

NAME _____

Schedule G -- Business Positions
(SEE INSTRUCTIONS ON PRECEDING PAGE)

NAME OF ENTITY	ADDRESS OF ENTITY
DESCRIPTION OF BUSINESS ACTIVITY	YOUR JOB TITLE OR POSITION
POSITION HELD THROUGH ENTIRE REPORTING PERIOD? <input type="checkbox"/> YES <input type="checkbox"/> NO	IF NO PLEASE INDICATE: POSITION COMMENCED ON _____ POSITION TERMINATED ON _____
NAME OF ENTITY	ADDRESS OF ENTITY
DESCRIPTION OF BUSINESS ACTIVITY	YOUR JOB TITLE OR POSITION
POSITION HELD THROUGH ENTIRE REPORTING PERIOD? <input type="checkbox"/> YES <input type="checkbox"/> NO	IF NO PLEASE INDICATE: POSITION COMMENCED ON _____ POSITION TERMINATED ON _____
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NAME OF ENTITY	ADDRESS OF ENTITY
DESCRIPTION OF BUSINESS ACTIVITY	YOUR JOB TITLE OR POSITION
POSITION HELD THROUGH ENTIRE REPORTING PERIOD? <input type="checkbox"/> YES <input type="checkbox"/> NO	IF NO PLEASE INDICATE: POSITION COMMENCED ON _____ POSITION TERMINATED ON _____

If additional space is needed, check box and attach an additional Schedule G.

INFORMATION FOR COMPLETING SCHEDULE H-1-- Commission Income

BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT OF INTEREST CODE TO DETERMINE THE TYPES OF INCOME YOU MUST DISCLOSE.

Brokers, agents, or salespersons are required to disclose the names of sources of commission income if their pro rata share of the gross commission income amounts to \$10,000 or more from a single source. *No ownership interest in a business entity is necessary to require disclosure or disqualification under this provision.* "Commission income" means gross payments received as a result of services rendered as a broker, agent, or salesperson. Persons who must report commission income include: insurance brokers or agents, real estate brokers or agents, travel agents or salespersons, stockbrokers, and retail or wholesale salespersons. The "source" of commission income may be a client or customer or it may be a broker, a company or other business entity through which the goods or services were sold, or it may be both. (See example below.) NOTE: If you have reported yourself or your employer as a source of commission income on Schedule D, you are not required to itemize yourself or your employer as a source of income on Schedule H-1.

During the reporting period, did you or your spouse receive "commission income" for services rendered as a broker, agent, or salesperson?

NO --- You are not required to complete Schedule H-1.

YES --- You must provide the name of each individual or entity which:

- Is located in, or doing business in, your jurisdiction; and
- Was a source of income, provided that your pro rata share of such receipts was \$10,000 or more.

EXAMPLE, SCHEDULE H-1

Assume that:

- You are an agent for Smith and Jones Insurance Company. You sold a Businessmen's Insurance Company insurance policy to XYZ Company. You received commission income of \$15,000 from the transaction.
- Your spouse is a real estate broker for Goldwater Realty and received a commission of \$20,000 from the Grand Company.

You would:

- Report both XYZ Company and Businessmen's Insurance Company as sources of commission income because each was a source of \$10,000 or more. Smith and Jones is disclosed on Schedule D as a source of commission income, and on Schedule H-1 as the business entity through which you received the income.
- Report Grand Company, your spouse's client, because your community property share (50%) of the gross receipts amounted to \$10,000 and would meet the reporting threshold. You would also report your community property share of your spouse's income from Goldwater Realty on Schedule D as a source of income.

Schedule H-1 would be completed as follows:

NAME OF BUSINESS ENTITY Smith and Jones Insurance Company
NAMES OF SOURCES OF INCOME XYZ Company
Businessmen's Insurance Company
NAME OF BUSINESS ENTITY Goldwater Realty
NAMES OF SOURCES OF INCOME Grand Company

NAME _____

Schedule H

(SEE INSTRUCTIONS ON PRECEDING PAGES)

Schedule H-1

Commission Income Received By Brokers, Agents And Salespersons

NAME OF BUSINESS ENTITY	
NAMES OF SOURCES OF INCOME	

Schedule H-2

Income And Loans To A Business Entity Or Trust

NAME OF BUSINESS ENTITY OR TRUST	ADDRESS OF BUSINESS ENTITY OR TRUST
NATURE OF BUSINESS	
NAMES OF SOURCES OF INCOME AND LOANS TO THE BUSINESS ENTITY OR TRUST	

Schedule H-3

Income From Rental Property

You must disclose the name(s) of any renter(s) who made rent payments, provided that your pro rata share of such receipts from any one renter was \$10,000 or more.

ADDRESS OF RENTAL PROPERTY	CITY
NAMES OF RENTERS	
ADDRESS OF RENTAL PROPERTY	CITY
NAMES OF RENTERS	

If additional space is needed, check box and attach additional schedules.

**INFORMATION FOR COMPLETING SCHEDULES H-2 AND H-3 --
Income And Loans To Business Entities Or Trusts
And Income From Rental Property**

***BEFORE COMPLETING THIS SCHEDULE, CONSULT YOUR AGENCY'S CONFLICT
OF INTEREST CODE TO DETERMINE THE TYPES OF INCOME YOU MUST DISCLOSE.***

If, during the reporting period, you and your spouse owned an aggregate interest of 10% or more in any business entity (including rental property) or a trust, you must provide the name of each individual or entity which:

- Is located in, or is doing business in, your jurisdiction; and
- Was a source of income, including loans received or outstanding, to the business entity or trust, provided that your pro rata share of such payments or receipts was \$10,000 or more (Schedule H-2), or
- Made rent payments, provided that your pro rata share of such receipts was \$10,000 or more (Schedule H-3).

IMPORTANT: The requirement to report sources of income to a business entity or trust is determined by the location of the source of loan or income--not by the location of the business entity or trust which received the loan or income or by the location of the rental property.

If the business entity in which you have a 10% or greater interest is located in or doing business in your jurisdiction, it must also be reported on Schedule A and you may be required to complete Schedules C-1 and C-2. Your pro rata share of the gross income to the business entity must also be reported on Schedule D.

If the rental property in which you have a 10% or greater interest is located in your jurisdiction, it must also be reported on Schedule B. Your pro rata share of the gross rental income from the property must also be reported on Schedule D.

FPPC Regulation 18740 provides a procedure for obtaining an exemption from the disclosure requirement of clients' names which are legally recognized as privileged under California law. You may obtain a copy of Regulation 18740 by contacting the Fair Political Practices Commission.

NOTE: If your pro rata share of income or a loan to a business entity or trust is \$250 or more, you may be required to disqualify yourself from decisions affecting that source of income or loan, even though you are not required to report it.

EXAMPLE, SCHEDULE H-2

Assume that:

- During the reporting period, ABC Land Developers, in which you have a 50% partnership interest, received a loan from the Little Town Bank in the amount of \$30,000. The bank has a branch which is located in your jurisdiction.
- ABC Land Developers received a gross payment from John H. Brown, a customer, in the amount of \$15,000. Mr. Brown is doing business in your jurisdiction.
- Your spouse owns 100% of a law firm. A client paid your spouse \$20,000 during the reporting period. This client is doing business in your jurisdiction.

You would:

- Report the loan to ABC Land Developers from the Little Town Bank because your pro rata share (50%) of the \$30,000 loan is \$15,000 and meets the \$10,000 reporting threshold.
- Not report the name of John H. Brown, a customer, because your pro rata share (50%) of his \$15,000 gross payment is only \$7,500 and does not meet the \$10,000 reporting threshold. However, Mr. Brown is a source of income to you, and you may have to disqualify yourself from decisions affecting Mr. Brown.
- Report your spouse's law firm and its client because your pro rata share (50%) of the \$20,000 paid to the law firm is \$10,000 and meets the reporting threshold.

Schedule H-2 would be completed as follows:

NAME OF BUSINESS ENTITY OR TRUST ABC Land Developers	ADDRESS OF BUSINESS ENTITY OR TRUST 5744 Tenth Street, Little Town
NATURE OF BUSINESS, IF ANY Land Developers	
NAMES OF SOURCES OF INCOME AND LOANS TO THE BUSINESS ENTITY OR TRUST Little Town Bank	
NAME OF BUSINESS ENTITY OR TRUST Smith and Jones	ADDRESS OF BUSINESS ENTITY OR TRUST 1261 High Street, Little Town
NATURE OF BUSINESS, IF ANY Law Firm	
NAMES OF SOURCES OF INCOME AND LOANS TO THE BUSINESS ENTITY OR TRUST Joseph Brown and Associates	

EXAMPLE, SCHEDULE H-3

Assume that:

- You own 25% of a commercial building located in your jurisdiction from which rental income was received from a single tenant in the amount of \$40,000.

You would:

- Report the name of the rental tenant who provided payments in the amount of \$40,000 to the commercial building because your pro rata share (25% of the rental payments) is \$10,000 and would meet the reporting threshold.

Schedule H-3 would be completed as follows:

ADDRESS OF RENTAL PROPERTY 14738 Spruce Street	CITY Little Town
NAMES OF RENTERS Sylvan Taylor, M.D.	



TO: Library Board of Trustees
FROM: Elizabeth D. Minter, Library Director *edj*
DATE: February 16, 1993
SUBJECT: FY1992-1993 Budget

BACKGROUND:

Calleguas Lawsuit

Russ Behrens, an attorney representing the Calleguas Municipal Water District, reported on February 12, 1993, that the 2nd District Court of Appeals, 6th Division, Ventura County, has denied the petition filed by Calleguas Municipal Water District, and other Districts in Ventura County, challenging the constitutionality of the property tax shift legislation passed earlier this year. The Court of Appeals issued no written opinion, simply a denial. Behrens reported that the appeal to the California Supreme Court was being filed on February 12th. Altadena Library District has filed a letter of support of the lawsuit with the Court.

*Also Palos
Verdes.*

California Legislature

The Assembly Revenue and Taxation Committee and the Assembly Local Government Committee held a hearing on budget issues on February 10, 1993. Attachment A is a letter that was sent to each Committee member and the Assembly leadership. Attachment B is the testimony submitted by Palos Verdes Library District.

The Senate Local Government Committee, Chaired by Senator Marian Bergeson, will be having a hearing on budget issues on February 17, 1993. A letter to each Committee member and the Senate leadership is being prepared.

Establishment of Library Benefit Assessment Districts

PLEASC, Public Library Executives Association of Southern California, is having a meeting on February 26, 1993, to hear presentations about and discuss legislation being presented by Senator Roberti, Los Angeles County, and identified at the major issue for support this legislative session by the California Library Association (CLA), which will provide the authorization to establish library service districts and to levy library services assessments. Background materials, including a copy of the proposed legislation, for the PLEASC Meeting are Attachment C.

A copy of the CLA legislative issues is Attachment D.

Public Information Program

The revenue reduction brochure and bookmarks have been put out at the public service desks in the Library. Staff reports that there has been a lot of interest in these handouts. Information from the brochure has also been included in the Spring issue of the Placentia Quarterly, Attachment E.

Meeting with Senator Lewis

The Board's meeting with Senator John Lewis is scheduled for March 5, 1993, at 3:00 P.M. in Senator Lewis' Office in Orange. President Dinsmore, Trustee Shkoler and Library Director Minter are scheduled to attend.

Lobbyist

Buena Park and Palos Verdes Library Districts are willing to join Placentia in hiring a lobbyist to represent our mutual needs to the California Legislature this session. Altadena is interested but has not yet decided to commit their money.

A meeting of the Library Directors and no more than two trustees from each District has been set for February 18, 1993, at 2:00 P.M. at the Buena Park Library District Office.

At this time available lobbyists will be discussed so that a recommendation for selection can be made. It looks as if Placentia Library District will be the coordinating agency for this project.

Background Information

The February, 1993, California Special District Association (CSDA) newsletter contains several articles which provide historical and factual perspectives on the current budget and legal issues, Attachment F.

The January, 1993, California Special District Financial Information Service Outlook is Attachment G.

The editorial from the January, 1993, issue of *Library Journal* is Attachment H.

RECOMMENDATIONS:

Give direction on future activities.

