

# 2021 CGJA Annual Standing Committee Reports

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



Unfortunately, the pandemic upended the usual plan. Instead, in 2020 we offered a membership meeting (required by our bylaws). That meeting was conducted via Zoom on October 26, 2020.

It was a "first" for the CGJA. Approximately 93 members participated in the event which featured a keynote speaker, the recipients of the Rolando Service Award and the Excellence in Reporting awards, along with comments from the outgoing and incoming presidents. Feedback from the members who attended the meeting was overwhelmingly positive.

Based on the success of the 2020 Annual Membership Meeting and the continuing concern about members' willingness to travel in the uncertain pandemic climate, the board of directors followed the committee's recommendation that the 2021 Annual Membership Meeting on October 25 be conducted in the same fashion.

I am pleased to report that planning is underway for the 2022 Annual Conference which is scheduled to be held at the Embassy Suites, San Rafael, on October 23-24, 2022, with a full complement of award presentations, informative speakers, an update from the CGJA President, and a gala dinner on the evening of October 23. The committee will continue to monitor the pandemic situation to insure a safe environment for our meeting.

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



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

This year the CGJA will present **Excellence in Reporting Awards (EIR)** for a grand jury report and media coverage and the **Angelo Rolando Service Award**.

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

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



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

This past year, BPRC reviewed proposed amendments to the CGJA Bylaws related to the election of the association's officers and the filling of vacancies on the Finance Committee and in the position of president. We also reviewed proposed amendments to the policy manual, including those related to local achievement awards, the appointment of members to the Finance Committee, and the revocation of chapter charters.

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# CGJA 2021 Committee Reports

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



This year the Finance Committee

- conducted a successful 2020 year-end donation solicitation campaign.
- conducted a monthly review of CGJA financial records and transactions, including adherence to budget.
- compiled and facilitated approval of the 2021 CGJA budget.
- provided timely reminders to chapters concerning their tax-filing obligations.
- filed IRS CP 119 Form to update subsidiary CGJA chapter nonprofit status.
- filed updated Entity Numbers for Subordinates to CGJA with the California Franchise Tax Board.
- successfully managed finance-related issues with the assistance of the CGJA Treasurer.
- forwarded financial information for 2020 to the CPA for preparation of the federal and state tax returns.
- prepared and submitted the annual sales tax payment to the Board of Equalization.
- prepared and submitted the odd-year Corporate Statement of Information (S-100) to the Secretary of State.
- prepared and submitted an Annual Financial Report for the CGJA Board and membership.

**LEGAL AND LEGISLATIVE RESOURCES (LLRC)** - answers questions submitted by grand juries, grand jurors, CGJA chapter members, legal advisors to grand juries and court personnel. **Chair, Karen Jahr**

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



Over the years, LLRC has suggested modifications to CGJA's training manuals and the website's FAQ page based on the questions we've answered. Most of the questions posed to us can be answered informally by a committee member by reference to these resources. We have seen a steady decrease over time in the number of questions that require the consideration of the full committee.

This past year, LLRC or its members provided responses to questions on a number of topics, including the distinctions between inquiries and investigations, whether grand juries can contact public entities about noncompliant responses, how a grand jury can inquire into the condition and management of a detention facility when tours are unavailable due to Covid protocols, county counsel conflicts, investigating matters that are in litigation, obtaining public records, and retaining documents and grand jury reports and the responses to the reports.

The committee also updated CGJA's Compendium of California Grand Jury Law, which reprints the annotated statutes related to the grand jury's watchdog function.

Another function of the committee is to monitor legislation that could affect the grand jury system and provide an analysis of the bills to the board of directors. No bills related to grand jury operations were introduced this year.

