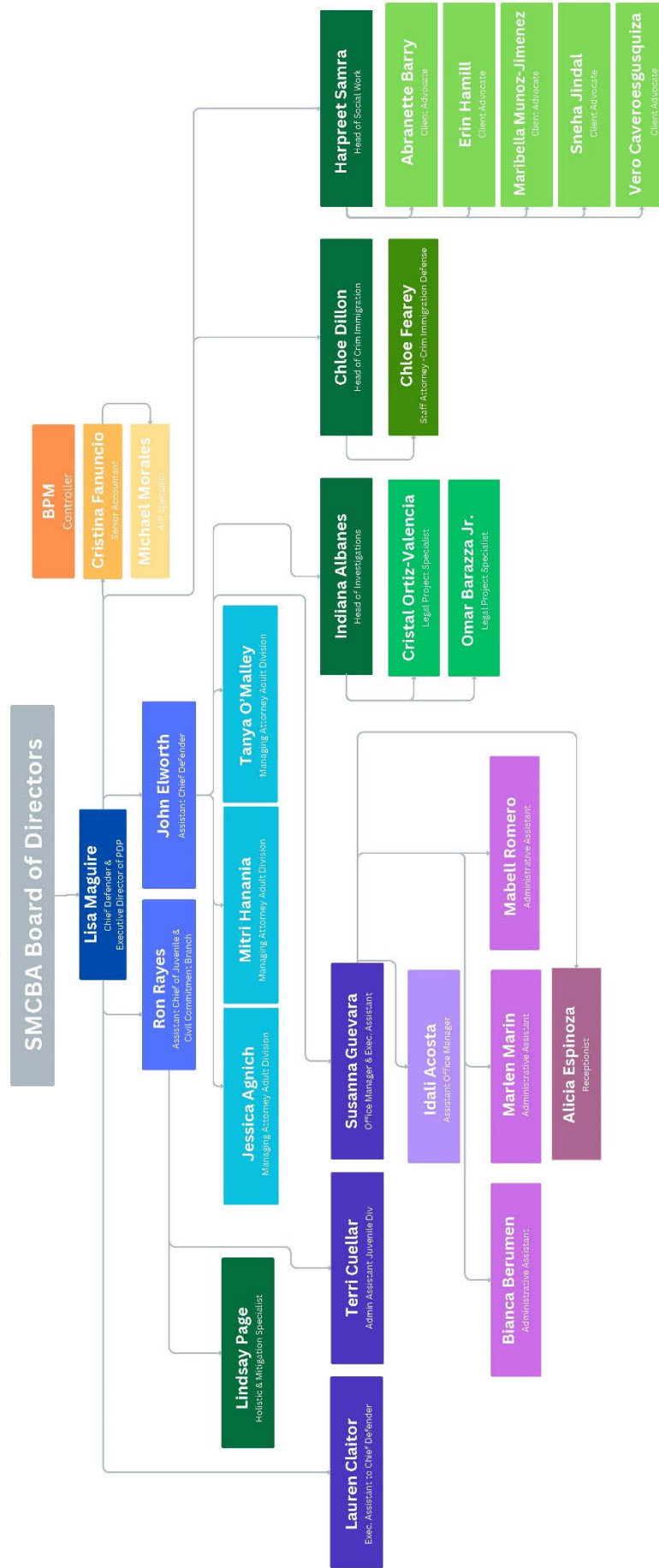
Under the direction of the Office Manager, the administrative team played a central role in the Program's daily operations. Staff tracked the acceptance of court appointments and coordinated case assignments, matching cases to attorneys based on practice level and availability. This work supported timely assignments and the effective coordination of representation across the Program's diverse practice areas.

The Program also expanded its Investigations Division to address the increasing volume of discovery, additional court appearances, and growing need for case preparation support. Supervised by the Head of Investigations, these additional staff members focused on discovery monitoring and organization, data collection, and calendar preparation. This investment strengthened the Program's capacity to manage information, support attorney preparation, and respond to increasingly complex case demands.

Together, these teams formed the operational foundation of the Program's interdisciplinary approach to defense. By coordinating leadership, administrative support, and specialized services, they equipped attorneys, investigators, social workers, and client advocates to deliver thorough and effective representation. The Program's continued investment in its staff supported both accountability in day-to-day operations and its ability to meet the evolving needs of clients.

# SMCBA Private Defender Program

## Organizational Chart



## THE MANAGEMENT TEAM



**Lisa Maguire** has led the Private Defender Program as Chief Defender since 2019, overseeing a panel of dedicated defense attorneys who provide diligent and zealous representation to their clients. Under her leadership, the Program has expanded significantly to support a more holistic approach to client representation. Lisa first joined the Program as a criminal defense attorney in 2001, handling a wide range of cases, including serious felonies and homicide cases. In 2017, she was hired as Assistant Chief Defender, where she assisted with program operations before stepping into the Chief Defender role in 2019. An active leader in the legal community, Lisa serves on the board of the California Public Defender Association, is a member of the Legislative Committee, and co-chairs the Amicus Committee. In recognition of her contributions, she received the Eleanor Falvey Award in 2023 for outstanding service to Women Lawyers and the San Mateo County legal community.



**John Elworth** as Assistant Chief Defender helps oversee the administration of the Private Defender Program. He works to ensure that attorneys provide high-quality legal representation by improving data collection and analysis to drive management decisions. He has collaborated with national experts on indigent defense data to identify metrics for evaluating indigent defense models and has made changes to PDP's case management system to track this critical data. John has been an attorney since 2003 and has spent most of his career focused primarily on indigent criminal defense cases. John joined the Private Defender Program as a panel attorney in 2008 handling serious felony cases, including several homicide cases that resulted in favorable outcomes. In recognition of his dedication to zealous advocacy, he was awarded the PDP's Woodman Award by his colleagues in 2019. John joined the PDP as Assistant Chief Defender in 2023.



**Ron Rayes** as the Assistant Chief of the Juvenile and Civil Commitment Branch administers Juvenile Justice cases, Dependency cases, Lanterman-Petris-Short-Act (LPS) cases, CARE court, Probate Guardianships, and Conservatorship cases. He is responsible for assigning these cases as well as providing support to the PDP attorneys within these units. Prior to joining management in 2019, Ron was a criminal defense attorney for over 16 years. In his private practice, Ron represented indigent clients in San Mateo and Santa Clara counties, representing adult and juvenile clients and litigating transfer cases. Ron serves on the California Youth Defender Center's Executive Board and is an active advocate for juvenile justice reform, frequently presenting juvenile justice issues before the California Legislature.



**Mitri Hanania** as a Managing Attorney in the Adult Division of the Program primarily focuses on management for the misdemeanor and post-conviction units. He supports the PDP attorneys by providing training, case consultation, and oversight on misdemeanor cases and post-conviction matters, including record clearance and resentencing. He also manages the custody calendar and helps recruit, onboard, and train new attorneys. Mitri joined the Private Defender Program as a panel attorney in 2001. After more than 20 years practicing criminal defense, he joined the management team in 2022. Throughout Mitri's career, he has handled a diverse range of cases, from minor traffic violations to complex homicide cases. Mitri earned the Woodman Award in 2021 for his excellent work with the Private Defender Program, and he is a Criminal Law Specialist certified by the State Bar of California Board of Legal Specialization.



**Tanya Montano O'Malley** is the Managing Attorney of Specialty Courts & Community Engagement. She provides training and guidance to attorneys navigating the complexities of collaborative and specialty courts, helping them advocate for the best possible holistic outcomes for their clients. Tanya also collaborates with judges, district attorneys, treatment providers, social workers, and other justice partners to develop and refine specialty court structures within San Mateo County. Tanya worked for the 9th Circuit Court of Appeals before opening her own private practice. She was a PDP attorney for 17 years, handling a large variety of criminal cases. In her private practice, she assisted San Mateo County in implementing various collaborative courts and programs, including homeless connect and drug courts. Tanya joined the management team in 2022.



**Jessica Agnich** is a Managing Attorney in the Adult Division of the Private Defender Program. She primarily provides training and support to PDP attorneys who handle felony cases. Jessica assigns serious felony cases and provides guidance to attorneys on complex legal issues, including case strategy and expert witness selection. She also plans and coordinates MCLE trainings to support ongoing attorney development. In addition, Jessica helps recruit, onboard, and train new attorneys. Jessica served as a public defender for seven years before transitioning to private criminal defense, where she practiced for eleven years. Her extensive experience focused on homicides, gang-related cases, and serious and violent felonies. Jessica joined the PDP in 2018 and became a member of the management team in 2024. Jessica is a Criminal Law Specialist certified by the State Bar of California Board of Legal Specialization.

## DIVISION HEADS



**Chloe Dillon** as Head of Criminal Immigration Defense for the PDP helps PDP attorneys navigate the intersection of criminal and immigration law and assists with case resolutions that minimize immigration penalties and avoid deportation proceedings for clients. In addition to case-specific consultations, Chloe conducts training sessions to equip attorneys with knowledge to advocate for noncitizen clients, and engages in community outreach throughout San Mateo County to educate and support immigrant communities. Chloe began her career in immigration law as an attorney advisor with the Los Angeles Immigration Court. She then practiced criminal law for 10 years as an assistant federal public defender and trial attorney, handling misdemeanors and felonies, as well as training attorneys on the interaction between criminal and immigration law. Chloe was then appointed as an Immigration Judge at the San Francisco Immigration Court, where she adjudicated a variety of immigration cases involving applications for lawful status and the immigration consequences of crimes. Chloe joined the PDP management team in September 2025.



**Indiana Albanes** as Head of Investigations at the PDP oversees a panel of over 40 criminal investigators and nine paralegals. Indiana assigns investigators and paralegals based on their level of experience and expertise. She provides training and support to PDP investigators and assists PDP attorneys with investigative strategy and guidance with their cases. Indiana joined the team as Head of Investigations in 2023. In her role, she plans provision of investigation and paralegal services for attorneys, as well as recruiting panel investigators. Prior to her start as division head, Indiana acquired 15 years of experience as an investigator where her work emphasized a client-centered approach and how life experiences and trauma shape outcomes and drive people to the criminal justice system. Indiana's approach aligns with the holistic defense model and focuses on providing meaningful prevention and intervention services.



**Harpreet Samra** as Head of Social Work leads a panel of 42 mental health professionals and five client advocates. Preet consults with attorneys, investigators, and paralegals to determine the best course of action for the social work team. She works closely with community partners, collaborates with Correctional Health Services, and liaises with community-based organizations to ensure clients receive comprehensive support. Preet created the PDP's social work division from the ground up by recruiting mental health professionals, developing a sustainable referral system for attorneys, and creating training tools for service providers. With over 18 years of experience in social work before joining the PDP in 2021, Preet has dedicated her career to improving holistic outcomes for individuals involved in the legal system. Her background in mental health advocacy and direct client services has made her a leader in bridging social work and legal defense.



**Cristina Fanuncio: Senior Accountant.** Tina received her Bachelor of Science degree with an emphasis in accounting from San Francisco State University. She has been a Senior Accountant for the last 19 years with an emphasis on non-profit industries. She joined the Private Defender Program in 2017. As the Senior Accountant, she provides monthly financial analyses and reports for our office and assists with the preparation of budgets and yearly audits.

## THE ADMINISTRATIVE TEAM



**Susanna Guevara** with over two decades of experience in the legal field, currently serves as the PDP's Executive Assistant and Office Manager. Susanna's journey with the organization began in 2001 as a Lawyer Referral Service (LRS) appointment secretary, and since then, she has taken on several key roles, including receptionist, billing coordinator, Assistant Office Manager, and Office Manager for the Private Defender Program. In her role, Susanna provides critical administrative support, oversees case assignments, and ensures the smooth operation of the office.



**Terri Cuellar** serves as the Administrative Assistant at the Office of the Juvenile and Civil Commitment Branch. A dedicated member of the PDP family for more than 45 years, she provides invaluable support to Assistant Chief Ron Rayes and the attorneys on the Juvenile, LPS, Contempt, and Probate panels. As the longest-serving employee of the PDP, Terri has worked alongside five Executive Directors and hundreds of attorneys and investigators. Throughout her remarkable tenure, she has been recognized for her unwavering patience, steady demeanor, and reliability—qualities that countless colleagues have come to admire and depend on.

For the Private Defender Program to operate, we require a dependable administrative team to coordinate the assignment of over 22,000 cases. Our administrative team, pictured here, includes a group of dedicated, hard-working women that keep things running smoothly each day. The work requires patience, organization, and a sense of humor. Their commitment to this Program is admirable and it is a pleasure to work alongside them.



**PDP Admin Team**

Front L to R: Marlen Marin & Idali Acosta  
Back L to R: Mabell Romero, Alicia Espinoza & Bianca Berumen

## 2026 SUMMER INTERNS

Building on the success of its inaugural summer intern program, the Private Defender Program welcomed another outstanding cohort in the summer of 2026. Eleven college students and two law students joined the program, providing valuable support to attorneys while gaining firsthand experience in criminal defense. College interns assisted with the PDP's ongoing data collection efforts and interviewed family members on the custody calendar, providing attorneys with critical information to support release arguments. Law students served as case assistants, conducting legal research, writing, and discovery review. Throughout the summer, interns regularly observed court proceedings, including jury trials, and several expressed an interest in returning to San Mateo County as future criminal defense attorneys.



2026 Summer Interns working at the PDP office

### Law Student Case Assistants

**Ryan Berkshire (McGeorge School of Law)** conducted legal research and writing for PDP attorneys and regularly observed court proceedings.

**Alexander Skikos (University of San Francisco School of Law)** performed legal research, reviewed extensive discovery in a serious felony case, and participated in court observations.

### College Student Interns

**Nataly Sanfiel (Claremont McKenna College)** assisted with data collection and custody calendar interviews that supported attorneys' bail arguments.

**Kathryn Evans (Tulane University)** contributed to custody interviews and research efforts before beginning law school in Virginia.

**Marea O'Connor (UC Berkeley)** conducted custody interviews, supported data collection, and shadowed panel attorneys in court.

**Annie Stent (Bowdoin College)** assisted Attorney Charlie Smith while observing pretrial conferences, motions, and a jury trial.

**Laya Karthik (University of Michigan)** conducted custody interviews, supported data collection, and observed criminal court proceedings.

**Zinnia Khan (Claremont McKenna College)** interviewed clients' family members and contributed to the PDP's research and data collection efforts.

**Tara Ozdemir (UC Irvine, returning intern)** served as an interview lead, coordinated custody interview teams, and has continued with the PDP as a case assistant on a homicide case.

**Sofia Cueva (UC Riverside, returning Intern)** co-led custody interview teams, prepared the custody calendar, and helped attorneys secure the release of numerous clients.

**Laura Wood Carracedo (UC Santa Cruz)** supported custody interviews, data collection, and bilingual client advocacy projects.

**Ana Goya (San Jose State University)** participated throughout the entire program, contributing consistently to custody interviews and data collection.

**Tiffany He (UCLA)** made significant contributions to the PDP's data collection efforts, creating resources that will continue to inform the program's work.

The Private Defender Program is grateful for the dedication, professionalism, and enthusiasm demonstrated by this exceptional group of interns. Their contributions strengthened the program's work on behalf of clients and reinforced the importance of investing in the next generation of criminal defense advocates.



2026 Intern Group with Managing Attorney Mitri Hanania



2026 Intern Group at SMCBA & PDP's Juneteenth Picnic

# THE ATTORNEYS OF THE PRIVATE DEFENDER PROGRAM

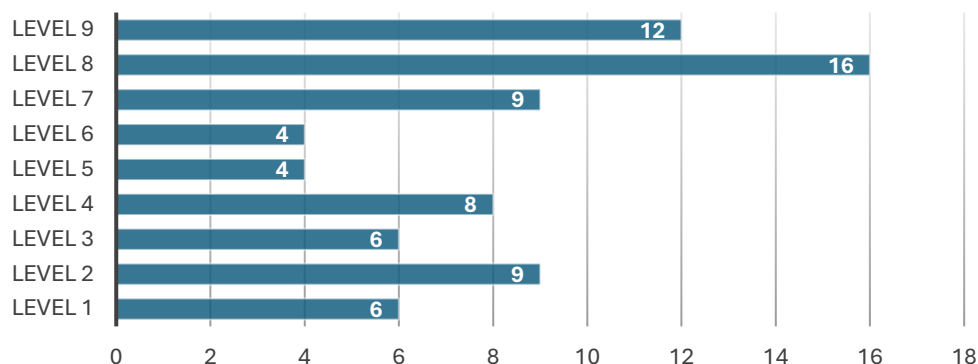
The Private Defender Program's 120 panel attorneys bring a broad range of experience to cases spanning misdemeanors, serious felonies, and capital matters. They also represent clients in juvenile justice, juvenile dependency, and civil commitment proceedings. Some attorneys concentrate on a single practice area, while others handle cases across several areas.

For misdemeanor and felony appointments, the PDP uses a nine-level case classification system, ranging from low-level misdemeanors to capital murder<sup>1</sup>. Management and staff consider an attorney's qualifications, experience, and availability when making assignments. The classification system also helps the Program assess workloads considering case complexity. The PDP has twelve panel attorneys who meet the stringent legal qualifications to serve as lead counsel in death penalty cases.<sup>2</sup>

The PDP maintains a separate panel for post-conviction representation, writs, appeals, and complex motion practice. These attorneys pursue relief through matters such as compassionate release petitions, resentencing requests based on changes in the law, and motions to vacate convictions under Penal Code section 1473.7. For eligible clients, a successful motion under section 1473.7 can provide relief from the immigration consequences of a conviction or sentence.

Panel attorneys also litigate emerging legal issues, including challenges to denials of mental health diversion and pretrial release. In the PDP case *In re Kowalczyk*, PDP attorney Marsanne Weese challenged the denial of pretrial release for her client and successfully argued the case before the California Supreme Court. She secured a favorable decision that clarified California law governing pretrial detention and the setting of bail in noncapital cases. The Court held that when bail is required, it generally must be set at an amount reasonably attainable for the defendant. The decision's broader impact is discussed on page 55.

## PDP Attorneys by Level Fiscal Year 2025-2026



<sup>1</sup>The nine levels are: (1) low-level misdemeanors; (2) high-level misdemeanors; (3) low-level felonies; (4) mid-level felonies; (5) high-level felonies; (6) felony sex cases; (7) felonies carrying indeterminate life terms; (8) felony homicide and life-without-parole cases; and (9) capital murder cases. See Appendix 6 for additional detail.

<sup>2</sup> The level system excludes post-conviction and writing and research attorneys who do not do trial work. Those attorneys are given assignments commensurate with their experience by management.

## ATTORNEY SUPPORT SERVICES

The PDP provides attorneys with access to paralegals, expert consultants and witnesses, and attorneys with specialized experience in writs and complex motion practice. These resources assist attorneys in preparing and litigating cases and help ensure that clients receive thorough and informed representation. Other support services, including investigators, social workers, client advocates, and the Crim-Immigration Unit, are discussed elsewhere in this report.

### Paralegal Services

PDP attorneys may request paralegal assistance in any assigned case. Paralegals support attorneys with case preparation, legal research, document review, and the organization of discovery and other case materials. They may also assist with other time-intensive tasks that are necessary to prepare a case for negotiation, litigation, or trial. This support is particularly valuable in cases involving substantial discovery, extensive records, or complex factual and legal issues. By assigning appropriate work to paralegals, attorneys can devote more time to client communication, case strategy, and courtroom advocacy. Paralegal services help attorneys manage demanding caseloads while maintaining careful and consistent case preparation.

### Expert Witness Services

Expert witnesses are increasingly important as criminal cases involve more scientific, technical, and medical evidence. PDP attorneys are encouraged to consult with experts when specialized knowledge is necessary. Experts may work with attorneys, investigators, and social workers as consultants or witnesses, depending on the needs of the case. The experts used by PDP attorneys include DNA analysts, toxicologists, forensic pathologists, ballistics experts, psychologists, and professionals in other specialized fields. The PDP dedicates a significant portion of its annual budget to expert services so that attorneys have access to appropriate assistance when it is needed. This investment helps ensure that complex evidence is carefully reviewed and that defense attorneys are prepared to challenge, explain, or present expert evidence effectively.

### Writs and Motion Support

The PDP has a group of attorneys with substantial experience in appellate litigation, writ proceedings, and complex motion practice. Several panel attorneys have represented clients before the California Courts of Appeal and the California Supreme Court. Other attorneys have developed expertise in specialized areas such as the Racial Justice Act, the California Electronic Communications Privacy Act, bail litigation, and other evolving areas of criminal law. When a case presents a complex legal issue, the assigned attorney may request the assignment of an attorney with relevant experience to assist with research, briefing, strategy, or litigation. This structure allows attorneys to draw on specialized knowledge while continuing to manage the broader representation of the client. It also promotes consistency and quality in cases that involve significant constitutional, statutory, or procedural questions.



Managing Attorney Jessica Agnich with Attorneys Adriana Eberle & Francoise Espinoza

## NEW PRIVATE DEFENDER PROGRAM ATTORNEYS

At a time when criminal defense programs across the country face attorney shortages, the Private Defender Program welcomed 12 new attorneys to its panel this past fiscal year. They bring varied professional backgrounds and levels of experience, strengthening the Program in different ways. Some bring years of practice and expertise; others contribute a new perspective. Together, they bring a renewed capacity to manage caseloads and provide skilled representation to clients.

**Ahmad Askar** is a newly licensed attorney who established his own law practice after a career at a medical technology company. During law school, Ahmad externed with the Center for Integrity in Forensic Sciences, where he assisted with post-conviction case review and appellate research. Ahmad is fluent in Arabic.

**Ryan Brogan** joined the panel after five years as a trial attorney with the Santa Clara County and Solano County District Attorney's Offices. He handled both misdemeanor and felony matters. Ryan recently transitioned to criminal defense and brings significant litigation experience to his practice. Ryan is fluent in French.

**William Costelli** is a newly admitted attorney who was born and raised in San Mateo County. He earned his law degree from UC Law San Francisco and completed internships and a post-bar clerkship with the Santa Clara County Public Defender's Office. He is fluent in Greek.

**Kelly Glatthorn** earned her law degree from the University of Hawaii School of Law after attending Virginia Tech, where she played Division I lacrosse. During law school, she volunteered with the Santa Clara County Alternate Defender Office, working on post-conviction matters. Prior to joining the panel, Kelly also handled misdemeanors and assisted with felony cases as an associate at a private criminal defense firm.

**Gary Goodman** recently retired from the Santa Clara County Public Defender's Office after thirty-five years of service as a Deputy Public Defender. At the Public Defender's Office, Gary served in almost every role in the office, including as a Supervising Deputy Public Defender responsible for training and managing attorneys. Over the course of his career, Gary represented thousands of clients and tried a wide range of serious criminal cases.

**Ahmed Hasan** received his law degree from Emory University School of Law. During law school, he interned with the Federal Defender Program in Georgia and the DeKalb County Public Defender's Office. After graduation, Ahmed participated in the San Francisco Public Defender's volunteer program. He then began representing clients in appointed criminal cases in San Francisco before joining the PDP. Ahmed is fluent in Hindi.

**Bobby Lau** has maintained a law practice in Santa Clara County for sixteen years. Over the course of his career, he has handled a wide range of matters and developed extensive criminal law experience. Bobby has a longstanding commitment to indigent defense work and brings substantial litigation experience to the panel.

**Kassandra Mariscal** began her career in criminal defense taking private cases at a defense firm. She then joined the Santa Clara County Public Defender's Office, where she represented thousands of misdemeanor clients. Kassandra has been an attorney for three years and has extensive experience

litigating cases in court. Kassandra is fluent in Spanish.

**Hayley Slater** is a newly admitted attorney and a graduate of UC Santa Barbara and UC Law San Francisco, where she graduated with high honors. During law school and as a post-bar clerk, she worked with the Santa Clara County Public Defender's Office, assisting with felony jury trials and later independently managing misdemeanor calendars.

**Kayla Sparks** has practiced criminal defense in private practice for the past three years. Her work has included felony representation in multiple Bay Area counties and the Central Valley. During that time, she conducted preliminary hearings, argued motions, and second-chaired multiple jury trials.

**Hana Steinbronn** attended law school with the goal of becoming a public defender. During law school, she completed multiple internships and positions at public defender offices. After graduation, Hana joined the Santa Clara County Public Defender's Office, where she represented thousands of clients. She joined PDP this year to continue her commitment to indigent criminal defense.

**George Tran** brings more than thirteen years of experience from positions with the Santa Clara County District Attorney's Office, Sonoma County District Attorney's Office, and the United States Department of Justice. Over the course of his career, he has handled thousands of cases and developed extensive jury trial experience. George is now in private practice, where he focuses primarily on white-collar criminal defense matters. He joined the panel this year to expand his practice and serve PDP clients. George is fluent in Vietnamese.

During the last fiscal year, the PDP also added the following attorneys to our post-conviction panel: Charles Huang, Ellen Ivens-Duran, Helen Lawrence, Joanna Sheridan, Richard Such and Sharine Xuan.



(L to R): Attorneys Ahmad Askar, Will Costelli, Gray Goodman, Hayley Slater, Kassandra Mariscal, Kayla Sparks

## NEW PDP ATTORNEY TRAINING PROGRAM

Over the past two years, the PDP has added several attorneys who were in their first year of legal practice. To support them in their new practices, the PDP developed a series of trainings to provide a strong foundation in misdemeanor defense and the practical skills needed to represent clients effectively. The PDP continues to offer additional training and to respond to the attorneys' needs as they manage their cases and develop their practices.

### Foundational Training for New Attorneys

Our new attorneys received four days of in-house MCLE training for attorneys entering misdemeanor practice. The program covered the legal, practical, and ethical issues that commonly arise when attorneys begin handling appointed criminal cases.

| <b>New PDP Attorney Training Topics</b><br><i>Providing over 12 hours of MCLE</i> |
|-----------------------------------------------------------------------------------|
| Developing a Case Theory                                                          |
| Identifying & Addressing Immigration Issues in Criminal Defense                   |
| Specialty Courts: Criteria & Procedures                                           |
| Discovery in Misdemeanor Defense                                                  |
| Working with Investigators                                                        |
| Motions Practice in Misdemeanor Practice                                          |
| Case Settlement & Plea Bargain Negotiations                                       |
| Collaborating with Social Workers & Client Advocates                              |
| Bail law & Advocacy: Strategies for Securing Client Release                       |

### Continuing MCLE Training

The PDP offered supplemental MCLE trainings throughout the next few months directly addressing topics our attorneys were seeing in their misdemeanor practice.

| <b>Specific Topics Covered</b><br><i>Providing 5.5 hours of MCLE</i> |
|----------------------------------------------------------------------|
| Jury Trial Rules & Procedure                                         |
| <i>Serna</i> Speedy Trial Motions                                    |
| The DMV & License Suspensions                                        |

## Informal and Practice-Based Training

The PDP also offered informal trainings that gave the new attorneys an opportunity to discuss cases and work through practical issues together. Our new attorneys attended a two-part **DUI Trial Skills Training** where they discussed issue spotting in DUI cases and how to prepare a DUI case for trial.

Our attorneys also attended an **Issue Spotting and Case Strategy Clinic** led by Carlie Ware Horne. Carlie is a lecturer and clinical supervising attorney at Stanford Law School. Using a mock misdemeanor case, the attorneys participated in an issue-spotting clinic focused on how to approach a newly assigned case. They worked together to identify potential legal and factual issues, discuss initial investigative steps, and consider how those issues could shape the defense strategy.

## Intensive Trial Advocacy Training

The PDP's new attorneys are also attending the **Stanford Trial Advocacy and New Defender Uplift Program (STANDUP)**. This four-day intensive program teaches trial and litigation skills to new lawyers. Each day begins with instruction on a trial skill or topic. In the afternoon, the attorneys practice that skill in a mock setting and receive feedback.

| Topics Covered at STANDUP |
|---------------------------|
| Theory of the Case        |
| Jury Selection            |
| Opening Statement         |
| Cross-Examination         |
| Admitting Exhibits        |
| Impeachment               |
| Refreshing Recollection   |
| Closing Argument          |
| Attorney Wellness         |



New PDP attorneys attending Stanford Law's STANDUP in Palo Alto  
L to R: Shawntay Jordan, Ahmed Hasan, Jonathan Dombro, Cyrus Corman-Gill, Hayley Slater, Will Costelli, Ahmad Askar, Kelly Glatthorn & Ashley Madigan

## Ongoing Development

The attorneys who joined the PDP early in their careers are now building caseloads, gaining courtroom experience, and becoming active members of the panel. The training program has helped provide them with a strong foundation while continuing to support their development as criminal defense attorneys.

## JUVENILE DIVISION UPDATE

Under the leadership of Ron Rayes, the PDP's Juvenile Division continues to expand its advocacy for young clients, including work that extends beyond the resolution of their cases. Early access to counsel, individualized release planning, and continued support during placement and reentry are central to this work. Ron enjoys a close working relationship with each of the attorneys working in this area of law.

### Early Access to Counsel

The PDP assigns a youth defender before every juvenile arraignment. In fiscal year 2025–2026, defenders met with their clients before arraignment **99.4% of the time**, giving them an opportunity to begin building trust and preparing for the hearing.

The Program also maintains a panel of specially trained attorneys available around the clock to consult with youth age 17 and younger before custodial interrogation, as required by Welfare and Institutions Code section 625.6. During the fiscal year, youth who received these consultations invoked their Miranda rights 98% of the time.



**PDP Team at The Youth Services Center**

L to R: Attorneys Adriana Eberle, David Avila, Assistant Chief of Juvenile & Civil Commitment Branch Ron Rayes, Admin Assistant Terri Cuellar, Attorneys Amanda Fischer & Lindsey Dazel & Holistic Mitigation Specialist Lindsay Page

### Support During Secure Youth Treatment Facility Commitments

Youth committed to a Secure Youth Treatment Facility are assigned a Client Advocate as part of their defense team. Advocates help develop Individual Rehabilitation Plans, meet with the youth at least monthly, participate in multidisciplinary meetings and court reviews, and coordinate with service providers. This ongoing work helps attorneys advocate for appropriate less restrictive programs and a successful transition back to the community.

### POST-DISPOSITION ADVOCACY YOUTH IN SYFT

Courts can reduce SYFT commitment time by up to 6 months at every 6-Month Review for demonstrated rehabilitation progress

During Fiscal year 25-26  
9 youth were eligible for a 6-Month Review

Through the advocacy of Defenders and Client Advocates, 9 youth reduced their SYTF commitments by a combined total of 55 months

## Education Advocacy

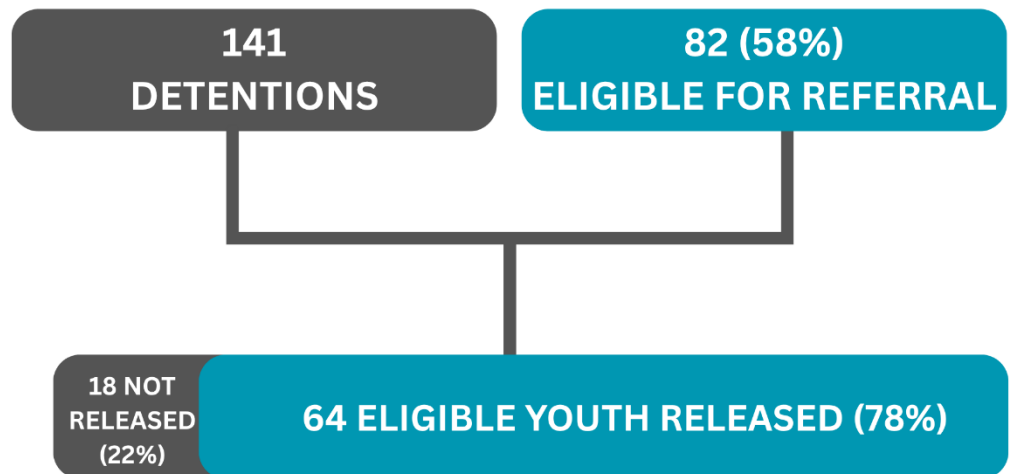
The PDP works with Stanford Law School's Youth and Education Law Program (YELP) to address clients' school needs. Student advocates and PDP staff review transcripts, explore partial credits and graduation options, assist with school reentry, and identify needs for special education services. When student advocates are unavailable or a matter needs additional follow-up, PDP social workers provide support under the guidance of YELP supervising attorney Abigail Trillin. During fiscal year 2025–2026, 21 youth were referred to YELP's pro bono clinic for education representation.

## Individualized Support and Release Planning

After seeing the value of **Lindsay Page**'s work as Youth Advocate, the PDP hired her as a full-time Holistic and Mitigation Specialist in March 2026. She supports youth in juvenile proceedings and clients in CARE Court and other matters. Lindsay brings more than 20 years of defense investigation experience, including work developing social histories and mitigation reports in serious criminal cases.



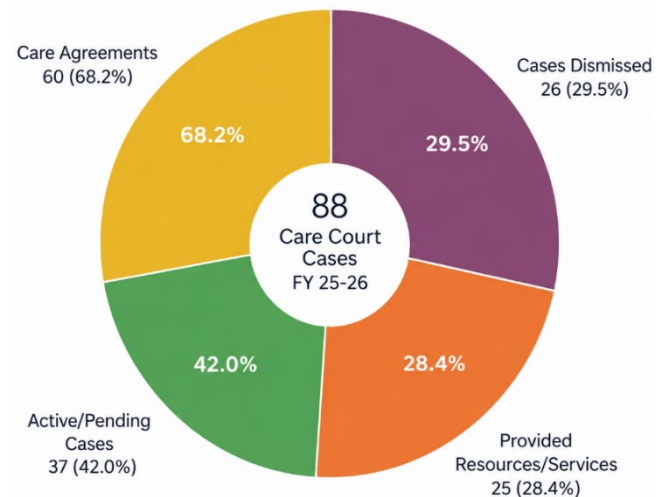
PDP Holistic Mitigation Specialist  
Lindsay Page



For detained youth, Lindsay gathers information about family circumstances, education, health, treatment needs, and available community support. She works with clients, families, attorneys, and service providers to develop practical alternatives to detention. During fiscal year 2025–2026, she also developed safety and release plans, connected youth with community organizations, and helped coordinate school reentry.

## Representation in CARE Court

Panel attorneys represent respondents in CARE Court, which connects eligible adults with mental health treatment and other services through a civil court process. Lindsay works with counsel and service providers to identify clients' needs, to support access to services, and to assist with transitions to stable housing. In March 2026, San Mateo County was recognized by the Governor as one of the state's CARE Court "Champions."



## PDP's 7th Annual Holiday Party at the Youth Services Center (YSC)

Every year, the youth defenders fundraise to give the youth in the Youth Services Center-Juvenile Hall a little holiday cheer. For the seventh year in a row, we were able to host a holiday lunch for our young clients and the staff at YSC. The PDP attorneys, investigators, and staff sponsored the party by donating money and time to make this event a success. The party gave attorneys the opportunity to spend time with our incarcerated clients outside the formalities of the courtroom and share a meal with them.

Due to generous donations from attorneys, PDP management, and staff, we were also able to raise enough money to purchase gift cards for all of the youth at YSC. We were all touched by the gratitude the youth showed us for planning this party for them.



**Hosting the Holiday Party at the YSC**

L to R: Head of Social Work, Harpreet Samra, Assistant Chief of Juvenile & Civil Commitment Branch, Ron Rayes, Legal Project Specialist Cristal Ortiz-Valencia, Client Advocates Sneha Jindal and Vero Caverogusquiza, Attorney Kevin Nowack, Client Advocate Abranette Barry, Attorneys Shelley Landon, Gerritt Rutgers, & Kathy Yolken.

## FLY Luncheon

The PDP had a strong presence at the Annual FLY luncheon at which we were able to show support for several youth who were working with our client advocates. All of the supported youth were present at the luncheon and proudly showed off their work, including some impressive artwork.



**Attending FLY Luncheon**

Front L to R: PDP Client Advocates: Sneha Jindal, Abranette Barry & Maribella Munoz-Jimenez. Back L to R: Client Advocate Erin Hamill, Chief Defender Lisa Maguire, Head of Social Work Harpreet Samra, Attorney Adriana Eberle & Client Advocate Vero Caverogusquiza



Client Advocate Vero Caverogusquiza at the FLY Luncheon with her client & his award-winning artwork

## INVESTIGATIONS UNIT UPDATE

Investigators are an essential part of the PDP's work, taking the time to understand each client and the circumstances surrounding their case. They identify and interview witnesses, gather information, and investigate questions that may not be answered through the existing discovery. Building trust with clients and witnesses is an important part of this work. Investigators work closely with attorneys throughout the case, sharing what they learn, addressing new questions as they arise, and helping develop a fuller understanding of the facts and a client's history. Their work helps ensure that the client's story is heard and that important information is not overlooked.

Investigators also regularly collaborate and share their expertise, whether by conducting interviews in another language, reviewing cell phone data, or assisting with other specialized investigative work. The diversity of experience across the panel allows the PDP to tailor investigative support to each client and the needs of their case.

Investigators on the PDP Investigator panel help build the foundation of a case through the investigative process, working diligently to provide comprehensive services throughout the entirety of a case. They review and analyze often dense reports, witness statements and digital discovery, searching for exculpatory evidence and information that corroborates client and witness statements. They engage with a myriad of subjects pertaining to their client's defense, including investigating a witness' background using social media, court searching, collecting client records and tracking down and interviewing witnesses. Investigators provide court support and testimony when needed.



Attending a PDP social event

L to R: Head of Investigations, Indiana Albanes, Investigators Luis Villasenor, Cliff Jorgensen, Scott Williams, & Doug Eckles & Legal Project Specialist Omar Barraza Jr.

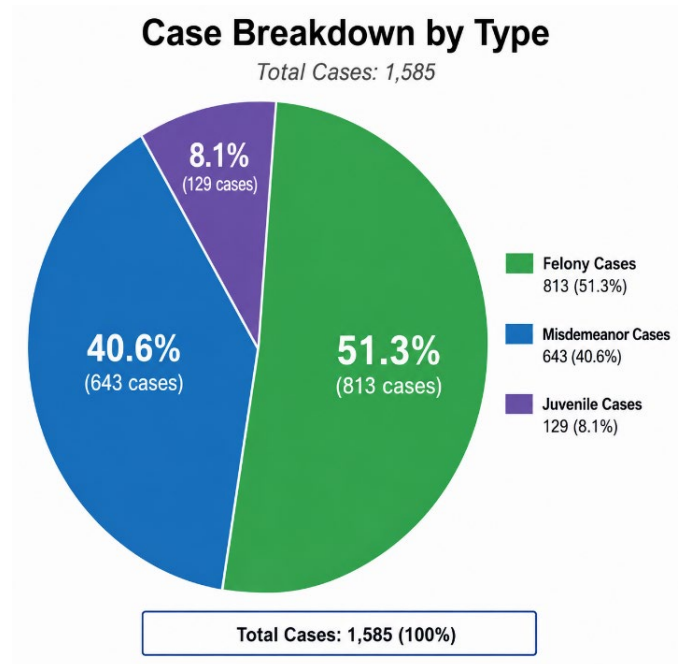
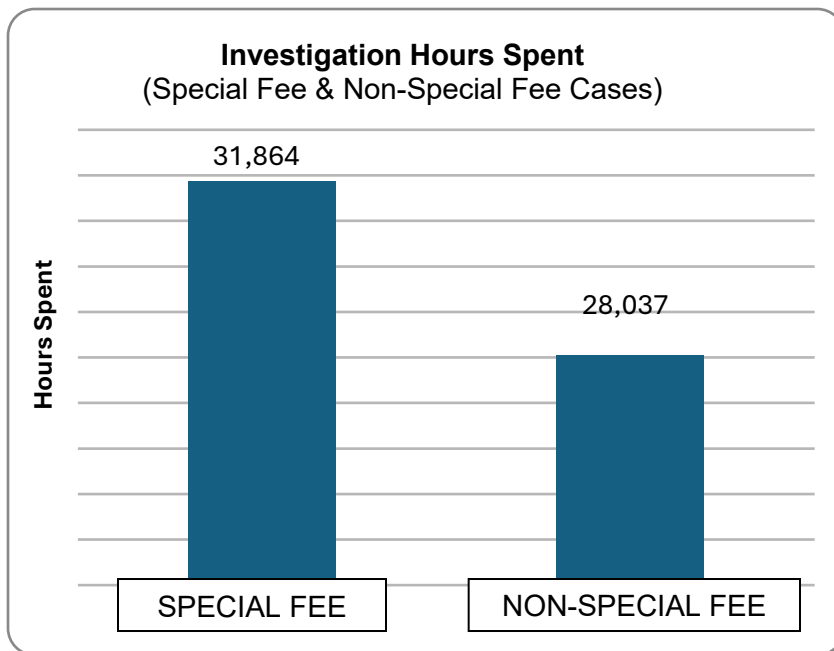
Investigators on the panel have a wealth of expertise often shared through their collaboration on cases. Whether it be an investigator assisting another by interviewing a witness in their shared native language or lending their expertise in cell phone data review and technology, teamwork is encouraged and valued by the PDP. Mitigation investigation and interviewing are also skills possessed by investigators who have years of experience and training eliciting sensitive information from social history witnesses. The importance of having a diverse panel of investigators is essential to providing a holistic, comprehensive, and effective defense. This fiscal year the PDP welcomed a new investigator to our experienced panel. **Joseph Perez** brings experience as a former police officer as well as experience as a private criminal investigator. We look forward to applying his experience to the PDP clients' cases.

