



DEPARTMENT OF CONSUMER AFFAIRS

COURT REPORTERS BOARD

OF CALIFORNIA

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Fax (916) 263-3664 / www.courtreportersboard.ca.gov**COURT REPORTERS BOARD OF CALIFORNIA
MINUTES OF OPEN SESSION
MAY 9, 2025**CALL TO ORDER

Ms. Denise Tugade, chair, called the meeting to order at 9:27 a.m. The public meeting was held at Department of Consumer Affairs, HQ2 Ruby Room, 1747 North Market Boulevard, Sacramento, CA 95834 and via a teleconference platform.

ROLL CALL

Board Members Present: Denise Tugade, Public Member, Chair
Robin Sunkees, Licensee Member, Vice Chair
Laura Brewer, Licensee Member
Michael Dodge-Nam, Public Member
Arteen Mnayan, Public Member

Staff Members Present: Yvonne K. Fenner, Executive Officer
Helen Geoffroy, Board Counsel
Steven Vong, Regulations Counsel
Paula Bruning, Executive Analyst

Board staff established the presence of a quorum.

1. PUBLIC COMMENT FOR ITEMS NOT ON THE AGENDA

Ana Costa, on behalf of her students, requested to know if the Board will be considering at a future meeting the possibility of moving away from using ProctorU for testing. She suggested the Board move to using the method being used by the National Court Reporters Association (NCRA). She mentioned a lawsuit by the State Bar of California against ProctorU.

2. REVIEW AND APPROVAL NOVEMBER 15, 2024, MEETING MINUTES

Ms. Sunkees and Ms. Brewer provided amendments to the minutes.

Ms. Sunkees moved to approve the minutes as amended. Ms. Brewer seconded the motion. Ms. Tugade called for public comment.

Dolores Rene Wood provided an amendment to a date in the minutes.

A vote was conducted by roll call.

For: Ms. Brewer, Mr. Dodge-Nam, Mr. Mnayan, Ms. Sunkees, and Ms. Tugade

Opposed: None

Absent: None

Abstain: None

Recusal: None

MOTION CARRIED

3. DEPARTMENT OF CONSUMER AFFAIRS UPDATE

Leslie Barmby with the Department of Consumer Affairs (Department/DCA) provided a Department update.

Ms. Barmby reported that Governor Newsom's proposed 2025-26 state budget includes a proposal to split the Business, Consumer Services, and Housing Agency into two state agencies: the California Housing and Homelessness Agency (CHHA) and the Business and Consumer Services Agency (BCSA). The proposed CHHA would oversee housing and homelessness solutions and safeguard civil rights whereas BCSA will be responsible for consumer affairs, licensing, and enforcement. DCA would be part of the eight departments within the new BCSA agency.

As part of the process, the reorganization plan was submitted to the nonpartisan Little Hoover Commission for review, which has an approximate 90-day formal review process. The commission held public hearings April 23-24, 2025, to receive testimony and input on the proposed reorganization. Agency Secretary Moss, DCA Director Kirchmeyer, and other impacted department leaders testified in support of the Governor's plan and responded to questions from the commissioners. The commission is preparing a report that will be submitted to the Governor and legislature, which will offer a recommendation as to whether it believes the reorganization plan should go into effect. The legislature will then have 60 days to review and consider the plan. If approved, the new agency will be created July 2025 and become operative on July 1, 2026. Detailed information on the reorganization plan is available at <https://bcsh.ca.gov/about/reorganization>.

Governor Newsom issued an executive order requiring all state agencies, and departments, employees to increase their in-office days from two to four days per week beginning July 1, 2025. The Department of Human Resources issued guidance on implementation of the executive order, which defined parameters for case-by-case exceptions to the new minimum requirement. DCA has been working with a few programs on identifying additional space needed for the transition as well as hosting bi-weekly meetings with board and bureau leadership to provide updates and answer questions.