PLACENTIA LIBRARY DISTRICT



411 East Chapman Avenue

Placentia, California 92670

(714) 528-1906

February 8, 1993

The Honorable Johan Klehs, Chair.
Assembly Revenue and Taxation Committee
2013 Capitol Building
Sacramento, CA 95814

Dear Chairman Klehs:

SUBJECT: Testimony for Assembly Local Government Committee and Assembly Revenue and Taxation Committee Joint Hearing on February 10, 1993

ABOLISH AB8 BEFORE ENACTING ANY FURTHER REDUCTIONS IN PRE-PROP 13 PROPERTY TAX PERCENTAGES FOR NON-ENTERPRISE INDEPENDENT SPECIAL DISTRICTS.

Placentia Library District in Orange County has adopted this as its "first choice" legislative solution to the State's budget crisis for several reasons:

More than 20% of California's special districts were exempted from the 1992-1993 revenue reductions mandated by the Legislature because those districts serve more than one county or meet other exclusionary criteria. *Not all non-enterprise independent special districts were treated the same by the 1992-1993 Budget bills.*

The 1992-1993 Budget legislation assumed that Placentia Library District is receiving all or part of its \$400,947 contribution to the Special District Augmentation Fund in Orange County, when, in fact, the Orange County Supervisors have allocated \$0.00 to the District for the past 4 years.

Because it has been receiving no Special District Augmentation Funds for the past 4 years, Placentia Library District has been operating 100% under the restrictions of Prop 13. *The 1992-1993 revenue reduction enacted by the Legislature reduced the District's property tax percentage below its pre-Prop 13 level when it did not impose the same reduction on all other special districts.*

Abolishing AB8 places all local government agencies back on an equal Pre-Prop 13 property tax percentage basis.

Placentia Library District, February 8, 1993, Page 2.

THE "SUPERPOT" IDEA WILL WORK ONLY IF BOARDS OF COUNTY SUPERVISORS ARE REQUIRED TO PASS THROUGH FUNDS TO THE INDEPENDENT NON-ENTERPRISE SPECIAL DISTRICTS.

The current structure of the Special District Augmentation Fund will not work because the Boards of County Supervisors have discretion over the distribution of the funds and have systematically created their own dependent "Special Districts" and denied funding to the independent special districts.

CREATE THE AUTHORITY FOR LOCAL GOVERNMENTS, INCLUDING INDEPENDENT SPECIAL LIBRARY DISTRICTS, TO ESTABLISH SPECIAL ASSESSMENT DISTRICTS FOR PUBLIC LIBRARY SERVICES.

This will enable voters the opportunity to fund local services at a higher level if they are willing to enact a special assessment.

If you would like additional information about the services of the Placentia Library District, or background on its legislative positions, please give me a call at 714-528-1925.

Yours truly,



Elizabeth D. Minter
Library Director



Palos Verdes Library District

650 Deep Valley Drive, Palos Verdes Peninsula, California 90274-3662
(310) 541-2559 or 377-9584 FAX (310) 541-6807

Linda P. Elliott, Director

February 9, 1993

The Honorable Sam Farr, Chair
Assembly Local Government Committee
State Capitol
Sacramento, CA 95814

Dear Chairman Farr and Members of the Local Government Committee:

As I am unable to attend the Joint Committee hearing regarding the Governor's 1993-94 Budget scheduled for February 10, 1993, I am submitting written testimony for your consideration.

My concerns focus on the continuation of public library services in California and, in particular, the existence and services of the Palos Verdes Library District, an independent special district.

DISTRICT BACKGROUND AND FUNDING

The Palos Verdes Library District was formed by a vote of the people in 1928. The service area encompasses four cities. The District is governed by an elected Board of Library Trustees, of which I serve as president. Local property taxes, voted by the people, provide 92% of District funding. The remaining minor sources of income are funds from the State Library, monies collected from library fines and fees (restricted by law), and gifts from the community.

There are approximately 157 public library jurisdictions in California which are funded through cities and counties. The fiscal conditions facing cities and counties have forced them to reduced funding for library services. California's eight independent special library districts are directly dependent on property taxes and do not have alternative revenue options for replacing property taxes lost through tax shifts imposed by the State.

1992-93 REVENUE LOSS

As a result of the State's 1992-93 budget solution, Palos Verdes Library District revenues were reduced by \$347,000 (10% of total District revenues based on the 1989-90 budget year). This loss, coupled with a decrease in the Special District Augmentation Fund allocation from the County Board of Supervisors, has forced the Board of Trustees to initiate a hiring freeze, which has resulted in staff reductions; eliminate planned capital expenditures, including deferred maintenance projects; reduce the budget for library materials by 25% (books, magazine subscriptions, books-on-cassette, etc.); and revise the fine and fee schedule to enhance revenues as much as possible while maintaining free and open access to basic library services.

IMPACT OF 1993-94 PROPOSED REVENUE REDUCTION

The Governor's 1993-94 Budget proposes to further reduce special district revenues through an additional property tax shift. If the proposed shift were to equate to a reversal of the AB8 bailout, and if the current 10% shift were calculated as a part of the AB8 reversal, the Palos Verdes Library District would stand to lose an additional \$432,000 annually. This would bring the total District loss from the property tax shift to approximately 19% of total revenues. If the 1992-93 shift were not calculated as part of an AB8 reversal, the District's total revenue loss would equal 28%.

The loss would be even greater if the Special District Augmentation Fund mechanism were also left in place, requiring the District to continue to pay into the fund, which would be unlikely to yield any future return. Therefore, the District would lose any allocation plus its contribution. This scenario jumps the projected revenue loss for 1993-94 to over 40% of total District revenues.

Any revenue loss beyond the current year tax shift will impact public access to library services and materials. A loss with the magnitude of the AB8 reversal would result in severe service reductions. Further cuts would be made in the library materials budget, library hours would be reduced, additional staff would be laid off, and branches would be closed.

CONSIDERATIONS FOR COMMITTEE MEMBERS

As you process the information you receive and deliberate over solutions to the coming budget problems, please consider the following points:

- Look at the multi-year, cumulative impact of revenue reductions, taking into account monies lost in 1992-93 along with proposals for 1993-94.
- If the full AB8 reversal is to be implemented, do not require continued payment to the Special District Augmentation Fund, which was established as an element in the AB8 bailout mechanism.
- If local government revenues are to be shifted to schools, in addition to the 1992-93 shift, determine a formula which applies fairly to all; do not use the "superpot" mechanism which places an undue burden on independent special districts which are dependent on property taxes for their revenues.
- Uphold the principle of local control which the independent special districts represent. The people served by these districts voted to establish the local jurisdictions to obtain services responsive to local needs. In the case of the independent special library districts, the people also voted to pay for these services through local property taxes levied in direct support of their libraries. Undermining the fiscal viability of the independent special districts undermines local control.

Agenda Item 26
Attachment B
Page 3

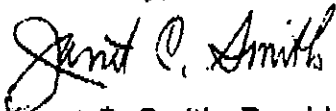
• Support viable alternative revenue sources for those local jurisdictions without options for property tax revenue replacement. The California Library Association is co-sponsoring a bill which would authorize local jurisdictions to establish benefit assessment districts for library services. This would enable communities to provide financial support for their libraries. Assessment revenues would backfill the tax shift loss.

MAINTAIN LIBRARY SERVICES

The importance of free public libraries cannot be overstated. Libraries serve all elements of society, facilitating personal development, job retraining, and social change. In times of financial uncertainty, libraries become even more vital. In California, the public libraries are also an integral part of the educational infrastructure, the service which the tax shift is supporting.

Thank you for the opportunity to give input to the process and to present this material for your consideration.

Yours truly,



Janet C. Smith, President
Board of Library Trustees

OVERVIEW

Cuts to local government could not be avoided in bridging the severe state General Fund shortfall. The state has historically provided funding to local government through a variety of means. Some sources, such as property tax and the local share of the Vehicle License Fee, are general revenues available for any local purpose. Other sources are restricted in how they can be used, such as the local share of gasoline taxes and the sales tax on gasoline, which must be used for local transportation purposes.

Still others, such as redevelopment tax increment funds, are general funds that have been shifted from cities, counties, special districts and schools to redevelopment areas and earmarked for a specific purpose, in this case the provision of infrastructure and other improvements in blighted areas. By earmarking the funds for exclusive use by redevelopment agencies, other local agencies such as cities, counties, schools, and special districts, have their revenues reduced.

The local finance portion of the budget passed by the Senate includes AB 979, the budget bill, and SB 617 and SB 844, trailer bills that make changes in state laws to conform to the budget. The budget passed by the Legislature made major changes in the following areas of local government finance:

- Local Government Property Tax Reductions
- Vehicle License Fees
- Cigarette Tax Revenues

The state budget revises property tax allocations by shifting a portion of county, city, redevelopment, and special district property tax revenue to schools. The total shift in local property tax revenues in the budget is \$1.3 billion. The budget also shifts \$100 million in Vehicle License Fee (VLF) revenue to cities and counties, offset by shifting \$100 million in property taxes to schools and community colleges, and shifts \$25 million in cigarette tax revenues from cities to the state General Fund. In addition, other measures would make a number of mandated programs optional for 1992-93.

LOCAL GOVERNMENT PROPERTY TAX REDUCTIONS

Proposition 13 limited local property taxes to 1% and directed the Legislature to apportion the resulting revenue. In 1979, AB 8 created the existing property tax allocation system. Although complex, current law generally allows local agencies to get the same percentage of property tax that they received before Proposition 13. AB 8 also shifted some school district property tax revenue to cities, counties, and special districts. The state makes up the shortfall to schools from the General Fund.

Counties

The budget shifts a portion of each county's property tax to school districts. Property tax makes up about 65% of total discretionary county revenue. The Hill-Isenberg/conference committee proposal recommended cutting counties by \$740 million to fund this shift, while the governor recommended \$475 million.

As finally enacted, the budget shifts \$525 million. Statewide, this is a reduction of county property tax revenues of 8.4%. A total of \$5 million is available to offset cuts to counties with federally-declared disasters.

Cities

The budget shifts a portion of each city's property tax to school districts. Property tax is about 25% of total discretionary city revenue. The Hill-Isenberg/conference committee recommendation was to cut cities by \$160 million. The governor recommended a \$200 million cut.

As finally enacted, the budget shifts \$200 million from cities. Each city loses 9% of its property tax revenues. However, in 1992-93 and 1993-94, cities with federally-declared disasters lose less money. The total cost of these lowered reductions would be \$15 million. In addition, 4 charter cities with ports can tap into some of their "discretionary reserves" to pay for city services. A fifth port, San Diego, may provide similar support by mutual agreement with 5 adjacent cities.

Redevelopment

The budget transfers \$200 million from redevelopment agencies to schools. The Hill-Isenberg/conference committee recommendation was for a \$350 million transfer. The governor recommended a \$100 million shift.

Under the budget as enacted, each redevelopment agency must transfer its share of the \$200 million to a county-wide educational revenue augmentation fund. The city council or board of supervisors must make up any shortfall in redevelopment funds to ensure that the school transfer is fully realized..

Special Districts

The budget shifts a portion of each special district's property tax to school districts. The Hill-Isenberg/conference committee recommended a \$470 million shift. The governor proposed \$275 million.

As finally enacted, the budget shifts \$375 million from special districts to schools. A district would lose up to 35% of its property tax, but no more than 10% of its total revenue. If the 35/10 formula proves insufficient to raise the full \$375 million in general fund savings, the director of Finance can raise the formula up to 40% of property tax revenues. Hospital, city, and multi-county districts are exempt. Cuts to water wholesale districts are limited to 10% of their property tax revenues. Small fire districts, and those providing services to "state responsibility areas" with critical watershed lands are protected against excessive losses.

A district with a high dependence on property tax (a park, fire, or library district) would lose 10% of its revenue. A district with a low dependence on property tax (a retail water or sewer district) will lose a larger amount of its property tax, but no more than 10% of its total revenue.

**LOCAL GOVERNMENT PROPERTY TAX
1992-93 ESTIMATE
(Millions)**

	Total Prop. Tax	AB 8 Bailout	Adopted Budget Reduction	Reduction % of total Prop. Tax
COUNTIES	\$6,239	\$1,233	\$ 525	8.4%
CITIES	\$2,371	\$ 914	\$ 400*	16.9%
SPECIAL DISTRICTS	\$1,671	\$ 716	\$ 375	22.4%
TOTAL	\$10,281	\$2,863	\$1,300	12.6%

* \$200 million may come from redevelopment tax increment or local property tax.

