



2024  
to  
2028

## Strategic Plan



**COURT REPORTERS BOARD**  
**OF CALIFORNIA**

Prepared by:  
SOLID Planning Solutions  
Department of Consumer Affairs

## TABLE OF CONTENTS

|  |    |
|--|----|
| Board Members.....                                     | 3  |
| Court Reporters Board of California .....              | 4  |
| Message from the Chair.....                            | 5  |
| Board Mission, Vision, and Values.....                 | 6  |
| Goal 1: Professional Qualifications for Licensure..... | 7  |
| Goal 2: Enforcement.....                               | 8  |
| Goal 3: Educational Oversight .....                    | 8  |
| Goal 4: Outreach.....                                  | 9  |
| Goal 5: Administration .....                           | 10 |
| Strategic Planning Process.....                        | 10 |

## COURT REPORTERS BOARD OF CALIFORNIA MEMBERS

Denise A. Tugade, Public Member, Chair

Laura P. Brewer, Licensed Member

Mike Dodge-Nam, Public Member

Arteen Mnayan, Public Member

Robin Sunkees, Licensed Member

Gavin Newsom, Governor

Ted Egawa, Acting Secretary, Business, Consumer Services and Housing Agency

Kimberly Kirchmeyer, Director, Department of Consumer Affairs

Yvonne K. Fenner, Executive Officer, Court Reporters Board of California

# COURT REPORTERS BOARD OF CALIFORNIA

## ABOUT THE BOARD

The Court Reporters Board was established in 1951 by an act of the Legislature. The Board's mandate is to protect the consumers of the state. It does that by:

1. Licensing individual court reporters and registering court reporting firms.
2. Regulating the minimum curriculum which court reporting schools and programs must offer.
3. Disciplining licensees when necessary.

In addition, the Board administers the Transcript Reimbursement Fund (TRF), which reimburses Certified Shorthand Reporters (CSRs) for providing transcripts to indigent civil litigants. All the Board's activities are funded from licensing and examination fees. Thus, the Board is considered a "special fund" or self-funded agency because no tax dollars from the General Fund support the Board, with the exception of the TRF, which received a one-time grant of \$500,000 from the General Fund in 2021.

The Board is composed of three public members and two licensees. The Governor appoints one public member and two licensees to the Board. The Speaker of the Assembly and the Senate Rules Committee each appoint one public member. All Board members serve staggered, four-year terms.

The Board currently has approximately 5,500 licensees. In the profession, licensees are known as either "officials" who work in court, or "freelancers," who generally work through court reporting agencies and report mostly depositions. The Board currently has 203 registered court reporting firms.

The Board's only office exists in Sacramento. There is an executive officer and a staff of four full-time employees. There is an enforcement analyst, an exam/licensing analyst, a TRF Pro Bono Program/school compliance analyst, and a TRF Pro Per Program analyst for the Board.

## MESSAGE FROM THE CHAIR

On behalf of the Court Reporters Board of California (Board), I am pleased to present the 2024-2028 Strategic Plan.

Court reporters play an essential role in the justice system, ensuring that the record is captured with accuracy. Over the years, there have been changes to the industry, landscape, and technology; however, the critical responsibilities of hearing and preserving the words of all parties equally and of maintaining the integrity of our justice system have remained.

The Board has made progress in addressing several longstanding and root issues consumers and the workforce are facing. This Strategic Plan builds on that progress and directs the Board's focus going forward, informed by the Department of Consumer Affairs (DCA) Strategic Organizational Leadership and Individual Development (SOLID) planning unit's coordinated staff focus groups, individual interviews with the Board's executive management team and Board members, input from a wide array of stakeholders, and working meetings. The Board's core mission remains the protection of consumers, ensuring our justice system is serving a California for All.

Sincerely,

A handwritten signature in blue ink, appearing to read "Denise Tugade".

Denise Tugade

Public Member

Board Chair

## BOARD MISSION, VISION, AND VALUES

### MISSION

To protect the public by ensuring the integrity of the judicial record and maintaining the standard of competency through oversight of the court reporting profession.

### VISION

Consumers hiring a California licensed court reporter engage the highest quality, most knowledgeable, and most ethical professional.

### VALUES

- **Collaboration** - We value partnerships. We foster the public's trust through open communication and work in a cooperative, respectful, and courteous manner.
- **Consumer Protection** - We make effective and informed decisions in the best interest and for the safety of Californians.
- **Excellence** - We have a passion for quality and strive for continuous improvement of our programs, services, and processes through employee empowerment and professional development.
- **Integrity** - We are committed to honesty, ethical conduct, and responsibility.
- **Service** - We are professional and responsive to the needs of our stakeholders.