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# CGJA 2021 Committee Reports



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

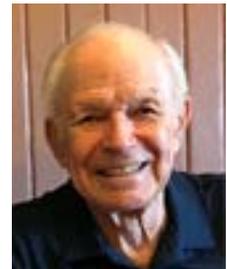
Voting membership has steadily increased over the last year from 270 at the end of August 2020 to 324 at the end of August 2021. This is directly attributable to several successful campaigns promoting the benefits of becoming a regular voting member by drawing from the ranks of Introductory Members as well as individuals whose memberships have lapsed in the last five years. The CGJA Training Committee has been especially supportive of these efforts and as a result, many new members have joined during their grand jury training sessions in lieu of becoming Introductory Members. MCRC has set a target goal of 350 voting members by the end of 2021.

There are 26 CGJA chapters representing 28 counties. Several groups of former grand jurors are currently in the process of becoming or revitalizing chapters in their counties. It is anticipated that these will be completed in the next few months and we will be able to welcome at least one new chapter before the new year.

In April 2021, we hosted our 2021 Presidents' Get-Together, allowing our chapters and invited associations the opportunity to meet and get to know CGJA President Lou Panetta as well as members of MCRC. A lively exchange of information and ideas convinced all involved that this should become a regularly scheduled event to demonstrate CGJA's support of its chapters and vice versa.

In the last several months, we have instituted a follow-up welcome letter to both new voting members and new Introductory Members. The letters incorporate many of the most popular links on the CGJA website that have proven to be most helpful to chapters as well as currently impaneled grand juror members. They have served to remind our members that their membership is valued and appreciated.

**PUBLIC RELATIONS (PRC)** - continues to present timely information about CGJA and the California civil grand jury system to our members, our chapters, sitting grand jurors, and interested others. **Chair, Jerry Lewi**



Shortly after last year's membership meeting, our committee and all of CGJA suffered a grievous loss with the passing of newly-elected President and PRC Chair, Jim Ragan. The Public Relations Committee (PRC) has taken Jim's legacy to heart and are endeavoring to carry out the programs he recommended while continuing to carry our regular duties. This report will add those items.

We have accepted the challenge of increasing public awareness about grand juries that is both a part of our mission statement as well as a recently adopted strategic goal. We have taken action along several fronts that includes: Seeking publicity by widely-read journalists throughout the state, developing a state-wide media contact of journalists who regularly cover grand juries in their community, seeking chapter assistance wherever appropriate, and updating, publishing and promoting our *Grand Jury System* book

## Website

PRC continues to manage the content responsibility of our news blog, [Grand Jury News](#), on the website. It continues to post all news articles we can find about grand juries. The technical responsibility for the blog has been turned over to the Technical Committee who is endeavoring to restore a feature whereby interested persons can automatically be notified when new items are posted. Your chair is anxiously searching for a volunteer to assist in the search and posting of new items on a continuous basis.

**PRC** – continued on next page

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## **The Grand Jurors' Journal**

The bimonthly *Grand Jurors' Journal* continues as a vibrant information vehicle to reach our members, current grand jurors, and court and county staffs. Barbara Sommer, our editor, continues to produce first-class editions. In each journal, one can find CGJA announcements, chapter news, training information, and other topics of interest to readers. Our [website](#) contains [Journal Archives](#) that go back to 2001 (and even a few issues before that).

## **CGJA News and Juror Messages**

This is a support-function for PRC. We continue to support the president and committee chairs in electronically sending messages to members and others under two conditions. The first is when the messages cannot wait for the next edition of the journal. The second is when the messages are so important that they require emphasis outside the journal.



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

The Technology Committee's area of focus for 2021 has been the continued technical support for CGJA – primarily for the website, Dropbox file maintenance, and Zoom. For the website, new and updated sample documents were added, newly released examples of well-written grand jury reports were uploaded, and additional chapter resource documents are now available.

Dropbox users were provided with links to key documents by the CGJA secretary making access easier for key committee and board members. A Zoom license was added to support the widespread use of Zoom in CGJA training workshops given the increased reliance on remote training due to the pandemic.