VEHICLE LICENSE FEES

The state charges a fee for the issuance of motor vehicle licenses. Historically, all revenues (minus the State Department of Motor Vehicle's administrative costs) have gone to cities and counties. About 75 percent of the proceeds from the Vehicle License Fee have been divided equally between cities and counties; each half of the proceeds is distributed on a per capita basis.

Vehicle License Fees on trailer coaches and manufactured home license fees have traditionally been allocated to cities, counties, and school districts based on the location of the coach or home.

The state budget changes the allocation of the VLF for the 1992-93 budget year to compensate for a shift in property tax allocations from cities and counties to a newly-created Educational Revenue Augmentation Fund. Under this approach, \$100 million in local property tax allocations are shifted to compensate for reduced state general fund support for schools. This property tax loss is offset to cities and counties by reducing the VLF share of DMV's budgeted administrative costs by \$100 million, thus increasing the amount of VLF available for distribution to cities and counties. This shift-and-replacement is known as the "VLF roundabout." This shift occurs only for 1992-93.

DRAFT #3

Agenda Item 26
Attachment C
Page 4

CHANGE IN LOCAL AGENCIES AUTHORITY
GOVERNMENT CODE DIVISION 2 OF TITLE 5
REVENUE AND TAXATION CODE DIVISION 1

SECTION 1. Chapter 7 is hereby added to Part 1 of Division 2 of Title 5 of the Government Code and shall read as follows:

CHAPTER 7 LIBRARY SERVICES ASSESSMENTS

ARTICLE 1
General Provisions

Section 54800 Legislative findings and declarations

The Legislature finds and declares that it is in the interest of the public that there be public libraries; that public libraries are necessary to reduce illiteracy, supplement the formal system of public education and provide after-school opportunities for children and adolescents, provide a resource for lifelong learning, foster cultural diversity, promote economic growth and improve the conduct of business and the development of research.

The Legislature also finds and declares that it is in the public interest to allow local agencies to finance public library services through the imposition of an assessment upon the property which benefits from those services.

The Legislature further finds and declares that assessments imposed for the purpose of providing library services benefit individual properties and are not taxes for the general benefit of the governmental entity, but are assessments for services which confer special benefits upon the properties to which the services are provided.

Section 54801 Authorization to establish district and levy library services assessments

Any local agency which provides public library services, including but not limited to county free library services, may, by ordinance or resolution adopted after notice and hearing, establish an assessment district and determine and levy an annual assessment for library services and facilities pursuant to this chapter. The local agency may provide such services directly or by contract with the state or a local agency or by a contract provider.

The assessment may be made for the purpose of acquiring, constructing, furnishing, equipping, operating and maintaining the real property, buildings, equipment, vehicles and other facilities necessary in the provision of library services; for the purpose of providing collection development and maintenance, lending services, information services and programs and administration necessary in

electronic access and other special service programs; provision of information, recreation and lifelong learning of all persons; and administrative and indirect costs of providing such services.

(e) "Revenues" means (i) the proceeds of any assessment levied pursuant to this chapter, and (ii) the fees, charges, and other revenues of the local agency derived from library services or facilities.

Section 54803 Ordinance or resolution; assessment apportionment

(a) The ordinance or resolution to form the assessment district and to determine and levy the initial annual assessment shall establish a method for apportioning the annual assessment among the properties within the assessment district on the basis of the benefit derived from individual parcels or classes of property.

(b) Determinations of benefit may be based on the use of the property, class of improvement of property, structure size or property size, distance from library services and facilities, and other factors relative to making library services available to the property.

(c) The ordinance or resolution shall also do all of the following:

(1) establish the boundaries and designation of the assessment district and any zones or areas of benefit within the assessment district;

(2) describe each lot or parcel of property proposed to be subject to the assessment;

(3) establish the amount of the assessment for each lot or parcel for the initial fiscal year;

(4) establish the maximum aggregate amount of the annual assessment and the method of providing an automatic adjustment, if any, to the assessment or to the maximum assessment;

territorial jurisdiction of any city without the consent of the governing body of the city.

Section 54806

Prohibition of review, approval or disapproval by LAFCO

Notwithstanding any provision of Part 1 (commencing with Section 56000) of Division 3, a local agency formation commission shall have no power or duty to review and approve or disapprove creation of an assessment district under this chapter.

Section 54807

Applicability of California Environmental Quality Act

Any action taken by a local agency hereunder with respect to formation of an assessment district or the issuance of bonds shall not be subject to compliance with the California Environmental Quality Act, constituting Division 13 (commencing with Section 21000) of the Public Resources Code.

Section 54808

Special Assessment Investigation, Limitation and Majority Protest Act of 1931

An assessment levied pursuant to this chapter is not subject to the Special Assessment Investigation, Limitation and Majority Protest Act of 1931 (Division 4 (commencing with Section 2800) of the Streets and Highways Code).

Section 54809

Alternative authority and procedure; other charges; construction of chapter; severability

This chapter provides an alternative authority and procedure for the subject to which it relates but does not affect any other law relating to the same or a similar subject. When proceeding under this chapter, its provisions only need be followed.

This chapter does not limit or prohibit the levy or collection of any other fee, charge, assessment, or tax for library services or facilities authorized by any other provision of law.

This chapter and all of its provisions shall be liberally construed in order to effectuate its purposes. No error, irregularity or informality, and no neglect or omission of any officer, in any

obligated to pay the proposed assessment, may make written protest against the proposed assessment. The protest shall be in writing, shall contain a description of the property and the interest in the property which each signer of the protest represents, sufficient to identify the property, and, if the signers are not shown on the last equalized assessment roll as the owners of the property, shall contain or be accompanied by written evidence that the signers are the holders of the property interest proposed to be charged and who will be obligated to pay the proposed charge. All protests shall be delivered to the clerk or secretary of the local agency and for the purposes of Section 54814 no other protests or objections shall be considered.

Section 54812 Hearing; withdrawal of protest

(a) At the time, date and place stated in the notice given under Section 54810 the legislative body shall hear and consider all objections or protests, if any, to the ordinance or resolution referred to in the notice and shall also hear and determine all protests as provided in Section 54814. The legislative body may continue the hearing from time to time.

(b) Any written protest may be withdrawn, in writing, by the person who made the protest at any time prior to the conclusion of the hearing or any adjournment of the hearing.

Section 54813 Changes to ordinance or resolution

During the course of or upon the conclusion of the hearing, the legislative body may order changes in the resolution or ordinance, which changes do not increase any assessment, except that the legislative body may order the inclusion of additional territory within the assessment district upon the written request of a property owner or upon the giving of mailed notice of hearing to owners of property proposed to be added to the assessment district.

Section 54814 Determination of percentage of protest

(a) Upon the conclusion of the hearing pursuant to Section 54812, the legislative body shall determine the percent of protests made. For that purpose, the territory of the assessment district

found by the legislative body to be less than ten percent of the total proposed annual assessment, the legislative body may, at any time after conclusion of the hearing, by ordinance or resolution, establish the assessment district and adopt or reduce each or any assessment.

(b) If the proposal has been approved by a majority of the voters of the local agency, zone or area of benefit, the legislative body may, at any time after the canvass of returns, by ordinance or resolution establish the assessment district and adopt or reduce each or any assessment.

(c) The legislative body shall make a determination upon each assessment. The adoption of the ordinance or resolution shall constitute the levy of the initial annual assessment.

(d) The legislative body may annually thereafter determine the cost of the services which are financed by the assessment and, by ordinance or resolution, after notice and hearing as provided in Sections 54819 and 54820, determine and impose the assessment.

Section 54817 Election costs

The local agency shall pay the county for costs, if any, incurred by the county in conducting the election. An election called by a legislative body pursuant to this chapter is subject to all provisions of the Elections Code applicable to elections called by the local agency.

Section 54818 Amendment of adopted ordinance or resolution

After adoption, any ordinance or resolution adopted pursuant to this section may be amended by the legislative body following notice and a hearing. Notwithstanding the provisions of Section 54954.6(c), if such amendment shall not increase any assessment, notice of the hearing thereon shall be given as provided in Section 54810(a). For any amendment that shall increase any or all assessments, notice shall also be given as provided in Section 54810(b).

assessment in the same manner, and subject to the same penalties as, other fees, charges and taxes fixed and collected by, or on behalf of, the local agency. If the assessments are collected by the county, the county may deduct its costs incurred for that service before remittal of the balance to the local agency's treasury.

Section 54822 Recordation of notice and map

Following adoption of the ordinance or resolution, the clerk or secretary of the local agency shall record a notice and map describing the assessment district pursuant to Section 3100 et seq. of the Streets and Highways Code.

Section 54823 Validity of proceedings

The failure of any person to receive a notice, resolution, order or any other matter shall not affect in any way whatsoever the validity of any proceedings taken under this chapter or prevent the legislative body from proceeding with any hearing so noticed.

Section 54824 Actions or proceedings to challenge ordinance or resolution; limitations; appeal

(a) Chapter 9 (commencing with Section 860) of Title 10 of Part 2 of the Code of Civil Procedure applies to any judicial action or proceeding brought by the legislative body to determine the validity of any ordinance or resolution adopted under this chapter, or modifying or amending an existing ordinance or resolution.

(b) Except as provided in subdivision (a) of this section, the validity of the formation of an assessment district, or an assessment levied, under this chapter shall not be contested, questioned or challenged in any action or proceeding unless the action or proceeding is commenced within 30 days after the district is formed or the assessment is levied, as the case may be, and in case such action or proceeding is not brought within that period, then thereafter all persons whatsoever shall be barred in any action, suit or proceeding from pleading, asserting or claiming that the assessment is invalid or that any of the proceedings or other actions herein specified, were defective, faulty or invalid in any respect.

(c) All bonds issued pursuant to this article shall be limited obligations of the local agency, payable only from the revenues specified in the resolution initiating issuance proceedings; provided, that if such funds are insufficient for the payment of principal and interest, the local agency may, at its discretion, make such payments from any other funds or revenues that may legally be applied to their payment. By resolution, the legislative body may pledge, place a charge upon, and assign all or any part of the revenues for the security of the bonds. All revenues which have been pledged to the payment of the bonds and interest earned thereon constitute a trust fund for the security and payment of the interest on and principal of the bonds.

(d) The bonds shall bear interest at a rate or rates not exceeding the maximum rate authorized by Section 53531, may be payable at the time or times, may be issued in one or more series, may bear a date or dates, may mature at a time or times not exceeding 31 years from their respective dates, may be payable in the medium of payment at a place or places, may carry the registration privileges, may be subject to the terms of redemption and the premiums, may be executed and sold in the manner, may contain those terms, covenants and conditions, and may be in the form as the resolution authorizing issuance may provide. The bonds may be sold at public or private sale in the manner and upon the terms as may be provided in the resolution authorizing issuance.

(e) Bonds of the same issue shall be equally and ratably secured by the pledge, lien and charge on the revenues specified in the resolution authorizing the issuance of the bonds, without priority for date, number, or time of sale, execution or delivery; except that any local agency may authorize the issuance of bonds of different series and may provide that the bonds in any series shall, to the extent and in the manner prescribed in the resolution authorizing issuance, be subordinated and be junior in standing, with respect to the payment of principal and interest and the security thereof, to such other bonds as may be specified in the resolution.

Section 54827

Nature of local agency obligation with respect to bonds

The general fund of a local agency is not liable for the

(iii) Events of default and terms upon which the bonds may be declared due before maturity and the terms upon which the declaration and its consequences may be waived.

(iv) The rights, liabilities, powers, and duties arising upon the local agency's breach of any covenants, conditions or obligations.

(v) The vesting in a trustee of the right to enforce covenants to secure payment of, or in relation to, the bonds and the trustee's powers and duties, and the limitation of the trustee's liabilities.

(vi) The terms upon which the bond owners or any percentage of them may enforce covenants or duties of the local agency with respect to the bonds.

(vii) A procedure for amending or abrogating the terms of the resolution with the consent of the owners of a specified number of the bonds. Such procedure may also provide for meetings of bond owners or for their written assent without a meeting and the manner of consenting, with or without a meeting.

(viii) Any other acts and things necessary, convenient or desirable to secure the bonds or tending to make them more marketable.