This year, responsibility for the office's discovery collection and distribution transitioned to the Investigations Unit, expanding the unit's role in supporting panel attorneys and investigators. As part of this transition, the discovery process was reviewed to identify opportunities to improve organization,

accessibility, and the long-term management of digital evidence. The focus was on reducing delays in getting discovery to attorneys and creating a more centralized and organized system that makes information easier to locate and access.

To support these efforts and address the increasing volume and complexity of digital evidence, the office upgraded to Axon Justice Premier. The enhanced platform provides unlimited evidence storage and additional tools for reviewing and managing digital evidence, giving investigators, paralegals, and attorneys more effective ways to access and review case materials. Working with the office's Legal Systems Data Analyst, the Investigations Unit also developed an automated process for managing initial discovery and ensuring its accessibility and preservation for panel attorneys while reducing the administrative work required to distribute it.

The Investigations Unit will continue to evaluate our processes to ensure they meet the evolving needs of the office and pursue thoughtful, practical ways to strengthen the support we provide to our panel.



## SOCIAL WORKER UNIT UPDATE

Social workers continue to play an integral role in holistic defense at the PDP. The social work panel is now comprised of 42 mental health professionals. In addition, the social work division has grown to include 5 client advocates who are full-time employees of the PDP (please refer to the Partners for Justice Client Advocates section for an in-depth breakdown of their work).

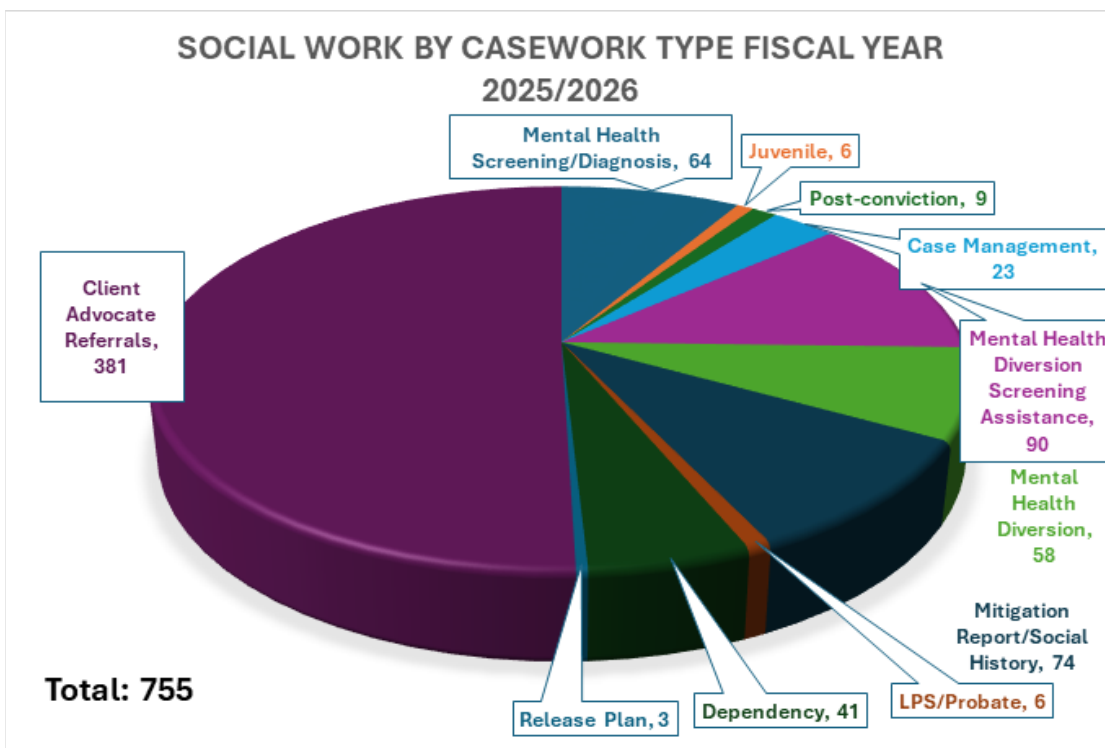


Attending a PDP social event

L to R: Paralegal Daniela Guillen, Client Advocates Olivia Eknoian(FY26-27) & Sneha Jindal, Head of Social Work Harpreet Samra, Social Workers Jennifer Cust & Lauren Tarver, & Camille Branch and Investigator Jose Mendoza

With the assistance of client advocates, who have taken over much of the case management work, the social workers continue to focus on mental health related mitigation tasks. As demonstrated in the chart below, the majority of social work tasks continue to be centered around mental health diversion, mitigation reports, and diagnoses.

In the fiscal year 2024-2025, there were 428 social work requests and 229 client advocate requests, for a combined total of 657. This year, due to an additional advocate, as well as an increase in advocate requests, there were 374 social work requests and 381 client advocate requests, for a combined total of 755.



As always, social workers do an in-depth review of a request and assist attorneys in trying to get the best outcome for a client. For example, if a case requires an assessment of whether a client is a good fit for mental health diversion, a social worker will review the diagnosis and records, determine if there is a nexus between the offense and mental illness and provide a thorough report and treatment plan to the attorney. Many times, social workers are asked to respond to an opposition to their report. The work that goes into a case is extensive, but the hours spent often lead to great results.

Below is a story of just how much work can go into seeking a mental health diversion grant.

*Jacob W. was charged with multiple violations of the Tax Code. His attorney, Mara Feiger, requested the assistance of panel social worker Andrew Exstein, LCSW, who concluded that Jacob's Major Depressive Disorder was a contributing cause to the offense.*

*At the mental health diversion suitability hearing, the DA objected. They made the arguments they had been making for months about MHD violating the California Constitution and California victims' rights to restitution, especially when the defendant may not be able to pay restitution before the completion of diversion.*

*After the hearing, the judge found Mara's client eligible, suitable, and not a risk to public safety. However, she nevertheless denied the mental health diversion application. The judge found that the large amount of restitution and limited time to make payments precluded Mara's client, and that she did not want to grant MHD because it "would be putting the interests of the Defendant over that of the victim."*

*Mara then requested the assistance of panel attorney Maggie Staines to assist in a writ. Maggie wrote a beautiful brief for Mara, and it convinced the Court of Appeal that MHD should have been granted.*

*The Court pointed out that **"a defendant's inability to pay restitution due to indigence or mental disorder shall not be grounds for denial of diversion."** They found that the judge committed error when she denied the petition on this basis, and when she did not hold a restitution hearing before making such an order. The Court found that **"nothing in the statute...suggests that a court may deny diversion based on its concern that a diverted defendant will be unable to pay full restitution by the end of the diversionary period."***

*The Court of Appeal then took the unusual step of ordering the court to vacate its order denying mental health diversion. Jacob was then admitted to mental health diversion. What an incredible win for all, but especially Jacob, who can now receive treatment in the community and complete his diversion program.*

*As Mara reflected on Andrew's work, she said, "He was dogged, professional, punctilious, and never gave up. Just spectacular."*

## NEW PDP SOCIAL WORKERS

**Katie Herman, LCSW** has been working with the PDP since December 2025. She received her BA in English from the University of San Diego and her MSW from Columbia University School of Social Work. She worked in New York City for 8 years as a social worker at the Center for Alternative Sentencing and Employment Services (CASES) for the city's first felony alternative to incarceration program for adults with serious mental illnesses. Katie moved home to San Francisco in January of 2020 and worked as a Senior Policy Analyst at the Council of State Governments Justice Center, where she worked at the intersection of criminal justice, behavioral health, and homelessness in California and nationally until May of 2025. She specializes in working with people with serious mental illness, violence risk assessment, and risk-need-responsivity.

**Angelina Gianfermo, ASW, MSW** is a Master's-level social worker with more than 18 years of experience in behavioral health and recovery services. She has worked in community-based programs, treatment settings, correctional health, and specialty courts, providing substance use services, case management, crisis intervention, and client-centered support. Angelina holds a Master of Social Work and a Bachelor of Arts in Sociology and is committed to providing compassionate, professional services to individuals and families, including those involved in the justice system.

**Lisa Cresson, LMFT, ATR** is a Licensed Marriage and Family Therapist with nearly 20 years of experience serving individuals with serious mental illness, co-occurring substance use disorders, and complex behavioral health needs across county-operated and county-contracted systems of care. Throughout her career, she has worked in community mental health, court-mandated treatment, higher education, and private practice, and currently serves as a Licensed Team Leader and Clinical Supervisor for a Full Service Partnership program in San Mateo County. In addition to providing psychotherapy and clinical supervision, Lisa has developed and delivered continuing education programs for behavioral health professionals and taught psychology as an adjunct faculty member with the San Mateo County Community College District.

**Julia Taylor, MSW** is a Fresno / Visalia, CA based social worker, who holds a BSW and MSW from Briar Cliff College and the University of Nebraska with a specialization in marginalization and cultural sensitivity needs of people of color. Julia has professional experience in holistic defense social work, which has included an array of mitigation work such as capital cases and mental health diversion. Julia has practiced social work for 30+ years in the areas of mental health and substance use treatment in prison settings, mental health triage and crisis management, family court/child custody litigation, Child Protective Services and family reunification, as well as social work in juvenile dependency cases. Julia has been with the PDP since December 2025. Julia presently works full time in Family Court Services as a Family Court Mediator, with Kings Superior Court, in Hanford. Julia is also a contracted social worker with the Tulare County Public Defender's Office.

**Alisa Jacobo Mortezaie, LCSW**, is a mental health therapist and Licensed Clinical Social Worker based in Oakland, CA. As a social worker for over 17 years, Alisa has worked in a variety of settings both internationally and here in the US, including- community mental health, disaster relief and recovery, social justice programming and community development, and social work education. Alisa is passionate about working with adult children of immigrants and refugees. In her free time you'll find her exploring the Bay Area food scene, hiking, swimming or playing pickleball.

**Carlin Eng, MSW**, is a forensic social worker who recently joined the PDP in July 2026 after graduating from San Jose State University with a Masters in Social Work. He also previously earned a Masters in Public Health from Loma Linda University and worked with substance use disorder

patients where he developed a passion for working with marginalized populations. With a lifelong interest in behavioral science, Carlin hopes to assist those whose lives have been derailed by mental health challenges and support them in developing resilience and effectively achieving their life goals. He is also personally motivated by his own mental health challenges and believes that improving mental health is key to building a stronger community and society.

**Camille Branch, MSW** received her Master of Social Work from San Jose State. Her background has been mainly child welfare in San Mateo County. Camille enjoys working with children and families and advocating for their safety and wellbeing. She also enjoys her time working with the PDP and continuing to support families in whatever way possible. Camille is excited to expand her experience and work with vulnerable populations in other areas of the social work field.

**Lauren Tarver, ASW** has been working with the PDP since June of 2026. Her background includes both domestic and international work with vulnerable people including children, young people, families, Indigenous communities, and refugees. Lauren has worked primarily in education and youth justice systems, in roles ranging from public servant in government to community legal services. Lauren has always been driven by a commitment to support and advocate for the most vulnerable populations within the mental health sector. Lauren is motivated to support clients by learning and understanding each person's lived experience while helping them find effective treatment pathways to address underlying needs and barriers.

**Mariana Torres, LCSW**, has been with the PDP since June 2026 and brings more than 25 years of experience working across Alameda and Contra Costa counties, as well as statewide. She holds a bachelor's degree in Human Development from UC Davis and an MSW from Cal State East Bay, and is currently pursuing a Doctor of Behavioral Health at Arizona State University. With more than 15 years of leadership experience, Mariana has worked across clinical practice, government, and philanthropy, specializing in public systems, trauma, mental health, unhealthy substance use, correctional psychiatry, and court processes. She is excited to serve as a forensic social worker, where she can advocate for individuals and help ensure systems of care function as intended.

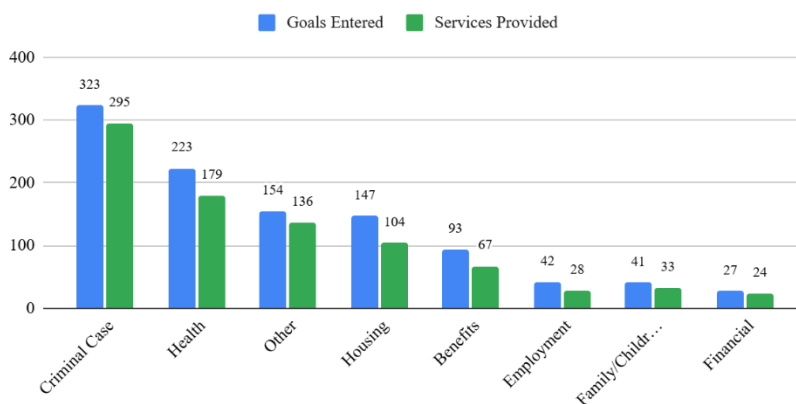
## PARTNERS FOR JUSTICE CLIENT ADVOCATES

The PDP continues to strengthen its commitment to holistic defense through a continued partnership with Partners for Justice (PFJ), a nonprofit organization dedicated to transforming indigent defense by addressing the underlying drivers of arrest, improving case outcomes, and helping clients achieve greater stability in their lives.

Our Client Advocate team has grown to five full-time, dedicated Advocates who provide direct client support. Partners for Justice recruited two new Advocates, Sneha Jindal and Maribella Munoz-Jimenez, in July 2025 to support our office. The new team of Advocates received extensive training and began taking cases in late July 2025.

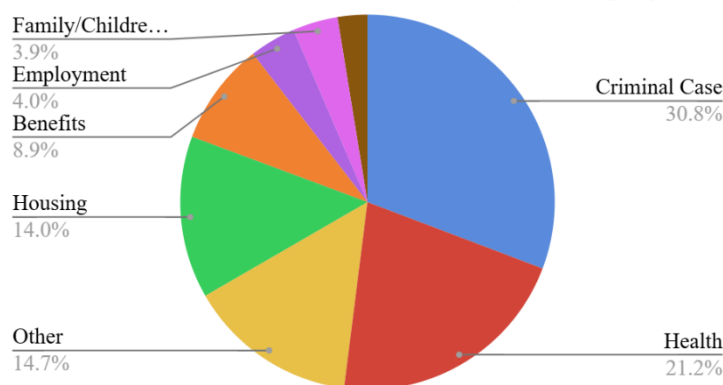
The Advocates work on cases in all areas of the PDP's practice, including adult criminal, juvenile, dependency, immigration-related, and guardianship cases. This fiscal year, the Advocates opened 393 cases, about 155 more cases than the last fiscal year. They entered 1,050 service goals across all case categories, of which 866 services were actively provided, an overall fulfillment rate of approximately 82%, which is a 10% increase from last year. Criminal case goals, including mitigation support, represented the largest share of goals entered (323, or 31%), followed by health goals such as substance use and mental health treatment (223, or 21%), other goals (154, or 15%), and housing goals such as shelter navigation (147, or 14%). Criminal case support also had the highest fulfillment percentage, with a rate of 91%, followed by financial support, with a fulfillment of 88%. The Advocates also work with various civil legal providers and have referred their clients to over 10 civil legal organizations over the past year to aid with matters involving immigration, family defense, civil, education, etc.

Service Goals Entered and Provided by Category



Total Goals Entered: 1,050 | Total Services Provided: 866 | Overall Fulfillment Rate: 82%

Share of Service Goals Entered by Category



The Advocates also work closely with juvenile clients, mostly with those who are in the Secure Youth Track Facility (SYTF). Over the past fiscal year, the Advocates worked with all of the SYTF clients and a few non-SYTF juvenile clients. Some highlights from their work include multiple SYTF clients being granted community passes to attend college classes, visit college campuses, engage in community-building, and gather vital documents. Advocates have also worked to bring community resources – such as Berkeley Underground Scholars, Project Rebound, and Sharp Circle – into the juvenile hall to provide youth with additional support. In May 2026, we got to celebrate the first SYTF client being released from custody after three and a half years of SYTF confinement!



**Attending PFJ Conference**

L to R: Client Advocate Vero Caveroguesquiza, Chief Defender Lisa Maguire, Client Advocates Sneha Jindal, Abranette Barry, Erin Hamill & Maribella Munoz-Jimenez, Head of Social Work Harpreet Samra

## INTRODUCTION TO THE FY 2025-2026 ADVOCATES & THEIR WORK



**Abranette Barry** graduated from Stanford University in 2024 with a B.S. degree in Computer Science. While at Stanford, Abranette co-founded the Black Action Contingent (B.A.C) to create more spaces on campus for students to engage with social causes and activism. Through her work at the B.A.C she helped organize multiple direct action and political education campaigns around campus. Abranette's experience with community organizing has directly shaped the work she does as a Client Advocate. Outside of work, Abranette loves to read, listen to music, knit, and sew her own clothes.

*I was assigned to a case by an attorney with the task of providing mitigation and case management support. The client was a young mother whose 3 year-old daughter was removed from her care by CPS after she was charged with felony child abuse. The attorney believed that the client's race, African American, played a critical role in why the client was charged and believed the client's compelling life circumstances and current efforts could mitigate the charge she was receiving. Through my work with the client, I helped her navigate and meet CPS case requirements, assisted with the retrieval of her car after it was towed, and helped the client with housing assistance and placement. Through months of working with the client, I was able to compile a comprehensive mitigation report highlighting the client's life circumstances and all of the work she had put in to regain custody of her daughter. Through the client's hard work and the defense team's effort, the court reduced the client's felony charges to a misdemeanor and placed her on misdemeanor diversion. The judge went so far as to admit on the record that the client's race did, in fact, play a critical role in the initial charges. Currently, the client is on track to meet diversion requirements and regain custody of her daughter.*



**Vero Caverogusquiza** graduated from University of California, Santa Barbara in 2024 with a degree in Political Science, minor in Earth Science, and a certificate as an Intersectional Justice Facilitator. While at UCSB, Vero advocated for students at the local, state, and national level, and is happy to be directly advocating for people with the PDP. Vero is a Spanish heritage speaker whose caseload is usually at least 1/4 monolingual Spanish speakers. In her free time, Vero likes to watch the San Jose Sharks and the Golden State Valkyries.

*I began working with one of the juveniles in the Secure Youth Track Facility program in March 2025. At the time, only one youth in SYTF had gotten a sentence reduction, which had only occurred the month before. While working with this youth and his attorney to provide regular reports on program completion and engagement, this youth proceeded to get the maximum sentence reduction three reviews in a row, and became the first youth ever released from SYTF in San Mateo County. This youth was also permitted to live out of state upon release, and is now finishing his Bachelor's degree while living with his partner, and working with his deep network of service providers that we prepared for him.*



**Erin Hamill** graduated from the University of California, Berkeley in 2023 with a degree in Political Science and minors in Human Rights and Race and the Law. She previously worked as a Justice Corps Student Member and at the San Francisco Superior Court Access to Justice Center. At Berkeley, Erin served as the Director of the Grievance Division of the Student Advocate's office, helping students advocate for

their rights on campus in areas such as housing, disability accommodations, and sexual violence survivor support. Erin is fluent in Spanish and has assisted many of the PDP's noncitizen clients. Her dedicated work received a Commendation signed by the San Mateo County Board of Supervisors. Erin will be attending UC Law San Francisco in August 2026 to begin her law school journey.



Head of Social Work Harpreet Samra and Chief Defender Lisa Maguire celebrating Erin

*I assisted a client when she found herself in need of emergency housing while she was halfway through her Mental Health Diversion treatment plan. She was offered a bed in a shelter and did not claim the bed due to her disability. Because she denied the bed, she was barred from the shelters for 14 days and was forced to live in her car. During this time, her mental health was spiraling; she was having trouble accessing her medication and sticking to her treatment plan. I assisted by speaking with the county's ADA Coordinator. It didn't feel right to me that, because of the client's needs, she was denied services. The ADA coordinator assisted the client in getting referred to a non-congregate shelter environment due to her special needs, and the client has been living in the Navigation Center ever since. Her mental health has restabilized, and she is back on track to graduate from Mental Health Diversion.*



**Maribella Munoz-Jimenez** graduated from Claremont McKenna College in 2025 with a B.A. in Public Policy and Philosophy honors. She interned at After Innocence and Access to Justice Lab at Harvard Law School where she worked in criminal justice reform and research, spearheading her interest in becoming a public defender. Maribella is a Spanish heritage speaker whose caseload is a majority of monolingual Spanish speakers.

*In November 2025, I began working with a client who had been issued a removal order by Immigration Court in July 2025 after he did not receive his Notice to Appear as he had become unhoused the year prior. At the same time, he was also dealing with some petty theft charges—all deportable charges. I collected mitigation information as well as letters of support from his community for his attorneys to file a motion to dismiss the charges. We were also working with a short timeframe as his criminal case needed to be resolved before his immigration hearing. After collecting the mitigation, the main support the client needed was someone he felt comfortable expressing his worries with and helping convey those concerns to the attorneys. He expressed his worries about what it would mean to show up to court and possibly be detained by ICE. Throughout this complicated process, I accompanied him to all of his court dates, including his immigration hearing. He is now working to get his green card reinstated, has graduated from his substance program, and no longer has any criminal charges.*



**Sneha Jindal** graduated from Haverford College in 2025 with a B.A. in Anthropology and a Concentration in Peace, Justice, and Human Rights. In college, she was involved with various restorative justice programs, advocacy efforts, community organizations, and South Asian cultural groups. She also worked at an immigration nonprofit, helping refugees and asylees navigate complex legal immigration applications. In her free time, she enjoys reading, listening to music, and painting.

*In December 2025, I began working with a client who had been unable to regain his driver's license since a 2016 DUI. The organization where he completed his required 18-month DUI class shut down shortly after the client finished his course but never notified the DMV of his completion. This left the client with no official proof of completion and the looming threat of having to repeat the entire \$2,700 course. The client and I spent months contacting everyone we could imagine, including various DMV and county departments, to no avail. Given his immigration status, the client was hesitant to involve legislators, but he eventually agreed to me contacting our local assemblymember as a last resort. Within days, a representative intervened, successfully pressuring the DMV to update his records based on the plethora of documentation we had gathered. This breakthrough allowed the client to take his DMV knowledge and behind-the-wheel tests and finally receive the license he has spent ten years working toward!*

## CRIM-IMMIGRATION UNIT UPDATE

In September 2025, former Immigration Judge **Chloe Dillon** joined the PDP as the Head of Crim-Immigration Defense, and the Crim-Immigration Unit added a second position, staff attorney **Chloe Fearey**, who has contributed to every aspect of the unit's community outreach as well as the volume of Padilla consultations and attorney dialogue, all of which saw improvement and expansion over the last fiscal year.

The primary role of the Crim-Immigration Unit is to provide case-specific advice to defense attorneys to inform discussions with their clients, and defend against, immigration consequences caused by criminal convictions. Notably, the unit saw a significant uptick in the number of Padilla consultations by PDP attorneys this year. While October 2025 saw 59 consultations and January 2026 saw 51 consultations, March 2026 had 72 consultations, April 2026 had 104 consultations, May 2026 had 112

consultations, and June 2026 had 150 consultations. We expect the number of monthly consultations to hover around 120 consultations, meaning that the number of monthly Padilla consultations has doubled (or more) since October 2025. Increased access to case-specific, rapid immigration advice to defense attorneys is critical to ensuring our non-citizen clients receive the representation they are owed under *Padilla v. Kentucky* and Penal Code 1016.3(a).

In addition, Padilla consultations have increased in quality, with attorneys receiving a clear written breakdown of the immigration consequences of any plea as well as advice on how to pursue immigration-neutral alternatives for charges that carry significant or even life-changing immigration consequences. Each consultation additionally includes supplemental information for the client, such as their case status in Immigration Court, referrals to community organizations for immigration representation, and Know Your Rights information. The unit also continues to provide letters that attorneys may submit to the DA's office as part of plea negotiations. The unit has also expanded services to the Juvenile division, not only to advise of the immigration consequences of juvenile adjudications, but also to assist with drafting and obtaining predicate orders from the court for Special Immigration Juvenile Status (SIJS).



Presenting at "Know your Rights"  
Head of Crim Immigration Chloe Dillon &  
Attorney Valencia Herrera



Crim-Immigration Attorney  
Chloe Fearey

The unit also provided multiple trainings across the breadth of PDP's services, including to the juvenile division, the PDP adult panel, the advocates from Partners for Justice, and a training specifically geared for new PDP attorneys. In addition to these live and in-person trainings, the unit has published a series of memos to PDP attorneys to address specific, recurrent questions in the PDP practice and to provide tutorials on how to inform clients about immigration enforcement and consequences.

## NONCITIZEN POST-CONVICTION RELIEF

Since September 2025, the PDP has increased its services to noncitizens seeking post-conviction relief (PCR) on account of not meaningfully understanding, or not receiving accurate advice regarding, the immigration consequences of a conviction. In particular, since Fall 2025, the PCR unit has onboarded five experienced attorneys to assist in filing PCR motions specifically for noncitizens facing immigration consequences as a result of a conviction and was proud to welcome Ellen Ivens-Duran, Gabriela Lopez, Joanna Sheridan, Helen Lawrence, and Isela Castaneda to the PDP.

In an era of increased immigration enforcement and detention, the PDP has worked closely with immigration attorneys and clients to provide rapid services and support to those currently in ICE detention and those facing imminent deportation from the U.S. by ICE. Among those cases are noncitizens who have lived nearly their entire lives in the U.S., or who face imminent danger upon deportation, who have succeeded in vacating harmful convictions. In some cases, this has even led to termination of their removal proceedings in Immigration Court and/or the restoration of immigration status. These huge victories are based in part on the successful PCR efforts by PDP attorneys. In addition, successful PDP motions have also protected lawful permanent resident clients from losing long-held status and residence in the U.S., and cleared the way for these clients to apply for naturalization and become U.S. citizens.



Crim-Immigration Attorney Chloe Fearey and Managing Attorney Tanya O'Malley at San Mateo Adult and Career Education Resource Fair

The immigration unit remains committed to making these life-changing services accessible and well-known, and the unit attended several events throughout the year to connect with community members in need of this legal assistance, including the Record Clearing Event organized by Silicon Valley De-Bug in October 2025, the Post-Conviction Relief Clinic at The Navigation Center in May 2026, the Coast House Community Connect with WeHope in October 2025, and the San Mateo Adult Career School Resource Fair in November 2025.

# REPORT ON PERFORMANCE BENCHMARKS

The Agreement between the County and the San Mateo County Bar Association established a set of performance benchmarks by which to demonstrate the quality of services performed by the PDP. (See Appendix 1, sections 4.d.1 to 4.d.8.) These benchmarks are discussed below by reference to the specific section of the Agreement. This report is created to comply with section 4.d.8.

## ATTORNEY TRAINING

**Section 4.d.1 of the Agreement** recognizes that “ongoing professional training is a necessity to keep attorneys abreast of changes and developments in the law.” In keeping with this goal, the Agreement requires the Association to “provide sufficient training, whether in-house or through a qualified provider of Continuing Legal Education certified by the California State Bar Association [known as MCLE credits], to keep all of its attorneys who perform work under this Agreement abreast of developments in relevant law and procedure.”

To keep its panel attorneys informed of developments in the law, the PDP presented over 20 hours of MCLE qualified continuing legal education in fiscal year 2025-2026. These programs were geared toward both adult and juvenile panels. The PDP tracks participation, requiring verification of attendance. The State Bar of California requires that attorneys who are actively practicing law in California complete 25 hours of Minimum Continuing Legal Education (MCLE) every three years.

The PDP requires panel attorneys to complete 15 hours of minimum continuing legal education (MCLE) each year, or 45 hours over three years. That is 80% more than the State Bar of California’s requirement of 25 hours over three years. During fiscal year 2025–2026, PDP attorneys completed an average of 19.7 MCLE hours, exceeding the Program’s annual requirement. Fourteen panel attorneys completed at least 30 hours—twice the PDP’s annual requirement.

In addition to formal MCLE trainings, the PDP also held several informal training sessions and roundtables with our attorneys throughout the fiscal year. Furthermore, an education fund of \$750 is available annually for each PDP attorney. These funds may be spent on education and training programs or on memberships in professional organizations such as the California Attorneys for Criminal Justice (CACJ) and the National Association of Criminal Defense Lawyers (NACDL).



**PDP Attorneys at NACDL**

L to R Attorneys Alex Guilmartin & George Kadifa, Managing Attorney Jessica Agnich, Attorneys Cherie Wallace & Kate Bredenberg

## ATTORNEY TRAININGS PROVIDED IN FISCAL YEAR 2025-2026

| Date       | Seminar Title                                                                              | Presenter(s)                                                                              |
|------------|--------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|
| 7/24/2025  | Disrupting Deportation: Post-Conviction Relief in a High-Stakes Era                        | Carla Gomez                                                                               |
| 7/30/2025  | Making Effective Bail Arguments After <i>In re Humphrey</i>                                | Mitri Hanania                                                                             |
| 8/27/2025  | Understanding Housing Resources & Coordinated Entry in San Mateo County                    | Gema Corrales Ruiz                                                                        |
| 9/4/2025   | Protecting Noncitizen Clients: Effective Defense Strategies in the Trump Era               | Carla Gomez & Chloe Fearey                                                                |
| 9/9/2025   | Three Strikes: Local Practice, Lasting Consequences                                        | Eric Hove                                                                                 |
| 9/23/2025  | Mental Health Diversions: Process and Strategies                                           | Tanya O'Malley                                                                            |
| 10/1/2025  | Tracking Progress of Individual Rehabilitation Plans                                       | Ron Rayes, Lindsey Dazel & Erin Hamill                                                    |
| 10/8/2025  | Weaponizing 1538.5: Safeguarding the Fourth Amendment and Strengthening Trial Outcomes     | Tamani Taylor                                                                             |
| 10/16/2025 | Specialty Courts-Criteria and Procedures                                                   | Tanya O'Malley                                                                            |
| 11/6/2025  | Never Give Up: All About Appeals for Trial Attorneys                                       | L. Richard Braucher, Matthew Bedrick & Nicole Kalum<br>(First District Appellate Project) |
| 11/19/2025 | Ethical Obligations of Generative AI in Legal Research                                     | Lorena Campoazano                                                                         |
| 12/2/2025  | Competency-From Declaration of Doubt to Certification of Restoration or Dismissal          | Tanya O'Malley                                                                            |
| 12/4/2025  | Noncitizens in Juvenile Proceedings: Unique Challenges and Opportunities                   | Chloe Dillon & Chloe Fearey                                                               |
| 1/7/2026   | New Laws for 2026                                                                          | Garrick Byers                                                                             |
| 1/11/2026  | Delinquency Case Law Update                                                                | Jonathan Grossman                                                                         |
| 1/15/2026  | The 2025 Dependency Case Law Update                                                        | Sean Burleigh & Michelle Pena                                                             |
| 1/21/2026  | DNA 101: Core Concepts and Fundamentals for Defense Attorneys                              | Kristen Harty-Connell, M.S                                                                |
| 2/11/2026  | Turning Delay into Dismissal: Serna in Misdemeanor Practice                                | Tennille Duffy                                                                            |
| 2/25/2026  | The DMV and License Suspension                                                             | Mitri Hanania                                                                             |
| 3/25/2026  | What's the Rule for That? The Authority Behind Everyday Jury Trial Practice and Procedures | Scott Sherman & Jessica Agnich                                                            |
| 3/25/2026  | Elimination of Bias from Mental Health Determination                                       | Harpreet Samra                                                                            |
| 4/9/2026   | Mend Collaborative                                                                         | Miguel Quezada & Lupe Angulo                                                              |
| 4/23/2026  | Litigating Violations of the Juvenile Interrogation Laws                                   | Brian McComas                                                                             |
| 5/13/2026  | Padilla in Practice: How "The Chloes" Can Support You and Your Clients                     | Chloe Dillon & Chloe Fearey                                                               |

|           |                                                                 |                                |
|-----------|-----------------------------------------------------------------|--------------------------------|
| 5/20/2026 | FLY's 6-Month Review Report and Community Passes                | Melissa Poling & Harold Atkins |
| 5/27/2026 | Understanding Cellular Evidence and AI Tools for Basic Analysis | Shane Glynn                    |



**On-Site Training Event**  
Presentation provided by Attorney Tamani Taylor

## ATTORNEY EVALUATIONS

Section 4.d.2 of the Agreement requires annual evaluations of the professional performance of each Private Defender Program attorney by the Chief Defender and/or the Chief Defender's designee. The Annual Report must include a summary of the number and results of the evaluations without breaching their confidentiality.

Each attorney's performance is evaluated using the criteria set forth in the PDP Evaluation Standards included as Appendix 2. These standards address the attorney's professional ability, professional attitude, and relationships with clients and members of the justice system.

Specific methods used to evaluate attorney performance include:

### **Review of the Case Management System**

Management reviews information concerning each attorney's use of investigators, social workers, client advocates, paralegals, and experts.

The number and types of motions filed during the fiscal year are tracked and reviewed.

Management reviews data concerning how quickly attorneys visit incarcerated clients after assignment.

Client concerns documented through the Attorney of the Day system are reviewed, including the number and nature of concerns associated with each attorney.

### **In-Court Observations and Feedback**

Members of the management team attend court calendars and proceedings to observe attorneys' preparation, advocacy, communication, and overall courtroom performance.

Management considers relevant feedback from judicial officers and other members of the justice system.

Feedback from PDP staff and other defense-team members is considered when evaluating attorneys' communication, responsiveness, and work with investigators, social workers, client advocates, and program staff.

### **Annual Surveys**

Attorneys complete an Annual Survey that provides a general snapshot of each attorney's practice and information that may not otherwise be available through the case management system.

The survey allows management to monitor outside training and the percentage of each attorney's practice devoted to non-PDP cases.

Attorneys who recently joined the panel or serve in a limited role may be exempted from completing the survey.

## **Crim-Immigration Unit Data**

Management reviews the number of immigration consultations requested by each attorney and relevant actions taken in those cases.

## **Collaborative Courts and Diversion**

Management reviews available information concerning attorneys' efforts to identify and pursue appropriate placements in collaborative courts and diversion programs, including Mental Health Diversion.

## **Electronic Discovery**

Management reviews available information concerning whether attorneys are accessing and regularly reviewing electronic discovery provided through the AXON system.

## **Caseload Review**

Management reviews each attorney's caseload, including the number, level, and types of cases assigned.

Caseloads are evaluated using the PDP case-level system to help ensure that attorneys are not handling more serious or complex cases than they can effectively manage. Additional information concerning caseload monitoring is provided in Section 4.d.4.

## **Continuing Legal Education**

Management reviews compliance with the PDP's annual continuing legal education requirements.

## **Summary of Attorney Evaluations**

This year, the management team met over several days, reviewed the available information, and discussed the performance of all PDP attorneys.<sup>1</sup>

- 21 attorneys on the Adult panel were identified for follow-up meetings with one or more members of the management team.
- All 13 attorneys in the Juvenile Division participated in an annual evaluation meeting with the Assistant Chief of the Juvenile & Civil Commitment Branch.<sup>2</sup>

The reasons for the follow-up meetings varied. For some attorneys, the meetings will provide an opportunity to check in, discuss caseload preferences, and obtain their perspectives on their practices. Other meetings will focus on caseload levels, Crim-Immigration consultations, motion

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<sup>1</sup> The evaluation of some attorneys was brief because they maintain limited caseloads or serve in specialized roles, including post-conviction or legal research and writing. Management extensively reviewed the performance of 68 attorneys with active caseloads.

<sup>2</sup> Rather than selecting particular Juvenile Division attorneys for follow-up, all attorneys in the Juvenile Division participate in an annual evaluation meeting with the Assistant Chief of the Juvenile and Civil Commitment Branch.

practice, collaborative court practice, or use of investigators and social workers. In a limited number of cases, the meetings will address concerns that have been raised, including communication with clients or other members of the defense team.

Overall, the meetings are intended to provide support, gather feedback, and ensure that attorneys have the resources necessary to represent their clients effectively. Depending on the circumstances, management may also provide ongoing training and guidance, monitor an attorney's caseload or performance data, or conduct a subsequent review.

The evaluation process also identified attorneys who needed to complete additional continuing legal education hours. Those attorneys were directed to complete the required hours by a specified date to avoid new case assignments being withheld until they demonstrate compliance.

## *CLIENT FEEDBACK*

Section 4.d.3 of the Agreement specifies a procedure by which PDP clients may ask questions or register complaints directly with a felony-qualified attorney who has at least five years of felony experience on the PDP panel during regular business hours.

Every business day, the PDP has an experienced attorney serving as the Attorney of the Day (AOD). The AOD answers questions and addresses concerns raised by PDP clients, their families, and members of the public. During fiscal year 2025–2026, attorneys serving as AOD documented 3,796 inquiries received through telephone calls and visits to the PDP office, an average of over 70 calls/inquiries per week.

The AOD documents complaints in the PDP's case management system, allowing for consistent and reliable tracking. Management reviews the entries to monitor the resolution of individual complaints, identify clients who have raised concerns on multiple occasions, and determine whether multiple complaints have been made concerning a particular attorney. Responses entered by an attorney are visible to subsequent attorneys serving as AOD and can assist them in keeping clients informed.

The AOD also attempts to resolve issues raised by clients. Many concerns can be addressed through a discussion with the client or a telephone call to the assigned attorney. When an issue cannot be readily resolved and the client requests a new attorney, the AOD may make a recommendation to management regarding whether the case should be reassigned. A Managing Attorney reviews the complaint, the AOD's recommendation, and the surrounding circumstances. If reassignment is determined to be appropriate, a new attorney is assigned. If the Managing Attorney does not recommend reassignment, the request may be further reviewed by the Assistant Chief Defender or the Chief Defender.

Continuity of counsel generally benefits the client and promotes more effective representation. The PDP therefore seeks to resolve concerns and preserve the attorney-client relationship when appropriate. In some circumstances, however, reassignment is determined to be in the client's best interests. During fiscal year 2025–2026, attorneys were replaced in seven cases based on client requests. A reassignment based on a client request does not necessarily reflect a sustained complaint or a finding of ineffective assistance of counsel. Reassignments may instead be based on relationship issues or other circumstances indicating that a change of counsel is in the client's best interests.