On April 28, Levi Hull began serving as DCA's new Compliance and Equity Officer. His responsibilities include leading and coordinating Department-wide quality improvement efforts to ensure consistency and regulatory compliance. This position oversees DCA's SOLID Planning and Training Services, the Organizational Improvement Office, the Equal Employment Opportunity Office, and the Internal Audit Office. The position also serves as the liaison to the Department's Diversity, Equity, and Inclusion Steering Committee and is

dedicated to enhancing the diversity, equity, inclusion, and accessibility policies, trainings, and activities throughout the Department's programs.

Ms. Barmby reminded the members that they must complete Board Member Orientation Training (BMOT) within one year of their appointment or reappointment. BMOT will be offered virtually on June 18, 2025, and October 22, 2025. Members may register for this training via the Learning Management System.

The first week of May is Public Service Recognition Week. Ms. Barmby offered a special thank you to the Board, its executive officer, and Board staff for their hard work and dedicated efforts to achieve DCA's mission of consumer protection and extraordinary service every day.

Ms. Tugade called for public comment. No comments were offered.

4. REPORT OF THE EXECUTIVE OFFICER

4.1 CRB Budget Report

Ms. Fenner provided a review of the Board's budget and referred the Board to page 25 of the Board agenda packet for the expenditure projections for Fiscal Month 8. She indicated that staff continues to watch expenditures closely as the Board nears its budgeted spending allowance for Fiscal Year 2024/25.

She referred to the Board's overall fund condition on page 26 of the Board agenda packet. She stated that the projected transfer to the TRF had been reduced to \$150,000 per year beginning in Fiscal Year 2027/28. This item is difficult to budget for since it is unknown how many claims will be received. The Board's Months in Reserve is projected to close in on the six-month threshold that stops transfers to the TRF. A close watch is being kept on the future projections in order to alert the Board to the need for a possible fee increase.

4.2 Transcript Reimbursement Fund

Ms. Bruning reported current statistics for the 2024/25 fiscal year. She stated that the TRF paid out more than \$87,000 for pro bono cases. She added that over \$48,000 was paid for pro per applicants with an additional \$60,000 in provisionally approved applications awaiting final invoices.

4.3 Enforcement Activities

Ms. Fenner referred to the enforcement statistics through the third quarter of the current fiscal year beginning on page 28 of the packet.

4.4 License Exam

Ms. Fenner indicated that the overall exam statistics began on page 33 of the Board agenda packet starting with the comparison of the steno and voice writer skills portion of the exam. The historical results for all three exams follow, beginning on page 34.

Ms. Fenner reported that 105 candidates took the most recent skills exam, of which 42 were voice writers. This was the first exam to take place since the exam pass rate had been reduced to 95% accuracy. There were 43 first-time candidates, of which 31 were voice writers. She indicated that the pass rate was 83.7% for all first-time candidates, with a pass rate of 90% for first-time voice-writer candidates.

Since January 1, 2025, the Board has licensed 72 court reporters via the NVRA reciprocity. At the time of the meeting, 219 voice writers had been licensed.

Ms. Fenner referred to the results for the two written exams on pages 36-39 of the Board agenda packet.

She shared that staff was still working with the Senate Business, Professions and Economic Development Committee on language to change the skills exam from the four-voice format to the national format. She indicated that Board Members Brewer and Sunkees had worked hard to ready a test bank for pretesting and recording once the green light was lit by the legislature.

Ms. Costa shared her elation for the high exam pass rate. She stated that she requires her students to subscribe to the Board's email notification and learn to use the Board's website and database.

4.5 Los Angeles Fire Victims Assistance

Ms. Fenner reported that resources for the victims of the Los Angeles fires can be found at www.ca.gov/lafires. She highlighted the executive order issued by Governor Newsom that allows licensees in affected zip codes to defer payment of their license renewal fees for one year.

4.6 Family Violence Appellate Project v. Superior Courts Cal. Supreme Court No. S288176

Ms. Fenner updated that Board on California Supreme Court case Family Violence Appellate project vs. Superior Courts of California (S288176). The case presents the following issue: Does the prohibition on electronic recording of certain proceedings in Government Code section 69957(a) violate the California Constitution when an official court reporter is unavailable and a litigant cannot afford to pay a private court reporter?