(c) The resolution shall specifically state the effect of amendment upon the rights of the owners of all of the bonds and shall be binding upon the owners of all of the bonds issued pursuant to the resolution.

Section 54830

General bond provisions

(a) A separate, distinct and special fund shall be created at or before the issuance of the bonds, which shall be maintained continuously during the time that any of the bonds or the interest thereon are outstanding and unpaid. The pledged revenues shall be deposited in the special fund to the extent necessary to pay the principal of the bonds and the interest thereon. All pledged revenues deposited in the special fund shall be held in trust for the benefit of the owners of the bonds and shall be applied in

1, ~~or~~ Article 16 (commencing with Section 53970) of Chapter 4 of Part 1 of Division 2, or Chapter 7 (commencing with Section 54800) of Part 1 of Division 2 of Title 5 of the Government Code.

SECTION 3. This act is an urgency statute necessary for the immediate preservation of the public peace, health, or safety within the meaning of Article IV of the California Constitution and shall go into immediate effect. The facts constituting the necessity are:

In order to prevent an immediate shortage of funds necessary to fund current expenses and operations of public library services and facilities throughout the state, it is necessary that this act take effect immediately.

JAF:jf:sh
leg-120

January 28, 1993

TO: ALL COOPERATIVE LIBRARY SYSTEMS FOR FORWARDING
TO MEMBER LIBRARIES AND CLA LEGISLATIVE CONTACTS

FROM: Mike Dillon, Lobbyist
California Library Association

RE: LEGISLATIVE ISSUES

I. BENEFIT ASSESSMENT LEGISLATION

Senate President Pro Tem David Roberti has agreed to author the Benefit Assessment legislation, co-sponsored by L.A. County and the California Library Association. The proposal is currently being drafted by the Legislative Counsel's Office and will be introduced shortly. We will let you know as soon as the bill has been put across the senate desk and assigned a number. In the next on-tyme we will provide you with the details of the Benefit Assessment legislation, which may ultimately be of benefit to city, county, and special district libraries.

II. BOND PROPOSALS - PUBLIC LIBRARIES

Assemblywoman Deda Alpert, San Diego, has introduced AB 61, a \$300 million library bond proposal. The language is virtually identical to Senator Keene's proposal of last session, which failed to pass the Assembly along with numerous other bond proposals.

On the senate side, Senator Milton Marks of San Francisco will also be introducing a bond bill. Senator Marks' staff has informed CLA that they intend to introduce a measure in the amount of \$350 million. This bill will also be patterned after Senator Keene's legislation. (Note: In case our readers have forgotten Senator Keene resigned his senate seat in December.)

III. BOND PROPOSAL - HIGHER EDUCATION FACILITIES

Assemblyman Rusty Areias has introduced AB 163 which would enact the Higher Education Expansion Bond Act of 1994 and, if approved by the Legislature, would be submitted to the voters at the November, 1994 general election. AB 163 would provide bonds in the amount of \$1 billion for the acquisition of new campus sites, the construction of new buildings, classrooms, laboratories, libraries, and related facilities for the University of California, the California State University, and California Community Colleges.

IV. COUNTY FREE LIBRARY LEGISLATION

Senator Quentin Kopp, who represents parts of San Francisco and San Mateo Counties, has tentatively agreed to author CLA's

Agenda Item 26
Attachment D
Page 2

legislation which would clarify that county free libraries are special districts for tax purposes. The need for the legislative change arose from a Sacramento County Counsel's Opinion dated April 19, 1992. That opinion questions the special district status of county free libraries. The loss of special district status would make county free libraries ineligible for an important local property tax distribution. Paul Smith, Attorney for the State Library, has provided CLA with the clarifying legislation. Senator Kopp has submitted the draft language to the Legislative Counsel's office, who will put the language in bill form.

V. SENATE PROPERTY TAX SHIFT HEARING

Recently Senator Marian Bergeson, Chair of the Senate Local Government Committee, sent a letter to a number of city, county, and special district associations impacted by the \$2.6 billion property tax shift from local government to schools proposed in the Governor's budget. Senator Bergeson's letter, in part, states, "Because I assume that the final state budget will require us to shift substantial amounts of local property tax revenues to schools, it will not be productive to take the committee's time bemoaning that issue. What is more important is your advice on what legislators can do in exchange."

Senator Bergeson states that she is especially interested in getting ideas about how the Legislature can reform the state governments relationship with local agencies. Senator Bergeson would like us to respond and make suggestions regarding 1) contracting out, 2) reducing specific state mandates, and 3) making it easier to leverage from federal grants and loans. CLA has asked for, and been granted permission to testify at the hearing.

VI. ASSEMBLY LOCAL GOVERNMENT AND REVENUE AND TAXATION COMMITTEE HEARING

Assemblyman Sam Farr, Chair of the Assembly Local Government Committee, and Assemblyman Johan Klehs, Chair of the Assembly Revenue and Taxation Committee, have announced that they will hold their own hearing on the impact of the \$2.6 billion property tax shift. The hearing is scheduled in Sacramento, in Room 4202, from 1:30 p.m. - 5:00 p.m. on February 10. The tentative agenda calls for an overview by state officials from the Governor's office, Legislative Analyst, and others, followed by panel discussions by representatives of local government and business. CLA has been invited to testify.

PLACENTIA LIBRARY DISTRICT NEWSLETTER

Placentia Library lost

\$127,967

and it may be more tomorrow . . .

The District's revenue loss of \$127,967 is based upon 10% of the District's total revenue, regardless of its source:

- ➔ 10% of the property tax
- ➔ 10% of the gifts received from individuals
- ➔ 10% of the fines, fees, and rentals
- ➔ 10% of the literacy grant
- ➔ 10% of the fees for children's arts and crafts programs

The 1992-1993 State Budget Isn't Equitable

- ➔ More than 20% of California's special districts have been exempted by the Legislature from the revenue reduction provisions of the 1992-1993 State Budget because they serve more than one county or meet other exclusionary criteria.

Not all independent special districts are being treated the same by the Budget Legislation.

- ➔ The Budget Legislation assumes that Placentia Library District is receiving all or part of its \$400,947 contribution to the Special District Augmentation Fund, when, in fact, the Orange County Supervisors have allocated \$0.00.
- ➔ Because it has been receiving no Special District Augmentation Funds for the past three years, Placentia Library District has been operating 100% under the restrictions of Proposition 13.

The Budget Legislation reduces Placentia Library District's property tax percentage below pre-Proposition 13 levels when it doesn't impose the same reductions on all other special districts.

If you are concerned about the impact of the State Budget on your services at Placentia Library District, and/or if you would like to help, please ask for more information at any of the Library Desks or call (714) 528-1925.

"Libraries Change Lives"

National Library Week Writing Competition

Placentia Library District is sponsoring a writing competition on the theme "How the Library Changed My Life."

Submissions may be in the form of essays, poetry, short stories, plays or other forms of written expression, as long as the work pertains to the competition theme and is the original work of the entrant.

Entry forms and competition rules will be available in the Library beginning February 16, 1993.

Entries may be submitted between February 16 and March 31, 1993.

Winners will be announced and prizes awarded at a recognition ceremony on Tuesday April 20, 1993.

Individuals fitting one of the categories listed below are invited to participate:

Students in 4th through 7th grades

Students in 8th through 12th grades

Adults

Adult literacy students - Basic Reading

Adult literacy students - English as a Second Language

"Libraries Change Lives" is the National Library Week theme selected by the American Library Association for 1993 and 1994. Placentia Library District is sponsoring the writing competition so that library patrons may share their success stories and celebrate National Library Week in a personally meaningful way.

All entries will be submitted to the national competition where three will be selected to receive a trip for two to the 1993 American Library Association Annual Conference in New Orleans where they will be honored at the opening General Session.

For more information, pick up a copy of the competition entry form and rules at the Placentia Library Reference Desk starting February 16, 1993 or call Suad Ammar, or Melanie Daniels at (714) 528-1906.

**It's small enough to fit in your wallet...
powerful enough to change your life!**

It's a library card

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PLACENTIA LIBRARY DISTRICT
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Monday - Thursday 10:00 AM - 8:45 PM
Friday - Saturday 10:00 AM - 5:45 PM
Sunday 1:00 PM - 4:45 PM

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CSDA NEWS

VOLUME 9, NUMBER 2

FEBRUARY 1993

CALIFORNIA SPECIAL DISTRICTS ASSOCIATION



Legal Actions on Property Tax Shift

THIS ISSUE OF CSDA NEWS highlights current actions taking place in response to the 1992-93 property tax shift. All indications show that 1993 is not going to be an easy legislative year for California's special districts. CSDA will keep you updated on all State budget efforts in the Capitol, in the courts and in the media. Special Districts need to be informed and prepared as we enter back into another State Budget battle.

"This petition/complaint challenges the constitutionality of Senate Bills 844 and 617, which were enacted in September 1992 by the California Legislature to provide funds to balance the State Budget and allow for its implementation."

These words are in the opening paragraph of a petition filed in the California Supreme Court on behalf of local agencies in Ventura County, residents and a taxpayers association.

California special districts have prepared themselves to receive the financial blow of the legislative activities reflected in the State budget battle in 1992. However, these parties are fighting the actions in the courts. On December 10, 1992, this petition was filed to request the Supreme Court to "assume original jurisdiction; to declare the recent tax shift legislation unconstitutional, and to issue of writ of mandate directing the County Auditor of Ventura County to refrain from applying the tax shift legislation in allocating the property tax revenue currently being received."

Ventura County Taxpayers Association et al. v. Norman R. Hawkes (Civil No. S-030172) addresses the legality of SB 844 and

SB 617, the legislative bills which were passed in September 1992.

The primary arguments cited by the districts in challenging SB 844 and SB 617 are:

- The legislation violates Article 13, Section 24 of the State Constitution which prohibits the Legislature from imposing taxes for local purposes;
- The legislation violates the provision of Article 13A, Section 4 of the State Constitution in that it constitutes a special tax without a two-thirds vote of the people;
- The legislation violates Article 13B, Section 6 of the State Constitution in that it imposes a state mandated cost on local government without provision for state subventions to reimburse those agencies;
- The legislation violates the purpose and intent of Proposition 13 of providing effective tax relief and certainty in taxation, and thus constitutes a fraud and subterfuge on the taxpayers;
- The legislation violates Article 16, Section 6 of the California Constitution which expressly prohibits the Legislature from making or authorizing any gift of public funds to a private party or to another public entity, and prohibits the transfer of public funds collected for one local government entity to another governmental entity for a purpose unrelated to the transferring entity.

The first task is to have the

California State Supreme Court take jurisdiction over the case. The Court has the authority to send it to a lower court prior to hearing the case. This will slow down the process during a period when the State Legislature is looking at transferring additional funds away from special districts.

As asked by the plaintiff agencies, CSDA has written a letter respectfully requesting the Court to assume jurisdiction in this case. Executive Director David Nagler wrote, "...CSDA recognizes the enormous confusion which will exist this year as the Legislature grapples with yet another budget shortfall should the Supreme Court not act quickly in this case. A cloud will hand over all legislative debate, potentially crippling everyone's ability to look to the future."

CSDA will not be taking a position on the merits of the suit

itself since this is a function which should be left up to local districts.

Questions about the suit may be directed to the Law Firm functioning on behalf of these districts, McCormick, Kidman, Behrens & Holzwarth. The lead attorney is Arthur Kidman at (714) 755-3100.

Petitioners in the suit include: Ventura County Taxpayers Association, Donald R. Kendall, Patrick H. Miller, Herbert J. Robings, Calleguas Municipal Water District, Camrosa Water District, Casitas Municipal Water District, Conejo Recreation and Park District, Ojai Valley Sanitary District, Rancho Simi Recreation and Park District, United Water Conservation District, Ventura Port District and Ventura Regional Sanitation District.

CSDA will keep you updated on the status of this important case.

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CSDA NEWS

CSDA NEWS is a publication of the California Special Districts Association. CSDA is located at 915 L Street, Suite 1000, Sacramento, CA 95814 (916/442-7887).

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OPR DRAFT PROPOSAL

Local Government Fiscal Reform Act Enters Budget Picture

The Office of Planning and Research (OPR) has initiated a proposal of its own on how to resolve the state budget crisis. The draft proposal is entitled the, "Local Government Fiscal Reform Act of 1994." Discussions on this Act as well as other options will be addressed as part of 1992-93 budget deficit solution.