During the complaint process, clients are also informed of their right to seek a Marsden hearing and ask the court to determine whether different counsel should be assigned. During fiscal year 2025–2026, four Marsden motions were granted based on the court’s determination that there had been a breakdown in communication between the client and the attorney. No Marsden motions were granted based on ineffective assistance of counsel. The PDP abides by court rulings regarding the replacement of assigned counsel. Clients are also informed of their right to file a complaint with the California State Bar if they believe such a complaint is warranted.

The complaint process developed in agreement with the County is illustrated in the Client Complaint Procedures flowchart.

## **Summary of Number and Nature of Client Inquiries**

During the fiscal year ending June 30, 2026, the AOD system documented 3,796 inquiries, which fell into the following general categories:

### **General Inquiries: 3,660**

General inquiries include requests for court dates, assistance with recalling warrants, assistance with expungements, attorney contact information, jail visits or telephone calls from assigned attorneys, and other information or assistance relating to pending or resolved cases.

### **Complaints: 136**

The AOD documented 136 complaint entries involving 95 individual clients. Because some clients contacted the AOD more than once, the number of complaint entries exceeds the number of individual clients. Each complaint entry was categorized according to the nature of the concern raised. Accordingly, the same client may be represented in more than one category or may have multiple complaints within the same category.

### **Relationship Issues: 106**

Relationship issues include claims that the attorney is not listening to the client, concerns about insufficient communication, and other issues that may interfere with the ability of the attorney and client to work productively together.

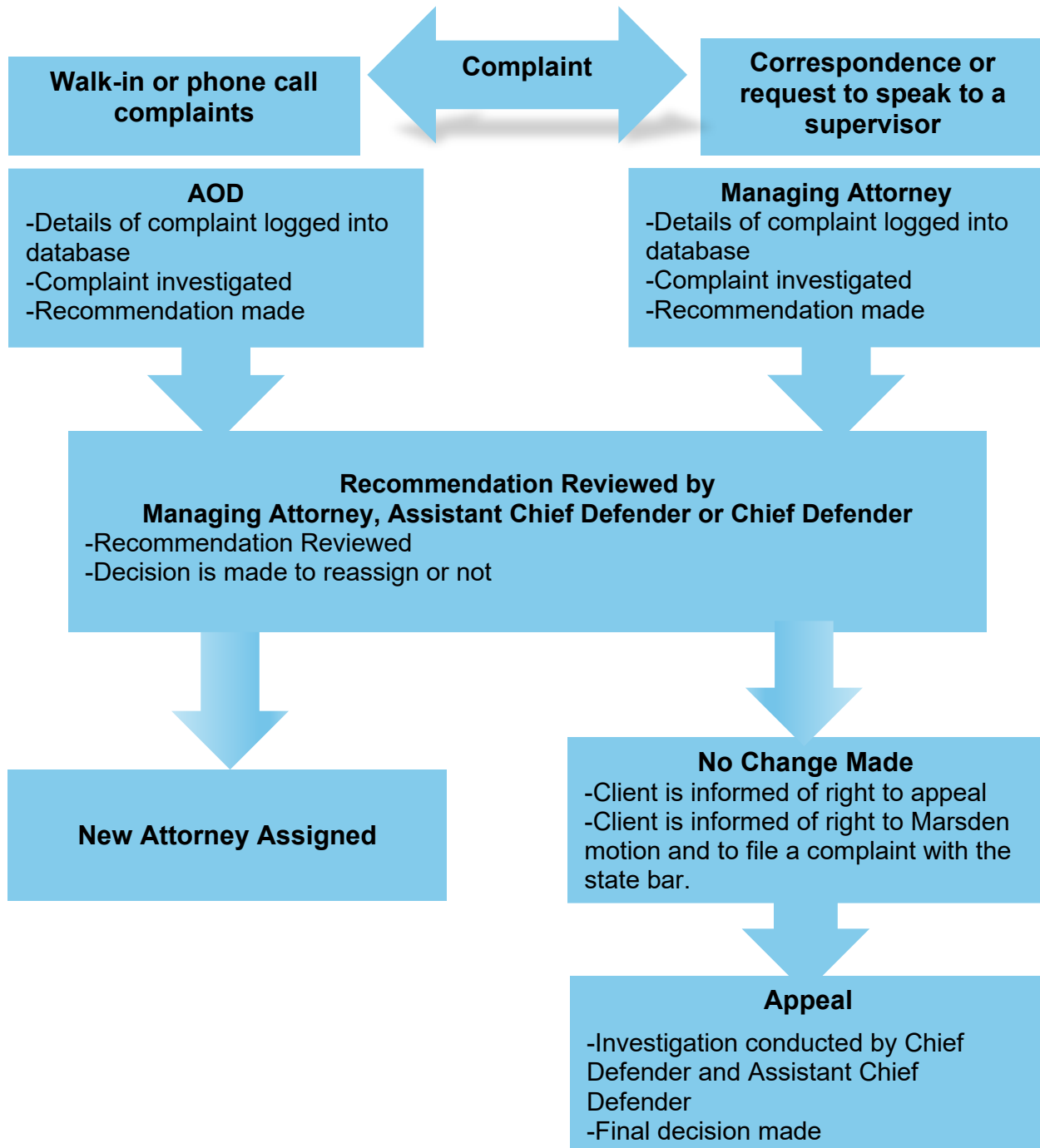
### **Performance Issues: 30**

Performance issues include claims that the attorney is not performing work the client believes should be completed, such as investigating or filing a motion.

Approximately four percent of all inquiries were complaints, and less than one percent involved reported performance issues. Some clients also contacted the AOD to express appreciation for their court-appointed attorneys or for assistance provided by the AOD.

The following flowchart represents the complaint process developed in agreement with the County.

## CLIENT COMPLAINT PROCEDURES



If the Assistant Chief Defender or Chief Defender declines to reassign, client will be informed about Marsden motion remedies and the right to pursue a complaint to the California State Bar. The AODs are trained to inform clients that they have a right to request a Marsden motion at any stage of the proceedings.

## ATTORNEY CASELOADS

Section 4.d.4 of the Agreement requires the PDP to report “the caseloads of each Private Defender Program attorney by types of cases, as well as the average caseloads for the Private Defender Program.” During this fiscal year, PDP attorneys handled a total of 22,558 cases/assignments compared with 21,125 during the prior fiscal year.<sup>1</sup> This represents an increase of 1,433 or 6.8 percent.

### Caseloads of Each PDP Attorney and the Program by Type

Attached as Appendix 4 is an anonymized list showing the number and types of cases assigned to each attorney during the fiscal year, together with a description of each case type.

The average caseload of the Private Defender Program was compiled by tracking the types and numbers of cases accepted for assignment each month and is included as Appendix 5.

### Caseload Monitoring During the Fiscal Year

It is the responsibility of the PDP to assign attorneys who have the skill, experience, and availability necessary to provide excellent legal representation to their clients. The number and seriousness of the cases assigned to an attorney may affect the attorney’s capacity to give each client the attention the case requires. The PDP therefore actively monitors attorney caseloads throughout the year in the following ways:

- **Number of Cases:** Attorney case counts are provided to management weekly and show the number of new cases assigned to each attorney and the attorney’s total number of open cases. Management and staff use this information to help determine which attorneys are available to accept new assignments.
- **Level of Cases:** Because the number of cases alone is not sufficient to assess an attorney’s capacity to accept additional assignments, the levels and complexity of the attorney’s existing cases are also considered.

### Case Assignments Using the Levels System

Guided by the National Public Defense Workload Study,<sup>2</sup> the PDP classifies adult criminal cases by level. Adult misdemeanor and felony cases are classified as Levels 1 through 9 based on the most serious charge in each case. Levels 1 and 2 are misdemeanor cases, and Levels 3 through 9 are felony cases. The applicable level is entered into the PDP’s case management system when the case is assigned. A description of the case levels is included in Appendix 6.

Classifying cases by level assists management and staff in evaluating attorney assignments, workloads, and training needs. Attorneys are also classified at Levels 1 through 9 based on their experience and demonstrated abilities.<sup>3</sup> Attorneys are not assigned cases above their approved experience level without

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<sup>1</sup> The total of 22,558 cases/assignments includes all court appointments accepted by the PDP during the fiscal year, not only misdemeanor and felony cases. This total includes, among other matters, appointments handled by the Juvenile and Civil Commitment Branch, calendar assignments, and representation of witnesses.

<sup>2</sup> *Understanding the National Public Defense Workload Study: A Guide for California Defenders.*

<sup>3</sup> This classification excludes juvenile, post-conviction, and legal research and writing attorneys who do not regularly handle adult trial cases. Assignments to those attorneys are made by management based on their experience and the nature of the work.

management approval. This helps ensure that cases are assigned to attorneys who have the experience and ability necessary to provide effective representation.

The administrative team assigns cases at Levels 1 through 4. PDP management assigns all cases at Levels 5 through 9. Before assigning a Level 5 through 9 case, management reviews the charging document and other available information to evaluate the seriousness and complexity of the case.

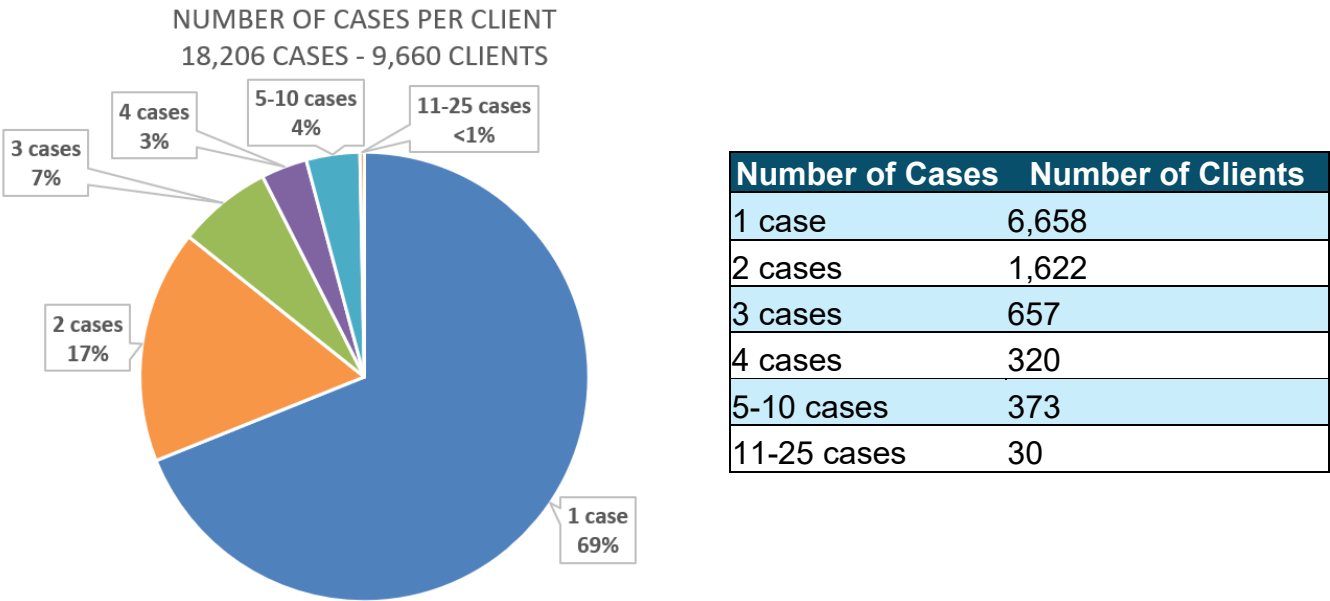
In addition to evaluating the number and levels of cases assigned, the PDP considers national caseload standards when reviewing attorney workloads. The 1973 National Advisory Commission on Criminal Justice Standards and Goals recommended annual maximum caseloads of 400 misdemeanor cases, 150 felony cases, or 200 juvenile delinquency cases per attorney.<sup>1</sup>

Based on the case assignments recorded in the PDP’s case management system, eight attorneys received misdemeanor assignments exceeding the recommended annual limit of 400 cases, and fourteen attorneys received felony assignments exceeding the recommended annual limit of 150 cases. No PDP attorney exceeded the recommended limit for juvenile delinquency cases.

The increase in the number of attorneys exceeding the felony standard should be considered in the context of the 26.9 percent increase in felony assignments during the fiscal year. The PDP also evaluates workloads based on the seriousness and complexity of the cases assigned, the attorney’s number of open cases, the number of individual clients represented, and other demands on the attorney’s practice.

Multiple Cases Involving the Same Client

Case counts do not always correspond to the number of individual clients represented. As reflected in the chart below, many PDP clients had multiple cases, with one client having 27 cases pending at the same time. Although each case requires review and attention, cases involving the same client often entail overlapping client communication, investigation, mitigation, negotiation, and court appearances.



<sup>1</sup> These numerical standards do not account for differences in case seriousness or complexity, the amount of work performed on individual cases, or situations in which one client has multiple pending cases.

It is also common for one or more misdemeanor cases to trail a felony case, with litigation efforts focused primarily on the felony because it carries more serious potential consequences. The misdemeanor cases may ultimately be dismissed following a favorable felony disposition or resolved as part of a comprehensive agreement addressing all of the client's pending cases. These circumstances provide important context when evaluating caseloads based on numerical limits.

## INITIAL CLIENT MEETINGS

Section 4.d.5 of the Agreement with the County requires an annual report regarding attorneys' initial meetings with incarcerated clients. The Private Defender Program's Policies and Procedures Manual emphasizes that communication with clients is of utmost importance. The Manual provides that attorneys are expected to meet with incarcerated clients at the earliest possible time after assignment and that every effort should be made to conduct the initial meeting within two business days after the case is assigned.

The Agreement requires the PDP to report annually on its monitoring of these early interviews of incarcerated clients. It further provides that monitoring should consider factors affecting an attorney's ability to conduct an early jail visit, including the number of days between arraignment and the next court appearance and the speed with which cases are assigned to individual attorneys.

The PDP's commitment to early client communication is reflected in the resources devoted to the in-custody arraignment calendar. Two attorneys handle the calendar to ensure that every incarcerated client is interviewed by a PDP attorney before arraignment.

To track the initial client interviews occurring after the arraignment, the PDP case management system requires attorneys to report the number of business days between the assignment of an in-custody case and the initial client visit. When a visit does not occur, the attorney must provide an explanation. Requiring this information in every case involving an incarcerated client improves the accuracy of the data and allows management to review delayed or missed visits.

During fiscal year 2025–2026, the case management system recorded 4,939 assignments in which the client remained in custody. Attorneys completed an initial visit before the first substantive post-arraignment court appearance in 95% of those assignments. The remaining 240 entries included cases in which a visit could not occur due to illness of the client or the attorney, the client's refusal to meet, a late assignment or an error or other circumstances identified by the attorney. The reporting system allows PDP management to review the explanation provided in each case and address individual or systemic concerns when appropriate.

The PDP also monitors the timing and frequency of client communication through other methods, including review of hourly billing records and initial-client-conference fees, observation of attorneys at court appearances, court and client complaints, and information provided by attorneys in their responses to the Annual Survey.

Panel attorneys reported using several methods to contact clients who were not in custody, including sending letters to the address listed on the criminal complaint and telephone calls to numbers provided at arraignment. Attorneys also returned calls to numbers provided to PDP administration when clients contacted the office seeking information about the attorney assigned to their cases.

The case management system documented 23,788 client-communication entries during fiscal year 2025–2026 for in-custody and out-of-custody clients. The PDP continues to develop its case management system to improve the collection and analysis of client-contact information.

## COMMUNITY OUTREACH

**Section 4.d.6 of the Agreement** with the County recognizes the impact of the criminal justice system on the community and calls on the PDP to communicate its mission and role in the criminal and juvenile justice systems. In fiscal year 2025–2026, the PDP connected residents with legal information and resources through clinics, educational programs, community events, and partnerships with service providers.

### Direct Services and Legal Resources

The PDP reached people facing barriers related to housing, employment, and prior involvement with the justice system through multiple events during the year. The Program participated in four legal clinics at the Navigation Center in Redwood City, helping previously identified clients through Homeless Connect Court outreach efforts, as well as others present at the Center.

At the WeHope Coast House Community Connect event and the Stand Down for Veterans events, PDP representatives helped connect individuals experiencing homelessness with legal information and community resources.

At the San Mateo County Adult & Career Center, the PDP offered expungement services to people pursuing education and employment opportunities. For those whose prior convictions have created barriers, expungement relief can improve access to employment and housing.

The Program also collaborated with Silicon Valley DeBug, a local organization that supports families affected by the justice system, on record clearance events and a presentation about changes in the law concerning the right to bail in noncapital criminal cases. The management team participated in a tour of East Palo Alto with members of Silicon Valley DeBug to learn more about the city's history. The tour concluded with a presentation at the Free At Last recovery center.

The Crim-Immigration Unit met regularly with community partners to pursue better outcomes for noncitizens in active cases and through post-conviction relief. Crim-Immigration attorney Chloe Fearey attended the San Mateo County Immigration Provider Mixer to strengthen connections with other service providers. Chloe Dillon, the Head of the Crim-Immigration Unit co-led a presentation at a Know Your Rights workshop in San Carlos, aimed at providing direct information about available assistance to community members.



Managing Attorney Tanya O'Malley and Attorney Maggie Staines at Stand Down for Veterans



Crim-Immigration Attorney Chloe Fearey & Managing Attorney Tanya O'Malley at the Navigation Center

## Community Education and Outreach

PDP representatives shared information about the Program and available resources at Fiestas Patrias and the Palestine Festival, both held in downtown Redwood City and also attended Black August in East Palo Alto. These events gave residents opportunities to meet Program representatives in familiar community settings.

Chief Defender Lisa Maguire presented at the San Mateo County Civics 101 Academy, where she explained the PDP's role within the broader justice system. She also spoke at the Barristers' Annual Meet and Greet, an event for attorneys new to the practice of law to meet their peers and learn about practicing in San Mateo County.



**Hosting a booth at Fiestas Patrias**  
Assistant Chief Defender John Elworth

## Youth Education and Institutional Partnerships

PDP panel attorneys and management team members have long served as coaches, judges, and scorers in San Mateo County's Mock Trial competition for local high school students. This fiscal year, the PDP also participated in Law Day, which celebrates the students who took part in the competition. PDP representatives described the Program's work and gave students a tour of its office. In collaboration with the Superior Court, PDP attorneys also participated in Fred Korematsu Day, helping students learn about civil rights and the legal system.

Through the San Mateo County Superior Court Community Outreach Committee, PDP representatives helped develop outreach opportunities and strengthen community connections. Meetings with Behavioral Health and Recovery Services and participation in Field Crisis Committee meetings helped the Program learn about crisis response and resources for people whose legal needs intersect with behavioral health concerns.



**Attending Black August**  
Managing Attorney Mitri Hanania & Chief Defender Lisa Maguire

## Supporting Stanford's Legal Defense Clinic

The PDP also continued its longstanding partnership with Stanford Law School's Criminal Defense Clinic. Clinic students represent PDP clients under the supervision of their professors and a PDP attorney mentor, gaining practical experience while contributing to client representation.

The PDP's outreach during Fiscal Year 2025–2026 reflects a deliberate effort to engage with community members before, during, and after potential involvement with the criminal justice system. Rather than limiting outreach to traditional legal settings, representatives of the PDP participated in events and programs addressing many of the circumstances that can contribute to or intersect with justice-system involvement.

The PDP's community outreach efforts during Fiscal Year 2025–2026 demonstrate an ongoing commitment to making the PDP accessible and understandable to the community it serves. Through direct engagement at community events, legal clinics, court-based programs, educational forums, and meetings with partner agencies, the PDP attorneys continued to build relationships with individuals and organizations serving populations most likely to be affected by the criminal justice system.



2025 Stanford Law School's Criminal Defense Clinic at the PDP office

These efforts advance the shared goal of the PDP and the County: to ensure that members of the community understand the role of the PDP, know where to turn for legal assistance and related resources, and have meaningful opportunities to access information in the event that they or a loved one becomes involved in the criminal or juvenile justice systems.

## CLIENT SURVEYS

Section 4.d.7 of the Agreement provides that “the Association will create a survey instrument and process to seek client views on the representation from the Private Defender Program.” To meet this requirement, the PDP administration conducts client surveys with individuals whose cases have recently closed.

### Survey Process

Throughout each year, surveys are mailed to a random selection of clients, accompanied by self-addressed stamped envelopes to encourage responses. Surveys are also available on the PDP website, in the PDP office lobby, and in the Juvenile Court lobby. For confidentiality reasons and in compliance with WIC section 827, surveys are not mailed directly to juvenile clients. All surveys are provided in both English and Spanish.

During the fiscal year ending June 30, 2026, the PDP distributed 355 surveys and received 13 responses, 11 of which were positive.

The survey includes both multiple-choice and open-ended questions designed to assess two key areas:

#### Communication with Counsel

- Did your attorney return phone calls?
- Did you meet with your attorney before the first court appearance?
- Did you have enough time to discuss your case with your attorney?
- Did your attorney explain what was happening in your case?

#### Adequacy of Representation

- Did your attorney appear prepared in court?
- Was your attorney on time for meetings?
- Were you satisfied with your attorney’s overall representation?

The survey concludes with an open-ended question inviting clients to share additional comments about their experiences. Two examples of client comments are included below.

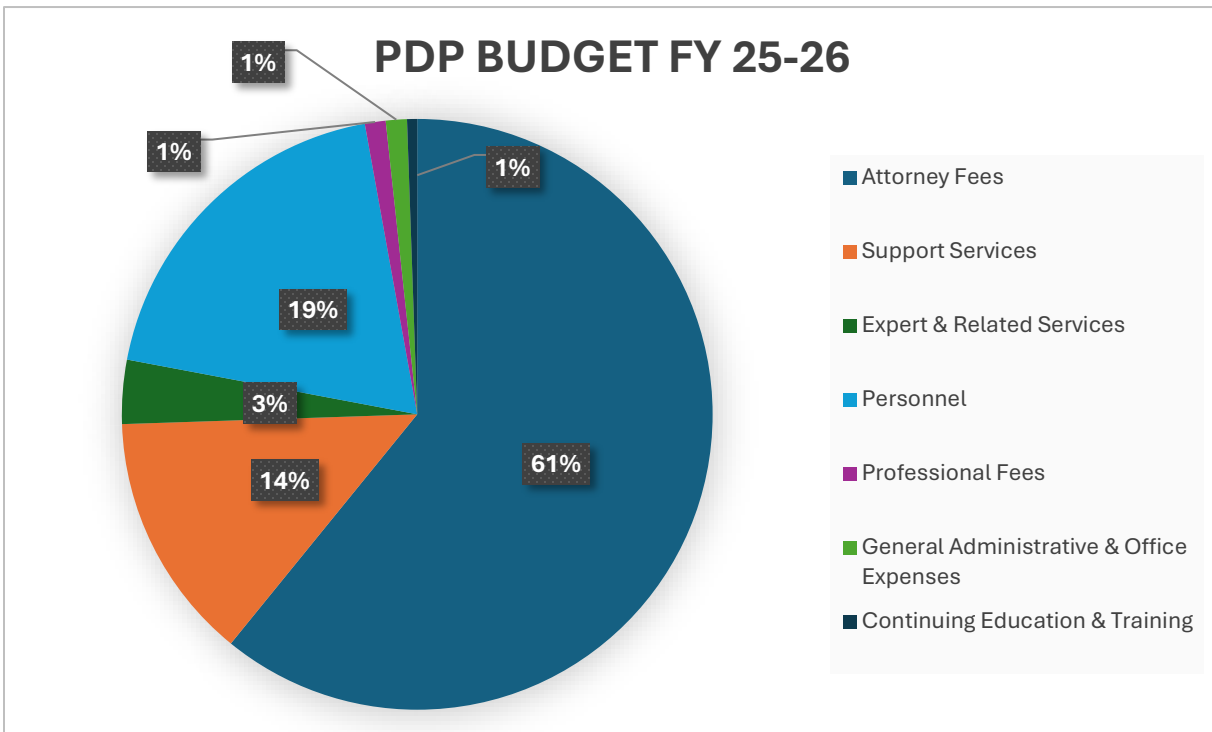
“Mr. Charlie Smith was a very helpful Private Defender. He was able to help the family with all concerns we are very grateful to Mr. Smith” – Family of client

“He was the only that believed me, fought for me. I owe him everything. I was able to keep my job, and I am still married.” -Client

## ANNUAL BUDGET

**Section 4.d.8 of the Agreement** requires that the Annual Report include, “the annual budget of the program, setting forth the costs of the operation of the program for the year, including fees for attorney’s services, investigation and other ancillary defense services as well as the cost of administration.”

The PDP, pursuant to agreements with San Mateo County, and with the Superior Court, managed a budget of \$27,344,741.43 for the fiscal year ending June 30, 2026. See Appendix 7 for a copy of the budget.



This budget reflects the total cost to run the PDP throughout the year. That includes work that is the result of contracts with the County, the Courts and pursuant to some grant funding for post-conviction relief. The money, as demonstrated by the above graph, goes largely to paying the attorneys for their representation of the clients, as well as the support services that allow them to provide the best representation possible.

## THE PDP AT WORK

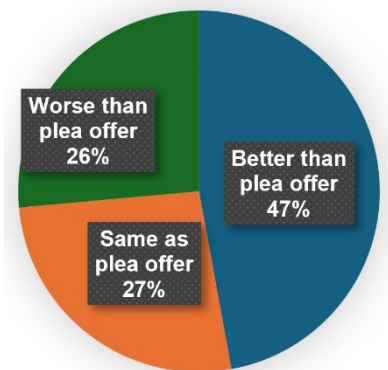
The PDP highly values the fundamental right to a trial on criminal charges. While most cases resolve without a trial, the ability and willingness of our attorneys to go to trial on behalf of their clients is of paramount importance.

### TRIAL STATISTICS

Fiscal year 2025-2026 was another successful year for the PDP panel attorneys. An impressive 66 criminal cases were litigated by PDP attorneys during the fiscal year. In addition, there were 19 Lanterman-Petris-Short (LPS) trials<sup>1</sup>.

Thirty-four attorneys on the Adult Panel had a criminal case sent out for trial, and 12 of those attorneys had three or more cases sent out for trial. Of the total criminal cases sent out to trial, there were 48 felony trials and 18 misdemeanor trials.

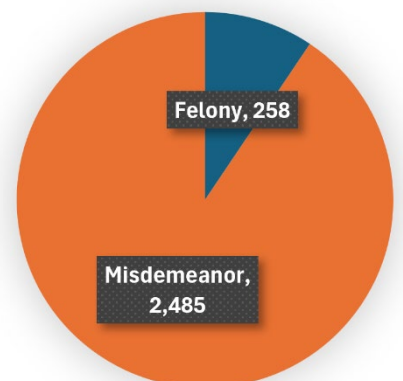
The outcomes of those cases were very favorable to the defense. The PDP determines favorability by comparing the trial outcome to the pre-trial offer. The metric used is simple: it asks was the outcome better than the plea offer, the same as the plea offer, or worse than the plea offer. 58% (38) reported a better outcome than the pre-trial offer, 18% (12) reported the same outcome as the pre-trial offer, and 24% (16) reported a worse outcome than the pre-trial offer.



### DISMISSED CASES

Dismissals are the best possible outcome for our clients. The pie chart on the right reflects the total cases dismissed this fiscal year. These cases are often dismissed due to the vigorous advocacy of our attorneys. Our attorneys get cases dismissed by filing motions, conducting investigation, and setting cases for trial, or negotiating resolutions that result in dismissals. Many of these dismissals happen on the day of trial after an attorney has worked up a case and shown the District Attorney's Office that they cannot meet their burden of proof.

### Dismissed Cases 2, 743 cases total



<sup>1</sup> A Lanterman-Petris-Short (LPS) Act trial is a legal proceeding to determine whether a person should be placed under involuntary psychiatric treatment (conservatorship) due to a mental disorder that makes them gravely disabled—unable to provide for their basic needs like food, clothing, or shelter. The trial evaluates evidence to decide if conservatorship is necessary for the individual's safety and well-being.

## COLLABORATIVE COURTS

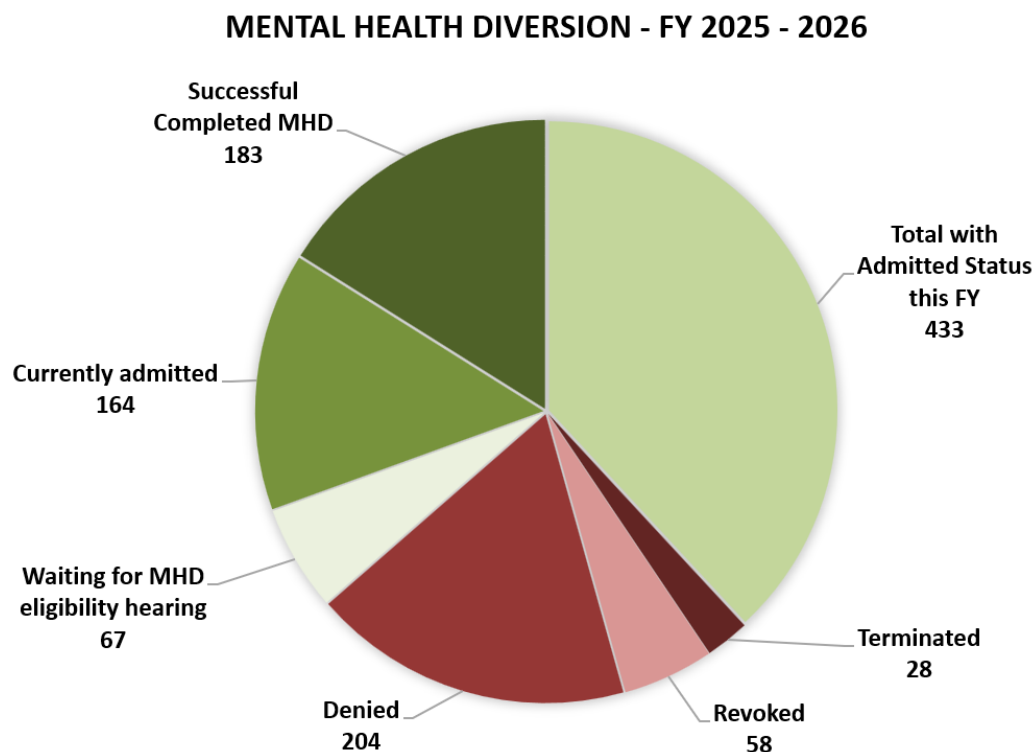
The San Mateo County Collaborative Courts provide alternatives to the traditional criminal justice process by connecting eligible individuals with treatment, support services, and structured court supervision. In some cases, participation may allow individuals to avoid incarceration and, upon successful completion, to avoid a conviction. The San Mateo County Collaborative Courts include Mental Health Diversion, Pathways Court, Drug Court, Proposition 36 Court, Military Diversion Court, Veterans Treatment Court, Multiple Driving Under the Influence Court, and Homeless Connect Court.

During fiscal year 2025–2026, the PDP panel attorneys continued to advocate for treatment-based interventions and alternatives to traditional criminal justice dispositions for clients who met the eligibility criteria for Collaborative Courts.

### Mental Health Diversion Penal Code § 1001.36

Mental Health Diversion (MHD) provides an opportunity for individuals whose mental health condition is a contributing factor to the alleged criminal conduct to receive treatment in lieu of proceeding through the traditional criminal justice process. PDP social workers use their mental health expertise to assist in developing individualized treatment plans, which are then submitted to the court for consideration.

When a client is accepted into MHD, the diversion period is generally one year for misdemeanor cases and two years for felony cases. Participants must comply with the terms of their treatment plans, and treatment providers regularly submit progress reports to the court. Upon successful completion of the MHD term, the case is dismissed in its entirety and sealed.



**Pathways Court**

Pathways Court is a specialized mental health court that provides treatment and supervision to individuals with serious mental illness. Unlike Mental Health Diversion, participation in Pathways Court requires a conviction.

To qualify, individuals must reside in San Mateo County, have a serious mental illness, and be amenable to treatment. Upon admission, participants are supervised by specialized Pathways probation officers and receive treatment and support through San Mateo County Behavioral Health and Recovery Services (BHRS).

When a client is denied Mental Health Diversion, PDP attorneys may advocate for admission into Pathways Court when the client appears to meet the program’s eligibility criteria. Participants generally remain in Pathways Court for the duration of their probationary period. Absent extraordinary circumstances, the Pathways judge expunges the charged offenses on the day of the participant’s Pathways graduation.

**Homeless Connect Court**

Homeless Connect Court (HCC) assists individuals experiencing housing instability who face outstanding traffic fines and fees that can create significant barriers to obtaining stable housing, employment, and reinstatement of a driver’s license. Shelter case managers and their clients have reported that outstanding traffic-related fines and fees can make it extremely difficult for individuals to qualify for license reinstatement.

HCC provides incentives and assistance to individuals who are working toward stable housing and employment, which may include the waiver of eligible outstanding traffic fines and fees owed in San Mateo County.

During the HCC process, PDP attorneys and staff may also identify prior convictions that are eligible for expungement or other post-conviction relief. When appropriate, individuals are referred to the PDP’s post-conviction relief process for further assistance.

HCC is generally held quarterly. The PDP maintains ongoing outreach to case managers at San Mateo County shelters to inform them about the availability of HCC and to identify individuals who may benefit from the program.

**HOMELESS CONNECT COURT  
FISCAL YEAR 2025-2026**

| COURT DATE | TOTAL PARTICIPANTS | TOTAL TRAFFIC TICKETS | TOTAL FINE AMOUNT WAIVED |
|------------|--------------------|-----------------------|--------------------------|
| 09/19/2025 | 4                  | 5                     | \$1,704                  |
| 12/12/2025 | 7                  | 22                    | \$8,837                  |
| 03/13/2026 | 7                  | 15                    | \$8,431.20               |
| 06/05/2026 | 4                  | 7                     | \$4,239                  |
| TOTALS     | 22                 | 49                    | \$23,211.20              |

## **Drug Court**

Established in 1995, Drug Court provides eligible clients with an opportunity to address substance use disorders through treatment while under court and probation supervision. Clients may be eligible when a substance use disorder is a substantial contributing factor to the conduct underlying the charged offense.

Participants are sentenced to treatment and supervised by the probation department. The program requires a plea and compliance with controlled-substance testing, participation in treatment, and regular court appearances to report on progress. Through Drug Court, clients are provided an opportunity to address the underlying substance use issues contributing to their involvement in the criminal justice system.

## **Proposition 36 Court**

Proposition 36 took effect on December 18, 2024. San Mateo County operates a Proposition 36 Court in conjunction with Drug Court.

Proposition 36 established Health and Safety Code § 11395, which creates a “treatment-mandated” felony drug offense. Under this legislation, a court may not sentence an individual to jail following a Health and Safety Code §11395 conviction unless the court first determines that the individual is either ineligible or unsuitable for treatment.

When an individual is determined to be suitable for treatment, the individual pleads guilty or no contest to the violation and waives time for sentencing and pronouncement of judgment. During this post-plea, pre-judgment period, the individual participates in a court-ordered treatment program. If the individual successfully completes the required treatment, the court dismisses the charges.

## **Military Diversion & Veterans Treatment Court Penal Code §§ 1001.80 and 1170.9**

PDP clients who are veterans may be eligible to participate in one of San Mateo County’s veterans courts. Eligibility generally requires a mental health condition related to the individual’s military service and eligibility for Veterans Administration (VA) benefits, subject to limited exceptions.

When a PDP attorney identifies a client as a veteran, the attorney advocates for the client to be considered for either Military Diversion Court (MDC) or Veterans Treatment Court (VTC). Both programs are available for felony and misdemeanor cases. MDC is a pre-conviction program, while VTC is available following conviction. PDP attorneys advocate for their clients’ eligibility and amenability to treatment and, in post-conviction cases, their eligibility for probation.

Upon admission to either MDC or VTC, veterans agree to participate in a structured treatment program designed to address the issues underlying their involvement in the criminal justice system.

The MDC/VTC team includes a PDP attorney, the Veterans Justice Outreach Coordinator, a VA mentor lead, a probation officer, a county BHRS case manager, a deputy district attorney, the court management analyst, and Judge Michael Wendler. Judge Wendler, himself a veteran, presides over both Military Diversion Court and Veterans Treatment Court.

## **Multiple Driving Under the Influence Court**

Multiple Driving Under the Influence (MDUI) Court provides intensive DUI probation for individuals convicted of a second or third DUI, or a felony DUI, within a 10-year period who are assessed as having a high risk of reoffending and a high need for treatment.

Following conviction, whether by plea or trial, the case is referred to probation for an MDUI assessment to determine eligibility. The program provides intensive supervision and accountability, including regular court appearances, random drug and alcohol testing, regular contact with probation, enrollment in the Multiple Offender Program, installation of an ignition interlock device, and participation in substance use treatment and/or other supportive programming.

Benefits of participating in MDUI Court include reduced jail sentences and fines.

Taken together, these collaborative courts provide PDP attorneys with meaningful opportunities to advocate for outcomes that address their clients' underlying needs while protecting their legal interests. The success of these programs reflects the persistent advocacy of PDP attorneys, who help eligible clients access treatment, housing support, supervision, and other services that can reduce incarceration, promote stability, and help clients move forward successfully.

The PDP represented clients in 14 cases involving requests to recall or reconsider state prison sentences. These proceedings gave clients an opportunity to seek an individualized review of their sentences under applicable law.

### Selected Case Results

**Resentencing in a three-strikes case.** Attorney Brian McComas represented a former Marine serving a life sentence under California's three-strikes law. In proceedings under Penal Code section 1172.75, Judge Hill conducted a full resentencing, struck a prior strike conviction, and imposed a sentence of time served. The ruling cleared the way for the client's release from Folsom State Prison.

**Parole granted after 27 years.** Attorneys Rebecca Rabkin and Shelley Itelson represented Megan H. before the Board of Parole Hearings, which granted her parole after 27 years in prison. The decision followed the Governor's reversal of an earlier parole grant in 2018 and three subsequent denials. The new grant remains subject to the applicable review process.

**Transfer to adult court denied.** Raul C. was 17 when he was prosecuted in adult court for a 2002 homicide case under the law then in effect. Following litigation that returned the case to juvenile court for a transfer hearing, Judge Cho denied the District Attorney's motion to transfer the case to adult court. Attorneys Peter Goldscheider and Dan DeSantis, together with Shelley Itelson, represented Raul in the transfer proceedings.

**Additional resentencing results.** Attorney Brian McComas secured resentencing and release for Tracy S., who had been serving a sentence of 205 years to life arising from nine bank robberies. Tracy is expected to receive mental health treatment through proceedings in Santa Clara County.

McComas and his team also obtained resentencing for Ronald P., who had been serving a life-without-parole sentence since 1991. Earlier investigative and legal work by PDP Attorney John Halley and Investigator Bill DiVita helped establish the basis for later claims under the Racial Justice Act. After Ronald developed serious medical needs, the defense sought resentencing under Penal Code section 1172.1 and pursued an emergency writ concerning those claims. Judge Davis resentedenced Ronald to 25 years to life, giving him a potential path to release.

**Life-without-parole sentence reduced.** Attorney Peter Goldscheider and Investigator Sylvia Palma obtained relief for Antoine C., who had spent 30 years in prison following a double-murder conviction. Judge Mallach reduced both convictions from first-degree murder with special circumstances to second-degree murder. Antoine's sentence changed from life without the possibility of parole to 15 years to life on each count.

## PDP ATTORNEY WINS BIG AT THE SUPREME COURT

In April 2026, the California Supreme Court issued a landmark ruling in *In re Kowalczyk*, fundamentally altering how trial courts impose money bail. While the court's watershed 2021 decision in *In re Humphrey* established that judges must consider an arrestee's ability to pay before requiring cash bail, it left open a critical question: Could a judge effectively detain an arrestee pretrial simply because they could not afford bail?

In *Kowalczyk*, the high court delivered an unequivocal answer: no. Cash bail cannot serve as a backdoor detention order. If a defendant is eligible for release, the court must set bail at an amount the person can reasonably attain. This landmark ruling has enabled tens of thousands of indigent arrestees across California to secure release, while requiring judges to conduct individualized bail determinations rather than routinely incarcerating defendants based on their inability to pay.



