



## **Mental Health Project Disability and Guardianship Project**

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May 20, 2021

Judicial Council of California  
455 Golden Gate Avenue  
San Francisco, CA 94102

Attention: Hon. Tani Cantil-Sakauye, Chairperson

Re: Update to *Probate Conservatorship Data: The Need to Improve Collection and Reporting*

Council Members:

We recently sent you a letter transmitting a report titled “Probate Conservatorship Data: The Need to Improve Collection and Reporting.” The report explains that current methods of gathering data from superior courts and reporting it to the public are wholly inadequate.

We were informed that our letter and the report were distributed to you. We wanted to present verbal remarks during a public comment segment of your upcoming meeting but have been informed that the Executive Committee will not allow any public comments at the meeting.

Attached to this letter you will find additional information provided to us by PAJAR at the Leadership Services Division of the Judicial Council. It verifies the magnitude of the data collection and reporting problem in connection with probate conservatorships.

This information shows that the Judicial Council and Chief Justice do not know how many new probate conservatorships are filed annually. Some courts report the data while others combine it with other unrelated data which makes it unusable. Likewise, the Judicial Council and the Chief Justice do not know how many conservatees are under the protection of the judicial branch.

This void in data collection and reporting should be fixed. Administrative leadership of the judicial branch cannot provide responsible oversight, engage in proper budgetary planning, or make improvements in the administration of justice in conservatorships without such basic data.

Respectfully submitted:

Thomas F. Coleman  
Legal Director

[tomcoleman@spectruminstitute.org](mailto:tomcoleman@spectruminstitute.org)



## REQUEST FOR JUDICIAL ADMINISTRATIVE RECORDS

Under California Rules of Court, rule 10.500

### Request Information

**Date of Request**

**Requester Name**

**Organization**

**Street Address**

**City, State, Zip Code**

**Telephone Number**

**Email Address**

**Description of Information Requested**

*Please be as specific as possible. Attach additional sheets of paper as necessary.*

**Will the requested records be used to further your or someone else's commercial, trade, or profit interest?**

*If so, fees may be reasonably calculated to cover direct costs of duplication or production of records.*

YES

NO

**Have you recently requested these materials from someone at the Judicial Council of California or a court?** *This information will help us more quickly answer your request.*

YES  Judicial Council  Courts

Name of person & Date of request:

\_\_\_\_\_

NO

### SUBMIT THIS FORM

1) *By Mail:*

Public Access to Judicial Administrative Records  
Legal Services  
455 Golden Gate Avenue  
San Francisco, California 94102

2) *By E-mail:* PAJAR@jud.ca.gov

**From:** PAJAR <PAJAR@jud.ca.gov>  
**Sent:** Friday, May 14, 2021 5:19 PM  
**To:** Spectrum Institute  
**Cc:** PAJAR  
**Subject:** RE: Administrative records request  
**Attachments:** Request + attachment.pdf; Disclosure 20210514.xlsx

Good afternoon,

In the first attachment, you request documents showing data, for 2019 and 2020, regarding probate conservatorship court cases. Below we summarize your individual requests and provide our responses.

Requests 1 and 2: Any document showing the number of petitions that were filed in each superior court in 2019 and 2020 seeking appointments of probate conservators.

**Response:** We have determined that we have a disclosable responsive record showing numbers for all of 2019 and the first six months of 2020. The record is attached. The reporting period for the remainder of 2020 has not concluded and numbers received for July 1 to December 31, 2020 have not been validated. The record showing incomplete and unvalidated numbers is exempt and not disclosable. (See Cal. Rules of Court, rule 10.500(f)(1), (f)(12).)

Please also note that we are only able to provide the requested information for superior courts that report filings data to the Judicial Council using the Judicial Branch Statistical Information System (JBSIS).

Some courts report data using the JBSIS Web Portal instead. The Portal includes fewer (broader) case types. Courts therefore aggregate and report as a single number the combined total filings numbers for multiple related case types. In reporting probate case type initial filings numbers, for example, Portal courts combine probate conservatorship and guardianship case initial filings numbers. Portal courts do not report separate totals of probate conservatorship case initial filings. We have determined, therefore, that we have no record responsive to requests 1 or 2 for Portal courts.

Requests 3 and 4: A document showing the number of active cases in 2019 and 2020 “for persons under an order of conservatorship.”

**Response:** We have determined that we have no responsive record.

You may direct any inquiries regarding this matter to Debora Morrison using the contact information provided in the signature block below.

Sincerely,

**Public Access to Judicial Administrative Records**

Legal Services | Leadership Services Division

Judicial Council of California

455 Golden Gate Avenue

San Francisco, California 94102-3688

415-865-7796 | [PAJAR@jud.ca.gov](mailto:PAJAR@jud.ca.gov)

	Calendar Year 2019	Calendar Year 2020 (through June 30)
	JBSIS Category 30 Data	JBSIS Category 30 Data
Alameda		
Alpine		
Amador		
Butte	28	18
Calaveras	7	5
Colusa	2	0
Contra Costa	243	77
Del Norte		
El Dorado	39	23
Fresno	165	64
Glenn		
Humboldt	56	32
Imperial	77	16
Inyo	7	0
Kern	141	70
Kings	10	6
Lake	5	5
Lassen	1	2
Los Angeles		
Madera	26	11
Marin		
Mariposa		
Mendocino		
Merced	31	17
Modoc		
Mono		
Monterey	73	37
Napa	29	19
Nevada		
Orange		
Placer	50	47
Plumas	7	2
Riverside*	251	
Sacramento		
San Benito	9	1
San Bernardino		
San Diego		
San Francisco		
San Joaquin		
San Luis Obispo	37	18
San Mateo	148	64
Santa Barbara	71	30
Santa Clara	366	143
Santa Cruz	57	20
Shasta	38	12
Sierra		
Siskiyou	9	4
Solano	82	34
Sonoma	74	37
Stanislaus	57	33
Sutter	19	13
Tehama	11	2
Trinity	2	1
Tulare	74	24
Tuolumne		
Ventura	164	67
Yolo	49	20
Yuba	10	5

\*Only includes January to June data. In July 2019, court began reporting using the JBSIS Web Portal, which does not contain data at this level of detail.