The proposal focuses on two areas: (1) a new property tax distribution formula; and (2) a new revenue source to soften the impact on those local governments adversely impacted by the implementation of a revised property tax distribution formula.

NEW PROPERTY TAX ALLOCATION

The constitutionality of the current AB 8 distribution remains somewhat uncertain. The initial court ruling in the challenge by San Diego County (County of San Diego vs. Kenneth Cory) declared that the property tax allocation formula enacted by the State Legislature in 1979 is unconstitutional. The plaintiffs declared (and the Superior Court Judge agreed) that the current system violates not only the equal protection clauses of the State and federal constitutions, but the very purpose and intent of the taxpayer reform in California under Proposition 13. On February 10, 1992, Superior Court Judge Michael I. Greer found in favor of the County and directed the State Legislature to adopt and implement a constitutional allocation method by July 1, 1993.

The State has filed in the Fourth District Court of Appeals and it is uncertain whether a stay will be granted while this issue is under appeal. In response to this uncertainty, state officials decided they should look at an alternative distribution system. The Local Government Reform Act offers a new allocation of property tax revenues.

The new distribution would occur as follows:

Counties	30 percent
Cities/ Special Districts	21 percent
School Districts	37 percent
Redevelopment, etc.	12 percent

Specifically, funds allocated of cities/special districts are to provide localized or municipal services. Examples of services these funds are targeted for, include: police, fire, parks, recreation, libraries, and animal control.

The proposal goes on to state in the new property tax allocation, "Special districts would be provided revenue in the first fiscal year equal to their current funding level for FY 1993-94. Once the base level of funding is established, the Special District Augmentation Fund (SDAF) would be eliminated and all special districts would proportionally share all future property tax growth. County boards of supervisors would be removed from the process of administering the SDAF. Special districts would still retain existing authority to seek tax overrides and/or benefit assessments."

NEW REVENUE SOURCE FOR LOCAL GOVERNMENT

It has been determined that the most reliable source of income for local governments has been the existing one cent (1¢) sales tax. The Board of Equalization collects these taxes and returns them back to cities and counties through a distribution formula set in the Bradley/Burns Act. Although this has had an overall positive effect, it has decreased the desire of communities to provide housing and development which would increase the demand for services to new residents.

With the new property tax distribution, an additional one cent (1¢) of the 6 1/4 cents sales tax

will go to local government. The loss of revenue to the State would be eased by having the cities give up Motor Vehicles in Lieu Fees and the counties giving up the Non-realignment portion of Motor Vehicles in Lieu Fees. In addition, the increase in property tax revenues allocated to public education would further relieve the General Fund.

The proposal states that, "The additional one cent (\$.01) of sales tax available to local government would be distributed as follows: (1) the first 1/2 cent would be distributed to each county to provide further support for existing regional services and to eliminate the potential of any counties suffering an actual loss as a result of the implementation of the new Property Tax Allocation Formula; the second 1/2 cent would be distributed on a per capita basis within each county."

OUTCOME

It appears the goal of the proposal is to ultimately have local governments removed from the budgetary process. The draft Act states, "Cities could project their revenues without having to wait for the Legislature to determine what funds would be available. Counties would similarly be benefited, although counties would still be dependent on other State revenue sources to fund some State mandated programs and the costs associated with the realignment of State programs."

Bottom line for special districts? Only time will tell. A representative of OPR stated that, "He is open to any and all suggestions we care to offer, recognizing the fact that shifting additional AB 8 property tax revenues is probably a foregone conclusion." Also, the "superpo concept for special districts...is again gaining support in the Capitol. ☺



In the Capitol

By RALPH HEIM



Ralph Heim

This article is being written on January 4, 1993, the day the Legislature returns to Sacramento to commence work on the 1993-94 Session.

In the next few days, Governor Wilson will deliver his State-of-

the-State address to a Joint Session of the Legislature, following which he will unveil his 1993-94 State Budget. We expect the Governor's address to focus on the economy, jobs and the growing deficit.

We also anticipate the Governor's proposed 1993-94 State Budget to provide us with specific insights relative to additional property tax revenue shifts form local agencies to schools.

We also expect some legislative activity early this Session to respond to the anticipated shortfall in the \$375 million of special district property tax revenues that was shifted to schools. It appears that the 35%-10% formula will result in \$100 million, or more, less property tax revenue than

anticipated, even if the 35% is raised to 40% as the law allows.

Some county auditors argue that the only way to resolve this shortfall is to raise the 10% factor to a level necessary to reach \$375 million. To do so would require urgency legislation, which is a high probability.

CSDA has given this issue its highest priority and we will alert you to new developments as they occur.


Lawsuit Filed Against Property Tax Shift: The firm of McCormick, Kidman, Behrens and Holzwarth, on behalf of a number of special districts in Ventura County, has filed suit challenging last year's property tax shift legislation.

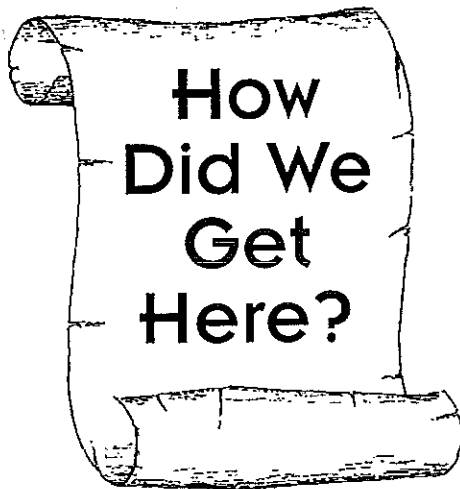
The action requests an immediate stay and requests the California Supreme Court to take jurisdiction of the case. CSDA has written the Court to assume jurisdiction, while not advocating the issues before the Court one way or the other.

All new developments relative to this case will be reported in future editions of the *CSDA News* or special mailers, as necessary.

New Legislation: Assembly Constitutional Amendment No. 1, introduced by Assemblyman Farr would, among other things, allow local general obligation bonds to be passed with a simple majority vote.

Senator Kopp has introduced SB 36, which is similar to his Brown Act legislation vetoed last year. SB 36 is currently under analysis to evaluate the provisions contained therein.

Senator Kopp has also introduced SB 2 relating to local term limits. As with Senator Kopp's 1992 legislation on this subject, SB 2 would allow governing bodies of local agencies to adopt term limits for submission to the agencies' voters. The issue may also be placed before the voters via initiative, and in either case, must be approved by a majority vote. 



The passage and implementation of Proposition 13 and the subsequent impact of this one piece of legislation is a mystery to many of us. Individuals who are now directors and staff of special districts may have been unaware of what this one action, taken in 1978, would mean in 1993. The following is a brief overview of Proposition 13 and what followed as the State enacted legislation to implement this proposition.

PROPOSITION 13

Article 13, Section 1 of the California Constitution empowers governmental agencies to tax all property and to tax it in a proportion to its full market value. In 1978, Proposition 13 added Article 13A to the Constitution. Section 1 of this Article, with exceptions, limits the maximum amount of an ad valorem property tax on real property to one percent of the full cash value. Article 13A also limits the imposition or change in any

State taxes by State legislation passed by not less than two-thirds of all members of the Legislature. The section also specifically prohibits new ad valorem taxes on real property and/or sales/transaction taxes on the sale of real property.

Proposition 13 did allow local agencies to impose special taxes by two-thirds of a vote by qualified electors. This did not include ad valorem tax on real property or a sales/transaction tax on real property.

SB 154

Following the passage of Proposition 13, the Legislature enacted "emergency legislation" when they passed Senate Bill 154. SB 154 provided a temporary system of financing local governments for fiscal year 1978-79. The bill allocated revenues from the one percent property tax rate to all counties, cities, special districts, and school districts on a pro rata basis. The formula relied on the average percentage of all property tax revenues that local agencies in each county had collected in the three prior fiscal years.

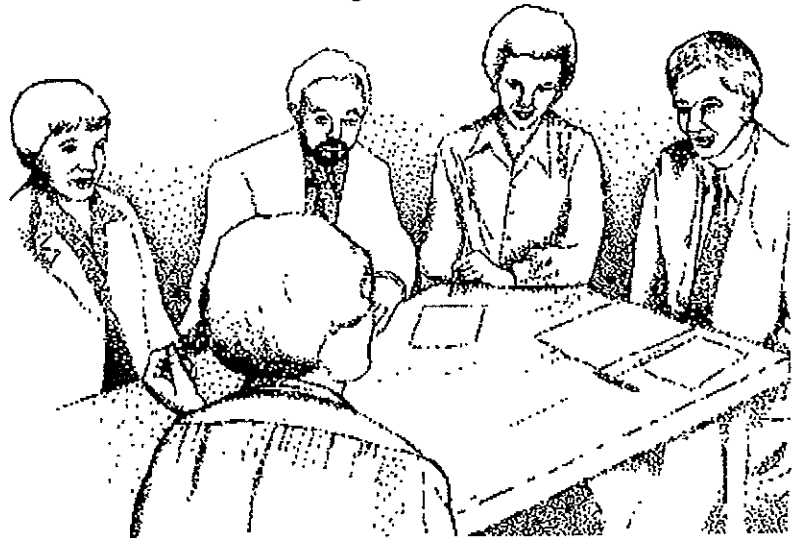
AB 8 - "BASE" AND "INCREMENT" TAX DOLLARS

AB 8 was enacted in 1979 as a method for allocated property taxes (Revenue and Tax Code Section 93 and 95, *et. seq.*) Under AB 8, tax "increment" revenue is allocated on a situs basis (based on geographic location) of the properties that have increased in value. Tax officials keep track of these properties within small geographic cells known as tax rate areas. Only the agencies serving these "cells" will receive additional property tax revenues.

The formula for allocating these "increment" property tax dollars is the same formula used in AB 8 to allocate the "base" property tax dollars from the preceding year. Thus, each local non-school agency in a given tax area receives its share of county property tax revenues collected the preceding year in the tax area. (Revenue and Tax Code Section 98). AB 8 provides the base property tax revenue allocated to agencies in a given fiscal year are added to the "increment" or growth in property tax revenues from the prior year,

continued on p. 5

CDAC Holds Hearings on Loss of Property Tax



In response to the \$1.3 billion reduction in property tax revenues to local governments, the California Debt Advisory Commission (CDAC) scheduled statewide hearings to evaluate the impact of this legislative action.

CDAC is the State's clearing-house for public debt issuance information. The Commission was created by the California Legislature in 1981 to assist State and local government agencies with the monitoring, issuance and management of public debt.

The hearings focused on three primary issues: (1) the ability of local governments to meet their existing debt service and their ability to enter into debt obligations in the future to finance capital and equipment needs; (2) the credit implications of reducing property tax revenues for cities, counties, special districts, and redevelopment agencies; and (3) the impact of the budget cuts on local economic development. The information gathered from these hearings will be provided to the Legislature and the Governor to consider as part of their deliberations during the 1993-94 legislative session.

Jeff Stava, Bond Counsel for CSDA Finance Corporation gave testimony at the December 3, 1992 hearing in San Diego. One of his primary points of concern for special districts is the definition of "debt" as referenced in SB 844 and SB 617.

Many districts have undertaken capital improvements

through the lease financing option offered by the CSDA Finance Corporation. The Corporation utilizes Certificates of Participation (COPs) to allow districts to finance capital improvement without issuing debt. COPs are secured through annual appropriations of lease payments, usually out of general fund revenues. The language of these bills, specifically excludes capturing property tax revenues dedicated to the repayment of debt. COPs are not legally debt. Stava states that, "While Senator Bergeson has attempted to clarify some of these matters in her October 9 letter, she also misuses some of the specific legal terms of art." He goes on to say that, "Specifically, she states that her intent was to include 'debt instruments such as bonds and certificates of participation.' While certain COP's do qualify as 'debt', others, including those secured by annual appropriation leases, are not, and cannot be, 'debt'."

Stava also addressed the flexibility of special districts to offset property tax reductions with fee increases. "Non-enterprise districts will have little or no ability to offset property tax reductions in this manner," Stava noted, "...even enterprise districts will have certain limitations on their ability to offset the property tax loss with new fees." This limitation is due to state law prohibiting raising fees beyond the cost of actual services provided. Community services districts will

be significantly impacted as they could not offset the cost of providing "non-enterprise services" such as parks and recreation by increasing the fees for their enterprise activities. "This drop of services would result in the necessity of further increases of fees, creating a downward spiral for the district," said Stava.