In its February 19, 2025, order, the Supreme Court ordered the respondents and the legislature to show cause why the relief sought in the petition should not be granted by the Supreme Court. The petition essentially seeks a massive expansion of electronically recording proceedings which is currently at odds with longstanding law.

She indicated that this Board has a history of opposing large-scale expansion of electronic recording as not being in the best interest of the consumer, citing multiple concerns with transcription of those recordings. She provided a brief declaration to the law office who filed an amicus brief on behalf of SEIU and a number of court reporting associations. The information included data on the increase in the number of applicants to the exam and the increase in the number of voice writers being

licensed. Staff will continue to follow the case as it will have lasting effects for California litigants.

Mary Pierce indicated that Stephanie Leslie also filed a declaration to the Supreme Court on behalf of the California Deposition Reporters Association (CalDRA).

4.7 Technology Modernization

Ms Fenner shared that July will mark the one-year point for the Board's new database, Connect. Savings in staff time and efforts have been realized with the reduction of processing and filing paper renewals. This has allowed the Board to promote its receptionist to an analytical position to provide more assistance in processing TRF claims rather than more clerical duties such as opening incoming mail.

Ms. Fenner congratulated Kim Kale, Licensing Analyst, for being awarded a gold level Superior Accomplishment Award for her outstanding work on the technology modernization project. While the entire staff contributed to the development process, her commitment to the project from inception to completion truly has been outstanding.

5. LEGISLATION

Ms. Fenner provided a report regarding the bills the Board is tracking. Information pertaining to the bills could be found beginning on page 40 of the Board agenda packet.

5.1 AB 479 (Tangipa) – This bill deals with notifying a board if a court is vacating a conviction against a licensee. There was no discussion on this item.

5.2 AB 711 (Chen) – This bill would require notice to other parties if one side is hiring a court reporter. The intent appears to be to help with multiple reporters showing up for the same proceeding causing a strain on court reporting services.

Ms. Brewer spoke in support of the bill. Ms. Sunkees agreed, adding that it may help the perceived shortage of court reporters, allowing reporters to be available for other hearings.

Ms. Tugade agreed with the goal but indicated there may be some questions on the enforcement measures.

Mr. Mnayan inquired what the noticing requirements would be and if they may have a negative effect on parties.

Ms. Tugade called for public comment.

Michelle Caldwell, president of the California Court Reporters Association (CCRA), provided input as a cosponsor of the bill. She stated that the bill's last iteration had a five-day notice requirement. She agreed this will aid in the perception of a shortage, citing examples of multiple reporters awaiting short hearings or multiple reporters being booked for the same hearing. She urged the Board's support.

Diane Freeman, on behalf of CalDRA, also spoke in support of the bill. She commented that the moving party would bear the responsibility to notify the court.

Ms. Pierce commented that she was not aware of anything in the bill that addresses enforcement. She also referred to the duplication of court reporters in hearings and the how the cost of duplication affects consumers.

Ms. Wood agreed with the comments of Ms. Pierce and in support of the bill. She shared that at times attorneys are told by the court to hire a private reporter but then the court would assign an official at the last minute. This results in the pro tem having to charge an appearance fee but not actually being used. This is a result of the attorney not filing the required paperwork in matters where the client has a fee waiver which requires the court to provide a reporter.

Cindy Tachell shared in the support of the bill with the goal of better use of resources.

Ms. Brewer indicated that while the bill would seemingly address the problem of multiple reporters being hired for the same case, however, it did not address the issue of multiple reporters covering the same courtroom. Ms. Fenner commented that this bill may be the first step to addressing the overall issues with the need to hire private court reporters. Ms. Sunkees and Ms. Tugade agreed that it is a good first step to help the courts and litigants.

Ms. Sunkees moved to take a SUPPORT position on AB 711 (Chen). Ms. Brewer seconded the motion. Ms. Tugade called for public comment.

Ms. Costa shared support of the comments made and the motion for the bill.