Recently, the Technology Committee took on the technical support of the CGJA Blog while its content continues to be managed by the Public Relations Committee. On the new and exciting front, work is underway to establish feasibility for the automation of the membership database linking it to the personal information provided by new members who use the website to join CGJA. For many years the CGJA membership database maintenance has been a manual effort on the part of the Membership and Chapter Relations Committee requiring a monumental effort on the part of the membership database manager. If successful, this automation will significantly reduce that manual effort. Looking forward, the Technology Committee is planning on the introduction of a new Blog platform targeting early 2022 for release and we continue to strive for improvements on the Grand Jury Report Topic search function to improve the relevance of returned results.

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

CGJA's Training Committee started 2021 hoping that things would be back to "normal" after such a crazy year in 2020 due to COVID. But we all know now that the pandemic seems to be stretching into at least a two-year event, with its effects lasting even longer, including in our training program.

The new year started in an unusual way – January saw us providing our regular training to new grand juries who were being impaneled for a calendar-year term; and that came right after an extended Report Writing Workshop season that didn't end until December 15 due to late impaneling of some grand juries in 2020.



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The “winter” regular training season was followed by a new “spring” Report Writing Workshop season, and sprinkled in between were some timely Foreperson and Pro Tem Workshops and Legal Advisor Workshops. Then one week after our last “spring” Report Writing Workshop, we started our “normal” summer training season. Training grand jurors has definitely become a year-round endeavor.

Our total number of training venues for the year can be summed up this way.

Time period covered	Regular seminars conducted on Zoom	Regular seminars conducted in-person	Foreperson and Pro Tem Workshops (Zoom)	Report Writing Workshops (mostly Zoom)	Legal Advisor Workshops (Zoom)
Jan - March	15	0	2	2	1
April – June 8	1	1	0	9	1
June 9 - Sept	21	7	3		1
Oct – Nov (scheduled)	1	0	0	18	

A total of 49 counties were trained as new grand juries in 2021. There were two counties that were unable to impanel a grand jury at all (Alpine and Sierra), two that will participate only in our Report Writing Workshops, and three that will not take part in our training at all this year. Two other counties have recently impaneled a grand jury and are considering scheduling training soon.

Scheduling our normal curriculum review and revisions has been challenging during this time, but we got it done and will do one more round of reviews before we start a new “winter” training season this January for those grand juries who are now on a calendar-year term.

Each year we identify grand jurors during our training seminars and workshops that we think would make good CGJA Trainers. The process of inviting them to apply, reviewing their applications, and conducting interviews takes place over the fall and winter months, and this year was no exception. We are always trying to grow and strengthen our training staff as every year we find ourselves needing to replace retiring trainers.

This year we were very successful in recruiting new trainers. We received applications from 14 people, 10 of whom passed the screening and selection process and were approved by the Training Committee. Of those ten, seven are still with us and one is on sabbatical, bringing our total number of trainers as of September 1 to 22 (although two of them have been inactive during COVID).

Our New Trainer Orientation program was conducted virtually again this year, which made it hard for the new trainers to get to know each other and the veteran trainers. We hope to get everyone together for an in-person workshop soon. But our “freshman class” this year has been amazing. They have all observed multiple seminars (mostly on Zoom but some in-person) and have had mentoring sessions on Zoom with our lead trainers. And all have presented at least some or all of one presentation. Several of them have already been determined to be a “qualified trainer” in one or more topics. We have been fortunate to add some excellent and skilled trainers to our staff this year.

Like the rest of the world, we have adapted to remote training – showing our PowerPoint slides, playing our mock interview demonstration videos, conducting interactive sessions using breakout rooms, and making the learning experience as interactive as possible. But we look forward to the day when most or all training can once again be conducted in person.

I want to thank all of our trainers and support volunteers for their dedication to CGJA’s important mission of providing training to California’s civil grand juries.