CDAC's concern of decreased capital improvement programs was also addressed by the CSDA representative. Stava stated that, "As soon as discussions were initiated last spring regarding stripping certain property taxes from various districts, as bond counsel we saw a distinct slow-down of inquiries regarding the Program as well as the withdrawal of a number of districts from proposed pools." He went on to say, "...a number of districts are reporting that they cannot afford to participate in the Program, not because they have found other economical ways of financing their capital needs, but because they cannot afford to construct the improvements at all."

In conclusion, Stava suggested the following issues be considered in proposals for the 1993-94 state budget as it is predicted additional reductions in State support for local governments are inevitable:


1) The Legislature and Governor adopt and approve the proposal submitted by Senator Bergeson regarding the clarifica-

tion of the property tax exemption for payment of debt service, with the caveat that close attention be paid to the use of legal terms of art in the legislation.

2) The debt exemption be modified to provide a more meaningful way of protecting the financing obligations of special districts. Any future formula should be structured to deduct amounts payable for debt service (Senator Bergeson's expanded term) from both the property tax calculation and the total revenue calculation.

3) The distinction between enterprise and non-enterprise districts be recongized as it is impossible to "pigeon-hole" special districts.

4) The level of voter approval for certain obligations of special districts should be reduced from two-thirds to a simple majority. This is a reasonable voting requirement that recognizes the unique and valuable service special districts offer the community.

CSDA and all of its associated service entities, will continue to participate in all discussions which take place on the reduction in property tax revenues. Stava's testimony reflects the commitment of CSDA, CSDA Finance Corporation, Special District Risk Management Authority, and the Special Districts Workers' Compensation Authority to represent the dilemma of special districts during the ongoing State budget battle. 

How did we get here?
continued from page 3

and the sum of property tax dollars get rolled over into the next year, and becomes the "base" for the next year.

**THE SUPREME COURT
DECISION AND
PROPOSITION 98**

In 1976, the California Supreme Court issued its decision in the Serrano v. Priest school funding case finding that the public schools in each county are mandated to fund on a per-child basis in an equitable manner - regardless of wealth or poverty of an individual school district. Proposition 98 was enacted in 1988 and amended by Proposition 111 in 1990 which provides for minimum State funding levels for the public school system.

SB 844 and SB 617

In 1992, the State found itself with a multi-billion dollar deficit and looked for ways to shift tax dollars to schools. By shifting these property tax dollars to education, the State would be able to fulfill the requirements of Proposition 98 without draining the General Fund.

SB 844 and SB 617 implement major changes to the permanent allocation system set up by AB 8.

Under SB 844, the local agencies lose either 35 percent of property tax revenues allocated in the prior fiscal year to the district, or 10 percent of the district's total revenue, whichever is less.

WHAT'S IN STORE?

Even after the most lengthy budget debate in the State's history, the numbers now show that the deficit is not behind us. Officials project that the State still has a \$7.5 billion dollar deficit even after the final resolution of the FY 92-93 budget. Special district property tax revenues are still being looked at to help relieve the State's financial crisis. The year, 1993, is sure to bring increased threats to all local government entities as the State tries to solve its own financial problems.

(Historical material as outlined in the Petition filed on behalf of Ventura County local agencies and taxpayers)

Superpot Idea back on the Table

During the FY 92-93 State budget discussions, one set of amendments to the local government bills included the special district "superpot".

Officially termed the Local District Allocation Fund, this proposal would

shift all special districts' historical and AB 8 property tax revenue to a single fund. The fund would be distributed by a committee comprised of nine members.

Although defeated in 1992, the "superpot" idea seems to again be gaining momentum in the Capitol.

Newsbriefs

WATER STILL NOT AVAILABLE

Just after a two-year restriction on new water hookups was removed, the El Dorado Irrigation District was forced to reinstate its moratorium.

The district, which is the water purveyor for most of El Dorado County's western slope, had just determined it had enough

continued on p. 8



CSDA's Deputy Director of Public Policy

CSDA has a new staff member — Ann Blackwood. Ann is CSDA's Deputy Director of Public Policy. In response to the increased demand on CSDA to be involved in legislative activities and public policy decisions, the Board of Directors approved a position specifically to assist districts in the political arena.

Ann comes to CSDA from the State Capitol where she most recently served as a consultant to the Assembly Committee on Higher Education. Prior to that position, she was an Issues Advisor for the Feinstein for Governor campaign. She has a B.A. in government with a minor in

communications from California State University, Sacramento.

Ann will work with CSDA's Legislative Advocate, Ralph Heim, in the halls of the State Capitol as well as being the districts' contact for questions and updates on legislative activities.

CSDA is committed to increasing the visibility and political clout of special districts in Sacramento. As we begin another legislative session with new (and old) threats to property tax revenue, Ann will play a vital role in representing the needs of districts.

"Ann comes to CSDA with extensive legislative experience and expertise," said CSDA Executive Director David

Nagler. "We are fortunate to have Ann join our staff and aid Ralph in his efforts in the Capitol."

In addition to her legislative responsibilities, Ann will be available to speak at chapter meetings and other CSDA functions to keep districts informed on legislation and other public policy activities.

"CSDA is entering into a new phase of its development," said Nagler. "Special districts need to have a strong voice in Sacramento and with Ralph. Ann and the grassroots activities of district representatives, we can make an impact."

Ann can be reached at the CSDA office (916) 442-7887.

California Special Districts Financial Information Service

OUTLOOK

NEW BUDGET, OLD STORY

For the third straight year, as the recession continues, California's state budget faces a multi-billion dollar deficit. Once again, Special Districts and other local agencies are facing a big "hit", based on the Governor's January proposed budget.

Primarily because General Fund revenues are running about \$2.5 billion below projections, the current fiscal year is expected to end with a \$2.1 billion deficit. After paying that off and continuing the current level of support for K-14 schools, there is considerably less money to go around in 1993-94 than is being spent this year.

To make up a \$7.5 billion (more or less) two-year shortfall, exacerbated by a proposal to allow a one-half cent sales tax to expire next June 30, the Governor bases his proposed "balanced" budget on several assumptions. One is that the Legislature will immediately repeal the renters' tax credit, not only for 1993, but retroactive to 1992. Another assumption is that, by March 1, the Legislature will implement the Governor's welfare reform proposals, some of which were just turned down by the voters in November in the form of Proposition 165. He also assumes savings during the current and next fiscal years through the elimination of some Medi-Cal benefits.

Perhaps the biggest example of wishful thinking is the assumption that the federal government will cough up \$1.5 billion to pay for federally-mandated services provided to immigrants. It is ironic that after years of turning down local agency requests for funds based on state-mandated programs, the state now is demanding that the federal government pay for the cost of federally-mandated programs. That is not likely to happen either, which will make balancing the budget more difficult as summer approaches.

For local agencies, the news is the worst yet. The Governor proposes to shift \$2.1 billion from cities, counties and Special Districts through an as yet undetermined "methodology which would be developed by the State working jointly with local governments". Enterprise Special Districts (except Transit and Hospital Districts) would be hit for another \$150 million and redevelopment agencies would lose an additional \$300 million. While \$149.5 million would be allocated to reimburse state-mandated local programs, 43 mandates worth an additional \$60 million would be suspended.

California Special Districts Financial Information Service

OUTLOOK

On January 26, the Commission on State Finance concluded that the Governor's proposed budget is unrealistic, overstating revenue by \$10 billion. State Treasurer Kathleen Brown gave Wilson's plan a "C for realistic revenue assumptions, a D for providing a complete plan and an F for its failure to protect against downside risk". The report was particularly critical of the proposal to divert \$2.6 billion from local agencies without a plan to provide needed services.

Most analysts agree that a substantial funding cut for local agencies without a realistic way to replace the revenue would mean, in many cases, bankruptcy, with the potential of many Special Districts going out of business. If there was ever a time for Special District Board members and managers to contact their legislators to urge that an adequate level of funding be maintained, this would apparently be it.

□ EDITORIAL □

Voters will support libraries, even when politicians won't

Take the Case to the People

The best protection from politics may be to take your case directly to the voters. That vast reservoir of popular support for libraries continually seems to replenish itself. Its wellsprings are, of course, all the things that must come together to create good library service—management with talent and vision, a user-friendly staff, an effective program, a strong collection, and attractive physical facilities. Beyond that, there is something about libraries that puts them well within the “best loved” category in our culture.

In the early days, the founders of public libraries went to great lengths to insulate them from what they called politics. The most common form on the New England library landscape is the independent library governed by an autonomous board but still totally or partially funded from local taxes. What those founders achieved was independence from local officials. In modern times, the goal of insulation from politics has been displaced by an isolation from the political process. The real purpose should be to protect the library from the vagaries of bureaucrats and politicians, not from the people or the political process.

Good politics does not mean isolation from the public. Good politics is talent and skill at the practice of democratic government. It requires a great deal of direct contact with that public. It is the most fundamental responsibility of the library trustees, director, and staff. Part of good politics in modern times may be steering the library clear of entrapment in politics by politicians.

When your library budget gets trapped in the local bureaucracy, it rarely comes out whole. In addition, the ambitious politician who chairs the local finance board could misuse negotiations for the library budget, since he or she looks at every agency budget as an opportunity to make headlines. Indeed, in an economy like the current one, every elected official tries to buy votes with tax savings. So like other agencies, the library sustains budget cuts.

Politicians know how to run for office. Some of them may even know how to manage a public institution, but, in the current environment, most see the meat axe as the best management tool. If the last election is any guide, in the public mind

politicians cannot be trusted with money. Yet, there is growing evidence that the public will trust librarians and library boards with their tax dollars.

The voters will vote for capital funding, as shown by Richard Hall's report on public library referenda (“85 Percent Approved,” *LJ*, June 15, 1992, p. 36–42). In 16 states, public library districts are legal, and, in fiscal terms, they have been highly successful, as Lee Brawner points out in “The People's Choice: Public Library Districts” (this issue, p. 59–62). The wonderful achievements of the Mid-Continent Public Library under John W. Ferguson, *LJ*'s 1992 Librarian of the Year (see cover, story p. 50) were made possible by support from voters in the library district. Ferguson and his staff overcame an initial defeat at the polls and rebounded to get massive backing. From the repeated victories over the Draconian California tax-cutting in Berkeley, to the public rallies for the Brooklyn, Queens Borough, and New York public libraries, from the bond issue in Atlanta to the citizens who rallied 'round the branches in the neighborhoods of Stamford, Ct., there is ample evidence that voters will support library budgets, even when they are in the mood to throw the rascals out of City Hall.

The point is simple enough. Getting your case before the people or on the ballot is not always so simple. If you haven't checked, now might be a good time to find out what levels of government and what actions it would take to put your budget on the ballot. It also might be time to check to see how the power structure in your community would react to a public outcry for libraries. If you have the talent and fortitude and run a decent library service, your next move should probably be to take your case to the people. The evidence is clear: the voters like libraries more than politicians do.



John N. Berry III, Editor-in-Chief

TO: Library Board of Trustees
FROM: Elizabeth D. Minter, Library Director
DATE: January 16, 1993
SUBJECT: Parking Committee (ad hoc) Report

*↓
- from Dat
- August, 1993*

BACKGROUND:

At its meeting on November 16, 1992, the Library Board instructed its Parking Committee (ad hoc) to present to the City of Placentia the Committee's recommendations for changes in the organization of the Civic Center Parking Lot.

Committee Members Sandra Stark and Al Shkoler and Library Director Elizabeth Minter met with City Manager Bob D'Amato on January 22, 1993. After discussing the recommendations from the Library Board the group toured the parking lot and reviewed the various types of spaces that were reserved.

Several changes were identified and mutually agreed-upon for implementation:

Removal of 2 spaces previously reserved for the grounds maintenance contract vehicles since they are at the Civic Center only in the mornings.

Transfer of 2 "Car Pool" spaces from the north side to the south side next to the handicapped spaces. The car pool spaces are really for public use by any vehicle carrying 2 or more people.

"Employee of the Quarter" sign will be removed during the 6 months of each year when that employee works at a location other than the Civic Center.