## STRATEGIC GOALS

### GOAL 1: PROFESSIONAL QUALIFICATIONS FOR LICENSURE

**The Board promotes the professional qualifications of those practicing court reporting by establishing examination standards and requirements.**

- 1.1 Pursue reciprocity with other state and national exams to reduce barriers to licensure.
- 1.2 Change the testing format to conform to universal formats to increase pass rates and the licensee pool.
- 1.3 Assess the feasibility of adding one in-person test annually to improve accessibility and inclusivity.
- 1.4 Research the reinstatement of lapsed licenses and determine if statutory changes are necessary.
- 1.5 Explore the possibility of provisional licensing to promote fully licensed reporters and address the shortage of licensees.
- 1.6 Pursue legislation that will require Certified Shorthand Reporters (CSRs) to complete continuing education.
- 1.7 Review demographic data provided through the strategic planning process to identify any workforce issues.

## GOAL 2: ENFORCEMENT

**The Board protects consumers by preventing violations and enforcing laws, codes, and standards when violations occur.**

- 2.1 Pursue legislation that will require Certified Shorthand Reporter (CSRs) to state their license number at the beginning of proceedings.
- 2.2 Pursue legislation that will grant the Board authority to set standards, license, and oversee digital recording to ensure accurate and timely transcripts for the protection of consumers.

## GOAL 3: EDUCATIONAL OVERSIGHT

**The Board advances higher education standards through educational oversight to increase the quality of education and safeguard consumer protection.**

- 3.1 Explore methods to improve the capturing and communication of statistics on the effectiveness and quality of educational programs.
- 3.2 Obtain data on schools and students to assist the Board with daily operations and to identify any diversity, equity, and inclusion (DEI) and workforce supply issues.



## GOAL 4: OUTREACH

**The Board increases awareness of its mission, activities, and services, with a focus on practice standards by sharing information with the public and professionals.**

- 4.1 Increase the Board's visibility to promote consumer awareness about the Board's role and efforts.
- 4.2 Address digital recording to educate consumers on the distinction between digital recorders and Certified Shorthand Reporters (CSRs).
- 4.3 Inform the public about voice writers to create awareness about the new technology, prevent confusion, and better inform consumers.
- 4.4 Increase awareness and inclusivity of the Transcript Reimbursement Fund (TRF).
- 4.5 Attract people to the profession to address the shortage of licensees.
- 4.6 Pursue legislation that will require licensees to provide an email address to the Board for the delivery of electronic communication and updates.
- 4.7 Update the Board's logo and incorporate voice writing for a more universal and inclusive logo.
- 4.8 Explore the need to increase TRF funding to support program needs and the Board's DEI initiative.
- 4.9 Review and update the "Best Practices Pointers"<sup>1</sup> on the Board's website.

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<sup>1</sup> Best practices pointers are not regulations or statutes. They are compiled guidance for particular situations based on regulations, statutes, and industry standards. Although the pointers may be used as a guide, they are not intended as legal advice, nor will the Board use the pointers themselves as a basis for discipline or enforcement.

## GOAL 5: ADMINISTRATION

**The Board enhances organizational effectiveness and strives to improve the quality of customer service.**

- 5.1 Streamline the Transcript Reimbursement Fund (TRF) process.
- 5.2 Create a succession plan for the executive officer position.
- 5.3 Collect data on website traffic to assist the Board in improving website functionality and accessibility for all stakeholders.

## STRATEGIC PLANNING PROCESS

To understand the environment in which the Board operates as well as identify factors that could impact the Board's success in carrying out its regulatory duties, the Department of Consumer Affairs' SOLID Planning Unit (SOLID) conducted an environmental scan of the Board's internal and external environments by collecting information through the following methods:

- Interview was conducted with the executive officer in May 2023.
- Interviews were conducted with staff and board members who opted for this format in May 2023.
- Online surveys were distributed to staff, board members, and external stakeholders in May 2023.

The most significant themes and trends identified from the environmental scan were discussed by board members, executive officer, and executive analyst during a publicly noticed strategic planning session facilitated by SOLID on August 31, 2023. This information guided the Board in the development of its strategic objectives outlined in this 2024-2028 strategic plan.



# COURT REPORTERS BOARD OF CALIFORNIA

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Strategic plan adopted on December 13, 2023.

This strategic plan is based on stakeholder information and discussions facilitated by SOLID for the Court Reporters Board of California on August 31, 2023. Subsequent amendments may have been made after the adoption of this plan.



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