A vote was conducted by roll call.

For: Ms. Brewer, Mr. Dodge-Nam, Mr. Mnayan, Ms. Sunkees, and Ms. Tugade
Opposed: None
Absent: None
Abstain: None
Recusal: None

MOTION CARRIED

- 5.3 AB 742 (Elhawary) – This bill would give priority to applications submitted by descendants of slaves. The Board's processing time is typically within two to seven days; therefore, the bill has little impact to the Board.

Ms. Geoffroy indicated that there are Department-wide issues with the bill. The bill is not clear as to the problem it attempts to solve. Although it appears to want to give priority to individuals the same way the military bill did, the language causes confusion and concerns of discrimination where it attempts to identify the intended beneficiaries of the bill. Also, most boards do not currently collect data on applicant identity. Making identifying information available to staff may make boards susceptible to litigation. Many boards are taking an oppose unless amended position where the State carries the burden of litigation for discrimination allegations against the boards.

Mr. Dodge-Nam suggested the Board remain neutral on the bill while the mechanics are worked out since it does not appear to affect the Board's operations. Mr. Mnayan and Ms. Sunkees agreed to take a watch position.

Ms. Tugade commented that the issues surrounding determining "who is a slave" must first be fleshed out and chaptered in SB 518 (Weber Pierson) before this bill would be operative. SB 518 would establish the Bureau of Descendants of American Slavery.

Ms. Tugade called for public comment. No comments were offered.

- 5.4 AB 882 (Papan) – This bill would allow electronic recording (ER) on a temporary basis whenever a transcript of court proceedings is required in family law, probate, and civil contempt proceedings if specified requirements are met.

Ms. Sunkees offered comments in support of the bill. The limited and temporary-basis is a smart way to help the courts create a record. Ms. Brewer agreed and added that it would give the courts some breathing room.

Ms. Tugade called for public comment.

Ms. Caldwell, CCRA, stated that considering the expansion of ER was initially shocking; however, after much discussion the association agreed that the bill offers a good compromise for the courts to have a temporary solution while they take ownership of the overall problem. It puts onus and responsibility back on courts to recruit and provide reporters to the neediest consumers. She requested the Board take a position of support.

Ms. Pierce, on behalf of CalDRA, commented in full support of the bill and thanked Ms. Caldwell for her comments.

Ms. Tachell echoed the comments by Ms. Caldwell and Ms. Pierce. She encouraged a position of support.

Ms. Brewer moved to take a SUPPORT position on AB 882 (Papan). Ms. Sunkees seconded the motion. Ms. Tugade called for public comment. No comments were offered. A vote was conducted by roll call.

For: Ms. Brewer, Mr. Dodge-Nam, Mr. Mnayan, Ms. Sunkees, and Ms. Tugade

Opposed: None

Absent: None

Abstain: None

Recusal: None

MOTION CARRIED

- 5.5 AB 1170 (Dixon) – This bill is a codes maintenance bill that does not affect the Board. There was no discussion on this item.

- 5.6 AB 1189 (Lackey) – This bill would require the CRB to develop standards for and then subsequently license digital recorders and legal transcriptionists. Board staff was informed by the author’s office that the bill would not be moving forward this year. There was no discussion on this item.
- 5.7 AB 1298 (Harabedian) – This is a spot bill regarding DCA. There was no discussion on this item.
- 5.8 SB 470 (Laird) – This bill proposes to extend the current Bagley-Keene Open Meeting Act requirements to January 1, 2030.

Ms. Sunkees spoke in support of the bill, citing the financial benefits of minimizing travel costs. The Board members offered sentiments of agreement. Ms. Tugade added that remote-capable meetings improve public participation.

Ms. Sunkees moved to take a SUPPORT position on SB 470 (Laird). Mr. Mnayan seconded the motion. Ms. Tugade called for public comment. No comments were offered. A vote was conducted by roll call.