The City Manager will ask the City Council if it is willing to share its reserved spaces with the Library Board so that the Library Board space may be eliminated.

The remaining City spaces are to be consolidated in the northwest corner of the parking lot.

The Library is free to promote to its users that "reserved" spaces are available for public use after 5:30 P.M. on week days and on weekends and holidays unless specifically posted otherwise. The City Council, Manager, Clerk and City Vehicle spaces will be reserved at all times.

Parking Committee (ad hoc) Report, February 16, 1993, Page 2.

RECOMMENDATION:

Review implementation of changes at a later date to be specified or determine other future actions.

TO: Library Board of Trustees

FROM: Sal Addotta, Assistant Library Director *Sma*
Pat Irot, President, Friends of Placentia Library

DATE: February 11, 1993

SUBJECT: California Room

BACKGROUND:

The Library Board has designated Assistant Library Director Addotta and Friends President Irot as Library representatives for the California Room.

Addotta and Irot attended the February 11, 1993 regular meeting of the Placentia Historical Committee to share the Library's support of the committee's goals, and to explore further cooperation between the two groups.

The proposed Collections Policy for Placentia Historical Committee was approved and is on the City Council Agenda for February 16, 1993. It is a document which may prove useful to the Library in formulating a similar policy for the California Room. A copy of the proposed policy is attached to this report.

Space in the California Room was offered for housing documents and other archival material. It was made clear that consultation and training would be available, but that no library staff time could be allocated for this purpose.

The need for a cooperative effort between the two committees was jointly expressed. President Irot asked if that effort could be formalized by having a joint sub-committee, and the response was very positive.

Larry de Graaf and Pat Jertberg volunteered to be contacts and to serve on the joint sub-committee. A meeting was set for 7 p.m. Thursday, February 18, 1993, in the California Room, to begin formulating proposed library policy and general brainstorming.] ✓

A report based on that meeting will be presented at the March Library board meeting.

RECOMMENDATION:

Receive and file this report.



Placentia City Council

AGENDA REPORT

TO: City Administrator

FROM: Assistant City Administrator

DATE: January 26, 1993

SUBJECT: Historical Collections Policy
(Continued from February 2 Meeting)

FINANCIAL IMPACT: Undetermined

On January 19 the Council met in Study Session with the members of the Historical Committee to review a draft Historical Collections Policy.

The policy establishes guidelines for the collection and storage of materials. Since limited storage space is available, the Committee plans to concentrate on the preservation of documents, maps, and photographs.

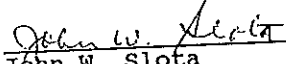
The Committee is presently working with the Library in an effort to place items in the California Room for use by the Public. Committee members will be responsible for cataloging and preservation of the documents.

During the February 2 Council meeting, questions concerning the location of the repository and liability were raised. The policy has been revised to state that the repository is to be located in the city. With respect to liability, Sections 4-7 were added to the Acquisition of Resources Section. A form, similar to the attached County of Orange form, will be submitted to the city Attorney for review.

RECOMMENDATION

It is recommended that the Council approve the Historical Collection Policy.

Respectfully Submitted:


John W. Slota
Assistant City Administrator

Reviewed and Approved:


Robert D'Amato
City Administrator

Attachments

AGENDA ITEM NO. _____

COUNCIL MEETING DATE _____

SPECIAL PROGRAMS AND PROCEDURES

POLICY NO. 507

COLLECTIONS POLICY FOR PLACENTIA HISTORICAL COMMITTEE

INTRODUCTION

One of the primary goals of the Placentia Historical Committee involves the preservation of historical resources, including artifacts, oral histories, and ephemera such as photographs, articles, documents and maps. Since the City of Placentia does not presently have a museum or storage facility, the Historical Committee is initially focusing on collections of documents, maps, articles, and similar items which are readily stored and managed.

The role of the Historical Committee is to facilitate, advise and coordinate the collection and conservation of these historical materials. Because the management of an historical collection is an on-going effort, a joint agreement must be created in which areas of responsibility are defined. This joint agreement would include the Historical Committee, the City, and a designated repository such as the Placentia Library.

Purpose of Collections Policy

The Placentia Historical Committee shall collect and preserve such historical resources as are appropriate to understanding and documenting the history of the City of Placentia and the areas historically associated with it. This mission shall be undertaken in increments, commencing with an inventory of all historic structures and a corresponding program to officially designate and preserve some of these as local historical landmarks, and proceeding next to the identification and collection of private and institutional documents and visual records. This will culminate in an inventory of all forms of historical resources held by residents or near-by institutions and the systematic provision for collecting and storing material objects.

In all of these phases, any historical material which is surveyed, inventoried, collected, and preserved shall meet one or more of the following conditions:

1. That it is related to an event or development occurring in the Placentia area in the past. "Past" shall be interpreted very flexibly, and no arbitrary age shall be required before an item might be considered as "historical."
2. That it be authored by, visually display, or describe in some way one or more persons living in the Placentia area in the past.

COLLECTIONS POLICY FOR PLACENTIA HISTORICAL COMMITTEE

Page 2

3. That it be a record of or related to an institution located in the Placentia area in the past. "Institution" shall be broadly construed to include business, religious, social, cultural, governmental, political, and educational institutions.
4. That it describe, measure, or depict the physical, economic, or social nature or condition(s) of Placentia in the past.
5. That its size, material composition, and value shall make its preservation feasible and appropriate to the history of Placentia.
6. "Historical materials" will include such technical works on the collecting, care, and management of local historical resources as are needed to implement this policy, and such historical works on the adjacent areas as are needed to place the history of Placentia in meaningful context.
7. In interpreting the above criteria, all periods of Placentia's history and all groups involved in it shall be considered, and every effort will be made to secure a collection which presents such a complete picture of the City's history.

Acquisition of Resources

All materials acquired under the auspices of the Placentia Historical Committee shall be in accordance with the following policies:

1. Each item (or, in the case of whole collections, a majority of its contents) shall meet the criteria of relevance set forth above.
2. Acquisition policies shall follow standards set by a professional organization in the field, e.g., the Society of American Archivists (SAA), American Association of Museums (AAM), American Association for State and Local History (AASLH). Manuals and guidelines of these organizations will be collected and kept on file by the Historical Committee so they are available for each consultation.
3. The Committee and the designated repository shall jointly keep a record of all acquisitions and of all donors. The City Clerk or other designated City officials shall be responsible for insuring that all records of collected items, deeds of gift, and inventories of the collections are stored and accessible.

COLLECTIONS POLICY FOR PLACENTIA HISTORICAL COMMITTEE

Page 3

4. All items accepted for acquisition shall meet one of the following sets of conditions:
 - A. They will be legally transferred to the City of Placentia (or to another entity designated by the City) as the unrestricted owner of those items and of any copyrights and associated rights attached to them; or
 - B. They be loaned to the City to reproduce copies of and return the original to the owner, in which case the City shall have full ownership and use of such copies.
5. When acquiring items of significant monetary value, City Council review is required. The City may require that an appraisal prepared by an independent party be furnished by the donor.
6. Insofar as possible, the City should avoid acquiring historical resources, with conditions attached as to their use, the acquisition ~~of~~ other items with them, or the inability of the City to deaccession any item if that should be deemed appropriate.
7. Items of significant monetary value shall not be acquired without a waiver of liability signed by the donor. The City shall not be required to carry insurance against loss or destruction of, or damage to, acquired materials, or in other respects to exercise greater precautions on the care of acquired items than it exercises with respect to its own property of similar nature. The City shall not be liable for destruction of or damage to acquired items caused by civil commotion, war, natural disasters, or other factors beyond its control.

Deaccessioning Policy

While the acquisition of historical materials should be done with such care that in most cases these items will be permanently retained, occasions will arise when limitations of space, obsolescence, of information, duplication or deterioration will make the retention of some items unnecessary or unfeasible. A deaccessioning policy shall be established with the designated repository, following the guidelines of professional organizations such as SAA, AAM, and AASLH.

Preservation and Repository

Any historical materials collected under the auspices of the Placentia Historical Committee shall be deposited in a repository which meets the following conditions:

1. It is located in the City of Placentia.

COLLECTIONS POLICY FOR PLACENTIA HISTORICAL COMMITTEE

Page 4

2. It is open to the general public a reasonable number of days and hours per week, ideally in excess of three days or ten hours per week.
3. It can provide security for its premises and any materials stored within them.
4. It will accept the above policies of acquisition and deaccessioning of materials, and accept the criteria for materials to be collected in all operations conducted jointly with this Committee. Beyond these conditions, the repository will determine modes of storage and presentation, time and conditions of access and use, and may at any time advise the Committee and the City on the merits of acquiring or deaccessioning any historical materials.
5. It will have or provide for staff personnel familiar with the collection and care of historical materials and who are adequate to care for the materials collected, assist in maintaining all records required, and serve the public seeking to use them.
6. It is willing to abide by the principle of shared authority set forth in this policy. Depending on which facility is willing to participate with the Committee and the City, some of the conditions set forth above might be modified, but the basic intent that the Placentia Historical Committee retain control over these collections should not be changed.

Administration

Administration is to be in accordance with professional standards established by such organizations as SAA, AAM, and AASLH.



Orange County Archives

Orange County Public Library

Agenda Item 28
Attachment C
Page 1

DEED OF GIFT

I (we) the undersigned, as donor(s), hereby vest all incidents of absolute ownership of the following described property to the County of Orange and its historical archives, including all rights to copyright, and including the absolute and unrestricted right to reproduce, make available for research, adapt, publish, perform, or exhibit the property.

It is understood that the Archives will take reasonable measures to ensure the preservation of the above described property. I (we) also have read the Conditions of Acceptance of Gift on the reverse of this form and agree to any and all conditions thereof.

Signed _____ Date _____

Name _____

Address _____

City _____ State _____ Zip _____

Telephone _____

Accepted by _____ (for the Orange County Archives) Date _____

CONDITIONS OF ACCEPTANCE OF GIFT

1. The Orange County Archives will not be required to carry insurance against loss or destruction of, or damages to, said materials, or in other respects to exercise greater precautions for the care and safety of said materials than it exercises with respect to its own property of the same or similar nature.
2. In no event shall the Archives be liable for the destruction of, or damage or injury to, said materials caused by act of civil commotions, natural disasters or other causes beyond its control.
3. The Orange County Archives will consider the materials in this Deed of Gift as an unrestricted gift offer without limiting conditions, except as stated, to be used in any manner which is deemed to be in the best interest of the Archives.

*Revised
9:01 pm*

TO: Library Board of Trustees
FROM: Elizabeth D. Minter, Library Director *edm*
DATE: February 16, 1993
SUBJECT: Review Health Insurance Proposals for 1993-1994.

BACKGROUND:

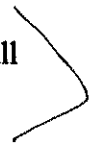
At the Library's request Anderson & Anderson has completed its annual review of group medical insurance policy options for the District. The new contract year begins April 1, 1993.