Attorney Marsanne Weese

The decision was the culmination of nearly five years of litigation and more than 13 filings on behalf of Mr. Kowalczyk across the Court of Appeal and the California Supreme Court. Although Mr. Kowalczyk secured his release in October 2021—roughly three months after filing his initial petition for a writ of habeas corpus—the Private Defender Program supported the efforts of the continued litigation of the bail-related issues to resolve the systemic pretrial detention of indigent defendants.

The case originated in San Mateo County with Gerald John Kowalczyk, an unhoused man with disabilities. After finding a stranger's discarded credit card, Mr. Kowalczyk allegedly used it to purchase a \$7 cheeseburger.

At his arraignment, the trial court set bail at \$75,000. Mr. Kowalczyk was completely indigent, with neither income nor assets. His appointed counsel from the PDP, Esther Aguayo, moved to reduce bail or secure his release under non-monetary conditions, including electronic monitoring and supportive treatment. She demonstrated that Mr. Kowalczyk posed no flight risk and had no history of violence. Despite these arguments, three successive San Mateo County Superior Court judges refused to lower the amount, leaving him incarcerated solely because of his poverty.

Recognizing the constitutional violations, Esther Aguayo consulted PDP panel attorney Marsanne Weese prior to Mr. Kowalczyk's third bail motion in 2021. After the trial court once again denied relief, the PDP assigned Ms. Weese as appellate counsel.

*In re Kowalczyk* highlights the institutional impact of the PDP's systemic litigation strategy. Beginning in about 2019, the PDP actively encouraged panel attorneys to challenge unlawful bail orders, funding trial transcripts, underwriting attorney fees, and hosting specialized trainings to help trial counsel preserve records for appeal and to file writs of habeas corpus challenging those orders. PDP regularly paired trial lawyers with appellate specialists like Marsanne Weese, who had filed over 60 bail-related writs in San Mateo County—more than 50 of them through PDP appointments.

The persistence at the trial level and the PDP's sustained appellate backing ultimately carried *In re Kowalczyk* from a \$7 charge to a defining victory for equal protection and due process to indigent detainees throughout California.

## PANEL MEMBER ACCOMPLISHMENTS

This year several members of the PDP community received awards recognizing their exceptional service to clients, the justice system, and the legal community. Their accomplishments reflect the experience, dedication, and commitment to justice found throughout the Program.

### **Private Defender Panel Attorney Emily Andrews wins the Dennis L. Woodman Award**

The Dennis L. Woodman Award was established to celebrate the Private Defender attorney whose work best reflects the fighting spirit of the late Dennis Woodman in the defense of indigent clients. The inscription on the award reads: "In recognition of the Private Defender who heedless of opposition and with ceaseless determination, fights for those whose liberty is in peril."

This award recognizes the attorney who understands that the client must be first. It is the highest form of recognition because it comes from peers, and it is given to defense attorneys who consistently stand up and fight for the rights of their clients against all adversaries.

This year's Woodman Award was presented to Emily Andrews. Emily began her career with the PDP in 2008. Over the years, she has handled nearly every type of case assigned through the program. She began with misdemeanors and juvenile justice cases before moving on to serious felonies, including murder cases. Emily is a tireless advocate for her clients. She is a strong legal writer with experience in writ and appellate work, and she is also an accomplished trial lawyer. Emily's commitment to her clients is reflected in the following comments from a community organization that worked with one of her clients and observed her advocacy firsthand:

*We're writing to praise the work of Emily Andrews...From the beginning, Emily's heartfelt advocacy and collaborative style won us over and provided [the client] with encouragement and hope. Her many contributions to the case included insightful analysis, formulation of strategy, and representation in hearings. Emily helped us research the immigration consequences of a conviction, which in this case are life-threatening. We hope to have an opportunity to work with Emily...in the future and are deeply grateful for her service.*

Hard to top those words of praise.

Please join us in congratulating Emily on her well-deserved award!



2025 Installation of Officers & Barristers

Attorneys Emily Andrews & Eric Liberman & Chief Defender Lisa Maguire



Woodman Award Winner  
Attorney Emily Andrews

## Private Defender Panel Attorney Sherrie Friedman wins the William Nagle Jr. Memorial Award

The William Nagle, Jr. Memorial Award is presented by the San Mateo County Bar Association (SMCBA) to an attorney who advances the professionalism of the Association through successful innovations and a selfless commitment of time and energy. This year, the award was presented to PDP attorney Sherrie Friedman.

Sherrie joined the SMCBA in 2009 and has worked on the dependency and probate panels of the PDP since then. She has served on the Bar Association's Board of Directors since 2021. During that time, she has served on the Bench and Bar Committee, the Audit Committee, and the Private Defender Oversight Committee and has been instrumental in arranging continuing legal education events for Bar Association members.

In addition to her successful law practice and work through the Bar Association, Sherrie was co-founder and board member of the California Foundation for Gifted Education. She served for eight years on the Board of Court Appointed Special Advocates (CASA), a program that supports and promotes court-appointed volunteers to serve as advocates for children's best interests, work that can have a life-changing impact.

In addition, Sherrie has been a volunteer with SolMateo, a nonprofit dedicated to supporting our community by raising money and awareness for service organizations addressing mental health, including suicide-prevention hotlines, emergency housing for people experiencing homelessness, and counseling services. She has participated in mock-trial programs through local law schools and high schools, where she has helped expose students to and prepare them for the practice of law. Sherrie's longstanding commitment to the legal profession and her community reflects the spirit of the William Nagle Jr. Award.



**2025 Installation of Officers & Barristers**  
Attorney Sherrie Friedman  
with Asst. Chief of Juvenile & Civil Commitment Branch Ron Rayes



**William Nagle Jr. Memorial Award Winner**  
Attorney Sherrie Friedman

## Private Defender Panel Attorney Eric Liberman wins the James M. Dennis Award



**James M. Dennis Award Winner**  
Attorney Eric Liberman  
with Chief Defender Lisa Maguire

The James M. Dennis award recognizes an attorney whose courage and determination, even in the face of adversity, have contributed significantly to justice in the community and raised the ethical standards of the San Mateo County Bar Association. This year, the award was presented to longtime PDP attorney Eric Liberman.

Eric's service to the PDP spans more than four decades. He served as a panel attorney and handled cases at the highest level of seriousness, including capital defense. Eric later served for many years as Managing Attorney of the Adult Division before becoming Assistant Chief Defender in 2020. In those leadership roles, he provided guidance and support to generations of panel attorneys and helped oversee the PDP's representation of indigent clients.

Although Eric has retired from PDP management, he continues to be actively involved in the local legal community, including through his service to the San Mateo County Bar Association. His extensive experience and institutional knowledge remain valuable resources to the Bar, the PDP, and less-experienced attorneys. Eric's longstanding commitment to indigent defense, the legal community, and the highest standards of the profession makes him a fitting recipient of the James M. Dennis Memorial Award.

### **Private Defender Panel Investigator Diana McMillen wins Richard Fischer Investigator Award**



The Richard John Fischer Investigator Award was created in 2025 to honor the memory and legacy of one of the PDP's longest-serving and most respected investigators. Rich began his career as a private investigator in 1972 and devoted decades of exceptional service to the PDP and its clients.

The award recognizes a PDP investigator who exemplifies Rich's commitment to justice, dedication to clients, investigative skill, and determination in pursuing the facts wherever they may lead. This year's award was presented to Diana McMillen, who joined the PDP as an investigator in October 2022 following a 26-year career as a San Mateo County Deputy Probation Officer. Diana is known for treating clients with fairness and compassion. Her experience, professionalism, and dedication to clients make her a deserving recipient of the Richard John Fischer Investigator Award.

**Richard John Fischer Investigator Award Winner**  
Investigator Diana McMillen  
with Head of Investigations Indiana Albanes

Together, these awards recognize the different ways in which members of the PDP community advance justice through dedicated representation, professional leadership, mentorship, community service, and skilled investigation. We congratulate Emily, Sherrie, Eric, and Diana and thank them for their contributions to the PDP, its clients, and the broader legal community.

## CONCLUSION

We hope that this Annual Report provides a comprehensive overview of the growth and impact of the work of the Program over the last fiscal year. Thank you to the entire team for contributing to this report. Special thanks to Lauren Claitor for assembling and beautifying the report.

This report represents just a small glimpse of the work being done by so many dedicated professionals. To all the members of the Private Defender Program who have committed themselves to this challenging and often thankless work-we appreciate you and your dedication to the work.

Thank you to the SMCBA Board of Directors, as well as the County of San Mateo for their continuing support of our program.

Respectfully submitted,

*Lisa M. Maguire*

# APPENDIX

1

# **AGREEMENT BETWEEN THE COUNTY OF SAN MATEO AND THE SAN MATEO COUNTY BAR ASSOCIATION**

THIS AGREEMENT, made and entered into this 13<sup>th</sup> day of June 2023 by and between the COUNTY OF SAN MATEO, a political subdivision of the State of California, (hereinafter “County”) and the SAN MATEO COUNTY BAR ASSOCIATION, a corporation, (hereinafter, “Association”);

WHEREAS, it is the desire of both the County and the Association (collectively, the “Parties”) to continue to provide appropriate and competent legal services to financially eligible persons accused of crime in San Mateo County, to those who are subject to the delinquency laws of the Juvenile Court, and to all those entitled to the services of court-appointed counsel in other proceedings;

WHEREAS, the Association is qualified to provide such legal services and representation through its Private Defender Program, subject to the authority of the courts to appoint counsel in certain cases;

NOW, THEREFORE, in consideration of the mutual promises, covenants and conditions contained herein, the Association agrees to furnish such legal services through its Private Defender Program (“PDP”), and the County agrees to pay to the Association certain sums therefore upon the following terms and conditions:

## **1. SERVICES**

The Association will provide qualified attorneys for all financially eligible persons entitled to court appointed counsel as a matter of law in the Superior Court of San Mateo County. The Association will provide such representation in criminal cases, juvenile delinquency cases, mental health cases, civil and miscellaneous cases as more fully described in Section 2 of this Agreement and Fee Schedule detail in **APPENDIX B**. As part of such representation, the Association shall provide attorneys to appear at all arraignment calendars, all specialty courts, juvenile court detention centers, review calendars, ‘602’ placement calendars, as requested by the Superior Court of San Mateo County, and as provided by law.

As to the cases described in Section 2 of this Agreement, and Fee Schedule detail in **APPENDIX B**, the Association will provide necessary and appropriate ancillary services such as investigators, experts and other forensic services, the expense of which is not otherwise provided by law.

The Association shall also employ appropriate staff as may be required to fulfill its obligations under this Agreement, including but not limited to the Chief Defender, Assistant Chief Defenders, Managing Attorneys, Accountants, Head of Social Work, Head of Investigations, Head of Crim-Immigration Defense, Paralegals, Client Advocates, Executive Assistants, Office Managers, Administrative Assistants, and a Receptionist.

The Association agrees and understands that the services performed under this Agreement, whether by the Association or the attorneys and/or investigators providing the representation described herein, are performed as independent contractors and not as employees of the County, and that neither the Association nor any attorneys and/or investigators performing hereunder acquire any of the rights, privileges, powers, or advantages of County employees.

## 2. CASE TYPES

For the purposes of this Agreement, a “case” shall be defined as follows: The representation of one person under one case number. Multiple charges against a defendant under one case number shall be deemed a single case. If a single defendant is accused in more than one accusatory pleading, each separate case number shall constitute a separate case. If multiple defendants are charged under a single case number; it shall be considered that there are as many cases as there are defendants. Matters involving trial competency pursuant to Penal Code 1367 *et seq.*, shall be deemed a separate case and will be categorized according to the underlying charges. Any other proceeding instituted after sentence, or after the Private Defender Program has been relieved by the Court, and allows for representation under this contract, shall be treated as one additional case.

a. **“TYPE A” CASE** is generally described as a felony matter involving one accusatory pleading including a complaint, indictment, information, or certification under Penal Code section 859(a). It also includes the matters described in greater detail in **APPENDIX A**, attached hereto and incorporated by reference as though fully set forth herein.

b. **“TYPE B” CASE** is generally described as a single matter involving one complaint alleging a misdemeanor and matters described in greater detail in **APPENDIX A**, attached hereto and incorporated by reference as though fully set forth herein.

c. **“TYPE C” CASE** is generally described as any case initiated pursuant to the Lanterman-Petris-Short Act or the Developmental Disability laws set forth in the California Welfare and Institutions Code.

d. **“TYPE E” CASE** is defined as any matter in the Juvenile Court brought pursuant to the juvenile delinquency statutes of the State of California, including but not limited to those set forth in Welfare and Institutions Code section 602 *et seq.*

If, during the term of this Agreement, the Legislature enacts any law, or a court decision is rendered which has the effect of changing the definition of a “Type” as defined in this Section above, the County and the Association agree to continue to define the case as set forth in this Agreement.

## 3. COMPENSATION

The Compensation pursuant to this Agreement covers fixed-quarterly payments for five years, through June 30, 2028, and is renewable if the Parties mutually agree, subject to the Parties’ Termination and Transition Services obligations as set forth in Section 6 herein. Both the County and the Association acknowledge uncertainty about the effect that significant increases or decreases in case appointments, the number and nature of murder and other Special Litigation (defined in this Section below) case appointments, legislation, court decisions, or actions of other agencies could have on the ability of the Parties to perform under the terms of the Agreement. The County and the Association agree to meet, at the request of either party, to discuss any such concern at the earliest possible time to

determine whether changes in the terms of the Agreement are necessary. The Parties estimated the amount of the funds, as set forth below, and the Parties acknowledged the uncertainty of increases and/or decreases of case appointments that may affect the amount spent within the requirements of this Agreement. To that end, if any funds advanced to the Association for the performance of Services remains unspent at the end of each fiscal year, the Association shall notify the County with an estimate of unspent balance within forty (40) days of the close of the fiscal year, and with a final amount of the unspent balance within 120 days of the close of the fiscal year. The Parties agree that the Association shall make a good faith effort to maintain a reserve fund. The Parties acknowledge that a minimum reserve level of 10 percent (10%) should be maintained by the Association for a program of this size and complexity. When the Association notifies the County of any unspent funds, the Association shall identify the amount the Association retains as reserve. The Association agrees that any unspent balance, not including a mutually agreed upon amount for reserves, will either be (1) returned to the County, or (2) applied to the remaining fixed payments as set forth below, at the County's sole election; however, any unspent funds will be applied to remaining payments set forth below until there is an agreement on compensation as outlined in (c) below.

In consideration for the Association's performance of the obligations set forth herein, and subject to the Association's satisfaction of its financial reporting obligations as set forth in Section 4, below, the County agrees to pay the Association the following:

- a. Costs will be based upon the actual amount paid by the Association for representation of PDP clients on all types of cases and services provided pursuant to this Agreement based upon the Fee Schedule which is attached hereto as **APPENDIX B**, plus any actual administrative overhead costs incurred that are not included in **APPENDIX B**. Unless otherwise stipulated by written agreement, the total amount paid to the Association for services pursuant to this Agreement shall not exceed the total sum set forth below for each fiscal year (July 1 through June 30) of the Agreement:

|                     |              |
|---------------------|--------------|
| Fiscal Year 2023-24 | \$23,666,049 |
| Fiscal Year 2024-25 | \$24,376,031 |
| Fiscal Year 2025-26 | \$25,107,311 |
| Fiscal Year 2026-27 | \$25,860,531 |
| Fiscal Year 2027-28 | \$26,636,347 |

- b. Except as specified in subsections (f) and (g) below, the above-stated amount of compensation shall include all services for court appointments defined under **Section 2, CASE TYPES**, and for **SPECIAL LITIGATION CASES**, defined in subsection (d) below, made during the period of the Agreement. An appointment shall be deemed made within the meaning of this Agreement on the date on which the Private Defender Program is first appointed.
- c. The Association shall be responsible for the complete representation of all persons for whom appointment was made under Section 2 during the period of

this Agreement. Complete representation shall include provision of all services under the terms of this Agreement until a new appointment is authorized by the terms of Section 2.

- d. A **SPECIAL LITIGATION CASE** is a case involving multiple charges, unusually complex issues of law or facts, novel issues of law requiring complex motions or writs, or which requires extraordinary demands upon an attorney's time, efforts and skill. Special Litigation cases are primarily cases involving a homicide, attempted homicide, or cases providing for a sentence of life imprisonment. They also include proceedings pursuant to the Sexually Violent Predators Act (California Welfare and Institutions Code section 6600 *et seq.*), proceedings to extend the commitments of Mentally Disordered Offenders (California Penal Code section 2962 *et seq.*), and proceedings to extend the commitments of persons found Not Guilty by Reason of Insanity (California Penal Code section 1026.5). Private Defender Program lawyers are compensated on an hourly basis for such cases, at the rates set forth in the Fee Schedule established by the Association, attached as Appendix B. In the event that no agreement exists between the County and the Association after June 30, 2028, the County agrees to pay for all Special Litigation case services provided after June 30, 2028 by the Association for Special Litigation cases appointed during the term of this Agreement or previous agreements at the rates the Association pays, and under procedures prevailing during the last year of this Agreement.
- e. The payments set forth in this Section above, are based on a calculation of the anticipated caseload for each type of case. The rates for each type of case, for the term of this Agreement, are set forth in detail in APPENDIX B, attached hereto and incorporated by reference as though fully set forth herein.
- f. **Exclusion for Certain Cases.** Any case in which an attorney is appointed pursuant to the provisions of *Harris v. Superior Court* (1977) 19 Cal.3d 786, 140 Cal.Rptr. 318, shall not be included within the terms of this Agreement, but may at the County's option, be the subject of a separate agreement for representation. Notice of any known *Harris* Motions shall be immediately forwarded to the County by the Private Defender Program. Any case in which a privately retained attorney seeks court appointment through the Private Defender Program, shall not be included within the terms of this Agreement unless the Chief Defender of the Private Defender Program approves. If the Chief Defender intends not to approve, he or she shall notify the County immediately. Without the Chief Defender's approval, the County has no obligation to compensate the Association for such cases, nor does the Association have an obligation to compensate such attorneys. Such attorneys must apply directly to the appointing court for compensation pursuant to Sections 987.2(a) and 987.3 of the California Penal Code.
- g. **Exclusion for Penal Code 987.9.** In the event that Section 987.9 of the California Penal Code (concerning funds for investigators, experts, and other

ancillary services in death penalty cases) is modified, repealed or superseded during the term of this Agreement, any case expense currently reimbursable by the State of California which is transferred to the County due to such Section 987.9 being modified, repealed or superseded is not included in the terms of this Agreement, and shall be reimbursed separately and in addition thereto.

#### **4. ADDITIONAL OBLIGATIONS**

In addition to the Services set forth in Section 1 herein, the Association and the County expressly agree to the following duties and obligations:

##### **a. PDP POLICIES AND PROCEDURES**

1. The Association shall maintain and document accounting policies and procedures for the PDP, which shall be designed to ensure that segregation of duties, proper reviews and approvals, financial analyses, monitoring by management, and other internal controls are followed. The Association's management shall ensure compliance with these policies and procedures.
2. The Association shall thoroughly review vouchers for accuracy and compliance with documented policies, prior to paying the vouchers. The review and approval procedures performed by PDP personnel shall be documented to ensure the rules are consistently applied and monitored by management to verify that they are being followed.
3. The Association shall maintain and implement policies to ensure that voucher approval duties are segregated from system administration and voucher payment duties. Any deviation from this requirement shall be subject to higher level management review and documentation by the Association.
4. The Association shall properly allocate costs to the PDP. The Association shall develop a methodology to allocate employees' salaries and benefit expenses between PDP and non-PDP activities, which should then be reflected in updated case costs and other estimates used to determine the annual contract amount.
5. The Association shall have the sole responsibility for determining the fees and rates paid to Private Defender Program attorneys for work performed under the terms of this Agreement. The Association shall provide the County a copy of the current Fee Schedule, setting forth such fees and rates, and shall provide the County a copy of any modifications to the Fee Schedule within 30 days of adoption by the Association.
6. The Association shall furnish to the County, within 60 days of the end of each quarter of this Agreement, the names of all attorneys who were paid for the representation of Private Defender Program clients during that quarter.

b. FINANCIAL REPORTING OBLIGATIONS

1. The Association shall provide to the County audited financial statements that include a Statement of Financial Position, Statements of Activities and Changes in Net Assets, and Statement of Cash Flows. The financial statements and Management Letter should be provided to the County no later than December 31 following the fiscal year-end. The Association shall change auditors at least once every five years.
2. The Association agrees to provide detailed reports of actual expenditures incurred for providing indigent legal services to the County no later than December 31 following the fiscal year-end to ensure the annual contract amount is reasonable and supported.
3. Within twenty-one days (21) after the end of each quarter, the Association shall provide the County with summary and detailed reports on case costs and related costs for the quarterly period immediately preceding the payment date that can be easily verified to source documentation upon request. The following summary and detailed reports shall be provided:
  - Expenditures by Attorney
  - Expenditures per Court Case Number, Case Type and Sub-Type
  - Expenditures by Fee Type
  - Expenditures by Administrative Expense Type
  - Case Count by Type and Sub-Type (with case number details)
  - All fees and costs which are, or may be, subject to reimbursement by the State or Federal governments, or which may be eligible for other than San Mateo County funding
4. The Association understands and agrees that: (1) the County may withhold the next quarterly payment to the Association pursuant to Section 3 above if the Association fails to deliver to the County the financial reports identified in Section 4, or if the financial reports are materially deficient or incomplete; and (2) any delay by the County in making the quarterly payment to the Association pursuant to Section 3 above resulting from the Association's failure to timely deliver the reports to the County as required by Section 4 shall not relieve the Association of any of its obligations under this Agreement, including—without limitation—its obligation to provide Services pursuant to Section 1 herein.

c. RECORDS AND AUDITS

1. The Association shall maintain records and accounts during the term of this Agreement and for four years thereafter and shall observe accepted accounting practices. The Association shall make all statistical and financial records and data relevant to the provisions of this Agreement that are not confidential and are not protected by the attorney-client or work-

product privileges, available for inspection and audit by authorized representatives of the County at any reasonable time.

Except as otherwise authorized by California Government Code sections 27707 *et seq.*, nothing herein shall be construed to permit the County to examine the files of assigned counsel pertaining to actual representation of accused persons, and the laws defining the attorney-client privilege and attorney work-product will be strictly construed and observed to protect client confidentiality.

2. The Association shall furnish to the County, within 20 days of the end of each month of each year of this Agreement, a statistical breakdown of the number of cases in each of the categories defined and described in Section 2 herein, to enable the County to evaluate the performance of services under this Agreement.
3. The County shall maintain complete records of all reimbursement to the County, from whatever source, for services provided by the Association pursuant to the terms of this Agreement. The County shall furnish to the Association, upon request, information regarding the amount and source of reimbursement received by the County.

d. PERFORMANCE BENCHMARKS

1. Attorney Training. The Association recognizes that ongoing professional training is a necessity to keep attorneys abreast of changes and developments in the law. The Association shall provide sufficient training, whether in-house or through a qualified provider of Continuing Legal Education certified by the California State Bar Association, to keep its attorneys who perform work under this Agreement abreast of developments in relevant law and procedure. This subject shall be included in the annual report of the Private Defender Program to the County as described in Section 4.d.8. below.
2. Attorney Evaluation. The Chief Defender of the Private Defender Program, and/or his/her designee, shall evaluate the professional performance of each Private Defender Program attorney annually. The Association shall make available to the County the standards by which performance was measured, and evidence that such evaluations were conducted, although all evaluations are to be confidential between the Private Defender Program and the attorneys. The number of evaluations conducted and the results thereof shall be included in summary form in the annual report of the Private Defender Program to the County as described in Section 4.d.8. below.
3. Client Complaints. The Private Defender Program will have a felony-qualified lawyer with at least five years of felony experience on the PDP attorney panel, on duty each business day at the Private Defender Program

offices during regular business hours to speak to and to answer the questions of or to receive complaints directly from PDP clients or others on behalf of the PDP client. Such attorneys, known as “Officers of the Day” (or “OD”), will follow a written procedure for handling of client complaints, which is attached hereto as APPENDIX C and incorporated herein by reference. The complaints or questions may be related to an ongoing case, a yet to be filed case, or a case already adjudicated. The person may be on the phone or may come to the PDP Office to meet with the OD. The PDP will maintain a list of the assigned ODs. If the OD has a personal or professional relationship with the attorney who is the subject of the complaint to such an extent that would cause the OD to be unable to exercise his or her professional judgment, the OD will refer the complainant to the the Assistant Chief Defender.

The Private Defender Program has developed and circulated to all staff and ODs a flowchart setting forth this complaint procedure, which includes information that clients may appeal to the Chief Defender if they are dissatisfied with the response to their complaint. If clients express an interest in appealing the matter further, the OD shall advise clients of their right to appeal to the Chief Defender and provide contact information for that purpose. The OD will also advise clients that they may make a complaint with the State Bar of California, and include information of where to locate the State Bar’s complaint form for that purpose. The OD will further advise any client who indicates dissatisfaction with the decision of the OD of his/her right to bring the complaint to the attention of the Court in the form of a *Marsden* hearing<sup>1</sup>, since the adequacy of the performance of counsel in court-appointed cases is ultimately for the Court to determine.<sup>2</sup> The number and nature of such complaints as well as their disposition shall be included in summary form, in the annual report of the Private Defender Program to the County, as described in Section 4.d.8. below.

4. Attorney Caseloads. The Association and the County agree that the number and type of cases for which a lawyer is responsible may impact the quality of representation individual clients receive. While there are many variables to consider, including the seriousness or complexity of each case and the skill and experience of the individual lawyer, useful information might be gathered from an evaluation of the caseloads of Private Defender Program attorneys. To this end, the Private Defender Program shall include the caseloads of each Private Defender Program attorney by types of cases, as well as the average caseloads for the Private Defender Program in the annual report of the Private Defender Program to the County, as described in Section 4.d.8. below.<sup>3</sup>

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<sup>1</sup> *People v. Marsden* (1970) 2 Cal.3d 118; 84 Cal.Rptr. 156.

<sup>2</sup> *Phillips v. Seely* (1974) 43 Cal.App.3d 104,115.

<sup>3</sup> The Parties acknowledge that caseload averages are not appropriate for measuring the quality of representation provided by any individual attorney; rather they are tools for evaluating staffing needs for the

5. Initial Client Meetings. The Association and the County agree that attorneys should conduct a client interview as soon as practicable after being appointed by the Court, to obtain information necessary to provide quality representation in the early stages of the case and to provide the client with information concerning the lawyer's representation and the course criminal cases take in the San Mateo County Superior Court. Such meetings may also serve to foster a relationship of trust and understanding that will ultimately inure to the client's benefit. Consequently, the Private Defender Program will devise a system to monitor the occurrence of early interviews of incarcerated clients, taking into account the factors that affect the ability of Private Defender Program lawyers to make early jail visits, including but not limited to the number of days between arraignment and the next court appearance and the speed of assignment of cases to individual lawyers. The results shall be included in the annual report of the Private Defender Program to the County, as described below in Section 4.d.8. The client will also be provided information, both verbal and written, explaining the Private Defender Program as well as a brief description of the process of a criminal case. The Private Defender Program has developed a brochure for this purpose, for both felony and misdemeanor cases. This brochure provides information to clients about the complaint process and shall be presented to each client at the initial arraignment on the case. A copy is attached hereto as APPENDIX C.
  
6. Community Outreach. The Association and the County recognize and acknowledge the significant impact that the criminal justice system has on our community, particularly in portions of our community that have been affected by crime to an extent disproportionate to population. The Association recognizes that the privilege of practicing law in this community also provides the lawyers of the Private Defender Program an opportunity to share their knowledge and experience with those whose lives are most likely to be disrupted by entanglement in the criminal justice system. The Association, independently and/or in conjunction with community outreach programs of the San Mateo County Superior Court and other community agencies, will undertake to communicate to the public the mission of the Private Defender Program and its role in the criminal and juvenile justice systems. Community outreach efforts will be included in the annual report of the Private Defender Program to the County, as described in Section 4.d.8. below.
  
7. Client Survey. The Association will create a survey instrument and process to seek client views on the representation they received from the Private Defender Program. The results of such survey will be included in the Annual Report of the Chief Defender.

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Private Defender Program as a whole. The Spangenberg Group, "Weighted Caseload Study for the Colorado State Public Defender", November 1996, pg.67.

8. Annual Report of the Chief Defender. Subject to the exception articulated in Section 10 hereunder, within ninety (90) days of the end of each fiscal year during the term of this Agreement, the Chief Defender of the Private Defender Program shall submit a written report to the Board of Supervisors detailing the Program's performance with respect to the items described in Sections 4.d.1, 4.d.2, 4.d.3, 4.d.4, 4.d.5, 4.d.6 and 4.d.7. The annual report will also include the annual budget of the program, setting forth the costs of the operation of the program for the year, including fees for attorney's services, investigation, and other ancillary defense services as well as the cost of administration. The Chief Defender may request an additional 30 days within which to submit said report, and upon receipt of said written request, the County may consent to said 30-day extension, which consent shall not be unreasonably withheld.

## 5. **NON-DISCRIMINATION**

- a. No person shall, on the grounds of race, color, religion, ancestry, gender, age (over 40), national origin, medical condition (including cancer), physical or mental disability, sexual orientation, pregnancy, childbirth or related medical condition, marital status, military or veteran status or political affiliation be denied any benefits or subject to discrimination, including the receipt of non-discriminatory services, under this Agreement. The Association shall ensure full compliance with federal, state or local laws, directives and executive orders regarding non-discrimination for all service providers, employees and subcontractors under this Agreement.
- b. The Association shall comply with section 504 of the Rehabilitation Act of 1973, which provides that no otherwise qualified handicapped individual shall, solely by reason of a disability, be excluded from the participation in, be denied the benefits of, or be subjected to discrimination in the performance of this Agreement.
- c. The Association shall ensure equal employment opportunity based on objective standards of recruitment, classification, selection, promotion, compensation, performance evaluation, and management relations for all employees under this Agreement. The Association's equal employment policies shall be made available to the County upon request.
- d. With respect to the provision of employee benefits, the Association shall comply with the County Ordinance which prohibits contractors from discriminating in the provision of employee benefits between an employee with a domestic partner and an employee with a spouse.
- e. The Association shall comply fully with the non-discrimination requirements required by 41 CFR 60-741.5(a), which is incorporated herein as if fully set forth.

- f. The Association shall comply with the San Mateo County Ordinance with respect to provision of jury duty pay to employees and have and adhere to a written policy that provides that its employees shall receive from the Association, on an annual basis, no less than five days of regular pay for actual jury service in San Mateo County. The policy may provide that employees deposit any fees received for such jury service with the Association or that the Association deduct from the employees regular pay the fees received for jury service.
- g. Violation of the non-discrimination provisions of this Agreement, as determined by a court or administrative agency of competent jurisdiction, shall be considered a breach of this Agreement and subject the Association to penalties, to be determined by the County Manager, including but not limited to:
  - i. termination of this Agreement;
  - ii. disqualification of the Association from bidding on or being awarded a County contract for a period of up to 3 years;
  - iii. liquidated damages of \$2,500 per violation;
  - iv. imposition of other appropriate contractual and civil remedies and sanctions, as determined by the County Manager.
- h. To effectuate the provisions of this paragraph, the County Manager shall have the authority to
  - i. examine the Association's employment records with respect to compliance with this Section 5;
  - ii. set off all or any portion of the amount described in this Section 5 against amounts due to the Association under the Agreement or any other contract between the Association and the County.
- i. With regard to performance and services provided pursuant to this Agreement, the Association shall report to the County Manager the filing by any person in any court of any complaint of discrimination or the filing by any person of any and all charges with the Equal Employment Opportunity Commission, the Fair Employment and Housing Commission or any other entity charged with the investigation of allegations within 30 days of the Association receiving notice of such filing, provided that within such 30 days such entity has not notified the Association that such charges are dismissed or otherwise unfounded. Such notification shall include the name of the complainant, a copy of such complaint and a description of the circumstance. The Association shall provide the County with a copy of the response to the Complaint when filed.

## **6. TERMINATION AND TRANSITION SERVICES**

- a. Termination upon 24 Months' Written Notice. If either of the Parties wishes to terminate this Agreement, the terminating Party must deliver Notice to the other Party, in writing, of said intent to terminate the

Agreement with an effective date of termination that is no earlier than twenty-four (24) months' from the date of the Notice. In the event of termination by Notice pursuant to this Section, the County shall be responsible for any actual direct and indirect costs incurred by the Association during the Notice period of twenty-four (24) months. The Association will invoice the actual costs of representation pursuant to this Agreement to the County without any added charges, and the County will reimburse the Association for approved actual costs referenced in Appendix B within 45 days of receipt of an invoice.

- b. Termination for Default. Either the County or the Association may terminate this Agreement if the other Party defaults in the observance or performance of its material covenants or agreements (other than a default in a payment obligation) and such default continues uncured for sixty (60) business days after written notice is given to such party failing to perform its covenants or agreements under this Agreement.
- c. Effect of Termination. Upon the effective date of the termination of this Agreement and after the expiration of the 24-month Notice period: (i) the Association may immediately cease providing new Services hereunder; and (ii) any and all payment obligations of the County under this Agreement will become due immediately. Upon such termination, and upon request of the County, the Association shall reasonably cooperate with the County to ensure a prompt and efficient transfer of all data, documents and other materials to a new service provider in a manner such as to minimize the impact of expiration or termination on the individuals receiving Services pursuant to this Agreement. The County agrees to pay the Association compensation for Services performed in connection with such transfer, to the extent not contemplated in the Agreement.
- d. Transition at Time of Termination
  - i. In the event of termination of this Agreement, in whole or in part, the Association shall take reasonable steps to ensure the orderly and effective transition of the Services to the County and/or a successor contractor ("Transition Assistance").
  - ii. All references in this Section to termination shall include partial and complete termination, cancellation or cessation unless the context otherwise requires.
  - iii. In relation to any partial termination, the provisions of this Transition Schedule shall apply only to those parts of the Services subject to such partial termination or expiry.
  - iv. Each reference to an obligation of the Association under this Section shall be deemed to include an obligation on the Association, to the extent possible, to secure compliance by all relevant sub-contractors with such obligation.

- e. Transition Assistance Period. The Transition Assistance Period shall mean as follows:
- i. In the case either Party serves notice to terminate this Agreement pursuant to Section 6.a., the Transition Assistance Period shall mean a period of such duration as is determined by the County, but is limited to a maximum of eighteen (18) months, commencing eighteen (18) months prior to the effective date of the termination;
  - ii. In the case of a termination by default pursuant to Section 6.b, the Transition Assistance Period shall mean a period of eighteen (18) months commencing sixty (60) business days after written notice is given to such party failing to perform its covenants or agreements under this Agreement; or
  - iii. In the case of a repudiatory breach of this Agreement, the Transition Assistance Period shall mean a period of eighteen (18) months commencing on the date upon which the non-defaulting Party accepts such repudiatory breach as terminating this Agreement. The Parties understand and agree that a repudiatory breach is a breach so fundamental that it permits the distressed party to terminate performance of the contract, in addition to entitling that party to sue for damages.
- f. Transition Assistance Election. During the Transition Assistance Period, the Services will be discontinued or transitioned to a Successor Contractor at the County's sole discretion and such transition shall then be performed in accordance with the Transition Assistance Plan. From the commencement of the Transition Assistance Period and continuing until a date pre-agreed or such provided to the Association by the County with a minimum of thirty (30) days' notice, all the terms and conditions of this Agreement will remain unchanged during the Transition Assistance Period.
- g. Transition Assistance Plan. The Association shall develop, with reasonable assistance from the County, a written transition assistance plan specifying in detail all activities, and the corresponding timing of such activities, necessary to facilitate an orderly and effective transition of the Services to be provided during the Transition Assistance Period ("Transition Assistance Plan"), and shall deliver the Transition Assistance Plan to the County as follows:
- i. In the case either party serves notice to terminate this Agreement pursuant to Section 6.a., within six (6) months of the service of notice to terminate this Agreement;
  - ii. In the case of a termination by default pursuant to Section 6.b, within fourteen (14) days of the commencement of the Transition Assistance Period as set forth in Section 6e.ii.; or
  - iii. In the case of a repudiatory breach of this Agreement, within fourteen (14) days of the commencement of the Transition Assistance Period as set forth in Section 6e.iii.

- h. Contract Materials. At the end of this Agreement, or in the event of termination, all finished or unfinished documents, data, studies, reports, photographs, time entries, and other written materials (collectively referred to as “contract materials”) provided by the County to the Association under this Agreement shall remain the property of the County and shall be promptly returned to the County. Upon termination, the Association may make and retain a copy of such contract materials if permitted by law.

## 7. INDEMNIFICATION

Each Party shall defend, indemnify and hold the other Party, its agents, officers and employees, harmless from and against all liability, loss, expense, attorneys’ fees, or claims arising out of the performance of this Agreement but only in proportion to and to the extent such liability, loss, expense, attorneys’ fees, or claims for injury or damages are caused by or result from the negligent or intentional acts or omissions of the indemnifying Party, its officers, agents or employees. The Parties expressly understand and agree that the attorneys, investigators and others providing services pursuant to this Agreement are not employees of the County for any purpose and the County is not responsible for any claims, liability or expenses relating to their status as independent contractors. This obligation to hold harmless, defend and indemnify shall continue beyond the terms of this Agreement or any extension of this Agreement.

## 8. INSURANCE

- a. **Liability insurance.** The Association shall take out and maintain during the life of this Agreement such Comprehensive General Liability, Motor Vehicle Liability and Professional Liability Insurance as shall protect the Association while performing work covered by this Agreement from any and all claims for damages for bodily injury, including accidental death, as well as any and all claims for property damage which may arise from the Association operations under this Agreement, whether such operations be by the Association or by any sub-contractor or by anyone directly or indirectly employed by either of them. Such insurance shall be combined single limit bodily injury and property damage for each occurrence and shall be not less than the amount specified below.

Such insurance shall include:

- (a) Comprehensive General Liability..... \$1,000,000
- (b) Motor Vehicle Liability Insurance..... \$1,000,000
- (c) Professional Liability..... \$1,000,000

After one year from the date this Agreement is first executed, the County may, at its sole discretion, require an increase in the amount of liability

insurance to the level then customary in similar County agreements by giving sixty (60) days' notice to the Association. The County and its officers, agents, employees and servants shall be named as additional insured on any such policies of insurance, which shall also contain a provision that the insurance afforded thereby to the County, its officers, agents, employees and servants shall be primary insurance to the full limits of liability of the policy, and that if the County or its officers and employees have other insurance against the loss covered by such a policy, such other insurance shall be excess insurance only.

In the event of the breach of any provision of this section, or the event any notice is received which indicates any required insurance coverage will be diminished or cancelled, the County of San Mateo at its option, may, notwithstanding any other provision of this Agreement to the contrary, declare a material breach of this Agreement and suspend all further work pursuant to this Agreement, if there is a failure to obtain adequate replacement coverage within 30 days.

- b. **Worker's Compensation Insurance.** The Association shall have in effect, during the entire life of the Agreement, Worker's Compensation and Employer Liability Insurance providing full statutory coverage. In signing this Agreement, the Association certifies awareness of the provisions of section 3700 of the California Labor Code which requires every employer to be insured against liability for Worker's Compensation or to undertake self-insurance in accordance with the provision of the Code, and certifies compliance with such provisions before commencing the performance of this work of the Agreement as set forth in California Labor Code section 1861.