For: Ms. Brewer, Mr. Dodge-Nam, Mr. Mnayan, Ms. Sunkees, and Ms. Tugade

Opposed: None

Absent: None

Abstain: None

Recusal: None

MOTION CARRIED

- 5.9 SB 806 (Dahle) – This is a spot bill regarding DCA. There was no discussion on this item.
- 5.10 SB 861 (Ashby – Chair) – This is the BP&ED Committee’s omnibus bill. The bill contains a provision to bring the school qualifier examinations into alignment with the changes made by the Legislature to the pass rate for the Board’s skills exam (95% accuracy).

Ms. Tugade suggested a position of support. Ms. Sunkees and Ms. Brewer agreed, however, expressed disappointment that the language did not included changes to the testing format. Ms. Tugade thanked Senator Ashby for continuing to work with the Board.

Ms. Brewer moved to take a SUPPORT position on SB 861 (Ashby). Mr. Dodge-Nam seconded the motion. Ms. Tugade called for public comment. No comments were offered. A vote was conducted by roll call.

For: Ms. Brewer, Mr. Dodge-Nam, Mr. Mnayan, Ms. Sunkees, and Ms. Tugade

Opposed: None

Absent: None

Abstain: None

Recusal: None

MOTION CARRIED

6. REGULATIONS

Mr. Vong updated the Board on its three rulemaking packages. Information was also included starting on page 43 of the Board agenda packet.

6.1 Title 16, Section 2472 – Disciplinary Guidelines Publication Text

Mr. Vong reported that the regulation section concerns Disciplinary and Denial Guidelines, which set forth recommended discipline for violations of the Board's statutes and regulations. The regulation was last updated through the Office of Administrative Law (OAL) in 1989. In November 2024 the Board voted to approve updates. Since that time, Board and Legal staff re-reviewed and found the need for substantive updates, such as including provisions related to license denial throughout the document, certain penalties on the penalty guidelines for violations table, and other non-substantive grammatical edits. He indicated that the edits were highlighted in Attachment 1 of Agenda Item 6.1. He recommended the Board review and approve the draft regulatory language and instruct staff to proceed with the rulemaking process.

Ms. Brewer requested staff review the document for consistency in the formatting of the required days for Respondent responses. Mr. Vong indicated that would be a non-substantive change, if needed.

Ms. Brewer moved to rescind the Board's previous November 15, 2024, motion and approve the newly proposed regulatory text and changes to CCR section 2472 as provided in the materials and direct staff to submit all approved text to the Director of the Department of Consumer Affairs and the Business, Consumer Services, and Housing Agency for review. If no adverse comments are received, authorize the Executive Officer to take all steps necessary to initiate the rulemaking process, make any non-substantive changes to the package, and set the matter for hearing if requested. If no adverse comments are received during the 45-day comment period and no hearing is requested, authorize the Executive Officer to take all steps necessary to complete the rulemaking and adopt the proposed regulations for section 2472 as noticed, with the authority to make any technical or nonsubstantive changes. Ms. Sunkees seconded the motion. Ms. Tugade called for public comment. No comments were offered. A vote was conducted by roll call.

For: Ms. Brewer, Mr. Dodge-Nam, Mr. Mnayan, Ms. Sunkees, and Ms. Tugade
Opposed: None
Absent: None
Abstain: None
Recusal: None

MOTION CARRIED

6.2 Title 16, Section 2410 – Transcript Reimbursement Fund Application and Applicant Privacy

Mr. Vong indicated that the Court Reporters Board administers the Transcript Reimbursement Fund (TRF), which provides transcript costs for indigent litigants in

civil matters. This proposed regulatory language relates to requirements on a TRF application, as follows:

Section (a) is for litigants who are representing themselves. Section (b) is for those who are representing indigent litigants pro bono. Section (c) states that certain information will be considered personal information pursuant to Information Practices Act of 1977 and shall not be subject to public disclosure.

He recommended the Board review and approve the draft regulatory language and instruct staff to proceed with the rulemaking process.

Ms. Sunkees moved to approve the proposed regulatory text for CCR section 2410; direct staff to submit the text to the Director of the Department of Consumer Affairs and the Business, Consumer Services, and Housing Agency for review; and if no adverse comments are received, authorize the Executive Officer to take all steps necessary to initiate the rulemaking process, make any non-substantive changes to the package, and set the matter for a hearing if requested. If no adverse comments are received during the 45-day comment period and no hearing is requested, authorize the Executive Officer to take all steps necessary to complete the rulemaking and adopt the proposed regulations at section 2410 as noticed, with the authority to make any technical or nonsubstantive changes. Mr. Mnayan seconded the motion. Ms. Tugade called for public comment. No comments were offered. A vote was conducted by roll call.

For: Ms. Brewer, Mr. Dodge-Nam, Mr. Mnayan, Ms. Sunkees, and Ms. Tugade
Opposed: None
Absent: None
Abstain: None
Recusal: None

MOTION CARRIED

The Board took a break at 10:58 a.m. and returned to open session at 11:15 a.m. Board staff established the presence of a quorum by roll call.

7. SKILLS EXAM GRADING POLICIES

Ms. Brewer reported that she met with Ms. Sunkees and Ms. Fenner to review and revise the Board's skills exam grading and punctuation policies. She referred to the "Examination Grading Policies for Skills Portion" and "Punctuation Guidelines for the CSR Examination" in the Board agenda packet. She then offered amendments to the draft Grading Policies.

Ms. Brewer shared that work had already begun on writing skills exams in the RPR format. She thanked Ms. Sunkees, Ms. Fenner, Holly Moose, Heatherlynn Gonzalez, Rene Wood, Michelle Caldwell, and Andrea Chavez for writing exams. She emphasized the amount of work that goes into writing even one test.

Ms. Sunkees thanked Ms. Brewer for doing vast majority of drafting amendments to Grading Policies.

Mr. Dodge-Nam thanked all participants for their work in this critical work for the Board that would not be impossible without them.

Mr. Dodge-Nam moved to approve as amended the proposed Examination Grading Policies including Punctuation Guidelines. Mr. Mnayan seconded the motion. Ms. Tugade called for public comment.

Ms. Costa expressed her appreciation for the revised policies and indicated she would pass them along to fellow teachers and to students.

Ms. Pierce stated that Ms. Brewer's attention to detail is nearly unparalleled. She thanked everyone who participated in the important work of test writing.

Ms. Tugade echoed her the appreciation to the Board members, staff, and other test writers.

A vote was conducted by roll call.

For: Ms. Brewer, Mr. Dodge-Nam, Mr. Mnayan, Ms. Sunkees, and Ms. Tugade

Opposed: None

Absent: None

Abstain: None

Recusal: None

MOTION CARRIED

8. SKILLS EXAM RECIPROCITY WITH RPR

Amy Welch-Gandy, Supervising Test Developer for DCA's Office of Professional Examination Services (OPES), provided updates regarding the Occupational Analysis (OA) for NCRA's RPR certification examination.

OPES conducted a review in 2021 of the RPR program, however, at that time NCRA did not have an OA for the skills test portion of the RPR exam. In September 2024, NCRA completed the OA for the RPR skills test. The Board contracted OPES in February 2025 to review the results of the OA. Along with subject matter experts (SMEs), OPES was able to determine that the RPR skills exam outline fully covers the tasks and knowledge areas identified in the California dictation exam outline. Additionally, they determined that the methodology used by NCRA to conduct the analysis meets professional standards.

Based on these findings, OPES supports the Board's consideration of the NCRA RPR skills test as an option to meet licensure requirements for California court reporters.

Ms. Sunkees thanked Ms. Welch-Gandy for the report. She was pleased with the findings as the RPR is a great test of entry-level skill. Ms. Brewer joined in the appreciation for the meaningful work toward having a robust test for competency.

Ms. Tugade called for public comment.

Ms. Caldwell expressed her happiness to hear the movement forward with RPR reciprocity.

Ms. Costa thanked those who worked on the project. She inquired if NCRA RPR reciprocity would be treated similarly to the NVRA CVR reciprocity wherein it waives the skills exam but not the written exams. Ms. Fenner confirmed that is the direction the Board is moving.