## 9. **MEDIATION**

Any dispute between the Parties arising out of this Agreement, or any of the APPENDICES attached hereto, that the Parties have been unable to resolve shall be referred to mediation. The Parties will agree upon a mediator from a list of available mediators within five (5) days of being provided with a list of mediators. If the Parties cannot agree on a mediator within such period, then a list of three available mediators will be sent by the Service Provider to the Parties. Each party may strike one name by delivering written notice to the Service Provider within five (5) days after delivery of the list of mediators. The remaining name will be the mediator; provided that if two names are left, the Service Provider shall select which of the two shall serve as mediator. The Parties shall use their reasonable efforts to resolve this dispute during the Mediation. Mediation shall continue until the dispute is resolved or the Parties decide to abandon mediation. In the event that the dispute has not been resolved within sixty (60) days after the dispute has been referred to mediation, either party shall have the right to proceed to litigation with respect to such dispute.

It is agreed by the Parties that the cost of the mediator and any associated costs resulting from mediation shall be shared equally between the Parties.

It is agreed by the Parties that unless otherwise expressly waived by them, any action brought to enforce any of the provisions of the Agreement for declaratory relief hereunder shall be filed and remain in a court of competent jurisdiction in the County of San Mateo, State of California.

#### **10. EVALUATION**

The County and the Association recognize and acknowledge that evaluation of the performance under the terms of this Agreement is a function that necessarily includes the participation of the San Mateo County Superior Court. As noted in *Phillips v. Seely* (1974) 43 Cal.App.3d 104,115:

“The availability of a reasonable sum of money to reasonably compensate assigned counsel where required by law is the responsibility of the board of supervisors; whether indigent persons entitled to counsel at public expense are being adequately represented by reasonably compensated counsel is for the court to determine.”

The County may form a committee to evaluate ongoing performance under the terms of this Agreement, at any time during the period of this Agreement and no less than every 5 years, that shall include members of the judiciary, members of the Association who are not actively participating as Private Defender Program attorneys, and may include other interested persons as determined by the County, to make such reports and recommendations as may be appropriate and of assistance to the Parties hereto.

In any year in which such a performance review is conducted it will be in lieu of the requirement of the Annual Report described in Section 4.d.8.

The County and the Association agree that, upon the submission of any report and/or recommendation by the Committee, either party may require the other party to meet and confer regarding any changes to the Private Defender Program or amendments to this Agreement that may be warranted based on such report or recommendations.

#### **11. WITNESS, INTERPRETER AND TRANSLATOR FEES.**

Payment of witness fees shall be governed by the provisions of Sections 1329 and 1334.3 of the Penal Code, by Sections 68093 and 68098 of the Government Code, and such other statutory provisions as may be applicable; and the payment of interpreter and translator fees shall be governed by Section 68092 of the Government Code and Sections 731 and 752 of the Evidence Code.

#### **12. COURT-REQUESTED INVESTIGATIVE SERVICES.**

Upon request of the Court and with the Association's acceptance, investigative and ancillary defense services shall be provided on behalf of a party before the court in a

proceeding where such party has not received appointed counsel. Any expense incurred for services rendered under the provisions of this paragraph during the period of this Agreement may be accounted for as a Special Litigation case, and is included within the total compensation paid by the County to the Association.

**13. TERM OF AGREEMENT.**

The term of this Agreement shall cover an initial period of July 1, 2023 through June 30, 2028, subject to the Parties' Termination and Transition Services obligations as set forth in Section 6. herein. This Agreement may be renewed for an additional period of five (5) years by mutual agreement of the Parties, also subject to the Parties' Termination and Transition Services obligations as set forth in Section 6. herein.

**14. Not Used**

**15. USE OF CONTRACT REVENUES.**

The Association agrees that all funds provided to it hereunder will be used only to enable the Association to meet its responsibilities as herein defined.

**16. SUCCESSION PLANNING.**

The Association shall appoint a Chief Defender of the Private Defender Program. The position of Chief Defender is filled by Lisa M. Maguire. Should the Chief Defender retire, resign, become incapacitated or otherwise leave her current post as the Chief Defender, the Association agrees to notify the County of such change immediately. The Association shall further meet and confer with the County regarding the selection process for the position of Chief Defender.

**17. TIME OF THE ESSENCE**

Both the County and the Association expressly agree that time is of the essence under this Agreement.

**18. ENTIRE CONTRACT.**

This is the entire contract between the Parties, and no alteration or variation of the terms of this Agreement shall be valid unless made in writing and signed by both the Association and the County. No oral understanding or agreement not incorporated herein shall be binding on any of the Parties hereto.

**19. AUTHORIZED AGENT; NOTICES.**

The County Manager's Office shall be County's agent for the purpose of this Agreement. All notices provided for hereunder shall be addressed and delivered to the County Manager's Office for the County of San Mateo.

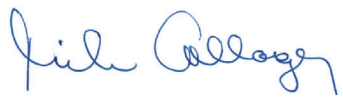
\* \* \* \* \*

**IN WITNESS WHEREOF**, the Parties hereto have executed this Agreement for the provision of services in connection with the Private Defender Program, effective as of July 1<sup>st</sup>, 2023.

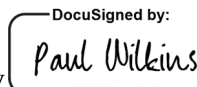
COUNTY OF SAN MATEO

BY  Resolution No. 079666  
\_\_\_\_\_  
President, Board of Supervisors

ATTEST:

  
\_\_\_\_\_  
Clerk of said Board

SAN MATEO COUNTY BAR ASSOCIATION

By  \_\_\_\_\_  
89FB75F3BF0E429... President 6/6/2023

## **AGREEMENT BETWEEN THE COUNTY OF SAN MATEO AND THE SAN MATEO COUNTY BAR ASSOCIATION**

***FY 2023-2028***

### ***APPENDIX A***

**“TYPE A” CASES** also include felony appeals to the Appellate Department of the Superior Court of San Mateo County; writs filed on behalf of defendants (specifically excluding writs of *habeas corpus* filed on behalf of prisoners of the State of California pursuant to the provisions of California Penal Code section 4750); post-conviction relief in which defendants are entitled to appointed counsel; all quasi-criminal and civil proceedings which are not specifically mentioned in subsections 2b, 2c, or 2d herein, but which are proceedings in which the law requires that counsel be provided at public expense, including but not limited to contempt proceedings (California Code of Civil Procedure sections 1209 *et seq.*); proceedings to terminate parental rights (California Family Code sections 7802, 7860-7864 *et seq.*); probate conservatorship proceedings pursuant to California Probate Code sections 1471 and 1852; paternity, support, and adoption proceedings, proceedings pursuant to the provisions of the Service Members Civil Relief Act, and proceedings pursuant to the Sexually Violent Predators Act (California Welfare and Institutions Code section 6600 *et seq.*). This category also includes motions to revoke or modify probation and post-conviction relief in the form of expungements or Certificate of Rehabilitation on felony matters.

**“TYPE B” CASES** also include misdemeanor appeals and proceedings to revoke or modify probation on misdemeanors; matters arising after the suspension of criminal proceedings in misdemeanors, representation at lineups; representation of witnesses; and any other appearances or representations by assigned attorneys specifically requested or ratified by a Judge of the Superior Court of San Mateo County, and not included in any other provisions of this Agreement, where the law requires that counsel be provided at public expense, whether or not such matter is filed in court.

# San Mateo County Bar Association Private Defender Program



## ATTORNEY FEE SCHEDULE

**Effective 02/13/2026**  
(Revised 03/10/2026)

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**SECTION I - MISDEMEANOR/FELONY CRIMINAL - ADULT****1. Misdemeanor - General Non-DV Charges**

|                                                                              |            |
|------------------------------------------------------------------------------|------------|
| A. Case Fee                                                                  | \$125      |
| B. Client Conference Fee                                                     | \$100      |
| C. Pre-trial Conference                                                      | \$275      |
| D. Probation Violation – Unconsolidated Case Fee                             | \$125      |
| E. Probation Violation – Consolidated Case Fee                               | \$75       |
| F. Probation Violation – Unconsolidated – Pre-Trial Conference Fee           | \$275      |
| G. Probation Report and Sentencing or Restitution                            | \$150      |
| H. Contested Hearings on Probation Violations, Sentencing, Restitution, etc. | \$125/hour |
| I. Immigration Consultation Fee                                              | \$100      |
| J. FTA Fee                                                                   | \$75       |

**NOTE:** **Client Conference Fees** are billable only once per case. This fee is payable after an in-person conference with client, before the first court appearance and after receipt of discovery. Where **client** is unable to meet, a substantive call or detailed e-mail exchange will suffice. Where client has multiple cases pending on the same calendar, the fee should only be billed on one of those cases.

**NOTE:** **Immigration Consultation Fee** is for consultation with our in-house Crim-Immigration Attorney, ILRC, a client's immigration attorney, or with a PDP approved immigration attorney. It is only billable once per case. In felonies, it may be billed before or after preliminary hearing. As with all work, if a request for consideration of an Administrative Fee seems appropriate based on the number of hours involved, it will be viewed favorably.

**NOTE:** **FTA Fee** is billable when a client fails to appear on a misdemeanor. If you are billing the FTA Fee for a client with multiple cases, it is only billable on one of the cases. If you choose to bill the FTA Fee, you may not bill for any other case events. However, if you choose the FTA Fee, you are not obligated in any way to take the case back. In the event you choose to bill for case events, you will be subject to the FTA policy and, absent extenuating circumstances, you will take the case back if the client returns within 6 months of the FTA without being issued a new voucher. The FTA policy now covers 2 FTAs.

**2. Misdemeanor - Domestic Violence**

|                          |       |
|--------------------------|-------|
| A. Case Fee              | \$125 |
| B. Client Conference Fee | \$100 |

|                                                                              |            |
|------------------------------------------------------------------------------|------------|
| C. Pre-trial Conference                                                      | \$300      |
| D. DV Probation Violation – Unconsolidated Case Fee                          | \$125      |
| E. DV Probation Violation – Consolidated Case Fee                            | \$75       |
| F. DV Probation Violation – Unconsolidated – Pre-trial Conference Fee        | \$200      |
| G. Probation Report and Sentencing or Restitution Determination              | \$150      |
| H. Contested Hearings on Probation Violations, Sentencing, Restitution, etc. | \$125/hour |
| I. Immigration Consultation Fee                                              | \$100      |
| J. FTA Fee                                                                   | \$75       |

**NOTE:** **Client Conference Fees** are billable only once per case. This fee is payable after an in-person conference with client, before the first court appearance and after receipt of discovery. Where **client** is unable to meet, a substantive call or detailed e-mail exchange will suffice. Where client has multiple cases pending on the same calendar, the fee should only be billed on one of those cases.

**NOTE:** **Immigration Consultation Fee** is for consultation with our in-house Crim-Immigration Attorney, ILRC, a client’s immigration attorney, or with a PDP approved immigration attorney. It is only billable once per case. In felonies, it may be billed before or after preliminary hearing. As with all work, if a request for consideration of an Administrative Fee seems appropriate based on the number of hours involved, it will be viewed favorably.

**NOTE:** **FTA Fee** is billable when a client fails to appear on a misdemeanor. If you are billing the FTA Fee for a client with multiple cases, it is only billable on one of the cases. If you choose to bill the FTA Fee, you may not bill for any other case events. However, if you choose the FTA Fee, you are not obligated in any way to take the case back. In the event you choose to bill for case events, you will be subject to the FTA policy and, absent extenuating circumstances, you will take the case back if the client returns within 6 months of the FTA without being issued a new voucher. The FTA policy now covers 2 FTAs.

### 3. Felony - Original Filing in Court of Limited Jurisdiction (Prior to “Superior Court”)

#### A. Preliminary Hearing Is Held when there is **No SCR**

|                                 |            |
|---------------------------------|------------|
| 1. First session (a.m. or p.m.) | \$750      |
| 2. Additional sessions          | \$125/hour |
| 3. Client Conference Fee        | \$150      |
| 4. Immigration Consultation Fee | \$100      |

**B. Preliminary Hearing Is Held when there IS an SCR**

|                                 |            |
|---------------------------------|------------|
| 1. SCR fee                      | \$150      |
| 2. First session (a.m. or p.m.) | \$675      |
| 3. Additional sessions          | \$125/hour |
| 4. Client Conference Fee        | \$150      |
| 5. Immigration Consultation Fee | \$100      |

When the Preliminary Hearing IS HELD and after the prelim the Court or DA reduces the entire case to a misdemeanor, the case is dismissed, the client pleads or the case is simply certified, then the fee is the same as above. If case is reduced to a misdemeanor after Preliminary Hearing but not completely resolved, you should bill Misdemeanor Case Fee and Pre-trial Fee as appropriate.

**C. No Preliminary Hearing Is Held And:**

|                                                                                                                                                                                                                                                                 |            |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| 1. SCR fee                                                                                                                                                                                                                                                      | \$150      |
| 2. Client WAIVES Preliminary Hearing                                                                                                                                                                                                                            | \$270      |
| 3. Client fails to appear, and attorney withdraws at SCR                                                                                                                                                                                                        | \$225      |
| 4. Client fails to appear, and attorney withdraws at Preliminary Hearing                                                                                                                                                                                        | \$280      |
| 5. Retained counsel substituted in at SCR                                                                                                                                                                                                                       | \$225      |
| 6. Retained counsel substituted in at Preliminary Hearing                                                                                                                                                                                                       | \$280      |
| 7. Client pleads to a felony or misdemeanor and is fully sentenced                                                                                                                                                                                              | \$400      |
| 8. Client pleads to a felony or misdemeanor and is put over for sentencing or restitution report                                                                                                                                                                | \$270      |
| 9. Case is totally dismissed at SCR                                                                                                                                                                                                                             | \$345      |
| 10. Case is totally dismissed at Preliminary Hearing                                                                                                                                                                                                            | \$400      |
| 11. Client pleads and is sentenced to DEJ                                                                                                                                                                                                                       | \$400      |
| 12. Case is reduced to misdemeanor before Preliminary Hearing is held.<br>(If this occurs at any time without client immediately entering a plea, you should create new billing entries for Misdemeanor Case Fee, Pre-Trial and Jury Trial Fee as appropriate.) | \$190      |
| 13. If a doubt is declared at any time before certification to Superior Court<br>(See also Fee Schedule 9. A.)                                                                                                                                                  | \$250      |
| 14. Contested hearings on restitution or sentencing issues                                                                                                                                                                                                      | \$125/hour |
| 15. Client Conference Fee                                                                                                                                                                                                                                       | \$150      |
| 16. Immigration Consultation Fee                                                                                                                                                                                                                                | \$100      |

**NOTE:** **Client Conference Fees** are billable only once per case. This fee is payable after an in-person conference with client before the first court appearance and after receipt of discovery. Where client is unable to meet, a substantive call or detailed e-mail exchange will suffice. Where clients have multiple cases pending on the same calendar, the fee should only be billed on one of those cases.

**NOTE:** **Immigration Consultation Fee** is for consultation with our in-house Crim-Immigration Attorney, ILRC, a client's immigration attorney, or with a PDP approved immigration attorney. It is only billable once per case. In felonies, it may be billed before or after Preliminary Hearing. As with all work, if a request for consideration of an Administrative Fee seems appropriate based on the number of hours involved, it will be viewed favorably.

**NOTE:** **On FTAs**, if your client fails to appear, you will be subject to the FTA policy and, absent extenuating circumstances, you will take the case back if the client returns within 6 months of the FTA without being issued a new voucher and beginning to bill the case again. The FTA policy now covers 2 FTAs.

#### 4. Superior Court Cases

|                                                                                                                                                                                                                                        |            |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| A. Felony Case Fee/Non-special Fee                                                                                                                                                                                                     | \$800      |
| B. Superior Court Pre-Trial Conference                                                                                                                                                                                                 | \$250      |
| C. Probation Report and Sentencing (859) or Restitution Determination<br>(This fee applies only to felonies that are resolved at SCR or Preliminary Hearing and require a future sentencing/restitution appearance in Superior Court). | \$250      |
| D. Probation Report and Sentencing/Restitution on Superior Court felonies                                                                                                                                                              | \$150      |
| E. Contested Hearing on Sentencing Issues                                                                                                                                                                                              | \$125/hour |
| F. Client Conference Fee                                                                                                                                                                                                               | \$150      |
| G. Immigration Consultation Fee                                                                                                                                                                                                        | \$100      |

**NOTE:** **Client Conference Fees** are billable only once per case. This fee is payable after an in-person conference with the client, before the first court appearance and after receipt of discovery. Where **client** is unable to meet, a substantive call or detailed e-mail exchange will suffice. Where clients have multiple cases pending on the same calendar or a consolidated probation violation, the fee should only be billed on one of those cases.

**NOTE:** **Immigration Consultation Fee** is for consultation with our in-house Crim-Immigration Attorney, ILRC, a client's immigration attorney, or with a PDP approved immigration attorney. It is only billable once per case. In felonies, it may be billed before or after Preliminary Hearing. As with all work, if a request for consideration of an Administrative Fee seems appropriate based on the number of hours involved, it will be viewed favorably.

**NOTE:** On FTAs, if your client fails to appear, you will be subject to the FTA policy and, absent extenuating circumstances, you will take the case back if the client returns within 6 months of the FTA without being issued a new voucher and begin to bill the case again. The FTA policy now covers 2 FTAs.

## 5. Post Conviction Cases

|                                                                                     |            |
|-------------------------------------------------------------------------------------|------------|
| A. Felony Probation Violation Unconsolidated - Case Fee                             | \$300      |
| B. Felony Probation Violation Consolidated - Case Fee                               | \$125      |
| C. PRCS Violation Unconsolidated - Case Fee                                         | \$300      |
| D. PRCS Violation Consolidated - Case Fee                                           | \$125      |
| E. Parole Violation Unconsolidated - Case Fee                                       | \$300      |
| F. Parole Violation Consolidated - Case Fee                                         | \$125      |
| G. Pre-Trial Conference for Probation, Parole and PRCS Violations if Unconsolidated | \$125      |
| H. Pre-Trial Conference For Probation, Parole and PRCS Violations if Consolidated   | \$275      |
| I. Hearings on Probation, Parole, PRCS Violations                                   | \$125/hour |
| J. Client Conference Fee                                                            | \$150      |
| K. Immigration Consultation Fee                                                     | \$100      |

**NOTE:** **Client Conference Fees** are billable only once per case. This fee is payable after an in-person conference with the client, before the first court appearance and after receipt of discovery. Where **client** is unable to meet, a substantive call or detailed e-mail exchange will suffice. Where clients have multiple cases pending on the same calendar or a consolidated probation violation, the fee should only be billed on one of those cases.

**NOTE:** **Immigration Consultation Fee** is for consultation with our in-house Crim-Immigration Attorney, ILRC, a client's immigration attorney, or with a PDP approved immigration attorney. It is only billable once per case. In felonies, it may be billed before or after Preliminary Hearing. As with all work, if a request for consideration of an Administrative Fee seems appropriate based on the number of hours involved, it will be viewed favorably.

**NOTE:** On FTAs, if your client fails to appear, you will be subject to the FTA policy and, absent extenuating circumstances, you will take the case back if the client returns within 6 months of the FTA without being issued a new voucher and begin to bill the case again. The FTA policy now covers 2 FTAs.

**6. Trial Fees - Misdemeanor and Felony (in addition to case fees)**  
**Non hourly cases:**

A. Jury Trial

- |                                                                          |            |
|--------------------------------------------------------------------------|------------|
| 1. Trial fees                                                            | \$150/hour |
| Includes all hours once case has been assigned to a trial department     |            |
| 2. Jury deliberation                                                     | \$150/hour |
| Only bill time for work performed (i.e., jury questions, legal research) |            |

B. Court Trial

- |                                                                       |            |
|-----------------------------------------------------------------------|------------|
| 1. Court trial fees                                                   | \$135/hour |
| Includes all hours once case has been assigned to a trial department. |            |

**7. Motions - a copy of the motion must be uploaded in Dd7 for review**

|                    |       |
|--------------------|-------|
| A. Complex Motions | \$600 |
|--------------------|-------|

A complex motion is one that includes complex issues, original research, original writing, or a combination of these things. Extensive details and facts regarding the client could also make a motion fall into this category (e.g.- a detailed Romero motion, a 995 with citations to the record and detailed legal analysis.). In this type of motion, facts are detailed, and the attorney has attempted to analyze and distinguish the case or go beyond addressing simple issues that have been previously briefed.

|                     |       |
|---------------------|-------|
| B. Standard Motions | \$300 |
|---------------------|-------|

A standard motion is one that uses material that has been previously briefed but still requires some original material that analyzes the applicability of the case's facts to the cited law and a statement of facts. It should include unique application to your client and argument applicable to your case.

|                                  |       |
|----------------------------------|-------|
| C. Misdemeanor Diversion Motions | \$125 |
|----------------------------------|-------|

|                        |      |
|------------------------|------|
| D. Boilerplate Motions | \$50 |
|------------------------|------|

A boilerplate motion is one that has no original research, writing, or argument about the case and the only original work is the caption and possibly a brief statement of facts. These are basic motions to continue, join in someone else's motion, *in limine* motions for not using certain terms like "victim", federalizing all objections, and the like.

**NOTE:** If you feel that your motion does not fit into a specific level – Administrative Fees may be requested with a detailed explanation of why your work is beyond the level generally applicable (See section IV: 1).

|                                     |            |
|-------------------------------------|------------|
| E. Hearings and Argument on Motions | \$125/hour |
|-------------------------------------|------------|

## 8. Misdemeanor and Felony Criminal Calendars

- |                                                                                                                                                                         |            |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| A. Misdemeanor Arraignment Calendar – Two (2) Hours or Less                                                                                                             | \$175      |
| 1. Over two (2) hours – additional hourly fee                                                                                                                           | \$100/hour |
| 2. Cases closed on calendar – per case                                                                                                                                  | \$100      |
| 3. Misdemeanor Diversion granted at arraignment                                                                                                                         | \$125      |
| This will be your case, and you should plan to file the petition to seal at the end. You can bill for a client conference fee that happens before the end of diversion. |            |
| B. Superior Court AM Arraignment Calendar - Two (2) Hours or Less                                                                                                       | \$300      |
| 1. Over two (2) hours – additional hourly fee                                                                                                                           | \$100/hour |
| 2. Cases closed on calendar - per case                                                                                                                                  | \$100      |
| C. Superior Court PM Custody Calendar                                                                                                                                   | \$540      |
| <b>NOTE:</b> Cases closed on this calendar or continued for resolution are not separately billable by attorney.                                                         |            |
| D. All Specialty Court Calendars – prep and court time (presumptive max of 2 hours of prep-time)                                                                        | \$150/hour |

**NOTE:** The above fees apply to the attorney assigned to handle the calendar.

## 9. Billing as a case proceeds through Specialty/Collaborative Courts

- |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |            |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| A. Pre-conviction Specialty/Collaborative Courts                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |            |
| 1. Military Diversion PC1001.80                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | \$125/hour |
| If you are seeking Military Diversion for a client who has served in the U.S. Military, review of reports and court appearances that occur in Military Diversion Court can be billed at an hourly rate of \$125 an hour. This begins on the first day you appear with your client in Military Diversion Court. You may bill for court appearances while your client is pending admission. If client is admitted, you may continue to bill for your court appearances and the review of progress reports during your client's participation in Military Diversion. Hourly billing ends if your client is denied admission or terminated from Military Diversion. |            |
| 2. Proposition 36 (2024) Court                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | \$125/hour |
| If you are seeking Proposition 36 (2024) treatment for a client, review of reports and court appearances that occur in Proposition 36 Court can be billed at an hourly rate of \$125 an hour. This begins on the first day you appear with your client in Proposition 36 Court. You may bill for court appearances while your client is pending admission. If client is admitted, you may continue to bill your court appearances and the review of progress reports during your client's participation in Proposition 36 Court. Hourly billing                                                                                                                 |            |

ends if your client is denied admission or terminated from Proposition 36 Court.

3. Mental Health Diversion (MHD) (PC1001.36) \$125/hour

If you are seeking MHD, you may start to bill at the rate of \$125 an hour once you begin gathering records regarding a DSM-V diagnosis and treatment for the MHD screening form. This means you may begin to bill at an hourly rate once you begin to gather information to establish a qualifying diagnosis for MHD, including seeking jail records, consulting with social workers, or other experts. It also includes appearances in MHD Court, in front of the MHD judge, and dealing with issues regarding treatment or your client's progress in treatment. Hourly billing ends if your client is denied admission or terminated from MHD.

**NOTE:** All hourly billing must adhere to the billing requirements in Appendix B of the latest version of the PDP Policies and Procedures Manual. If a voucher does not adhere to these requirements, it will not be paid.

**NOTE:** Event based flat fees do not apply for appearances or motions filed in pursuit of treatment in the above courts.

B. Post-conviction Specialty/Collaborative Courts:

1. Pathways Court \$125/hour

If you are seeking a Pathways Court sentence for your client, review of reports and court appearances that occur in Pathways Court can be billed at a rate of \$125 an hour. This begins the first day you appear with your client in Pathways Court. Hourly billing ends once your client is sentenced to Pathways or is denied admission into Pathways.

2. Veterans Treatment Court \$125/hour

If you are seeking a Veterans Treatment Court sentence for your client, review of reports and court appearances that occur in Veterans Treatment Court can be billed at an hourly rate of \$125 an hour. This begins the first day you appear with your client in Veterans Treatment Court. Hourly billing ends once your client is sentenced to Veterans Treatment Court or is denied admission into Veterans Treatment Court.

3. Drug Court \$125/hour

If you are seeking a Drug Court sentence for your client, review of reports and court appearances that occur in Drug Court can be billed at an hourly rate of \$125 an hour. This begins the first day you appear with your client in Drug Court. Hourly billing ends once your client is sentenced to Drug Court or is denied admission into Drug Court.

4. MDUI Court \$125/hour

If you are seeking a MDUI Court sentence for your client, review of reports and court appearances that occur in MDUI Court can be billed at an hourly rate of \$125 an hour. This begins the first day you appear with your client in MDUI Court. Hourly billing ends once your client is sentenced to MDUI Court or is denied admission into MDUI Court.

**NOTE:** All hourly billing must adhere to the billing requirements in Appendix B of the latest version of the PDP Policies and Procedures Manual. If a voucher does not adhere to these requirements, it will not be paid.

**NOTE:** Event based fees do not apply for appearances or motions filed in pursuit of treatment in the above courts.

**NOTE:** Management may ask you to return to a case to resolve an issue and assist your client while your client is progressing through Pathways Court, Veterans Treatment Court, Drug Court, or MDUI Court. If you are asked by management to return, you can bill hourly until the issue is resolved. Reasons for this include to prevent a revocation or a probation violation from being filed. If a formal probation violation affidavit is filed, and the PDP is appointed, billing will not be hourly under this section, but as indicated in the Fee Schedule for probation violations.

## 10. PC1367/1368 – When a Doubt is Declared as to Competence

### A. Felony Cases

\$125/hour

Upon a declaration of doubt regarding competence, the case will go to Superior Court for the appointment of doctor(s), receipt of doctor(s) report. The hourly rate applies to these appearances and review of the reports.

If the client is found **competent** and proceedings are reinstated, then the case returns to where it was left off, bill normally.

If a client is found **incompetent**, reviewing reports and court appearances that occur *after* the finding of incompetency can also be billed. This applies to Interest of Justice Hearing proceedings, DSH progress report appearances, IMHD appearances, appearances if client is restored under PC1372 and appearances if client is returned as not restorable. When criminal proceedings are reinstated, hourly billing ends.

### B. Misdemeanor Cases

\$125/hour

Upon a declaration of doubt regarding competence, the case will go to the 1370 Calendar for the appointment of a doctor and receipt of that doctor's report. This hourly rate applies to these appearances and review of the reports.

If the client is found **competent** and proceedings are reinstated, then the case returns to where it was left off, bill normally.

If the client is found **incompetent**, review of reports and court appearances that occur *after* the finding of incompetency can be billed. This applies to reports and court appearances for a BHRS assessment per 1370.01, status of PC1370.01 MHD, AOT, CARE Court, LPS Conservatorship, or general status of client prior to the dismissal of the case.

### C. Special Fee Cases – Felony and Misdemeanor

These cases should be billed hourly for all work at their applicable rate.

## D. Trial on Competency

If there is a trial on competency, then billing should be done pursuant to Section 6 of the Fee Schedule, billing like any other trial.

**11. Special Assignments (Only by assignment from the Staff Attorneys)**

|                                                                           |             |
|---------------------------------------------------------------------------|-------------|
| A. Special Assignment by Staff Attorneys                                  | \$150/hour  |
| B. Expungements (Basic)                                                   | \$250       |
| C. Trailing Expungements (unless filing of a separate motion is required) | \$75        |
| D. Expungement (with Declaration)                                         | \$350       |
| E. Petition to Seal (non-diversion)                                       | \$250       |
| F. Trailing Petition to Seal                                              | \$75        |
| G. PC 290.5 Sex Registration Petition for Relief                          |             |
| 1. Tier 1 review & Petition Case Fee                                      | \$350       |
| 2. Tier 2, 3, TBD review & Petition Case Fee                              | \$600       |
| 3. Post-petition proceedings and/or Contested Hearing                     | \$125/hour  |
| H. Post-Diversion Petition to Seal                                        | \$125       |
| I. Line-Up                                                                | \$295       |
| J. Motion to Withdraw Plea Review                                         | \$150/hour  |
| K. Officer of the Day – Half Day/Full Day                                 | \$325/\$650 |
| L. Witness Representation                                                 | \$150/hour  |

**12. General Billing Notes**

- A. Where a single client has multiple cases on the same calendar for pre-trial conference, only a single pre-trial conference fee may be billed.
- B. Where an attorney is assigned to handle a calendar that is paid hourly and they also have an hourly case on the calendar, they must choose which they are billing.
- C. When an open case is consolidated with a probation violation, only one pre-trial conference may be billed.
- D. Client conferences must occur in advance of the court appearance but can occur on the same day.

- E. Pre-trial fees are only paid once, regardless of how many pre-trial conferences are held on the case.
- F. As with any case that requires an extraordinary amount of work, an administrative fee request can be submitted. That may include cases that require multiple pre-trial conferences.
- G. Billing FTAs
  - 1. Misdemeanors
    - a. Bill the \$75 FTA fee and close out the case with no obligation to take the case back in the future. If you are billing the FTA fee for a client with multiple cases, it is only billable on one of the cases.
    - b. Bill the case fee and any other applicable fee, (i.e., the client conference fee, immigration consultation, motions) but then you must keep the case for 6 months. After two subsequent FTAs you can bill the case fee again.
    - c. You should NOT bill the pretrial conference fee when your client FTAs, nor should you conduct any pretrial discussions without your client being present.
    - d. If you have met with your client and received express permission to appear and engage in pre-trial discussions in their absence, the pre-trial conference may be billed.
  - 2. Felonies
    - a. Bill according to the Fee Schedule.
  - 3. Relieving the Program and bench warrants
    - a. If the court allows, you should ask for an opportunity to bring your client back on a future date and not ask to be relieved.
    - b. You should NEVER ask the court to issue a warrant, and you should attempt to avoid any warrants from being issued against your client.
- H. Special Fee/Hourly Cases
  - 1. No block billing is allowed. Everything should be billed in increments of 1/10 of an hour (6 mins). The exception is if you send multiple texts, emails or leave messages and it takes less than 6 minutes, then you should group them together.
  - 2. Cases must be billed MONTHLY, and in no event shall work that falls outside of the current fiscal year be paid.
  - 3. Any Special Fee vouchers from the previous fiscal year that are submitted beyond the July 31st cutoff date **WILL NOT** be paid, as those funds will have been returned to the County.
- I. Event-Based Cases
  - 1. Vouchers must be submitted within 90 days of the completion of the case, or they **MAY NOT** be paid.
  - 2. Vouchers submitted beyond 90 days of completion that are from the previous fiscal year **WILL NOT** be paid as the funds will have been returned to the County.

## **SECTION II - SPECIAL SERVICES**

### **1. Civil Proceedings**

(Family Law Contempt, DCSS Contempt, Probate, Military Dissolution, Paternity, WIC 6500, etc.)

- |                                                                               |            |
|-------------------------------------------------------------------------------|------------|
| A. Hourly fee (up to 15 hours: Special Fee Request required if over 15 hours) | \$135/hour |
| B. Trial Fees – Same as Adult see section I:6:A and B                         |            |
| C. Probate Code Sect. 3200 Medical Consent Cases                              | \$135/hour |
| D. DCSS Contempt Calendar                                                     |            |
| 1. Two (2) hours or less                                                      | \$175      |
| 2. Over two (2) hours – additional hourly fee                                 | \$100/hour |

### **2. CARE Court**

- |                                                     |            |
|-----------------------------------------------------|------------|
| A. Respondents' Representation (Out of Court)       | \$135/hour |
| B. Respondents' Representation (In Court/Reviews)   | \$135/hour |
| C. Respondents' Representation (Contested Hearings) | \$135/hour |

### **3. Writs**

- |                                                                                                          |            |
|----------------------------------------------------------------------------------------------------------|------------|
| Legal research and writing, plus Hearing (up to 15 hours; Special Fee Request required if over 15 hours) | \$150/hour |
|----------------------------------------------------------------------------------------------------------|------------|

### **4. Appeals**

- |                                                                                                          |            |
|----------------------------------------------------------------------------------------------------------|------------|
| Legal research and writing, plus Hearing (up to 15 hours; Special Fee Request required if over 15 hours) | \$150/hour |
|----------------------------------------------------------------------------------------------------------|------------|

### **5. Mentor Services**

- |                                                                                                                                                                                                                                                                                                                                                                                               |            |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| A. Standard Mentor                                                                                                                                                                                                                                                                                                                                                                            | \$150/hour |
| <b><u>NOTE:</u></b> This rate covers time spent with attorneys that are new to the panel. It includes, but is not limited to, meetings to discuss cases, attending court appearances including pre-trials and jury trials with your mentee. Being a mentor means being available to answer questions about various processes including billing, handling court coverage, filing motions, etc. |            |
| B. Advanced Mentor                                                                                                                                                                                                                                                                                                                                                                            | \$150/hour |
| <b><u>NOTE:</u></b> This rate is designed to allow experienced attorneys to seek advice from other more experienced attorneys to address specific issues in difficult cases. It is initially limited to 10 hours, although more time can be requested with an explanation regarding the need.                                                                                                 |            |

**6. Restraining Orders**

- |                                   |            |
|-----------------------------------|------------|
| A. Gun Violence Restraining Order | \$150/hour |
| B. Civil Restraining Order        | \$150/hour |

**NOTE:** Civil cases MUST be billed MONTHLY like other hourly cases.

**SECTION III - LPS****1. LPS Trials and Re-Hearings**

- |                         |            |
|-------------------------|------------|
| A. Case representations | \$150/hour |
| B. Trials               | \$150/hour |
- (Once assigned to a trial department, all work is billable at the hourly rate.  
Time during jury deliberation is billable for necessary work performed.)

**2. LPS Calendar**

- |                                                       |            |
|-------------------------------------------------------|------------|
| A. Calendar Preparation and Follow Up (up to 6 hours) | \$125/hour |
| B. Calendar                                           | \$150      |

**3. Writs**

- |                                                                                                             |            |
|-------------------------------------------------------------------------------------------------------------|------------|
| Legal research and writing, plus Hearing<br>(up to 15 hours; Special Fee Request required if over 15 hours) | \$150/hour |
|-------------------------------------------------------------------------------------------------------------|------------|

**4. Assisted Outpatient Treatment (AOT) Petitions** \$135/hour**5. Medical Consent/Do Not Resuscitate** \$135/hour

**NOTE:** Civil Cases that are determined to be Special Fee MUST be paid MONTHLY like other Special Fees and hourly cases. A bill should be submitted EVERY month.

**6. Hearing Revocation of Outpatient Treatment (PC 1608)** \$135/hour**SECTION IV - EXTRAORDINARY FEE REQUESTS****1. Administrative Fee Cases**

Reviewed by Staff Attorneys (Chief Defender, Assistant Chief Defender, and Managing Attorneys) for requests up to \$3500 additional to Fee Schedule.

Cases that do not meet the criteria for treatment as a Special Fee Case (see below), and yet require extraordinary effort and time, may be considered for additional compensation. The standard case fee already includes compensation for things that would normally come up in a case including working with a PI, experts, mental health experts, motions to continue, etc. When you have a case that is particularly complex or difficult you may apply for an Administrative Fee.

Administrative Fee requests allow for additional compensation, beyond the case fees, up to a certain amount. A request describing the case and specific factors that made it extraordinary should be attached to the bill. Additionally, you should include a detailed itemization of the time spent, which will be compensated at \$150/hour up to the max amount. A cursory statement simply asking for the additional fee without details is insufficient. Insufficiently documented requests will be returned for documentation and may not be paid.

Your bill should reflect your understanding that the Fee Schedule was designed to cover most cases and is intended to compensate all attorneys on the panel equally for their work. While the Administrative Fee process is available to compensate lawyers for truly extraordinary cases, the management will be mindful of the fact that panel attorneys are never asked to return money on cases assigned to them that settle quickly with little time or effort.

Management reserves the right to review and modify the amount awarded as an administrative fee.

## **2. Special Fee Cases**

Special Fee cases are assigned by the Staff Attorneys. These cases are billed hourly; no other part of the Fee Schedule is used in billing these cases. There are different types of Special Fee Cases.

### **A. Life Imprisonment**

This category includes murders and any case that includes a charge for which the penalty prescribed by law is life imprisonment. Examples of this type of case include murder, attempted pre-meditated murder, One-Strike sexual assault, kidnapping for ransom, etc.

### **B. Three Strikes Cases**

A true Three Strikes Case where the client has two or more strike priors, and the new charge is a serious or violent felony will start out as a “Life Case” under the Special Fee Schedule and is billed at \$165/hour.

If a Three Strikes Case, at any time during the pendency of the case, becomes a Second Strike case (e.g.- by designation of the District Attorney or because a prior is determined to not be valid, and this is acknowledged by the DA) then the Special Fee amount changes from \$165/hour to \$150/hour from that point forward.

If a client has multiple strike priors but the case is filed as, or is being prosecuted as, a Second Strike case, then the case is NOT a Three Strikes Case. (e.g. – the new charge is not a serious or violent felony.) This case should be billed as a general felony case. If you believe that the case qualifies for a Special Fee, then follow the instructions regarding making a request under that section of this Fee Schedule. (Section IV: 2: D)

### **C. Non-Life Imprisonment**

Cases that most frequently fall into this category are extremely difficult felony cases. Examples are Manslaughter, Kidnapping, Sexual Assault, Child Molestation, High Tech Crimes, Complex Fraud litigation, or any other case a Staff Attorney determines to be appropriately set as a Special Fee case based on the charges.

#### D. Difficult and Complex Issue Cases

These cases are ones that place extraordinary demands on the attorney's time and skills, and thus qualify, in the Staff Attorneys' judgment, for treatment as Special Fee cases payable at an hourly rate described below.

Generally, this type of case will be assigned by a Staff Attorney as a Special Fee case from the beginning. However, an attorney should make a request when it becomes clear that a case seems it should appropriately be billed as Special Fee. (See section IV: 3)

In determining whether it is appropriate for a case to be a Special Fee case, the Staff Attorney will evaluate the request for compensation considering the realities of indigent criminal defense representation, including our inability to pay the true market value of attorney services. Factors that are considered in determining whether a case merits Special Fee treatment include:

1. Difficult client – serious mental issues, personality, contrariness, etc.
2. Nature of charges – the gist of the case, the prosecution position, potential punishment.
3. Extra hours – unusual legal issues, unusual number of or type of expert witnesses to deal with, travel, quantity of documentary evidence to review, difficult witnesses to interview, etc.
4. Motions – unusual in scope or number (attach copy to billings)

#### E. Petitions for Resentencing

- |                          |       |
|--------------------------|-------|
| 1. Post Conviction       | \$165 |
| 2. Compassionate Release | \$150 |

### 3. Special Fee Request Format

Most Special Fee cases will be predetermined by the Staff Attorney(s). If you have a case that was not already marked as a Special Fee case that should have been (by charge or sentence exposure), you should contact one of the Staff Attorneys.