The Board directed Ms. Fenner to move forward with the initiative to achieve RPR exam reciprocity.

9. COURT REPORTER WORKFORCE DEVELOPMENT AND PIPELINE

Ms. Fenner started by sharing enrollment statistics from the recognized court reporting programs. Since 2017, enrollment has increased overall by 286%. Most of the recognized schools have opened voice writing programs. The Board's exam statistics reflect that voice writers have been driving the pass rate up since licensing for voice writers began in late 2022. Additionally, the number of first-time test takers has increased 100% since 2021.

She then referred to the offer from Assemblymember Kalra to assist with the training of court reporters. She, therefore, reached out to the recognized programs and received feedback that grants would be useful for paying graders, creating new dictation material, and developing study guides for the Board's two written exams. Additionally, there was an idea mentioned for securing credentialing waivers to make it easier to recruit teachers as readers for dictation.

Ms. Tugade favored the budget-friendly idea of credentialing exemptions for teachers, citing a similar waiver the Board of Registered Nursing acquired. Ms. Sunkees agreed, adding that her colleague is an instructor at a court reordering school and credentialing is often a barrier in recruitment.

Ms. Fenner indicated that she would research what obtaining such a waiver would entail.

Ms. Tugade called for public comment.

Ms. Pierce offered comments in support of credentialing waivers for retired court reporters to work in court reporting schools.

Ms. Sunkees highlighted that the increase in enrollment and licensing candidates being driven by voice writers supports the need for more instructors. Ms. Brewer agreed, commenting that she had once sought to be an instructor but was not able to due to her lack of credentialing.

Ms. Costa commented that Ms. Brewer's attention to detail would make her an amazing teacher. She shared that anyone with an AA would qualify to teach.

10. BEST PRACTICE POINTERS TASK FORCE

Ms. Brewer reported that the task force reconvened on both January 16, 2025, and February 12, 2025, and completed the review of the current Best Practice Pointers as well as developed four additional pointers. She thanked the task force members as well as staff and the public for their participation. She presented the five Best Practice Pointers for review and approval.

Ms. Sunkees echoed the comments of appreciation by Ms. Brewer.

Suggestions for future best practice pointers should be directed to Ms. Fenner.

Mr. Dodge-Nam moved to approve Best Practice Pointers 9, 15, 16, 17, and 18.

Mr. Mnayan seconded the motion. Ms. Tugade called for public comment.

Ms. Caldwell, on behalf of CCRA, thanked the task force for their work on the best practice pointers.

Ms. Pierce thanked the other task force members, staff, and public for their participation. She reported that CalDRA gave a seminar on the updated best practice pointers at their recent convention.

Ms. Costa shared that she uses the publications as a resource for her students.

A vote was conducted by roll call.

For: Ms. Brewer, Mr. Dodge-Nam, Mr. Mnayan, Ms. Sunkees, and Ms. Tugade

Opposed: None

Absent: None

Abstain: None

Recusal: None

MOTION CARRIED

11. 2024-2028 STRATEGIC PLAN

Ms. Fenner referred to the Action Plan Timeline starting on page 94 of the Board agenda packet. The timeline shows the actions achieved to date toward the Board's strategic plan objectives.

Mr. Dodge-Nam reported that production of a new Board logo had kicked off with a meeting on March 25, 2025, with the design team at the DCA Office of Publications, Design and Editing. The design team responded with a collection of first-draft proofs for consideration. A follow-up meeting is scheduled for May 13, 2025. He expressed his confidence that proposed design options would be brought before the Board at its next meeting.

Ms. Brewer commented that Action Item 1.5 pertaining to provisional licensing was deleted from a prior bill and suggested the status be updated since the Board is now pursuing other avenues to increase its licensee base, such as RPR reciprocity. Ms. Fenner responded that the item may come back around depending on changes that could occur over the next few years. She suggested leaving it as is for now since the timeline is a living document.