If you have a case that you would like to have considered as a Special Fee case (that is not one by its charge or sentence), then you **MUST** get approval from a Staff Attorney **BEFORE** you submit **ANY** hourly billing. Vouchers will be returned if you do not get approval prior to submitting hourly billing.

Without violating the attorney client privilege or compromising either the rights of the client or the attorney's ethical or legal duties, each Special Fee request **MUST** include the following:

- An email to a Staff Attorney explaining the charges against the client and why you believe the case is or should be a Special Fee case.

- A notation on the first billing of the case as to why it is Special Fee and which staff attorney made the Special Fee approval, and why (very briefly) it is Special Fee.
- Special Fee billing must be specific and detailed and done MONTHLY. Specific examples of how this billing must be done are as follows:
  - Attorneys shall identify each major issue researched and the time spent on them
  - The bill shall indicate the nature of the work performed, i.e., SCR, pre-trial, review discovery, Preliminary Hearing, preparation for trial, meeting with client, investigator, DA, or witness, etc.
  - Identify the documents reviewed
  - Identify any motion researched or drafted
  - State the nature of the court appearance and the time involved
  - All time spent must be itemized in 1/10-hour increments, except texts, calls and emails under 6 minutes should be grouped with other work.

#### 4. Special Fee Hourly Rates

When a case is a Special Fee case, the billing consists only of hourly billing. You should not bill a case fee, pre-trial fee, motion fees, or any other event-based fee.

- |                                                                                                                                                                                                                       |              |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|
| A. Applies to Lead Counsel in Death Penalty Cases                                                                                                                                                                     | *\$205/hour  |
| B. Applies to Lead Counsel in Special Circumstance Cases                                                                                                                                                              | \$175/hour   |
| C. Applies to Second Counsel in Death Penalty Cases and Transfer Cases                                                                                                                                                | *\$175/hour  |
| D. Applies to all other Murder, Attempted-Premeditated Murder Cases, Three Strikes Life cases, Sexually Violent Predator, and cases that include a charge for which Life Imprisonment can be imposed.                 | \$165/hour   |
| E. Applies to all cases listed within Penal Code Section 1192.7(c) plus, High Tech Crime, Complex Fraud Prosecution, NGI Extension, or any other case a Staff Attorney determines is appropriately set at this level. | **\$150/hour |

\*In Death Penalty Cases where two attorneys are authorized, counsel may agree to split the hourly rates between themselves. For example, Lead Counsel and Second Counsel might agree to each bill at \$190 per hour instead of \$205 and \$175 respectively.

\*\*The rate paid for jury trial in these cases will be the higher rate described for all jury trials in the Fee Schedule – e.g., \$150 an hour.

**NOTE:** You should be aware that some changes in the status of a case will likely result in a change of the applicable rate. For example, if the District Attorney's Office declares that they will no longer seek the Death Penalty in a Special Circumstance Murder prosecution, the rate would change from \$205/hour rate to \$175/hour. Similarly, if a simple Kidnapping charge becomes a Kidnapping for Robbery Case after the Preliminary Hearing, the case would go from a General Non-Special Fee Felony to a Special Fee case payable at the \$165/hour rate from that point forward. You should alert a Staff Attorney of such a change in status at the first available opportunity.

## **SECTION V - JUVENILE COURT**

### **1. Delinquency (602 Cases)**

|                                                               |       |
|---------------------------------------------------------------|-------|
| A. Case Fee                                                   | \$600 |
| 1. Additional petition - Unconsolidated                       | \$355 |
| 2. Additional petition - Consolidated (with case or other PV) | \$145 |
| 3. Client Conference Fee                                      | \$150 |
| 4. Immigration Consultation Fee                               | \$100 |

**NOTE:** **Client Conference Fees** are billable only once per case. This fee is payable after an in-person conference with clients, before the first court appearance and after receipt of discovery. Where client is unable to meet, a substantive call or detailed e-mail exchange will suffice. Where a client has multiple cases pending on the same calendar or a consolidated probation violation, the fee should only be billed on one of those cases.

**NOTE:** **Immigration Consultation Fee** is for consultation with our in-house Crim-Immigration Attorney, ILRC, a client's immigration attorney, or with a PDP approved immigration attorney. It is only billable once per case. In felonies, it may be billed before or after Preliminary Hearing. As with all work, if a request for consideration of an Administrative Fee seems appropriate based on the number of hours involved, it will be viewed favorably.

|                                                                                                         |            |
|---------------------------------------------------------------------------------------------------------|------------|
| B. Contested Hearing Fee<br>(Once assigned to a department, all hours are billable at the hourly rate.) | \$135/hour |
| C. Disposition Fee (for each separate appearance)                                                       | \$200      |
| D. Post Disposition Review                                                                              | \$160      |
| E. Calendars                                                                                            |            |
| 1. Detention or Placement Review Calendar                                                               | \$160      |
| 2. Girls Program Calendar                                                                               | \$400      |

### **2. Dependency: (300 Cases)**

|             |  |
|-------------|--|
| A. Case Fee |  |
|-------------|--|

- |                                                                   |         |
|-------------------------------------------------------------------|---------|
| 1. Child representation (1 or more children by the same attorney) | \$1,100 |
| 2. Parent representation (1 or both)                              | \$1,100 |

**NOTE:** Case Fee is billable after the disposition hearing and includes all uncontested hearings through disposition and all future non-appearance reviews. Contested Hearing Fees are additional.

- |                                                       |         |
|-------------------------------------------------------|---------|
| 3. Welfare and Institutions Code Section 387 Case Fee | \$1,100 |
|-------------------------------------------------------|---------|

**NOTE:** Only billable if the 387 petition is filed after disposition in the original case

**B. Initial/Detention Fee**

- |                                                |       |
|------------------------------------------------|-------|
| 1. Detention or Initial Hearing Appearance Fee | \$100 |
| 2. Client Conference                           | \$100 |

**NOTE:** Detention/Initial Hearing Appearance Fees & Client Conference Fees are billable only once per case to cover the first court appearance. The Client Conference fee is payable after an in-person conference with the client, before the first court appearance. Where a client is unable to meet, a substantive call or detailed e-mail exchange will suffice.

**C. Contested Hearing Fee** \$130/hour

**NOTE:** Hourly Fees Commence from the scheduled calendar time (e.g., 9:00 am or 2:00 pm) ONLY if evidence was presented, or if the court ruled on a disputed issue.

- |             |       |
|-------------|-------|
| 1. Prep-Fee | \$200 |
|-------------|-------|

**D. Mandatory Post Disposition Review – by assigned attorney (for each appearance made by assigned attorney. Must select a specific Review)**

- |                                          |       |
|------------------------------------------|-------|
| 1. Family Maintenance Review             | \$200 |
| 2. 6 Months Family Reunification Review  | \$200 |
| 3. 12 Months Family Reunification Review | \$200 |
| 4. 18 Months Family Reunification Review | \$200 |
| 5. 24 Months Family Reunification Review | \$200 |
| 6. Interim Review Family Reunification   | \$200 |

**3. Welfare and Institutions Code Section 366.26 Cases**

- |                          |            |
|--------------------------|------------|
| A. Case Fee              | \$1,100    |
| B. Contested Hearing Fee | \$130/hour |

**NOTE:** Hourly Fees commence from the scheduled calendar time (e.g., 9:00 am

or 2:00 pm) ONLY if evidence was presented, or if the court ruled on a disputed issue.

1. Prep-Fee \$200

C. Mandatory Post Disposition Review – by assigned attorney  
(For each appearance made by assigned attorney)

1. WIC 366.3 review \$200

#### 4. AB12 Case Fee:

A. When Originates From 602 \$1,100

B. When Originates From 300 and is a New Case \$1,100

C. When Continues From Established 300 Case There Is No New Case Fee \$0

D. Non-Minor Dependent (NMD) Review – Dependency \$200

#### 5. Title IV-E Funded Services- Dependency (300 Cases):

A. Dual Status Review Hearing WIC 241.1 \$200  
(For each 241.1 review hearing made by the assigned Dependency Attorney)

B. Home Visits - Children:  
Child Visits as required by California Rules of Court, Rule 5.660, up to 2.5 hours \$105/hour  
per visit

***For visits that may take more than 2.5 hours, prior approval from the Assistant Chief of the Juvenile & Civil Commitment Branch is required.***

C. Attorney Attending Child and Family Team (CFT) Meeting \$200

D. Attorney Attending Multi-Disciplinary Team Meeting (MDT) \$200

E. Attorney Attending CSEC MDT \$200

F. STRTP Placement Review (uncontested) \$200

#### 6. Motions- a copy of the motion must be attached to the bill for review.

A. Complex Motions

1. 602 complex motions \$600

2. 300 complex motions \$350

A complex motion is one that includes complex issues, original research, original writing, or a combination of these things. Extensive details and facts regarding the client could also make a motion fall into this category. (e.g. – difficult presumed father or relative placement motions, or complex 700.1 motions) In this type of motions, facts are detailed, and the attorney has

attempted to analyze and distinguish the case or goes beyond addressing simple issues that have been previously briefed.

B. Standard Motions

- |                         |       |
|-------------------------|-------|
| 1. 602 standard motions | \$300 |
| 2. 300 standard motions | \$125 |

A standard motion is one that uses material that has been previously briefed but still requires some original material that analyzes the applicability of the case's facts to the cited law and a statement of facts. The motion should include unique application to your client and argument applicable to your case.

C. Motion Using Standard "JV" Forms – 300 And 602 \$80

This motion simply requires the filling in of a form after finding out information from or about your client and his or her circumstances. (e.g. – WIC 778,388)

D. Boilerplate Motions \$50

A boilerplate motion is one that has no original research, writing, argument or thought about the case and the only original work is the caption and possibly a brief statement of facts. These are basic motions to continue, motions to join in someone else's motion, *in limine* motions for not using certain terms like "victim", federalizing all objections, and the like.

**NOTE:** If you feel that your motion does not fit into a specific level –  
Administrative Fees may be requested with a detailed explanation of why your work is beyond the level generally applicable (see section IV: 1).

E. Hearings And Argument on Motions

- |              |       |
|--------------|-------|
| 1. 602 cases | \$125 |
| 2. 300 cases | \$125 |

**7. Other Juvenile Related Assignments**

A. Assistant Chief of the Juvenile & Civil Commitment Branch Special Assignments

- |              |            |
|--------------|------------|
| 1. 602 cases | \$150/hour |
| 2. 300 cases | \$130/hour |

B. Adoption/Guardianship \$150/hour

C. DEJ Violations \$160

D. EMP Violations and Reviews \$160

E. Guardian Ad Litem #1 \$1,100

***As client representative in court when client has mental health issues, bill case fee and reviews just like any other dependency case.***

|                                                                                                                                                                                                              |             |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| F. Guardian Ad Litem #2<br>Representation of minor where the client/minor has a potential civil claim.                                                                                                       | \$125/hour  |
| G. Juvenile Court Adoption (Fam Code Section 7822 et seq.)                                                                                                                                                   | \$150/hour  |
| H. Writs – Dependency (300 cases only)                                                                                                                                                                       | \$125/hour  |
| I. Line-up                                                                                                                                                                                                   | \$295       |
| J. Officer of the Day – Half Day/Full Day                                                                                                                                                                    | \$325/\$650 |
| K. Sealing<br>Fee is per Petition. A copy of the sealing forms/orders for each petition should be attached. An attorney may request an Administrative Fee with explanation as to why extra fee is warranted. | \$250       |
| L. Witness Representation                                                                                                                                                                                    | \$150/hour  |
| M. Miranda Advice to In-Custody 17 Y.O. Or Younger Minor                                                                                                                                                     |             |
| On-call 24 hours for consultation – non holiday weekday 24 hours                                                                                                                                             | \$250       |
| On-call 24 hours for consultation – weekend 24 hours                                                                                                                                                         | \$350       |
| On-call 24 hours for consultation – holiday 24 hours                                                                                                                                                         | \$500       |
| Consultation with 17 y.o. or younger minor                                                                                                                                                                   | \$135/hour  |
| <b><i>This fee covers travel to/from location of minor to be questioned and time spent doing the consultation.</i></b>                                                                                       |             |
| N. Miranda Advice to Minors Requested by Juvenile Probation<br>This fee covers travel to/from location of minor to be questioned and time spent doing the consultation.                                      | \$135/hour  |
| O. Petition to Dismiss Pursuant to WIC 782(a)(2) (AB 2629)                                                                                                                                                   | \$125/hour  |
| P. Special Immigrant Juvenile Status Petitions (602 and 300 Cases)                                                                                                                                           | \$250       |

## 8. Re-Assignment of Cases

When a case is reassigned, the Chief Defender, Assistant Chief Defender or Assistant Chief of the Juvenile & Civil Commitment Branch will determine the fee to be paid. The factors considered in making the fee determination will be the type of case reassigned, the complexity of that case, as well as the status of the case on the court calendar.

## **SECTION VI - JUVENILE EXTRAORDINARY FEE REQUESTS**

### 1. Administrative Fee Cases

Reviewed by Assistant Chief of the Juvenile & Civil Commitment Branch  
(for requests up to \$3,500 additional to Fee Schedule for 602 cases and \$2,940 for 300 cases).

Cases that do not meet the criteria for treatment as a Special Fee Case (see below), and yet require extraordinary effort and time, may be considered for additional compensation. The standard case

fee already includes compensation for things that would normally come up in a case including working with a PI, expert, mental health expert, motions to continue, etc. When you have a case that is particularly complex or difficult you may apply for an Administrative Fee.

Administrative Fee requests must seek a **specific amount of compensation**. (**Specific dollar amount.**) A request describing the case and specific factors that made it extraordinary should be attached to the bill. Additionally, you should include a detailed itemization of the time spent, which will be compensated at \$125/hour up to \$3,500 for 602 cases, and at \$105/hour up to \$2,940 for 300 cases. A cursory statement simply asking for the additional fee without details is insufficient. Insufficiently documented requests will be returned for documentation and may not be paid.

Your bill should reflect your understanding that the Fee Schedule was designed to cover most cases and is intended to compensate all attorneys on the panel equally for their work. While the Administrative Fee process is available to compensate lawyers for truly extraordinary cases, the evaluators will be mindful of the fact that panel attorneys are never asked to return money on cases assigned to them that settle quickly with little time or effort.

Management reserves the right to review and modify the amount awarded as an Administrative Fee.

## **2. Juvenile Special Fee Cases**

Special Fee cases are assigned by the Assistant Chief of the Juvenile & Civil Commitment Branch. These cases are billed hourly; no other part of the Fee Schedule is used in billing these cases. In determining whether a case is appropriate for Special Fee status, the Assistant Chief of the Juvenile & Civil Commitment Branch will evaluate the case considering the realities of indigent criminal/juvenile defense representation, including our inability to pay the true market value of attorney services.

Determination regarding whether a juvenile case is a Special Fee Case may be made in advance of assignment or at the request of an attorney, but the Special Fee status can only be designated by the Assistant Chief of the Juvenile & Civil Commitment Branch. The specific hourly rate is determined by the type of case and/or by the Assistant Chief of the Juvenile & Civil Commitment Branch. (See section B below.)

### ***Factors that are considered in determining whether a case merits Special Fee treatment include:***

1. Difficult client – serious mental issues, personality, contrariness, etc.
2. Nature of charges – seriousness of the offenses charged, potential serious dispositional consequences
3. Extra hours – unusual legal issues, complex cases, quantity of documentary evidence to review, difficult witnesses to interview, etc.
4. Motions – unusual in scope or number (attach copy to billings)

#### **A. Juvenile Special Fee Hourly Rates**

When a case is a Special Fee case, the billing consists only of hourly billing. You should not bill a case fee, disposition fees, motion fees, or any other set type of fee.

1. Applies to Murder, Attempted Pre-Meditated Murder, and Transfer Cases \*\$175/hour
2. Applies to extremely serious felony 707(b) offenses or Sexual Assault Cases as defined in Penal Code section 290.008, Gang Cases and Non-Premeditated Attempted Murder Cases. \*\$150/hour
3. Applies to complex 300 cases (i.e., shaken baby cases, etc.). Managing Attorney determines which cases are appropriately set at this level. \$130/hour
4. Complex 300 cases, 300 cases involving extremely difficult clients. Managing Attorney determines which cases are appropriately set at this level. \*\$105/hour

**B. Special Fee Request Format**

Most Special Fee cases will be predetermined by the Assistant Chief of the Juvenile & Civil Commitment Branch. If you have a case that was not already marked as a Special Fee case that you think should have been, you should contact the Assistant Chief of the Juvenile & Civil Commitment Branch.

If you have a case that you would like to have considered as a Special Fee case that is not one by its charge or sentence, then you **MUST** get approval from the Assistant Chief of the Juvenile & Civil Commitment Branch **BEFORE** you submit **ANY** Special Fee billing. Any such vouchers will be returned if you do not get approval **PRIOR** to submitting hourly billing.

Without violating the attorney client privilege or compromising either the rights of the client or the attorney's ethical or legal duties, each Special Fee request **MUST** include the following:

1. An email to the Assistant Chief of the Juvenile & Civil Commitment Branch explaining the charges against the client and why you believe the case is or should be a Special Fee case.
2. Special Fee billing must be specific and detailed and done MONTHLY. Specific examples of how this must be done are as follows:
  - Attorneys shall identify each major issue researched and the time spent on them.
  - The bill shall indicate the nature of the work performed, i.e., Jurisdictional Hearing, Contested Hearing, Contested Dispositional Hearing, review of discovery, etc.
  - Identify the documents reviewed
  - Identify any motion researched or drafted
  - State the nature of the court appearance and the time involved
  - All time spent must be itemized in 1/10-hour increments

**3. General Billing Notes**

Where a single client has multiple cases on the same calendar for pre-trial conference, only a single pre-trial conference fee may be billed.

Where an attorney is assigned to a calendar that is paid hourly and also has an hourly case on the calendar, they must choose which they are billing

When an open case is consolidated with a probation violation, only one pre-trial conference may be billed

Client conferences must occur in advance of the court appearance but can occur on the same day.

Pre-trial fees are only paid once, regardless of how many pre-trial conferences are held on the case

As with any case that requires an extraordinary amount of work, an administrative fee request can be submitted. That may include cases that require multiple pre-trial conferences.

#### A. Billing FTAs

##### 1. Misdemeanors

- a. Bill the case fee and any other applicable fee, (i.e., the client conference fee, immigration consultation, motions) but then you must keep the case for 6 months. After two subsequent FTAs you can bill the case fee again.
- b. You should NOT bill the pretrial conference fee when your client FTAs, nor should you conduct any pretrial discussions without your client being present.
- c. If you have met with your client and received express permission to appear and engage in pre-trial discussions in their absence, the pre-trial conference may be billed.

##### 2. Felonies

- a. Bill according to the Fee Schedule.

##### 3. Relieving the Program and bench warrants

- a. If the Court allows, you should ask for an opportunity to bring your client back on a future date and not ask to be relieved.
- b. You should NEVER ask the Court to issue a warrant, and you should attempt to avoid any warrants from being issued against your client

#### B. Special Fee/Hourly Cases

1. No block billing is allowed. Everything should be billed in increments of 1/10 of an hour (6 mins). The exception is if you send multiple texts, emails or leave messages and it takes less than 6 minutes, you should group them together.
2. Cases must be billed MONTHLY, and in no event shall work that falls outside of the current fiscal year be paid.

3. Any Special Fee vouchers from the previous fiscal year that are submitted beyond the July 31st cutoff date **WILL NOT** be paid, as those funds will have been returned to the County.

C. Event-Based Cases

1. Vouchers must be submitted within 90 days of the completion of the case, or they **MAY NOT** be paid.
2. Vouchers submitted beyond 90 days of completion that are from a previous fiscal year **WILL NOT** be paid, as the funds will have been returned to the County.

D. 300 Cases

All 300 vouchers must be submitted within 30 days of the completion of the billable activity, or they may not be paid.

**Main Office**

333 Bradford Street, Suite 200  
 Redwood City, CA 94063-1529  
 PH: (650) 298-4000  
 FX: (650) 369-8083



**PRIVATE DEFENDER PROGRAM**  
**SAN MATEO COUNTY BAR ASSOCIATION**

**Juvenile Branch**

222 Paul Scannell Drive, Suite C219A  
 San Mateo, CA 94402  
 PH: (650) 312-5396  
 FX: (650) 655-6221

**Social Work Rates as of 7/1/2023\***

**\$75/hour MSW/ASW/AMFT or other non-licensed mental health related graduate degree and \$85/hour LCSW/LMFT/LPCC or other comparable level of licensure - Dependency**

**\$95/hour MSW/ASW/AMFT or other non-licensed mental health related graduate degree and \$105/hour LCSW/LMFT/LPCC or other comparable level of licensure:** [this includes shorter reports, quicker work, less research, etc.]

Includes but is not limited to:

- case management
- treatment plans
- release/re-entry plans
- MHD eligibility letter
- assessments (IMHD Screening, ACEs screening, Mini Mental Folstein, etc.) etc.
- In court advocacy (if requested by attorney; includes attending court with client, providing status updates, providing context to memos, supporting client)

**\$110/hour MSW/ASW/AMFT or other non-licensed mental health related graduate degree and \$120/hour LCSW/LMFT/LPCC or other comparable level of licensure** [this includes denser, require comprehensive assessments, a lot more writing, longer term cases a lot of the time, more research, etc.]

Includes but is not limited to:

- MHD reports
- mitigation reports (for any type of case)
- sentencing plans
- revocation plans
- alternative disposition plans
- felony consultation (armed robbery, serious sex charges, homicides, etc.)

**\$125/hour MSW/ASW/AMFT or other non-licensed mental health related graduate degree and \$135/hour LCSW/LMFT/LPCC or other comparable level of licensure** [this includes denser, require comprehensive assessments, a lot more writing, longer term cases a lot of the time, more research, etc.]

- Post-conviction cases (resentencing, YOP, Franklin, etc.)
- Felony cases (armed robbery, serious sex charges, homicides, etc.)

**\$145/hour:** [this rate is also reserved for other special circumstances to be determined]

- Testifying (if requested by attorney in an expert capacity; includes preparation with attorney prior to testifying)
- Special circumstance cases (dual CSEC/Delinquency)
- Juvenile transfers
- Capital cases.

\*Notes:

- If you are doing a combination of the above in any way, we can discuss what those rates will look like.

**Main Office**

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Redwood City, CA 94063-1529  
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FX: (650) 369-8083



**PRIVATE DEFENDER PROGRAM**  
SAN MATEO COUNTY BAR ASSOCIATION

**Juvenile Branch**

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PH: (650) 312-5396  
FX: (650) 655-6221

- If you start with one task, which then changes due to unforeseen circumstances to another, new rates and voucher must be approved.
- All tasks are not explicitly listed. Some tasks fall under a specific category listed, such as “case management.” If you have any questions regarding any task and what the rate may be, please do not hesitate to ask.
- There is flexibility in some rates, to be discussed with the Supervising Social Worker and approved by the Chief Defender.

**Main Office**

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**SAN MATEO COUNTY BAR ASSOCIATION**

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San Mateo, CA 94402  
PH: (650) 312-5396  
FX: (650) 655-6221

**INVESTIGATOR FEE SCHEDULE**

*Effective 07/01/2023*

**A. Investigation Fees**

**1. Hourly Rates**

- |                       |            |
|-----------------------|------------|
| a. Special Fee Cases: | \$100/hour |
| b. All Other Cases    | \$85/hour  |

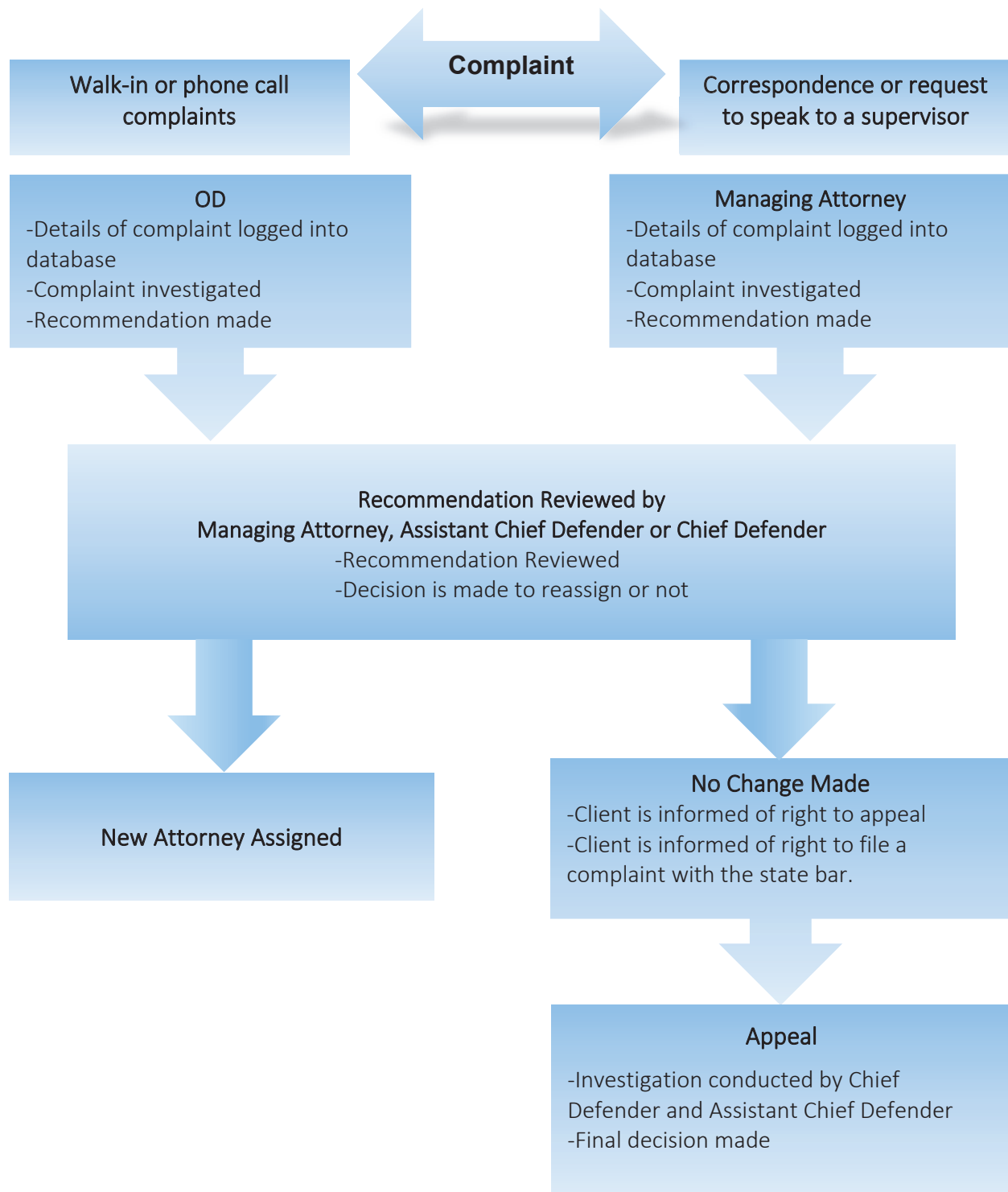
**B. Mileage Reimbursement**

1. Mileage is reimbursable at the rate set by the Internal Revenue Service.

**C. Billing**

1. Investigators shall bill in 1/10 of an hour increments (6 minutes)
2. The bills shall indicate the nature of the work performed, e.g., scene visit, witness interview, discovery review, meeting with the attorney, etc.
3. Bills must be submitted twice monthly, on the 1<sup>st</sup> and 15<sup>th</sup>, through the PDP's case management system.

## CLIENT COMPLAINT PROCEDURES



If the Assistant Chief Defender or Chief Defender declines to reassign, client will be informed about Marsden motion remedies and the right to pursue a complaint to the California State Bar. Complaint forms will be distributed upon request. The ODs are trained to inform clients that they always have a right to request a Marsden motion at any stage of the proceedings, and clients are uniformly told about the right to a Marsden motion at every stage of the complaint process.

# APPENDIX

2

# **EVALUATION STANDARDS**

## **I. PROFESSIONAL ABILITY**

### **A. Preparation and Knowledge**

1. Recognition of Legal Issues: The attorney recognizes the issues in the case that are necessary for the proper defense of the client. The attorney demonstrates creativity in resolving legal problems.
2. Judgment in Assessing Cases: The attorney demonstrates an ability to evaluate and assess a case, taking into consideration the strengths and weaknesses of the prosecution and defense cases.
3. Effective Legal Research and Use of Pretrial Motions: The attorney has a satisfactory working knowledge of resource materials for use in all aspects of criminal practice. The attorney prepares well-written and researched motions that are timely filed in appropriate cases.
4. Effective Use of Investigation: The attorney recognizes those cases in which investigation is required. Requests are reasonable, appropriate, and communicated in a clear and timely manner.
5. Effective Use of Experts: The attorney seeks assistance of experts in appropriate cases. Information is provided to the expert in a timely fashion, and the attorney prepares for the presentation of expert testimony.
6. Effective Use of Immigration Resources: The attorney recognizes cases in which consultation with an immigration attorney or accessing criminal immigration resources is appropriate and necessary to provide effective assistance of counsel. The attorney actively seeks possible outcomes that minimize negative immigration consequences for the client when appropriate.
7. Effective Use of Social Workers and Client Advocates: The attorney recognizes cases in which a social worker or client advocate could be beneficial to a client's case. The attorney works appropriately with social workers and client advocates to seek better overall outcomes for our clients and ensure effective holistic representation.

## **B. Advocacy**

1. Courtroom Demeanor: The attorney's demeanor is professional and conducive to effective representation.
2. Willingness to Try Cases: The attorney takes cases to trial when appropriate.
3. Advocacy Skills: A Private Defender is called upon to employ a variety of differing advocacy skills in representing clients in jury trials, court trials, juvenile hearings, preliminary hearings, and in other courtroom matters. For purposes of this category, the attorney should demonstrate effective advocacy skills including but not limited to such items as: voir dire; direct and cross-examination; introduction of, object to, and admissibility of evidence; argument; instructions; and recognition of potential appellate issues.
4. Case Negotiations and Sentencing: The attorney enters into case negotiations familiar with the significant issues and ascertainable facts. The attorney recognizes plea alternatives and consequences and properly advises the client. The attorney communicates effectively with the other parties involved in the case. The attorney makes thorough use of sentencing laws, seeking imaginative and creative sentencing alternatives.
5. Pursuit of Collaborative Courts and Diversion: The attorney recognizes cases in which entry into a collaborative court or other diversion program is appropriate. The attorney is educated about local and state diversion and collaborative courts that are available and files motions for entry into those programs when appropriate.

## **II. PROFESSIONAL ATTITUDE**

### **A. Professionalism**

1. Ethics and Integrity: The attorney demonstrates an interest in his or her professional growth by a willingness to accept new and more challenging assignments and by seeking educational opportunities that will make him or her a more knowledgeable advocate. The attorney's attendance at Private Defender Program education programs and at continuing education programs sponsored by other defender organizations such as OSPD, CPDA, and CACJ, should demonstrate his or her zeal for excellence as a trial lawyer.

### **B. Work Habits**

1. Volume and Calendar Management: The attorney satisfactorily handles the number of cases he or she accepts and manages his or her schedule to maximize personal effectiveness to the benefit of the client.

Court Appearances: The attorney appears in court punctually and keeps the court apprised of his or her whereabouts. If the attorney is unable to attend a court appearance, they arrange for coverage by another qualified attorney in advance and ensure that their client is informed of the situation. The attorney arrives at court appearances prepared and, whenever possible, has communicated with their client beforehand.

### *III. PERSONAL RELATIONS*

1. Clients: The attorney maintains contact with both in- and out-of-custody clients sufficient to provide competent representation for each court appearance. The attorney develops and maintains the client's trust and confidence. The attorney keeps the client advised as to the status of the case and explains constitutional and statutory rights. The attorney is sensitive to the special problems attendant to the representation of mentally ill clients, difficult clients, and resistant clients.
2. Private Defender Staff: The attorney's interaction with clerical staff, investigators, and other staff demonstrates a spirit of cooperation, assistance, and respect. The attorney is considerate of the pressures imposed upon all staff by high volume, time constraints and limited resources.
3. Members of the Justice System: The attorney conducts themselves with professionalism and respect in interactions with judicial officers, prosecutors, courtroom personnel, and others in the justice system. The attorney is mindful that their behavior reflects on their client and ensures that it does not negatively impact the client's interests.

# APPENDIX

3

# PDP Annual Attorney Survey (2025-2026)

This survey is divided into seven sections:

- 1) Identifying information
- 2) All Attorneys
- 3) Adult Panel Attorneys
- 4) Juvenile Justice Attorneys
- 5) Dependency Attorneys
- 6) LPS and Probate Attorneys
- 7) All Attorney Feedback

Please follow instructions regarding which section you should fill out depending on the kind of cases you do for PDP.

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\* Indicates required question

1. Email \*

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2. Your name \*

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3. Years of Legal Practice \*

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## **All Attorneys (Section 2)**

Everyone should fill out this section.

4. **Do you take retained cases and/or cases from other panels? \***

*Mark only one oval.*

- ☐ No, 100% of my law practice is PDP work
- ☐ Yes, I also take retained cases
- ☐ Yes, I also take cases from other panels
- ☐ Yes, I take retained cases and cases from other panels

5. **What percentage of your total law practice time is spent working on PDP cases? \***

Example: If 1/4 of your work time is spent on PDP cases, enter 25.

(Enter a number only, from 0 to 100. Do not include the % symbol.)

---

6. **Please provide the total number of MCLE credits directly related to your PDP practice that you earned during this fiscal year. \***

If you are a new attorney, you may include informal PDP trainings without MCLE credit (such as the New Attorney Trainings).

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7. **Please list any experts you have worked with during the past fiscal year, \* along with the areas of expertise for which you consulted them.**

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8. **If a *Marsden* motion has been granted in a PDP case assigned to you, or a finding of ineffective assistance of counsel by a trial or appellate court in your representation of a PDP client during the past fiscal year, please provide:**

Name of the defendant

Case number

Brief description of the basis for the Court's ruling

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9. **This question is to direct you to the appropriate next section.** \*

Section (3) is for attorneys who represent adults in criminal cases.

Section (4) is for Juvenile Justice Attorneys.

Section (5) is for Dependency Attorneys.

Section (6) is for LPS/Probate Attorneys.

Section (7) is for all attorney feedback.

Please select the next section applicable to you.

*Mark only one oval.*

☐ Send me to section 3, because I represent adults in criminal cases. Those who represent adults and juveniles will be able to move to section 4 after completing section 3. *Skip to question 10*

☐ Send me to section 4, because I represent juveniles in Juvenile Justice cases. *Skip to question 25*

☐ Send me to section 5, because I represent juveniles or adults in Juvenile Dependency cases. *Skip to question 35*

☐ Send me to section 6, because I represent LPS/Probate only. *Skip to question 42*

☐ Other:  
\_\_\_\_\_

**Adult Panel Attorneys (Section 3).**

Attorneys doing adult criminal cases should fill out this section.

10. **Please provide your total years of Criminal Defense Practice. \***

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11. **Please provide the total number of jury trials have you tried to verdict in your career? (total or approximate) \***

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12. **Have you had a jury trial for a PDP case in the last fiscal year? (July 1, 2025 and June 30, 2026?) \***

*Mark only one oval.*

☐ Yes

☐ No

☐ I do not do trial work.

13. **How many jury trials for PDP cases have you completed in the last fiscal year?**

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14. **If you have had a trial during this fiscal year, have you completed the mandatory PDP Trial form for all of your trials?** \*

[Link to 2025-2026 Jury Trial Form](#)

*Mark only one oval.*

- ☐ Yes, and I filled out the form.
- ☐ No, but I will do it right now (see link, above)
- ☐ I did not do a trial this year.
- ☐ I do not do trial work.

15. **Have you had a jury trial for a retained case or a case where you were appointed by a different panel in the last fiscal year?** \*

*Mark only one oval.*

- ☐ Yes
- ☐ No
- ☐ I do not do trial work.

16. **Please list any significant "wins" or positive outcomes not otherwise reflected by trial statistics that you would like us to know about.** \*

(e.g. Successful motions, significant dismissals, immigration neutral pleas, etc.)

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17. **Please provide two PDP cases that went to an evidentiary hearing on issues raised in written points and authorities during the last fiscal year. Please provide:** \*

Client's name

Case number

Type of motion

Outcome of motion

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18. **How many 1538.5 motions have you filed in the last fiscal year? \***

*Mark only one oval.*

☐ More than 10

☐ 6-10

☐ 2-5

☐ 1

☐ None

19. **If you handle felony matters, how many 995 motions have you filed in the last fiscal year?** \*

*Mark only one oval.*

- ☐ I don't handle felony matters
- ☐ More than 10
- ☐ 6-10
- ☐ 2-5
- ☐ 1
- ☐ None

20. **How many mental health diversion applications have you filed in the last fiscal year?** \*

(please include cases where motions were not filed because the DA conceded admission)

---

21. **Please list other substantive motions you have filed in the last fiscal year.** \*

(e.g. motion to compel, *Romero*, *Pitchess*, 827 petition, bail motions, demurrer, lineup motion, *Miranda*/voluntariness, new trial motion, motion to sever, recusal motion, speedy trial, 1385 motion, *Trombetta/Youngblood*, RJA litigation, writs/appeals, etc.)

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22. **Is it part of your practice to regularly obtain *Padilla* consultations for your non-citizen clients?**

If not, why not?

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23. **Approximately what percentage of the time does the DA's office offer an immigration neutral offer when requested?**

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24. **This question is to direct you to the next section you need to fill out. \***

-Section (4) is for Juvenile Justice Attorneys.

-Section (5) is for Dependency Attorneys.

-Section (6) is for LPS/Probate Attorneys.

If you do neither of those, then go to

-Section (7), Attorney Feedback.

Pick only one!

*Mark only one oval.*

☐ Send me to section 4, because I represent juveniles in Juvenile Justice cases.

☐ Send me to section 5, because I represent juveniles or adults in Juvenile Dependency matters. *Skip to question 35*

☐ Send me to section 6, because I do LPS/Probate, but I do not represent juveniles. *Skip to question 42*

☐ Send me to section 7 for my feedback. *Skip to question 46*

### **Juvenile Justice Attorneys (Section 4)**

Attorneys doing juvenile justice cases should fill out this section.

25. Please list 1 PDP (WIC 602) contested hearing in which witnesses were called.

Provide the case number, the nature of the hearing, the Judge before whom the case was tried, and the result.

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26. Please list PDP (WIC 602) cases in which you filed written points and authorities.

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27. Please list two PDP (WIC 602) cases which went to an evidentiary hearing on issues raised in written points and authorities. Please provide the case numbers, the Judges before whom the motions were litigated and the results.

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28. \*For Juvenile Panel Delinquency attorneys, please provide certification of compliance with the provisions of California Rule of Court 5.663 in regard to the responsibilities of children's counsel in delinquency proceedings and Rule of Court 5.664 in regard to the training requirements for children's counsel in delinquency proceedings; and for Juvenile Dependency attorneys, please provide certification of compliance with the provisions of WIC Section 317 and the provisions of California Rule of Court 5.660 in regard to attorney caseloads and training requirements for competent counsel in Juvenile Dependency matters.

*Mark only one oval.*

☐

Fill out the certification form here: <https://forms.gle/xYToocYPrJ3oZK5a8>

29. Please list the PDP (WIC 602) cases in which you raised or litigated In re Gladys R. or competency (WIC 709) issues.

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30. From July 1, 2025 until June 30, 2026, how many detained PDP (WIC 602) youth did you have a substantive meeting (in person or remotely) prior to the detention hearing? \*

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31. Provide the percentage of PDP (WIC 602) clients you met with (in person or remotely) after a court hearing. \*

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32. Provide the number of in-custody PDP cases in which the special advocate, Lindsay Page, services were used. \*

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33. Provide the number of PDP cases in which the work of the special advocate contributed to the youth's release from custody. \*

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34. This question is to direct you to the next section you need to fill out. The next \* section (5) is for Dependency Attorneys. Section (6) is LPS/Probate. Section (7) is attorney feedback and is for all. Please select the next section you need to fill out.

*Mark only one oval.*

- ☐ Take me to section 5, because I do Dependency cases.  
*Skip to question 35*
- ☐ Take me to section 6, because I do LPS/Probate, but not dependency.  
*Skip to question 42*
- ☐ Take me to section 7. *Skip to question 46*

**Dependency Attorneys (Section 5)**

Attorneys doing juvenile dependency cases should fill out this section.

35. Please list 1 PDP (WIC 300) contested hearing in which witnesses were called, and you were the moving party. Provide the case number, the nature of the hearing, the Judge before whom the case was tried, and the result.

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36. Please list PDP (WIC 300) cases in which you filed written points and authorities.

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37. \*For Juvenile Panel Dependency attorneys, please provide certification of compliance with the provisions of California Rule of Court 5.663 in regard to the responsibilities of children's counsel in delinquency proceedings and Rule of Court 5.664 in regard to the training requirements for children's counsel in delinquency proceedings; and for Juvenile Dependency attorneys, please provide certification of compliance with the provisions of WIC Section 317 and the provisions of California Rule of Court 5.660 in regard to attorney caseloads and training requirements for competent counsel in Juvenile Dependency matters.

*Mark only one oval.*

☐ Fill out the certification form here: <https://forms.gle/xYToocYPrJ3oZK5a8>

38. Please list the total number of children you currently represent in PDP WIC 300 cases. \*

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39. Between July 1, 2025 and June 30, 2026, how many of these children did you visit (in person or remotely) ? \*

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40. For the same time period, did you, a PDP Social Worker, or Investigator visit your child clients after a new placement? List the cases and indicate who conducted the visit.

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41. This question is to direct you to the next section you need to fill out. Section (6) is \* for LPS/Probate Attorneys. Section (7) is attorney feedback and is for all. Please select the next section you need to fill out.

*Mark only one oval.*

☐ Take me to section 6, because I do LPS/Probate *Skip to question 42*

☐ Take me to section 7 *Skip to question 46*

**LPS and Probate Attorneys (Section 6)**

Attorneys doing LPS or probate cases should fill out this section.

42. Have you had a jury or bench trial in the time period between July 1, 2025 and \* June 30, 2026?

*Mark only one oval.*

☐ Yes

☐ No

43. In cases where you had a jury or bench trial, please list the case number, judge, and outcome. \*

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44. Are you in compliance with the qualifications and the annual education requirements provided in the applicable California Rules of Court (Rules 7.1102 and/or 7.1103)?

*Mark only one oval.*

☐ Yes

☐ No

45. If you are currently not in compliance with the requirements of the applicable California Rules of Court (7.1102 and/or 7.1103), please indicate when do you anticipate to meet these requirements?

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## Attorney Feedback

Please rate how well the PDP is doing in the following areas on a scale of 1-5.

- (1) Poor
- (2) Needs improvement
- (3) Meets expectations
- (4) Exceeds expectations
- (5) Great/Excellent

46. **Access to Immigration/*Padilla* advice \***

*Mark only one oval.*

1   2   3   4   5

PDI ☐ ☐ ☐ ☐ ☐ PDB immigration has great access to immigration advice

47. **Access to investigators \***

*Mark only one oval.*

1   2   3   4   5

PDI ☐ ☐ ☐ ☐ ☐ PDB investigators great access to investigators

48. **Access to experts \***

*Mark only one oval.*

1   2   3   4   5

PDI ☐ ☐ ☐ ☐ ☐ PDB experts great access to experts

49. **Access to social workers \***

*Mark only one oval.*

1   2   3   4   5

PDI ☐ ☐ ☐ ☐ ☐ PDB provides great access to social workers

50. **Access to legal training/MCLE \***

*Mark only one oval.*

1   2   3   4   5

PDI ☐ ☐ ☐ ☐ ☐ PDB provides legal training to MCLE's & trainings

51. **Please list any training topics you would like to see offered in the upcoming year. \***

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52. **Please provide any additional information you believe would help us better support you in your practice. \***

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# APPENDIX

4

## **Private Defender Program Case Types**

**“Type A”** cases are generally described as a felony matter involving one accusatory pleading including a complaint, indictment, information, or certification under Penal Code section 859(a). It also includes felony appeals to the Appellate Department of the Superior Court of San Mateo County; writs filed on behalf of defendants (specifically of *habeas corpus* filed on behalf of prisoners of the State of California pursuant to the provisions of California Penal Code section 4750); post-conviction relief in which defendants are entitled to appointed counsel; all quasi-criminal and civil proceedings which are not specifically mentioned in subsections 2b, 2c or 2d herein, but which are proceedings in which the law requires that counsel be provided at public expense, including but not limited to contempt proceedings (California Code of Civil Procedure sections 1209 *et seq.*); proceedings to terminate parental rights (California Family Code sections 7802, 7860-7864 *et seq.*); probate conservatorship proceedings pursuant to California Probate Code sections 1471 and 1852; paternity, support, and adoption proceedings, proceedings pursuant to the provisions of the Service Members Civil Relief Act, and proceedings pursuant to the Sexually Violent Predators Act (California Welfare and Institutions Code section 6600 *et seq.*).

**“Type B”** cases are generally described as a single matter involving one complaint alleging a misdemeanor and also include misdemeanor appeals and proceedings to revoke or modify probation on misdemeanors; matters arising after the suspicion of criminal proceedings in misdemeanors, representation at lineups; representation of witnesses, and any other appearances or representations by assigned attorneys specifically requested or ratified by a Judge of the Superior Court of San Mateo County, and not included in any other provisions of the Agreement (Appendix 1 of PDP Annual Report), where the law requires that counsel be provided at public expense, whether or not such matter is filed in court

**“Type C”** cases are generally described as any case initiated pursuant to the Lanterman-Petris-Short Act (LPS) or the Developmental Disability laws set forth in the California Welfare and Institutions Code.

**“Type D”** cases describe those Juvenile Dependency cases in which the PDP was appointed and was part of the agreement with the County. These cases are now governed by an Agreement with the Court and are now reported to the court and not to the County. They are included in this report to give the County the opportunity to see all of the cases PDP attorneys handle.

**“Type E”** cases are defined as any matter in the Juvenile Court brought pursuant to the juvenile delinquency statutes of the State of California, including but not limited to those set forth in Welfare and Institution Code section 602 *et seq.*

**“Type G”** cases describe BSCC grant funded post-conviction work covered by the Public Defense Pilot Program.

**“Type X”** cases include, in addition to their regular caseloads, several PDP lawyers who appear at and cover regularly scheduled court calendars, which is a time set aside by one judge to handle a significant number of cases that are at the same procedural point of the criminal justice process. Attorneys with extensive serious felony experience handle the arraignment calendars for those clients who are in custody. In addition to the in-custody calendar there are six weekly out-of-custody arraignment calendars, all of which are staffed by PDP attorneys. In addition, there are several regularly scheduled calendars for the various specialty court calendars including Pathways Mental Health Court, Bridges (Probation Department Drug Program), Laura’s Law Court Drug Court, Penal Code 1370 (not competent to stand trial) Court, Restitution Court, Domestic Violence Review, Veterans Treatment Court and Military Diversion. This category also includes motions to revoke or modify probation and post-conviction relief in the form of expungements or Certificate of Rehabilitation on felony matters.

**PDP Caseloads by Attorney**  
**Fiscal Year Ended June 30, 2026**

|    | Percentage of Time Spent<br>on PDP Cases | A   | B   | C | D  | E  | G  | X   |
|----|------------------------------------------|-----|-----|---|----|----|----|-----|
| 1  | 100%                                     | 0   | 391 | 0 | 0  | 0  | 0  | 35  |
| 2  | 95%                                      | 94  | 109 | 0 | 0  | 0  | 0  | 0   |
| 3  | 75%                                      | 1   | 47  | 0 | 0  | 37 | 0  | 16  |
| 4  | 75%                                      | 207 | 254 | 1 | 0  | 1  | 0  | 4   |
| 5  | 95%                                      | 0   | 499 | 0 | 0  | 0  | 1  | 3   |
| 6  | *                                        | 25  | 208 | 3 | 1  | 60 | 20 | 174 |
| 7  | 50%                                      | 0   | 0   | 0 | 28 | 86 | 0  | 12  |
| 8  | 10%                                      | 9   | 35  | 0 | 0  | 0  | 0  | 0   |
| 9  | 15%                                      | 7   | 2   | 0 | 0  | 0  | 0  | 0   |
| 10 | 100%                                     | 271 | 191 | 0 | 0  | 0  | 0  | 22  |
| 11 | 99%                                      | 118 | 313 | 0 | 0  | 0  | 0  | 12  |
| 12 | *                                        | 25  | 87  | 0 | 0  | 0  | 0  | 0   |
| 13 | 40%                                      | 8   | 0   | 0 | 0  | 0  | 0  | 4   |
| 14 | 90%                                      | 338 | 259 | 0 | 0  | 0  | 0  | 124 |
| 15 | *                                        | 1   | 0   | 0 | 0  | 0  | 0  | 0   |
| 16 | 95%                                      | 168 | 216 | 0 | 0  | 0  | 0  | 2   |
| 17 | *                                        | 2   | 8   | 0 | 0  | 0  | 0  | 0   |
| 18 | 55%                                      | 13  | 10  | 0 | 0  | 0  | 0  | 0   |
| 19 | 100%                                     | 0   | 589 | 0 | 0  | 0  | 0  | 28  |
| 20 | 85%                                      | 171 | 519 | 0 | 0  | 0  | 0  | 67  |
| 21 | *                                        | 15  | 0   | 0 | 0  | 0  | 0  | 37  |
| 22 | 50%                                      | 2   | 0   | 0 | 0  | 0  | 0  | 0   |
| 23 | *                                        | 0   | 25  | 0 | 0  | 0  | 0  | 3   |
| 24 | 75%                                      | 17  | 6   | 0 | 0  | 0  | 0  | 0   |

**PDP Caseloads by Attorney**  
**Fiscal Year Ended June 30, 2026**

|    | Percentage of Time Spent<br>on PDP Cases | A   | B   | C  | D  | E   | G  | X   |
|----|------------------------------------------|-----|-----|----|----|-----|----|-----|
| 25 | 90%                                      | 107 | 341 | 0  | 0  | 0   | 0  | 22  |
| 26 | 100%                                     | 0   | 24  | 0  | 15 | 86  | 0  | 147 |
| 27 | *                                        | 7   | 0   | 0  | 0  | 0   | 0  | 0   |
| 28 | 100%                                     | 0   | 0   | 0  | 0  | 0   | 0  | 1   |
| 29 | 98%                                      | 33  | 101 | 0  | 0  | 101 | 0  | 28  |
| 30 | 98%                                      | 55  | 251 | 0  | 0  | 0   | 0  | 37  |
| 31 | 80%                                      | 52  | 65  | 0  | 0  | 0   | 0  | 2   |
| 32 | 85%                                      | 143 | 60  | 11 | 0  | 0   | 0  | 16  |
| 33 | 85%                                      | 0   | 0   | 0  | 49 | 118 | 0  | 0   |
| 34 | 99%                                      | 26  | 54  | 0  | 0  | 1   | 0  | 95  |
| 35 | 100%                                     | 18  | 0   | 0  | 46 | 0   | 0  | 0   |
| 36 | *                                        | 0   | 4   | 0  | 0  | 0   | 0  | 0   |
| 37 | 40%                                      | 1   | 1   | 0  | 0  | 0   | 0  | 0   |
| 38 | 50%                                      | 0   | 0   | 0  | 0  | 23  | 0  | 26  |
| 39 | *                                        | 132 | 33  | 0  | 0  | 0   | 0  | 102 |
| 40 | 100%                                     | 0   | 725 | 0  | 0  | 0   | 0  | 17  |
| 41 | 95%                                      | 51  | 32  | 4  | 0  | 0   | 0  | 1   |
| 42 | 85%                                      | 108 | 153 | 2  | 0  | 0   | 0  | 15  |
| 43 | 30%                                      | 34  | 123 | 0  | 0  | 0   | 0  | 1   |
| 44 | 99%                                      | 222 | 246 | 0  | 0  | 0   | 0  | 11  |
| 45 | 40%                                      | 2   | 1   | 0  | 0  | 0   | 0  | 1   |
| 46 | 40%                                      | 3   | 1   | 0  | 0  | 0   | 11 | 1   |
| 47 | 65%                                      | 51  | 23  | 0  | 0  | 0   | 2  | 6   |
| 48 | *                                        | 0   | 70  | 0  | 0  | 0   | 0  | 0   |

**PDP Caseloads by Attorney**  
**Fiscal Year Ended June 30, 2026**

|    | Percentage of Time Spent<br>on PDP Cases | A   | B   | C  | D  | E   | G | X   |
|----|------------------------------------------|-----|-----|----|----|-----|---|-----|
| 49 | 10%                                      | 33  | 21  | 1  | 0  | 24  | 0 | 0   |
| 50 | 95%                                      | 228 | 57  | 6  | 0  | 0   | 0 | 3   |
| 51 | 70%                                      | 24  | 21  | 0  | 0  | 0   | 0 | 4   |
| 52 | 90%                                      | 203 | 120 | 0  | 0  | 0   | 0 | 0   |
| 53 | *                                        | 0   | 0   | 0  | 0  | 0   | 0 | 258 |
| 54 | *                                        | 0   | 0   | 0  | 0  | 0   | 0 | 7   |
| 55 | 90%                                      | 281 | 366 | 0  | 0  | 0   | 0 | 5   |
| 56 | 100%                                     | 0   | 381 | 0  | 0  | 0   | 0 | 0   |
| 57 | 80%                                      | 10  | 4   | 0  | 0  | 0   | 0 | 0   |
| 58 | 80%                                      | 0   | 249 | 0  | 0  | 0   | 0 | 1   |
| 59 | 50%                                      | 104 | 51  | 1  | 0  | 0   | 0 | 1   |
| 60 | *                                        | 2   | 0   | 0  | 0  | 0   | 0 | 0   |
| 61 | 90%                                      | 270 | 405 | 0  | 0  | 0   | 0 | 38  |
| 62 | *                                        | 1   | 0   | 0  | 0  | 0   | 0 | 0   |
| 63 | 99%                                      | 19  | 0   | 38 | 44 | 0   | 0 | 8   |
| 64 | 50%                                      | 0   | 0   | 0  | 24 | 0   | 0 | 1   |
| 65 | 90%                                      | 21  | 66  | 0  | 0  | 0   | 0 | 0   |
| 66 | 85%                                      | 139 | 142 | 0  | 0  | 0   | 0 | 1   |
| 67 | 75%                                      | 4   | 4   | 0  | 0  | 0   | 0 | 8   |
| 68 | 85%                                      | 4   | 212 | 0  | 0  | 154 | 0 | 3   |
| 69 | 25%                                      | 52  | 22  | 0  | 0  | 0   | 0 | 0   |
| 70 | *                                        | 0   | 0   | 0  | 0  | 0   | 0 | 1   |
| 71 | *                                        | 108 | 10  | 0  | 0  | 0   | 0 | 161 |
| 72 | *                                        | 0   | 0   | 0  | 0  | 0   | 6 | 1   |

**PDP Caseloads by Attorney**  
**Fiscal Year Ended June 30, 2026**

|    | Percentage of Time Spent<br>on PDP Cases | A   | B   | C | D | E   | G | X   |
|----|------------------------------------------|-----|-----|---|---|-----|---|-----|
| 73 | 99%                                      | 7   | 68  | 0 | 0 | 0   | 0 | 19  |
| 74 | *                                        | 0   | 0   | 0 | 0 | 118 | 0 | 0   |
| 75 | *                                        | 0   | 1   | 0 | 0 | 0   | 0 | 7   |
| 76 | *                                        | 0   | 300 | 0 | 0 | 0   | 0 | 1   |
| 77 | *                                        | 20  | 0   | 0 | 0 | 0   | 0 | 16  |
| 78 | 20%                                      | 2   | 0   | 0 | 0 | 0   | 0 | 0   |
| 79 | 33%                                      | 6   | 4   | 0 | 0 | 0   | 0 | 0   |
| 80 | *                                        | 1   | 0   | 0 | 0 | 0   | 0 | 24  |
| 81 | *                                        | 0   | 0   | 0 | 0 | 0   | 0 | 1   |
| 82 | 100%                                     | 3   | 1   | 0 | 3 | 18  | 0 | 13  |
| 83 | 98%                                      | 0   | 648 | 0 | 0 | 11  | 0 | 29  |
| 84 | 65%                                      | 1   | 0   | 0 | 3 | 35  | 0 | 8   |
| 85 | 100%                                     | 1   | 0   | 0 | 0 | 1   | 0 | 0   |
| 86 | 80%                                      | 65  | 113 | 0 | 0 | 0   | 0 | 1   |
| 87 | 50%                                      | 6   | 0   | 0 | 0 | 0   | 0 | 0   |
| 88 | *                                        | 4   | 0   | 0 | 0 | 0   | 0 | 0   |
| 89 | *                                        | 0   | 19  | 0 | 0 | 0   | 0 | 0   |
| 90 | 80%                                      | 140 | 302 | 1 | 0 | 0   | 0 | 0   |
| 91 | *                                        | 1   | 0   | 0 | 0 | 0   | 0 | 0   |
| 92 | *                                        | 7   | 0   | 0 | 0 | 0   | 0 | 0   |
| 93 | 100%                                     | 4   | 0   | 0 | 0 | 45  | 0 | 74  |
| 94 | *                                        | 1   | 28  | 0 | 0 | 0   | 0 | 171 |
| 95 | 99%                                      | 30  | 538 | 0 | 0 | 0   | 0 | 26  |
| 96 | *                                        | 0   | 0   | 0 | 0 | 0   | 2 | 3   |

**PDP Caseloads by Attorney**  
**Fiscal Year Ended June 30, 2026**

|     | <b>Percentage of Time Spent<br/>on PDP Cases</b> | <b>A</b> | <b>B</b> | <b>C</b> | <b>D</b> | <b>E</b> | <b>G</b> | <b>X</b> |
|-----|--------------------------------------------------|----------|----------|----------|----------|----------|----------|----------|
| 97  | *                                                | 5        | 0        | 0        | 0        | 0        | 0        | 0        |
| 98  | 100%                                             | 0        | 355      | 0        | 0        | 0        | 0        | 24       |
| 99  | 50%                                              | 183      | 65       | 0        | 0        | 0        | 0        | 0        |
| 100 | 90%                                              | 294      | 209      | 0        | 0        | 0        | 0        | 20       |
| 101 | 95%                                              | 28       | 231      | 0        | 0        | 0        | 0        | 11       |
| 102 | 30%                                              | 1        | 1        | 2        | 0        | 0        | 5        | 38       |
| 103 | 95%                                              | 4        | 675      | 1        | 0        | 17       | 0        | 26       |
| 104 | 95%                                              | 60       | 0        | 83       | 17       | 6        | 0        | 15       |
| 105 | *                                                | 4        | 0        | 2        | 0        | 0        | 0        | 5        |
| 106 | *                                                | 1        | 0        | 0        | 0        | 0        | 0        | 0        |
| 107 | 10%                                              | 2        | 0        | 0        | 0        | 0        | 0        | 0        |
| 108 | 20%                                              | 3        | 2        | 0        | 0        | 0        | 0        | 0        |
| 109 | *                                                | 41       | 85       | 0        | 0        | 0        | 0        | 0        |
| 110 | 75%                                              | 71       | 98       | 0        | 0        | 0        | 0        | 6        |
| 111 | 99%                                              | 187      | 249      | 0        | 0        | 0        | 4        | 67       |
| 112 | 75%                                              | 307      | 241      | 1        | 0        | 0        | 0        | 3        |
| 113 | 100%                                             | 47       | 326      | 0        | 0        | 0        | 0        | 49       |
| 114 | *                                                | 9        | 62       | 0        | 0        | 0        | 0        | 0        |
| 115 | *                                                | 1        | 1        | 0        | 0        | 0        | 0        | 0        |
| 116 | 40%                                              | 3        | 1        | 0        | 0        | 0        | 0        | 21       |
| 117 | *                                                | 0        | 0        | 0        | 0        | 0        | 2        | 2        |
| 118 | 75%                                              | 55       | 47       | 1        | 0        | 0        | 0        | 2        |
| 119 | *                                                | 0        | 3        | 1        | 0        | 12       | 0        | 4        |
| 120 | 20%                                              | 1        | 1        | 0        | 0        | 1        | 0        | 324      |

**PDP Caseloads by Attorney**  
**Fiscal Year Ended June 30, 2026**

|     | Percentage of Time Spent<br>on PDP Cases | A | B | C | D  | E   | G | X  |
|-----|------------------------------------------|---|---|---|----|-----|---|----|
| 121 | 100%                                     | 1 | 0 | 0 | 47 | 187 | 0 | 22 |
| 122 | *                                        | 0 | 5 | 0 | 0  | 0   | 0 | 0  |

An asterisk (\*) next to an attorney's number in the column indicating the percentage of time spent working on PDP cases means that the attorney either joined the PDP very recently, has left the PDP, or spends less than 5% of their work time on matters dedicated to the PDP.

# APPENDIX

5

PRIVATE DEFENDER PROGRAM CASE COUNTS  
FOR FISCAL YEAR ENDED JUNE 30, 2026

|                                  | July<br>2025 | Aug.<br>2025 | Sept.<br>2025 | Oct.<br>2025 | Nov.<br>2025 | Dec.<br>2025 | Jan.<br>2026 | Feb.<br>2026 | March<br>2026 | April<br>2026 | May<br>2026  | June<br>2026 | Year End<br>True-up | Grand<br>Totals |
|----------------------------------|--------------|--------------|---------------|--------------|--------------|--------------|--------------|--------------|---------------|---------------|--------------|--------------|---------------------|-----------------|
| <b>"A" CASES</b>                 |              |              |               |              |              |              |              |              |               |               |              |              |                     |                 |
| 1170(D)                          |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| 1171/1171.1                      |              |              |               |              |              |              |              |              |               |               | 1            |              |                     | 1               |
| 1172.1                           |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| 1172.6                           | 2            | 1            |               |              |              |              |              |              | 1             | 1             |              |              |                     | 5               |
| SB-1437                          |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| 1473.7                           |              |              |               |              |              |              |              |              |               |               |              |              | 1                   | 1               |
| YOP - Resentencing               |              |              |               |              |              | 1            |              |              |               |               |              |              | 1                   | 2               |
| 1367, 1368                       |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| Appeals                          |              |              |               |              |              | 1            | 2            |              |               |               | 6            |              | 1                   | 10              |
| * Contempts                      | 3            | 2            | 3             | 1            | 2            | 1            | 4            | 1            | 2             |               | 1            | 2            | 3                   | 25              |
| * Contempt-OSC Fam               | 1            |              |               | 2            |              |              |              | 1            | 3             | 1             | 5            |              | 5                   | 18              |
| * Probate                        | 5            | 3            | 8             | 5            | 4            | 2            | 2            | 1            | 5             | 4             | 2            | 2            | 8                   | 51              |
| * Probate / Medical Consent      |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| Probate/Guardianship             |              |              |               |              |              |              |              |              | 1             | 1             | 2            |              | 1                   | 5               |
| Probate/Limited                  | 11           | 2            | 4             | 5            | 1            |              | 5            | 5            | 4             | 4             | 7            | 12           | 5                   | 65              |
| * SVP                            |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| SVP / Criminal                   |              |              |               |              |              |              |              |              |               |               |              | 1            |                     | 1               |
| Parole Violation                 | 5            | 2            | 2             | 5            | 3            | 2            | 7            | 2            | 1             | 1             | 7            | 2            |                     | 39              |
| PRCS                             | 20           | 23           | 14            | 36           | 13           | 17           | 15           | 19           | 28            | 26            | 26           | 17           |                     | 254             |
| Probation Violation              | 72           | 61           | 49            | 75           | 52           | 56           | 55           | 80           | 75            | 86            | 84           | 108          | 2                   | 855             |
| Sexually Violent Predator (SVP)  |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| * Adoption / Guardianship        |              |              | 1             |              |              |              |              |              |               |               |              |              |                     | 1               |
| * Military Civil Relief Act      |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| Witness Representations - GJ     |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| Witness Representations          | 2            | 4            | 2             | 1            | 1            | 1            |              | 3            | 3             |               | 3            | 1            | 3                   | 24              |
| Special Assignment / Witness Rep |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| 187                              |              |              | 2             | 1            |              |              |              |              |               |               | 1            |              | 2                   | 6               |
| 187 - DP                         |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| 187 - Spec Circ                  |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| 187 - DP - GJ                    |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| 187 - GJ                         |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| Life - GJ                        |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| Super Felony - GJ                |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| NGI Extension                    |              |              |               | 1            | 1            |              |              |              |               |               |              |              |                     | 2               |
| Other Mental                     |              |              |               |              |              |              |              |              | 1             |               |              | 1            |                     | 2               |
| 3 Strikes Review                 |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| 3 Strikes / 1 Strike Life        |              |              |               |              |              |              | 1            |              |               |               |              |              | 2                   | 3               |
| Life                             |              | 6            |               | 2            | 1            | 2            | 3            | 4            | 1             |               | 6            | 3            | 1                   | 29              |
| P47                              |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| P64                              |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| P57                              |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| Felony - No SCR                  | 120          | 103          | 98            | 110          | 82           | 108          | 90           | 82           | 126           | 116           | 108          | 112          | -1                  | 1254            |
| Felony - SCR                     | 258          | 201          | 222           | 245          | 188          | 209          | 183          | 188          | 212           | 196           | 243          | 205          | 7                   | 2557            |
| Super Felony                     | 31           | 20           | 29            | 24           | 29           | 31           | 22           | 14           | 26            | 44            | 33           | 41           | 3                   | 347             |
| Calendar Closed                  |              | 2            |               |              |              | 5            | 4            | 1            |               | 5             | 2            | 5            | -1                  | 23              |
| Superior - Consolidated PV       |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| Superior - Unconsolidated PV     |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| Writs / Criminal Superior        |              |              |               |              |              |              | 1            |              |               | 2             | 1            |              |                     | 4               |
| Writs                            |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| Veterans Resentencing (AB865)    |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| 859a                             | 3            | 1            |               | 2            |              |              | 1            |              |               |               | 1            | 2            |                     | 10              |
| Sex Registration Relief          |              | 1            | 1             |              |              |              |              |              |               |               |              |              |                     | 2               |
| Compassionate Release            |              |              |               | 1            |              |              |              |              |               |               |              | 1            |                     | 2               |
| Restitution                      | 1            |              | 2             | 4            | 2            | 2            | 3            | 1            | 1             | 2             | 2            |              |                     | 20              |
| <b>Monthly Totals</b>            | <b>534</b>   | <b>432</b>   | <b>437</b>    | <b>520</b>   | <b>379</b>   | <b>438</b>   | <b>398</b>   | <b>402</b>   | <b>490</b>    | <b>489</b>    | <b>541</b>   | <b>515</b>   | <b>43</b>           | <b>5618</b>     |
| <b>Cumulative Totals</b>         | <b>534</b>   | <b>966</b>   | <b>1403</b>   | <b>1923</b>  | <b>2302</b>  | <b>2740</b>  | <b>3138</b>  | <b>3540</b>  | <b>4030</b>   | <b>4519</b>   | <b>5060</b>  | <b>5575</b>  | <b>5618</b>         |                 |
| <b>"B" CASES</b>                 |              |              |               |              |              |              |              |              |               |               |              |              |                     |                 |
| Calendar Closed                  | 35           | 35           | 32            | 43           | 31           | 30           | 32           | 30           | 30            | 37            | 20           | 35           |                     | 390             |
| Criminal Contempt                |              |              |               | 1            |              |              |              |              |               |               |              |              | -1                  | 0               |
| DV Misdemeanor                   | 89           | 83           | 83            | 105          | 52           | 69           | 73           | 68           | 80            | 58            | 59           | 81           | 2                   | 902             |
| General Misdemeanor              | 973          | 784          | 934           | 1142         | 803          | 800          | 848          | 764          | 1048          | 909           | 852          | 853          | -14                 | 10696           |
| Misdemeanor Diversion            | 5            | 7            | 10            | 5            | 9            | 3            | 7            | 4            | 7             | 9             | 2            | 4            | -1                  | 71              |
| Probation Violation              | 66           | 45           | 60            | 71           | 51           | 61           | 82           | 66           | 83            | 76            | 60           | 76           | 5                   | 802             |
| Lineups                          |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| Lineups / Special Assignment     |              |              |               |              |              |              |              |              |               |               |              |              |                     | 0               |
| Writs / Criminal Municipal       |              |              |               |              |              |              |              |              |               |               | 1            | 1            |                     | 2               |
| Witness Representations          |              |              |               |              | 1            |              |              |              |               |               |              |              |                     | 1               |
| <b>Monthly Totals</b>            | <b>1168</b>  | <b>954</b>   | <b>1119</b>   | <b>1367</b>  | <b>947</b>   | <b>963</b>   | <b>1042</b>  | <b>932</b>   | <b>1248</b>   | <b>1089</b>   | <b>994</b>   | <b>1050</b>  | <b>-9</b>           | <b>12864</b>    |
| <b>Cumulative Totals</b>         | <b>1168</b>  | <b>2122</b>  | <b>3241</b>   | <b>4608</b>  | <b>5555</b>  | <b>6518</b>  | <b>7560</b>  | <b>8492</b>  | <b>9740</b>   | <b>10829</b>  | <b>11823</b> | <b>12873</b> | <b>12864</b>        |                 |

**PRIVATE DEFENDER PROGRAM CASE COUNTS**  
**FOR FISCAL YEAR ENDED JUNE 30, 2026**

|                                                                                                                                                            |             |             |             |             |             |              |              |              |              |              |              |              |              |              |  |
|------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-------------|-------------|-------------|-------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--|
| <b>"C" CASES-LPS</b>                                                                                                                                       |             |             |             |             |             |              |              |              |              |              |              |              |              |              |  |
| LPS - Regular                                                                                                                                              | 9           | 5           | 13          | 6           | 6           |              | 1            | 6            | 4            | 9            | 5            | 6            | 18           | 88           |  |
| LPS - DNR / Medical Consent                                                                                                                                |             |             |             | 2           | 3           | 1            | 1            | 1            | 2            | 2            | 2            | 2            | 1            | 17           |  |
| LPS - Rehearing Petition                                                                                                                                   |             |             |             |             |             | 2            | 1            |              |              | 1            |              |              | 1            | 5            |  |
| LPS - Writs                                                                                                                                                | 8           | 9           | 8           | 12          | 8           | 4            | 4            | 3            | 4            | 6            | 1            | 7            | 10           | 84           |  |
| CARE Court                                                                                                                                                 | 4           | 4           | 7           | 3           | 2           | 9            | 3            | 5            | 2            | 4            | 12           | 3            | 8            | 66           |  |
| Civil/Writ                                                                                                                                                 |             |             | 1           |             |             |              | 1            |              |              |              | 1            |              | 1            | 4            |  |
| AOT Petition                                                                                                                                               |             |             |             |             |             |              |              |              |              |              |              |              |              | 0            |  |
| <b>Monthly Totals</b>                                                                                                                                      | <b>21</b>   | <b>18</b>   | <b>29</b>   | <b>23</b>   | <b>19</b>   | <b>16</b>    | <b>11</b>    | <b>15</b>    | <b>12</b>    | <b>22</b>    | <b>21</b>    | <b>18</b>    | <b>39</b>    | <b>264</b>   |  |
| <b>Cumulative Totals</b>                                                                                                                                   | <b>21</b>   | <b>39</b>   | <b>68</b>   | <b>91</b>   | <b>110</b>  | <b>126</b>   | <b>137</b>   | <b>152</b>   | <b>164</b>   | <b>186</b>   | <b>207</b>   | <b>225</b>   | <b>264</b>   |              |  |
| <b>"E" CASES</b>                                                                                                                                           |             |             |             |             |             |              |              |              |              |              |              |              |              |              |  |
| P57                                                                                                                                                        |             |             |             |             |             |              |              |              |              |              |              |              |              | 0            |  |
| P47                                                                                                                                                        |             |             |             |             |             |              |              |              |              |              |              |              |              | 0            |  |
| 602 - Delinquency                                                                                                                                          | 35          | 36          | 34          | 38          | 28          | 19           | 30           | 29           | 45           | 46           | 51           | 55           |              | 446          |  |
| 602 - GAL                                                                                                                                                  |             |             |             |             |             |              |              |              |              |              |              |              |              | 0            |  |
| Writs- 602                                                                                                                                                 |             |             |             |             |             |              |              |              | 2            |              |              |              |              | 2            |  |
| Special Advocate                                                                                                                                           | 5           | 7           | 6           | 10          | 12          | 1            | 8            | 5            |              |              |              |              | 4            | 58           |  |
| Witness Representations - JV                                                                                                                               |             |             |             |             |             | 1            |              |              |              |              |              |              |              | 1            |  |
| SB 203                                                                                                                                                     | 32          | 31          | 30          | 31          | 32          | 32           | 31           | 28           | 31           | 30           | 31           | 31           | 1            | 371          |  |
| Miranda - SB 395                                                                                                                                           | 21          | 6           | 11          | 21          | 17          | 20           | 14           | 22           | 15           | 22           | 17           | 12           | 20           | 218          |  |
| Prob. Req. Miranda Advice                                                                                                                                  | 6           | 4           | 2           | 6           | 2           |              | 3            | 5            | 6            | 1            | 9            | 7            | 12           | 63           |  |
| <b>Monthly Totals</b>                                                                                                                                      | <b>99</b>   | <b>84</b>   | <b>83</b>   | <b>106</b>  | <b>91</b>   | <b>73</b>    | <b>86</b>    | <b>89</b>    | <b>99</b>    | <b>99</b>    | <b>108</b>   | <b>105</b>   | <b>37</b>    | <b>1159</b>  |  |
| <b>Cumulative Totals</b>                                                                                                                                   | <b>99</b>   | <b>183</b>  | <b>266</b>  | <b>372</b>  | <b>463</b>  | <b>536</b>   | <b>622</b>   | <b>711</b>   | <b>810</b>   | <b>909</b>   | <b>1017</b>  | <b>1122</b>  | <b>1159</b>  |              |  |
| <b>"G" CASES</b>                                                                                                                                           |             |             |             |             |             |              |              |              |              |              |              |              |              |              |  |
| 1170(D)/1170.03                                                                                                                                            |             |             |             |             |             |              |              |              |              |              |              |              | 1            | 1            |  |
| 1170.95                                                                                                                                                    |             |             |             |             |             |              |              |              |              |              |              |              |              | 0            |  |
| 1473.7                                                                                                                                                     | 5           | 1           | 3           | 7           | 3           |              |              |              |              |              |              |              | 12           | 31           |  |
| 3051                                                                                                                                                       |             |             |             |             |             |              |              |              |              |              |              |              |              | 0            |  |
| <b>Monthly Totals</b>                                                                                                                                      | <b>5</b>    | <b>1</b>    | <b>3</b>    | <b>7</b>    | <b>3</b>    | <b>0</b>     | <b>0</b>     | <b>0</b>     | <b>0</b>     | <b>0</b>     | <b>0</b>     | <b>0</b>     | <b>13</b>    | <b>32</b>    |  |
| <b>Cumulative Totals</b>                                                                                                                                   | <b>5</b>    | <b>6</b>    | <b>9</b>    | <b>16</b>   | <b>19</b>   | <b>0</b>     | <b>0</b>     | <b>0</b>     | <b>0</b>     | <b>0</b>     | <b>0</b>     | <b>0</b>     | <b>32</b>    |              |  |
| <b>"X" CASES</b>                                                                                                                                           |             |             |             |             |             |              |              |              |              |              |              |              |              |              |  |
| 1018                                                                                                                                                       |             |             |             |             |             |              |              | 4            |              |              | 1            |              |              | 5            |  |
| 1370 Court                                                                                                                                                 | 4           | 4           | 4           | 4           | 4           | 3            | 3            | 3            | 5            | 4            | 3            | 5            |              | 46           |  |
| 1370 IOJ/MHD Confrence                                                                                                                                     |             |             |             |             |             |              | 3            | 4            | 4            | 4            | 4            | 5            |              | 24           |  |
| 1370/MHD Conference                                                                                                                                        | 5           | 4           | 5           | 4           | 3           | 3            | 1            |              |              |              |              |              |              | 25           |  |
| 1473.7                                                                                                                                                     |             |             |             |             |             |              | 3            | 3            | 1            |              | 4            | 2            | 4            | 17           |  |
| A. Gun Violence RO                                                                                                                                         |             |             | 1           |             |             | 3            |              |              | 1            | 1            | 1            | 1            | 1            | 9            |  |
| B. Civil Restraining Orders                                                                                                                                | 1           |             |             | 1           |             |              |              |              |              |              | 1            |              | 1            | 4            |  |
| Contempt Calendar                                                                                                                                          | 5           | 4           | 4           | 5           | 4           | 5            | 3            | 4            | 4            | 5            | 4            | 4            | 1            | 52           |  |
| Detention Calendar                                                                                                                                         |             |             |             |             |             |              |              |              | 3            | 4            | 5            | 4            | 6            | 22           |  |
| Drug Court/Prop 36                                                                                                                                         | 1           | 2           | 2           | 2           | 2           | 2            | 2            | 2            | 2            | 2            | 2            | 2            |              | 23           |  |
| DUI Confrence Calendar                                                                                                                                     | 5           | 4           | 3           | 2           | 2           | 2            | 2            | 2            | 2            | 2            | 2            | 2            |              | 30           |  |
| DUI Review Calendar                                                                                                                                        |             |             |             |             |             |              |              |              |              |              |              |              |              | 0            |  |
| Expungement                                                                                                                                                | 1           |             | 12          | 10          |             | 2            | 1            | 24           | 4            | 1            |              | 2            | 564          | 621          |  |
| Girls Program                                                                                                                                              |             |             |             |             |             |              |              |              |              |              |              |              |              | 0            |  |
| I/C Muni Arraignment                                                                                                                                       | 44          | 42          | 40          | 46          | 34          | 44           | 40           | 36           | 42           | 44           | 40           | 42           |              | 494          |  |
| LPS Calendar                                                                                                                                               | 5           | 4           | 5           | 4           | 4           | 5            | 4            | 4            | 4            | 5            | 4            | 5            |              | 53           |  |
| Mentor                                                                                                                                                     | 2           |             | 3           | 1           | 1           | 5            | 4            |              |              |              | 5            | 4            | 2            | 27           |  |
| Mental Health Diversion                                                                                                                                    | 4           | 4           | 5           | 4           | 4           | 4            | 3            | 3            | 5            | 4            | 3            | 5            |              | 48           |  |
| Military Diversion                                                                                                                                         | 2           | 1           | 2           | 2           | 2           | 1            | 1            | 1            | 1            | 1            | 1            | 1            |              | 16           |  |
| Misd. Diversion Calendar                                                                                                                                   |             |             |             |             |             |              |              |              |              |              |              |              |              | 0            |  |
| O/C Muni Arraignment Calendar                                                                                                                              | 41          | 37          | 37          | 41          | 31          | 27           | 35           | 32           | 38           | 40           | 35           | 39           |              | 433          |  |
| Officer Of The Day                                                                                                                                         | 43          | 25          | 26          | 30          | 28          | 29           | 26           | 21           | 25           | 24           | 21           | 23           | 1            | 322          |  |
| Pathways Court                                                                                                                                             | 3           | 5           | 3           | 5           | 3           | 3            | 5            | 4            | 4            | 4            |              |              |              | 39           |  |
| Placement Review Calendar                                                                                                                                  |             |             |             |             |             | 1            |              |              | 1            |              |              |              | -1           | 1            |  |
| Restitution Court                                                                                                                                          | 1           | 1           | 1           | 1           | 1           | 1            | 1            | 1            | 1            | 1            | 1            | 1            |              | 12           |  |
| Special Asgmt                                                                                                                                              | 2           |             | 5           | 2           | 1           | 3            | 3            | 2            | 2            | 4            | 2            | 3            | 5            | 34           |  |
| Special Project                                                                                                                                            |             |             |             |             |             |              | 1            |              |              |              |              | 1            |              | 2            |  |
| Sprcial Project / Sup Atty                                                                                                                                 |             |             |             |             |             |              |              | 1            |              |              |              |              |              | 1            |  |
| Superior Arraignment Calendar                                                                                                                              | 22          | 21          | 20          | 23          | 17          | 22           | 20           | 18           | 21           | 22           | 20           | 21           |              | 247          |  |
| Veterans Court                                                                                                                                             | 2           | 1           | 2           | 1           | 1           | 1            | 1            | 1            | 1            |              | 1            | 1            | 1            | 14           |  |
| Witness Rep./ Not Appointed                                                                                                                                |             |             |             |             |             |              |              |              |              | 1            |              |              | -1           | 1            |  |
| <b>Monthly Totals</b>                                                                                                                                      | <b>193</b>  | <b>159</b>  | <b>180</b>  | <b>188</b>  | <b>142</b>  | <b>166</b>   | <b>162</b>   | <b>170</b>   | <b>171</b>   | <b>173</b>   | <b>160</b>   | <b>173</b>   | <b>584</b>   | <b>2621</b>  |  |
| <b>Cumulative Totals</b>                                                                                                                                   | <b>193</b>  | <b>352</b>  | <b>532</b>  | <b>720</b>  | <b>862</b>  | <b>1028</b>  | <b>1190</b>  | <b>1360</b>  | <b>1531</b>  | <b>1704</b>  | <b>1864</b>  | <b>2037</b>  | <b>2621</b>  |              |  |
| <b>MONTHLY GRAND TOTALS</b>                                                                                                                                |             |             |             |             |             |              |              |              |              |              |              |              |              |              |  |
|                                                                                                                                                            | <b>2020</b> | <b>1648</b> | <b>1851</b> | <b>2211</b> | <b>1581</b> | <b>1656</b>  | <b>1699</b>  | <b>1608</b>  | <b>2020</b>  | <b>1872</b>  | <b>1824</b>  | <b>1861</b>  | <b>707</b>   | <b>22558</b> |  |
| <b>FY 2025-2026 CUMULATIVE GRAND TOTAL</b>                                                                                                                 |             |             |             |             |             |              |              |              |              |              |              |              |              |              |  |
|                                                                                                                                                            | <b>2020</b> | <b>3668</b> | <b>5519</b> | <b>7730</b> | <b>9311</b> | <b>10967</b> | <b>12666</b> | <b>14274</b> | <b>16294</b> | <b>18166</b> | <b>19990</b> | <b>21851</b> | <b>22558</b> |              |  |
| * = "A" & "B" Type Civil Cases                                                                                                                             |             |             |             |             |             |              |              |              |              |              |              |              |              |              |  |
| All "C" Cases are Civil Cases                                                                                                                              |             |             |             |             |             |              |              |              |              |              |              |              |              |              |  |
| "X" : Accounts for 'Services' as defined in the agreement between The County of San Mateo and The San Mateo County Bar Association dated 06/13/2023.       |             |             |             |             |             |              |              |              |              |              |              |              |              |              |  |
| "G": Accounts for BSCC grant cases covered by the Public Defense Pilot Program.                                                                            |             |             |             |             |             |              |              |              |              |              |              |              |              |              |  |
| NOTE Delays in adding cases into our computer system may result in case counts being understated. The "Year End True-up" column adjusts for cases added in |             |             |             |             |             |              |              |              |              |              |              |              |              |              |  |
| I = Incomplete data for this period.                                                                                                                       |             |             |             |             |             |              |              |              |              |              |              |              |              |              |  |