Ms. Tugade requested the Board pursue Action Item 1.7 regarding review of demographic data. She believed the Board's business modernization efforts should lend toward obtaining the data needed but questioned if legislation was necessary. Ms. Fenner believed it may be possible to collect the information on a voluntary basis with a redesign of the application forms.

Ms. Tugade called for public comment.

Ms. Costa inquired as to the status of Action Item 1.3 change relating to in-person testing. Ms. Fenner related that the Board determined at its November 2024 meeting that it will no longer consider an annual in-person test due to the increased success of online testing as well as the Board's budget constrictions.

12. AI GENERATED DEPOSITION SUMMARIES

Ms. Fenner referred to the existing regulation pertaining to the prohibition of preparation of deposition summaries on page 96 of the Board agenda packet (*CCR Title 16, Division 24, Article 8, section 2474*). She indicated that the Board clarified at its last meeting that the existing language does not prohibit AI-generated deposition summaries, but the Board requested to discuss the topic in greater detail at a future meeting.

Ms. Tugade called for public comment.

Ms. Costa requested clarification as to the proposed action. She indicated that if a reporter participated in the action described in subsection (a) of the regulation, they would clearly be in violation.

Ms. Pierce recalled that the conclusion reached by the Board's at last discussion was that if an online platform (AI) was being used, then the court reporter was not providing a summary. She expressed concern over whether or not agencies are taking appropriate precautions to avoid HIPPA violations and exposing or compromising intellectual property. Even with her security concerns, she still believed that if anyone is allowed to provide the service, than all should be allowed to do so in order to have an equal playing field.

Ms. Brewer asserted that section 2474 does not apply to what is going on with AI-generated summaries. She believed more information was needed about private or not-publicly available information being used to train AI models or if is somehow just an off-the-shelf product anyone can obtain. If it is using information from other litigation or private client information, she would have concerns. She also questioned if everyone in the litigation would have equal access to the exact same summary or if it is customized based on the party who orders it. Ms. Tugade joined in the privacy concerns.

Mr. Mnayan concurred there is some level of subjectivity with AI. He asserted that there needs to be clear notices that it is an AI summary, may be subjective, and should not be relied on as official court documents.

Ms. Tugade added that there also needs to be clear notices to consumers if and when their data is being used to train the AI models.

Mr. Dodge-Nam reiterated that the Board's initial concern was that the AI-generated summaries were a violation to the regulation, which the Board determined that they are not. The next area of interest is to make sure that all court reporters and firms are able to offer the service equally, then finally, the concerns over privacy and transparency notifications. He invited feedback from the public about what issues or benefits, if any, are occurring so the Board may make an informed decision.

Ms. Sunkees inquired if the Board had received any complaints from consumers regarding AI-generated summaries. Ms. Fenner indicated that none had been received. When complaints are received about issues, then the Board gets an idea of what the issues are. This may be an area the Board needs to watch closely and be informed in case there is a need to act.

Ms. Tugade contended that complaints may not be coming in purely for the fact that consumers are unaware their data may be being used. She would support a motion to clarify consumer notice issues.

The Board directed Ms. Fenner to do additional research and bring information back to the Board.

Ms. Tugade called for public comment.

Heatherlynn Gonzalez expressed that court reporters must offer the same products to both sides to avoid neutrality issues. Ms. Pierce offered comments in agreement.

Ms. Wood indicated that some deposition firms are owned by attorneys who also offer litigation support, including proofs of service and legal work. They may be able to provide tailor-made summaries even though they are also running the firm. That would make it difficult for CSR-owned firms to compete. She believed there should be safeguards in place as to not use language-learning model AI in order to protect information.

13. FUTURE MEETING DATES

Ms. Tugade stated that staff would poll the Board members offline for calendar availability for the next meeting.

Ms. Tugade called for public comment. No comments were offered.

14. CLOSED SESSION

This item was deferred.

ADJOURNMENT

Ms. Tugade adjourned the meeting at 12:35 p.m.



DENISE TUGADE, Board Chair

10/17/2025
DATE



YVONNE K. FENNER, Executive Officer

10/17/2025
DATE