# APPENDIX

6

## PDP CASE LEVELS 1-9

### MISDEMEANOR LEVELS

**Level 1: LOW LEVEL MISDEMEANORS:** All misdemeanors not listed under “level 2”, below.

**Level 2: HIGH LEVEL MISDEMEANORS:** The following misdemeanor offenses:

- Misdemeanor vehicular manslaughter- **191.5, 191, 192, 192.5**
- Arson Registration- **452, 453**
- Child abuse- **273**
- Animal cruelty- **286.5, 597, 599, 600, 600.2, 600.5**
- 290 sex registerable offenses- **243.4, 266, 272, 286, 287, 288, 288.4, 289, 311, 314, 653f, 647.6, 647a**
- Gang misdemeanors- **186.22**
- Domestic violence- anything that has a “**Domestic Violence Pretrial**”

### FELONY LEVELS

*See Attached PDP felony Level List by Statute*

**Level 3: LOW LEVEL FELONIES:** beginning “SCR” felonies, all felonies not qualifying as a 4-9, below

**Level 4: MID LEVEL FELONIES:** Serious felonies with some exceptions ( non-strike felonies with arson registration, simple sex offenses that are not a level “6”, simple violent felonies, drug and 2800 cases with high triads, charges too complex to be assigned to a beginning felony attorney)

**Level 5: HIGH LEVEL FELONIES:** violent felonies with some exceptions (gang cases, serious felonies with high triads, complicated charges or high risk of turning into a more serious case at prelim)

**Level 6: FELONY SEX CASES:** felony sex cases with 290 registration with some exceptions

**Level 7: FELONY INDETERMINATE TERM:** non-homicide life cases, including three strikes

**Level 8: FELONY HOMICIDE AND LWOP-** non capital homicide and other not homicide LWOP cases

**Level 9: FELONY CAPITAL MURDER-** special circumstances, DA has not announced penalty sought, capital cases

## **PDP FELONY LEVEL LIST**

**ALL FELONIES ARE A “3” EXCEPT THE FOLLOWING CHARGES OR  
ENHANCEMENTS, WHICH ARE DESIGNATED BY THE  
CORRESPONDING LEVELS**

| <b><u>CODE SECTION</u></b> | <b><u>Level</u></b> | <b><u>MISC. CONDITIONS</u></b>                                                                        |
|----------------------------|---------------------|-------------------------------------------------------------------------------------------------------|
| 32                         | See offense         | Determine level based on underlying offense                                                           |
| 37                         | 8                   |                                                                                                       |
| 128                        | 8                   |                                                                                                       |
| 136.1                      | 4                   |                                                                                                       |
| 148.10(a)                  | 4                   |                                                                                                       |
| 182                        | See offense         | Determine level based on underlying offense                                                           |
| 182.5                      | See offense         | Determine level based on underlying offense                                                           |
| 186.22(a)                  | 5                   |                                                                                                       |
| 186.22(b)(1)(A)            | 5                   |                                                                                                       |
| 186.22(b)(1)(B)            | 5                   |                                                                                                       |
| 186.22(b)(1)(C)            | 5                   |                                                                                                       |
| 186.22(b)(4)               | 7                   |                                                                                                       |
| 186.22(b)(5)               | 7                   |                                                                                                       |
| 187                        | 8                   |                                                                                                       |
| 187(a)                     | 8                   |                                                                                                       |
| 187(b)                     | 8                   |                                                                                                       |
| 190.2(a)(1) - 190.2(a)(22) | 9                   | If the DA has announced they are not seeking death, case would be a level “8”.<br>Otherwise it is a 9 |
| 190(d)                     | 8                   |                                                                                                       |
| 191.5(a), 191.5(b)         | 5                   |                                                                                                       |

|             |      |                                                                                                                                                                                                                        |
|-------------|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 191.5(d)    | 8    |                                                                                                                                                                                                                        |
| 192(a)      | 8    |                                                                                                                                                                                                                        |
| 192(b)      | 5    |                                                                                                                                                                                                                        |
| 192(c)      | 5    |                                                                                                                                                                                                                        |
| 192.5       | 5    |                                                                                                                                                                                                                        |
| 203         | 5    |                                                                                                                                                                                                                        |
| 205         | 7    |                                                                                                                                                                                                                        |
| 206         | 7    |                                                                                                                                                                                                                        |
| 207(a)      | 5    |                                                                                                                                                                                                                        |
| 207(b)      | 6    |                                                                                                                                                                                                                        |
| 209(a)      | 8, 7 | If it is it alleged in the charging document that the victim “suffered bodily or is intentionally confined in a manner that exposes that person to a substantial likelihood of death” it is an 8. Otherwise, it is a 7 |
| 209(b)      | 7    |                                                                                                                                                                                                                        |
| 209.5       | 7    |                                                                                                                                                                                                                        |
| 212.5       | 4    | If there is an enhancement, determine level based on enhancement. Otherwise it is a 4                                                                                                                                  |
| 215         | 5    |                                                                                                                                                                                                                        |
| 217.1(b)    | 7    |                                                                                                                                                                                                                        |
| 218         | 8    |                                                                                                                                                                                                                        |
| 219         | 8, 7 | If someone suffered death as a proximate result of the train wrecking it is an 8. Otherwise, it is a 7                                                                                                                 |
| 220(a)      | 6    |                                                                                                                                                                                                                        |
| 220(b)      | 7    |                                                                                                                                                                                                                        |
| 236.1(c)(2) | 7    |                                                                                                                                                                                                                        |
| 243(d)      | 4    |                                                                                                                                                                                                                        |

|           |   |  |
|-----------|---|--|
| 243.4     | 6 |  |
| 244       | 5 |  |
| 245(a)(1) | 4 |  |
| 245(a)(2) | 4 |  |
| 245(a)(3) | 5 |  |
| 245(b)    | 5 |  |
| 245(c)    | 4 |  |
| 245(d)    | 5 |  |
| 245.2     | 4 |  |
| 245.3     | 4 |  |
| 245.5     | 4 |  |
| 245.5(b)  | 4 |  |
| 246       | 4 |  |
| 246.3     | 4 |  |
| 247       | 4 |  |
| 261(a)    | 6 |  |
| 261.5     | 4 |  |
| 262(a)    | 6 |  |
| 264.1     | 6 |  |
| 266       | 4 |  |
| 267       | 4 |  |
| 269       | 7 |  |
| 273ab(a)  | 7 |  |
| 273ab(b)  | 7 |  |
| 286       | 6 |  |
| 287(b)(1) | 4 |  |
| 287(b)(2) | 4 |  |
| 287(c)(1) | 6 |  |

|              |   |  |
|--------------|---|--|
| 287(c)(2)(A) | 6 |  |
| 287(c)(2)(B) | 6 |  |
| 287(c)(2)(C) | 6 |  |
| 287(c)(3)    | 6 |  |
| 287(d)(1)    | 6 |  |
| 287(d)(2)    | 6 |  |
| 287(d)(3)    | 6 |  |
| 287(e)       | 4 |  |
| 287(f)       | 6 |  |
| 287(g)       | 6 |  |
| 287(h)       | 4 |  |
| 287(i)       | 6 |  |
| 287(j)       | 6 |  |
| 287(k)       | 6 |  |
| 288(a)       | 6 |  |
| 288(b)       | 6 |  |
| 288(c)       | 6 |  |
| 288(i)       | 7 |  |
| 288.2        | 6 |  |
| 288.3        | 6 |  |
| 288.4        | 6 |  |
| 288.5        | 6 |  |
| 288.7        | 7 |  |
| 289          | 6 |  |
| 289.6        | 4 |  |
| 311.1        | 6 |  |
| 311.2        | 6 |  |
| 311.3        | 6 |  |

|          |   |                                                    |
|----------|---|----------------------------------------------------|
| 311.4    | 6 |                                                    |
| 311.10   | 6 |                                                    |
| 311.11   | 6 |                                                    |
| 314      | 4 |                                                    |
| 404.6(c) | 4 |                                                    |
| 417(b)   | 4 |                                                    |
| 417(c)   | 4 |                                                    |
| 417.3    | 4 |                                                    |
| 417.6    | 4 |                                                    |
| 417.8    | 4 |                                                    |
| 422      | 4 |                                                    |
| 422.7    | 4 |                                                    |
| 451(a)   | 5 |                                                    |
| 451(b)   | 5 |                                                    |
| 451(c)   | 4 |                                                    |
| 451(d)   | 4 |                                                    |
| 451.1    | 4 |                                                    |
| 451.5    | 7 |                                                    |
| 452(a)   | 4 |                                                    |
| 452(b)   | 4 |                                                    |
| 452(c)   | 4 |                                                    |
| 453(a)   | 4 |                                                    |
| 454(a)   | 4 |                                                    |
| 454(b)   | 4 |                                                    |
| 455      | 4 |                                                    |
| 460(a)   | 4 | This is a 4, even if a person is present per 667.5 |

|                                  |           |                                                                                                                                                                                                                                                  |
|----------------------------------|-----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 461(a)                           | 4         |                                                                                                                                                                                                                                                  |
| 487(d)(2)                        | 4         |                                                                                                                                                                                                                                                  |
| 550(g)                           | 4         |                                                                                                                                                                                                                                                  |
| 647.6                            | 4         |                                                                                                                                                                                                                                                  |
| 653f(b)                          | 5         |                                                                                                                                                                                                                                                  |
| 653f(c)                          | 5         |                                                                                                                                                                                                                                                  |
| 664                              | See notes | Determine level based on underlying offense, EXCEPT: <ul style="list-style-type: none"> <li>• If underlying offense is 187, see below</li> <li>• If underlying offense is punishable by any other indeterminate term, it is a level 5</li> </ul> |
| 664/187                          | 7, 5      | If alleged with premeditation per Penal Code 189 it is a 7. Otherwise it is a 5                                                                                                                                                                  |
| 667.51                           | 6         |                                                                                                                                                                                                                                                  |
| 667.51(c)                        | 7         |                                                                                                                                                                                                                                                  |
| 667.61                           | 7, 8      | If the enhancement is 667.61(j)(1) or 667.61(l) it is a 8.<br><br>Any other subdivision(including 667.61(j)(2) ) is a 7                                                                                                                          |
| 667.7(a)(1)                      | 7         |                                                                                                                                                                                                                                                  |
| 667.7(a)(2)                      | 8         |                                                                                                                                                                                                                                                  |
| 667.71                           | 7         |                                                                                                                                                                                                                                                  |
| 667.75                           | 7         |                                                                                                                                                                                                                                                  |
| 1170.12(C)(2)<br>(THREE STRIKES) | 7         | Case is a level 7 if three strikes alleged in the complaint per 1170.12(c)(2) and DA has not announced they are not seeking 3 strikes.<br><br>Otherwise the level is based on the underlying offense                                             |
| 2800.3<br>(VC)                   | 4         |                                                                                                                                                                                                                                                  |

|                             |      |                                                                                                               |
|-----------------------------|------|---------------------------------------------------------------------------------------------------------------|
| 23104(b)<br>(VC)            | 4    |                                                                                                               |
| 23105(a)<br>(VC)            | 4    |                                                                                                               |
| 23566(b)<br>(VC)            | 4    |                                                                                                               |
| 23566(c)<br>(VC)            | 4    |                                                                                                               |
| 4500                        | 8, 7 | If the assault with a deadly weapon by a life prisoner resulted in a death it is an 8.<br>Otherwise it is a 7 |
| 4501(a)                     | 4    |                                                                                                               |
| 4503                        | 4    |                                                                                                               |
| 11353<br>(H & S)            | 4    |                                                                                                               |
| 11353.5<br>(H & S)          | 4    |                                                                                                               |
| 11353.7<br>(H & S)          | 4    |                                                                                                               |
| 11370.4(a)(1)(a)<br>(H & S) | 4    |                                                                                                               |
| 11370.4(a)(1)(b)<br>(H & S) | 4    |                                                                                                               |
| 11370.4(a)(1)(c)<br>(H & S) | 5    |                                                                                                               |
| 11370.4(a)(1)(d)<br>(H & S) | 5    |                                                                                                               |
| 11370.4(a)(1)(e)<br>(H & S) | 5    |                                                                                                               |
| 11370.4(a)(1)(f)<br>(H & S) | 5    |                                                                                                               |

|                             |   |  |
|-----------------------------|---|--|
| 11370.4(b)(1)(c)<br>(H & S) | 4 |  |
| 11370.4(b)(1)(d)<br>(H & S) | 4 |  |
| 11379.8(a)(3)<br>(H & S)    | 4 |  |
| 11379.8(a)(4)<br>(H & S)    | 4 |  |
| 11380(a)<br>(H & S)         | 4 |  |
| 11418(b)                    | 5 |  |
| 11418(c)                    | 5 |  |
| 14107(e)<br>(WI)            | 7 |  |
| 12022(a)(1)                 | 4 |  |
| 12022(a)(2)                 | 4 |  |
| 12022(b)                    | 4 |  |
| 12022(c)                    | 4 |  |
| 12022(d)                    | 4 |  |
| 12022.2                     | 5 |  |
| 12022.3                     | 5 |  |
| 12022.5                     | 5 |  |
| 12022.7                     | 5 |  |
| 12022.8                     | 5 |  |
| 12022.9                     | 5 |  |
| 12022.53(b)                 | 5 |  |
| 12022.53(c)                 | 5 |  |
| 12022.53(d)                 | 7 |  |

|          |   |  |
|----------|---|--|
| 12022.55 | 5 |  |
|----------|---|--|

**All Vehicle Code Sections are a “3”, except the following:**

|                  |   |
|------------------|---|
| 2800.3<br>(VC)   | 4 |
| 23104(b)<br>(VC) | 4 |
| 23105(a)<br>(VC) | 4 |
| 23566(b)<br>(VC) | 4 |
| 23566(c)<br>(VC) | 4 |

**All Welfare and Institutions Code Sections are a “3”, except the following:**

|                  |   |  |
|------------------|---|--|
| 14107(e)<br>(WI) | 7 |  |
|------------------|---|--|

**All Health and Safety Code Sections are a “3”, except the following:**

|                             |   |
|-----------------------------|---|
| 11353<br>(H & S)            | 4 |
| 11353.5<br>(H & S)          | 4 |
| 11353.7<br>(H & S)          | 4 |
| 11370.4(a)(1)(c)<br>(H & S) | 5 |
| 11370.4(a)(1)(d)<br>(H & S) | 5 |
| 11370.4(a)(1)(e)<br>(H & S) | 5 |
| 11370.4(a)(1)(f)<br>(H & S) | 5 |
| 11370.4(b)(1)(c)<br>(H & S) | 4 |
| 11370.4(b)(1)(d)<br>(H & S) | 4 |
| 11379.8(a)(3)<br>(H & S)    | 4 |
| 11379.8(a)(4)<br>(H & S)    | 4 |
| 11380(a)<br>(H & S)         | 4 |

# APPENDIX

7



**San Mateo County Bar Association**  
**Budget vs. Actual with Monthly Trend**  
**Private Defender Program**  
**As of June 30, 2026**

**Revenues over Expenditures**

**Revenues**

**Program Service Revenue**

**Program Revenue**

**CARE Court Fees**

**ABUS Probation/Parole**

**SSCC Grant Revenue**

**CCJ 300 W & J - JV**

**JCC Funding**

**Total Program Revenue**

**Total Program Service Revenue**

**Investment Income**

**Total Investment Income all**

**Other Revenue**

**Miscellaneous Revenue**

**Total Other Revenue**

**Total Revenues**

**Expenditures**

**Program**

**Attorney Fees**

**Investigator Fees**

**Paralegal Fees**

**Program Fees**

**Expert & Related Services**

**Answering Service & Other Expenses**

**SB395**

**Education Reimbursements - Attorneys**

**Education Reimbursements - Investigators**

**In-House Training Sessions**

**Lexis Nexis**

**Data Analytics**

**Interpreter Expense**

**Director's Office**

**Events Expense**

**Card Key Expense**

**Total Program**

**Personnel**

**Salary and Wages**

**PR Benefits**

**PR Taxes**

**Total Personnel**

**Occupancy**

**Professional Fees**

**IT Services**

**HR & Payroll Consulting**

|              | Month Ending<br>07/31/2025 | Month Ending<br>08/31/2025 | Month Ending<br>09/30/2025 | Month Ending<br>10/31/2025 | Month Ending<br>11/30/2025 | Month Ending<br>12/31/2025 | Month Ending<br>01/31/2026 | Month Ending<br>02/28/2026 | Month Ending<br>03/31/2026 | Month Ending<br>04/30/2026 | Month Ending<br>05/31/2026 | Month Ending<br>06/30/2026 | Year To Date<br>06/30/2026 | Budget Diff   | Budget Ratio |      |
|--------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|----------------------------|---------------|--------------|------|
|              | Actual                     | Actual                     | Actual                     | Actual                     | Actual                     | Actual                     | Actual                     | Actual                     | Actual                     | Actual                     | Actual                     | Actual                     | BUDGET                     |               |              |      |
| 6,385,191.75 | 0.00                       | 6,385,191.75               | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 6,385,191.75               | 0.00                       | 6,385,191.75               | 0.00                       | 0.00                       | 25,540,767.00              | 25,540,767.75              | (0.75)        | 1.00         |      |
| 0.00         | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 35,855.25                  | 92,093.63                  | 57,242.38     | 0.00         |      |
| 0.00         | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 529,062.23                 | 529,062.23                 | 0.00          | 1.00         |      |
| 78,901.29    | 42,603.54                  | 29,424.15                  | 37,546.89                  | 37,546.89                  | 34,961.87                  | 52,108.93                  | 43,861.69                  | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 280,408.36                 | 434,910.86                 | 154,502.50    | 0.00         |      |
| 0.00         | 163,986.50                 | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 163,986.50                 | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 663,986.00                 | 983,708.39                 | 319,722.39    | 0.00         |      |
| 0.00         | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 159,883.61                 | 240,530.00                 | 84,646.39     | 0.00         |      |
| 6,464,093.04 | 208,600.04                 | 6,598,972.29               | 37,546.89                  | 37,546.89                  | 34,961.87                  | 70,926.74                  | 6,556,049.94               | 0.00                       | 6,404,252.43               | 246,942.69                 | 0.00                       | 724,801.29                 | 27,347,147.22              | 26,909,387.00 | 437,760.22   | 1.02 |
| 6,464,093.04 | 208,600.04                 | 6,598,972.29               | 37,546.89                  | 37,546.89                  | 34,961.87                  | 70,926.74                  | 6,556,049.94               | 0.00                       | 6,404,252.43               | 246,942.69                 | 0.00                       | 724,801.29                 | 27,347,147.22              | 26,909,387.00 | 437,760.22   | 1.02 |
| 30,793.80    | 26,334.90                  | 19,256.36                  | 29,664.08                  | 29,664.08                  | 21,334.32                  | 15,707.57                  | 18,837.72                  | 18,732.63                  | 18,607.72                  | 25,358.97                  | 20,524.24                  | 14,797.52                  | 259,949.83                 | 154,500.00    | 105,449.83   | 1.68 |
| 0.00         | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 4,800.15                   | 4,800.15                   | 0.00          | 0.00         |      |
| 0.00         | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 4,800.15                   | 4,800.15                   | 0.00          | 0.00         |      |
| 6,494,886.84 | 234,934.94                 | 6,618,228.65               | 67,210.97                  | 67,210.97                  | 56,295.19                  | 86,634.31                  | 6,574,887.66               | 18,732.63                  | 6,422,860.15               | 272,301.66                 | 20,524.24                  | 744,398.96                 | 27,611,897.20              | 27,063,387.00 | 548,010.20   | 1.02 |
| 984,773.00   | 1,223,051.19               | 1,256,026.05               | 1,267,277.95               | 1,267,277.95               | 1,212,390.36               | 1,147,265.60               | 1,074,988.99               | 1,225,043.93               | 1,363,127.71               | 1,409,999.37               | 1,291,657.23               | 2,087,150.75               | 15,552,759.13              | 16,127,921.34 | (575,162.21) | 0.96 |
| 242,862.54   | 227,364.84                 | 219,305.69                 | 212,984.40                 | 212,984.40                 | 221,630.83                 | 193,015.52                 | 226,725.15                 | 268,111.57                 | 286,279.76                 | 220,408.75                 | 239,965.54                 | 291,333.14                 | 2,851,007.73               | 2,876,000.21  | 24,992.48    | 1.06 |
| 16,639.04    | 23,380.62                  | 23,380.62                  | 9,420.95                   | 9,420.95                   | 20,369.35                  | 13,939.35                  | 14,685.06                  | 16,148.41                  | 30,345.41                  | 25,011.71                  | 63,067.49                  | 36,248.82                  | 252,285.96                 | 252,285.96    | 0.00         | 1.00 |
| 34,370.76    | 47,589.54                  | 31,279.83                  | 62,706.22                  | 62,706.22                  | 38,964.94                  | 56,916.71                  | 49,415.61                  | 60,423.17                  | 112,788.80                 | 61,797.09                  | 109,954.36                 | 169,544.45                 | 835,961.46                 | 821,500.00    | 14,461.46    | 1.07 |
| 349.00       | 349.00                     | 349.00                     | 419.80                     | 419.80                     | 361.00                     | 361.00                     | 361.00                     | 367.60                     | 361.00                     | 361.00                     | 653.60                     | 501.00                     | 835,961.46                 | 821,500.00    | 14,461.46    | 1.07 |
| 0.00         | 0.00                       | 0.00                       | 1,091.75                   | 1,091.75                   | 2,775.00                   | 475.00                     | 600.00                     | 1,109.00                   | 489.00                     | 1,109.00                   | 489.00                     | 7,554.15                   | 14,562.90                  | 24,727.48     | (10,164.58)  | 0.59 |
| 0.00         | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 385.00                     | 0.00                       | 0.00                       | 276.25                     | 0.00                       | 0.00                       | 0.00                       | 250.00                     | 911.25                     | 11,534.78     | (10,623.53)  | 0.08 |
| 0.00         | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 1,200.00                   | 0.00                       | 0.00                       | 8,975.00                   | 10,175.00                  | 23,185.48     | (13,010.48)  | 0.44 |
| 6,473.61     | 7,165.61                   | 6,930.61                   | 7,038.61                   | 7,038.61                   | 7,038.61                   | 7,185.61                   | 7,775.55                   | 6,840.53                   | 7,496.53                   | 7,156.53                   | 7,751.53                   | 86,887.86                  | 86,887.86                  | 81,899.58     | 4,988.28     | 1.06 |
| 0.00         | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00                       | 0.00          | 0.00         | 0.00 |
| 16,706.71    | 14,953.50                  | 47,729.82                  | 17,865.46                  | 17,865.46                  | 14,559.50                  | 41,143.25                  | 18,480.00                  | 13,727.80                  | 501.00                     | 2,520.00                   | 11,291.33                  | 49,441.25                  | 297,550.00                 | 43,871.46     | 253,682.00   | 6.78 |
| 2,860.26     | 3,803.52                   | 3,267.66                   | 2,915.46                   | 2,915.46                   | 5,381.59                   | 2,448.78                   | 2,072.70                   | 3,703.53                   | 2,256.34                   | 20,260.47                  | 22,533.78                  | 19,554.25                  | 91,110.36                  | 43,871.46     | 293,862.60   | 6.78 |
| 0.00         | 0.00                       | 1,539.94                   | 40.00                      | 40.00                      | 289.76                     | 6,557.35                   | 4,770.90                   | 1,398.16                   | 1,398.16                   | 50.00                      | 904.87                     | 3,911.33                   | 19,454.31                  | 5,796.37      | 13,657.94    | 3.36 |
| 0.00         | 0.00                       | 0.00                       | 4,504.74                   | 4,504.74                   | 0.00                       | 4,424.00                   | 4,425.48                   | 40.00                      | 40.00                      | 0.00                       | 4,424.74                   | 3,911.33                   | 17,858.96                  | 18,049.37     | (190.41)     | 0.99 |
| 1,373,058.15 | 1,595,834.62               | 1,646,367.12               | 1,640,555.48               | 1,640,555.48               | 1,569,636.57               | 1,504,475.49               | 1,457,578.79               | 1,641,941.43               | 1,910,868.20               | 1,804,176.70               | 1,777,228.46               | 2,754,368.88               | 20,676,090.89              | 20,951,809.95 | (275,719.06) | 0.99 |

No assurance is provided on these financial statements. All disclosures required by GAAP are omitted.



Private Defender Program

San Mateo County Bar Association  
Budget vs. Actual with Monthly Trend

Private Defender Program

As of June 30, 2026

|                                                  | Month Ending 07/31/2025 |  | Month Ending 08/31/2025 |  | Month Ending 09/30/2025 |  | Month Ending 10/31/2025 |  | Month Ending 11/30/2025 |  | Month Ending 12/31/2025 |  | Month Ending 01/31/2026 |  | Month Ending 02/28/2026 |  | Month Ending 03/31/2026 |  | Month Ending 04/30/2026 |  | Month Ending 05/31/2026 |  | Month Ending 06/30/2026 |  | Year To Date 06/30/2026 |  | Budget Diff          |  | Budget Ratio      |  |             |  |
|--------------------------------------------------|-------------------------|--|-------------------------|--|-------------------------|--|-------------------------|--|-------------------------|--|-------------------------|--|-------------------------|--|-------------------------|--|-------------------------|--|-------------------------|--|-------------------------|--|-------------------------|--|-------------------------|--|----------------------|--|-------------------|--|-------------|--|
|                                                  | Actual                  |  | Actual                  |  | Actual                  |  | Actual                  |  | Actual                  |  | Actual                  |  | Actual                  |  | Actual                  |  | Actual                  |  | Actual                  |  | Actual                  |  | Actual                  |  | BUDGET                  |  |                      |  |                   |  |             |  |
| Other Professional Services                      | 0.00                    |  | 0.00                    |  | 0.00                    |  | 0.00                    |  | 0.00                    |  | 0.00                    |  | 0.00                    |  | 0.00                    |  | 0.00                    |  | 0.00                    |  | 0.00                    |  | 0.00                    |  | 5,150.00                |  | (5,150.00)           |  | 0.00              |  |             |  |
| Accounting Services                              | 6,050.00                |  | 6,396.66                |  | 7,585.44                |  | 6,546.30                |  | 6,647.52                |  | 6,650.00                |  | 6,648.50                |  | 7,271.62                |  | 6,396.06                |  | 8,059.68                |  | 6,080.00                |  | 6,885.00                |  | 81,206.78               |  | 83,467.73            |  | (2,260.95)        |  | 0.97        |  |
| Audit & Tax Prep Fees                            | 0.00                    |  | 588.00                  |  | 13,492.00               |  | 27,640.00               |  | 12,286.00               |  | 1,680.00                |  | 0.00                    |  | 515.00                  |  | 1,158.00                |  | 6,216.00                |  | 0.00                    |  | 0.00                    |  | 63,575.00               |  | 77,458.42            |  | (13,883.42)       |  | 0.82        |  |
| Legal Services                                   | 745.00                  |  | 127.50                  |  | 0.00                    |  | 0.00                    |  | 297.50                  |  | 233.75                  |  | 237.5                   |  | 0.00                    |  | 100.00                  |  | 1,217.50                |  | 0.00                    |  | 793.75                  |  | 3,538.75                |  | 24,761.19            |  | (21,222.44)       |  | 0.14        |  |
| <b>Total Professional Fees</b>                   | <b>17,675.87</b>        |  | <b>18,102.74</b>        |  | <b>32,078.02</b>        |  | <b>45,360.88</b>        |  | <b>29,837.84</b>        |  | <b>19,643.68</b>        |  | <b>17,983.91</b>        |  | <b>19,779.61</b>        |  | <b>17,937.60</b>        |  | <b>25,323.98</b>        |  | <b>18,346.00</b>        |  | <b>19,862.10</b>        |  | <b>301,610.59</b>       |  | <b>(19,468.36)</b>   |  | <b>0.94</b>       |  |             |  |
| <b>General and Administrative Expenses</b>       | <b>130.01</b>           |  | <b>0.00</b>             |  | <b>170.24</b>           |  | <b>163.72</b>           |  | <b>64.20</b>            |  | <b>153.09</b>           |  | <b>123.47</b>           |  | <b>108.49</b>           |  | <b>387.06</b>           |  | <b>0.00</b>             |  | <b>619.42</b>           |  | <b>522.13</b>           |  | <b>2,441.83</b>         |  | <b>0.00</b>          |  | <b>2,441.83</b>   |  | <b>0.00</b> |  |
| Credit Card and Other Service Charges            | 0.00                    |  | 0.00                    |  | 2,025.00                |  | 454.99                  |  | 0.00                    |  | 8,704.99                |  | 1,145.00                |  | 2,143.95                |  | 3,736.39                |  | 450.00                  |  | 220.00                  |  | 290.00                  |  | 18,539.00               |  | 15,639.00            |  | 3,291.32          |  | 1.21        |  |
| Due and Subscriptions                            | 756.06                  |  | 351.14                  |  | 4,226.64                |  | 4,535.05                |  | 136.88                  |  | 3,719.62                |  | 283.10                  |  | 2,093.85                |  | 1,950.40                |  | 3,999.66                |  | 2,194.36                |  | 4,094.93                |  | 28,331.69               |  | 15,046.96            |  | 13,284.73         |  | 1.88        |  |
| Equipment Rental                                 | 1,294.59                |  | (869.11)                |  | 0.00                    |  | (295.34)                |  | 0.00                    |  | 0.00                    |  | 0.00                    |  | 0.00                    |  | 0.00                    |  | 0.00                    |  | 560.37                  |  | 0.00                    |  | 677.51                  |  | 7,435.46             |  | (6,757.95)        |  | 0.09        |  |
| Insurance                                        | 10,005.88               |  | 9,057.88                |  | 8,084.58                |  | 7,031.88                |  | 8,089.80                |  | 7,031.88                |  | 7,031.88                |  | 7,031.88                |  | 7,028.54                |  | 8,429.24                |  | 7,028.54                |  | 92,883.86               |  | 82,352.13               |  | 10,531.73            |  | 10,531.73         |  | 1.13        |  |
| Meals and Entertainment                          | 138.91                  |  | 428.17                  |  | 334.80                  |  | 693.98                  |  | 250.86                  |  | 712.64                  |  | 455.22                  |  | 374.75                  |  | 609.84                  |  | 1,452.37                |  | 501.55                  |  | 434.63                  |  | 6,392.72                |  | 5,537.82             |  | 854.90            |  | 1.15        |  |
| Office Expenses                                  | 0.00                    |  | 0.00                    |  | 0.00                    |  | 0.00                    |  | 0.00                    |  | 0.00                    |  | 2,003.50                |  | 0.00                    |  | 0.00                    |  | 0.00                    |  | 0.00                    |  | 0.00                    |  | 4,466.83                |  | 9,274.19             |  | (4,807.36)        |  | 0.48        |  |
| Publication and Books                            | 4,029.01                |  | 1,796.53                |  | 1,982.79                |  | 3,582.69                |  | 1,988.43                |  | 5,192.92                |  | 3,312.20                |  | 2,872.22                |  | 3,240.18                |  | 2,654.40                |  | 2,745.09                |  | 4,966.44                |  | 38,332.90               |  | 37,286.61            |  | 1,034.29          |  | 1.03        |  |
| Office Supplies                                  | 4,635.07                |  | 0.00                    |  | 2,604.82                |  | 1,563.96                |  | 0.00                    |  | 2,587.77                |  | 2,096.49                |  | 241.41                  |  | 2,270.54                |  | 0.00                    |  | 0.00                    |  | 2,178.63                |  | 18,178.69               |  | 12,646.25            |  | 5,530.44          |  | 1.44        |  |
| Computer Hardware & Equipment                    | 13,507.90               |  | 26,087.53               |  | 12,886.12               |  | 9,920.17                |  | 8,598.77                |  | 9,561.12                |  | 11,265.04               |  | 11,620.79               |  | 12,977.35               |  | 12,264.93               |  | 12,868.39               |  | 12,981.80               |  | 154,539.91              |  | 62,600.80            |  | 91,938.11         |  | 2.47        |  |
| Computer Software                                | 22,171.98               |  | 27,854.06               |  | 17,473.73               |  | 15,280.69               |  | 10,587.20               |  | 17,455.57               |  | 18,677.23               |  | 14,734.42               |  | 18,488.07               |  | 14,919.33               |  | 17,748.18               |  | 20,126.87               |  | 215,518.33              |  | 121,821.85           |  | 93,696.48         |  | 1.77        |  |
| <b>Total Office Expenses</b>                     | <b>0.00</b>             |  | <b>0.00</b>             |  | <b>62.94</b>            |  | <b>62.94</b>            |  | <b>0.00</b>             |  | <b>0.00</b>             |  | <b>(50.00)</b>          |  | <b>236.75</b>           |  | <b>0.00</b>             |  | <b>466.50</b>           |  | <b>5.50</b>             |  | <b>0.00</b>             |  | <b>721.69</b>           |  | <b>450.20</b>        |  | <b>271.49</b>     |  | <b>1.60</b> |  |
| Postage and Delivery                             | 58.27                   |  | 315.11                  |  | 58.27                   |  | 102.34                  |  | 58.27                   |  | 58.27                   |  | 58.27                   |  | 58.27                   |  | 58.27                   |  | 98.56                   |  | 98.56                   |  | 98.56                   |  | 1,121.02                |  | 0.00                 |  | 1,121.02          |  | 0.00        |  |
| State and Local Taxes                            | 5,283.17                |  | 4,645.94                |  | 5,837.88                |  | 6,905.96                |  | 5,984.05                |  | 6,092.08                |  | 6,600.87                |  | 5,718.76                |  | 7,871.78                |  | 7,482.18                |  | 8,146.04                |  | 7,690.24                |  | 78,258.95               |  | 52,598.44            |  | 25,750.51         |  | 1.49        |  |
| Telecommunication                                | 44.98                   |  | 830.94                  |  | 263.38                  |  | 447.02                  |  | 1,570.13                |  | 796.11                  |  | 323.24                  |  | 1,081.91                |  | 119.34                  |  | 586.99                  |  | 149.65                  |  | 1,171.31                |  | 7,395.00                |  | 4,984.88             |  | 2,410.12          |  | 1.48        |  |
| Travel Expenses                                  | 39,873.85               |  | 42,614.73               |  | 38,481.52               |  | 35,385.23               |  | 26,747.39               |  | 44,742.5                |  | 34,633.28               |  | 33,558.03               |  | 40,286.03               |  | 36,184.73               |  | 38,673.87               |  | 41,457.21               |  | 452,812.92              |  | 305,776.74           |  | 146,836.18        |  | 1.48        |  |
| <b>Total General and Administrative Expenses</b> | <b>1,862,714.17</b>     |  | <b>2,089,310.53</b>     |  | <b>2,142,715.00</b>     |  | <b>2,189,703.42</b>     |  | <b>2,070,943.32</b>     |  | <b>2,076,855.20</b>     |  | <b>1,987,896.73</b>     |  | <b>2,168,400.81</b>     |  | <b>2,475,763.23</b>     |  | <b>2,365,427.94</b>     |  | <b>2,340,966.68</b>     |  | <b>3,604,944.80</b>     |  | <b>27,344,741.43</b>    |  | <b>27,063,887.00</b> |  | <b>280,854.43</b> |  | <b>1.01</b> |  |
| <b>Total Expenditures</b>                        | <b>4,832,172.87</b>     |  | <b>(1,854,375.59)</b>   |  | <b>4,475,513.65</b>     |  | <b>(2,092,492.45)</b>   |  | <b>(2,013,747.13)</b>   |  | <b>(1,990,220.89)</b>   |  | <b>4,586,990.93</b>     |  | <b>(2,149,668.16)</b>   |  | <b>3,947,096.92</b>     |  | <b>(2,093,125.58)</b>   |  | <b>(2,320,442.44)</b>   |  | <b>(2,320,442.44)</b>   |  | <b>267,755.77</b>       |  | <b>0.00</b>          |  | <b>267,755.77</b> |  | <b>0.00</b> |  |