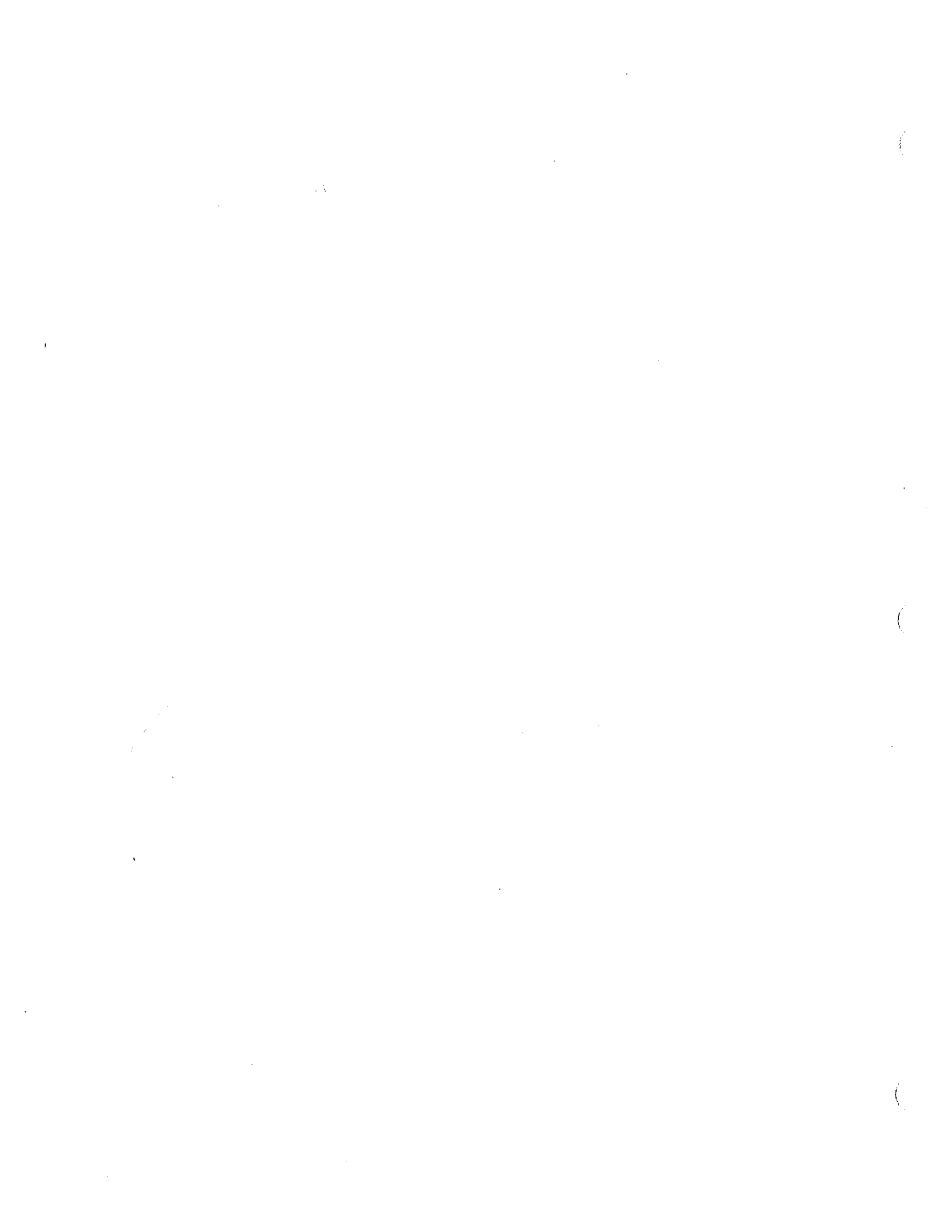
The Attachment A summarizes their findings.

Account Representative Carol Benson will attend the Board Meeting to answer any questions about the options presented.

RECOMMENDATION:

Determine level of benefit, select vendor, and authorize the Library Director to sign all contract documents.





ANALYSIS OF BENEFITS

FOR

PLACENTIA LIBRARY

**PRESENTED BY: SAM CUNNINGHAM, CLU, ChFC
PRESIDENT**

ANDERSON AND ANDERSON/BENEFITS

12 FEBRUARY 1993



Summary of Requested Proposals

for

Placentia Library

Medical

FHP

Did not submit quote

Kaiser

See Attached

PacifiCare

See Attached

TakeCare

See Attached

65,187.84
60,016.96

4,970.88

65,187.84



Final rates and benefits are subject to underwriting and approval by the carriers. This is for illustration purposes only and does not constitute coverage.



Placentia Library
Medical Options Analysis

Agenda Item 29
 Attachment A
 Page 3

		Current	Renewal
Combined Rate Summary		CareAmerica Plan 1800	CareAmerica Plan 1900
		\$8 Co-Pay 100% Hospital \$10 Rx Co-Pay Opt. Rider: \$100 Ded, \$1000 Ann Max	\$10 Co-Pay 100% Hospital \$10 Rx Co-Pay Opt. Rider: \$100 Ded, \$1000 Ann Max
Employee Only	22	Age Rated	Age Rated
Employee + 1	1		
Employee + Family	2		
Monthly Premium		\$5,064.65	\$5,432.52
Annual Premium		\$60,775.80	\$65,187.84
SUPER-COMPOSITE RATE		\$202.59	\$217.29

		Current	Renewal
Combined Rate Summary		CareAmerica Plan 1800	CareAmerica Plan 1900
		\$8 Co-Pay 100% Hospital \$10 Rx Co-Pay NO OPTION RIDER	\$10 Co-Pay 100% Hospital \$10 Rx Co-Pay NO OPTION RIDER
Employee Only	22	Age Rated	Age Rated
Employee + 1	1		
Employee + Family	2		
Monthly Premium		\$4,637.88	\$5,003.35
Annual Premium		\$55,654.56	\$60,066.60
SUPER-COMPOSITE RATE		\$185.52	\$200.22

		Option 1	Option 2
Combined Rate Summary		Kaiser Plan R	Take Care Classic Plan
		\$10 Office Visit 100% Hospital \$10 Rx Co-Pay	\$5 Office Visit 100% Hospital \$10 Rx Co-Pay
Employee Only	22	\$138.59	\$150.88
Employee + 1	1	\$276.18	\$313.09
Employee + Family	2	\$390.38	\$416.20
Monthly Premium		\$4,105.92	\$4,464.85
Annual Premium		\$49,271.04	\$53,578.20
SUPER-COMPOSITE RATE		\$164.24	\$178.59

		Option 3	Option 4
Combined Rate Summary		PacificCare Standard 10	FHP
		\$10 Office Visit 100% Hospital \$10 Rx Co-Pay	\$15 Office Visit, 100% Hospital \$8 Rx Co-Pay
Employee Only	22	\$157.07	\$136.01
Employee + 1	1	\$320.90	\$272.02
Employee + Family	2	\$433.11	\$408.03
Monthly Premium		\$4,642.66	\$4,080.30
Annual Premium		\$55,711.92	\$48,963.60
SUPER-COMPOSITE RATE		\$185.71	\$163.21



BENEFITS SCHEDULES



Placentia Library

HMO Schedules of Benefits

**Current Plan (1992-3)
CareAmerica Plan 1800**

Schedule of Benefits	
Physician Services	
Office Visit	\$8 Co-Pay
Dr. Visit/Hospital	100%
Out Of Pocket	\$1,000 Individual/\$3,000 Family
Hospital Services	
Room & Board	100%
Operating Room	100%
Delivery Room	100%
Lab & X-Ray	100%
Hospital Surgery	
inpatient	100%
outpatient	100%
X-Ray & Diagnostic	
inpatient	100%
outpatient	100%
Preventive Care	\$8 Co-Pay
Maternity	
Prenatal/Post Natal	\$8 Co-Pay
Nursery Care	
Well Child	
Family Planning	
Pregnancy Testing	\$8 Co-Pay
Sterilization	
o male	\$50 Co-Pay
o female	\$100 Co-Pay
Infertility	50% of Charges
Abortion(voluntary)	\$150 Co-Pay
Emergencies	
Ambulance	\$50 Trip
Emergency Room	\$50 Visit
Mental Health	
in patient	Not Covered
out patient	\$25 visit, 30 visit annual max.
Substance Abuse	
in patient	100%
out patient	\$8 Co-Pay
Pharmacy	\$10 Co-Pay

*Final rates and benefits are subject to final underwriting approval by the carriers. This is for illustration purposes only and does not constitute coverage.

Options Rider:
\$100 Deductible
\$1,000 Annual Max



Placentia Library

HMO Schedules of Benefits

Schedule of Benefits	Renewal Plan (1993-4) CareAmerica - Plan 1900
Physician Services	
Office Visit	\$10 Co-Pay
Dr. Visit/Hospital	100%
Out Of Pocket	\$1,000 Individual/\$2,000 Family
Hospital Services	
Room & Board	100%
Operating Room	100%
Delivery Room	100%
Lab & X-Ray	100%
Hospital Surgery	
inpatient	100%
outpatient	100%
X-Ray & Diagnostic	
inpatient	100%
outpatient	100%
Preventive Care	\$10 Co-Pay
Maternity	
Prenatal/Post Natal	\$10 Co-Pay
Nursery Care	100%
Well Child	\$10 Co-Pay
Family Planning	
Pregnancy Testing	\$10 Co-Pay
Sterilization	
o male	\$50 Co-Pay
o female	\$100 Co-Pay
Infertility	50% of Charges
Abortion(voluntary)	\$150 Co-Pay
Emergencies	
Ambulance	\$50/Trip
Emergency Room	\$50/Visit
Mental Health	
in patient	Not Covered
out patient	\$25 visit with 20 visit annual max.
Substance Abuse	(Acute Detox Only)
in patient	100%
out patient	\$10 Co-Pay
Pharmacy	\$10 Co-Pay

*Final rates and benefits are subject to final underwriting approval by the carriers. This is for illustration purposes only and does not constitute coverage.

Options Rider:
\$100 Deductible
\$1,000 Annual Max



Placentia Library

HMO

Schedule of Benefits	Kaiser Plan R
Physician Services	
Office Visit	\$10 Co-Pay
Dr. Visit/Hospital	100%
Out Of Pocket	
Hospital Services	
Room & Board	100%
Operating Room	100%
Delivery Room	100%
Lab & X-Ray	100%
Hospital Surgery	
inpatient	100%
outpatient	100%
X-Ray & Diagnostic	
inpatient	100%
outpatient	100%
Preventive Care	\$10 Co-Pay per Visit
Maternity	
Prenatal/Post Natal	100%
Nursery Care	100%
Well Child	100% up to 24 mos old then \$10/Visit
Family Planning	
Pregnancy Testing	\$10 Co-Pay per Visit
Sterilization	
o male	
o female	
Infertility	
Abortion(voluntary)	
Emergencies	
Ambulance	100%
Emergency Room	Kaiser's: Usual Co-Pays/Other: 50% of 1st \$200
Mental Health	
in patient	100%, 30 Days Max per Year
out patient	\$20 Co-Pay per Visit, 20 Visits/Yr Max
Substance Abuse	As Any Other Illness
in patient	100%, 30 Days Max per Year
out patient	\$10 Co-Pay per Visit for withdrawal
Pharmacy	\$10 Co-Pay

*Final rates and benefits are subject to final underwriting approval by the carriers. This is for illustration purposes only and does not constitute coverage.



Placentia Library

HMO

Schedule of Benefits	PacifiCare -- Standard 5
Physician Services	
Office Visit	\$5 Co-Pay
Dr. Visit/Hospital	100%
Out Of Pocket	\$800 Individual/ \$2,400 Family
Hospital Services	
Room & Board	100%
Operating Room	100%
Delivery Room	100%
Lab & X-Ray	100%
Hospital Surgery	
inpatient	100%
outpatient	100%
X-Ray & Diagnostic	
inpatient	100%
outpatient	\$5 Co-Pay
Preventive Care	\$5 Co-Pay
Maternity	As any other illness
Prenatal/Post Natal	100%
Nursery Care	100%
Well Child	0-2 ys. 100%; 2+ ys. \$5 Co-Pay
Family Planning	
Pregnancy Testing	\$5 Co-Pay
Sterilization	
o male	\$50 Co-Pay
o female	\$150 Co-Pay
Infertility	50% of covered charges
Abortion(voluntary)	\$75 Co-Pay 1st Tri.; \$150 2nd; 3rd Not Covered
Emergencies	
Ambulance	100%
Emergency Room	\$35 Co-Pay
Mental Health	
in patient	Not Covered
out patient	\$35/Visit with 20 Visits Annual Max
Substance Abuse	(Detox Only)
in patient	100%
out patient	100%
Pharmacy	\$10 Co-Pay

*Final rates and benefits are subject to final underwriting approval by the carriers. This is for illustration purposes only and does not constitute coverage.



Placentia Library

HMO

Schedule of Benefits	Take Care Classic Plan
Physician Services	
Office Visit	\$5 Co-Pay
Dr. Visit/Hospital	100%
Out Of Pocket	N/A
Hospital Services	
Room & Board	100%
Operating Room	100%
Delivery Room	100%
Lab & X-Ray	100%
Hospital Surgery	
inpatient	100%
outpatient	100%
X-Ray & Diagnostic	
inpatient	100%
outpatient	100%
Preventive Care	\$5/ Visit
Maternity	
Prenatal/Post Natal	\$5/ Visit
Nursery Care	100%
Well Child	\$5 Co-Pay
Family Planning	
Pregnancy Testing	\$5 Co-Pay
Sterilization	
o male	\$75 Co-Pay
o female	\$150 Co-Pay
Infertility	50% of Charges
Abortion(voluntary)	Not Covered
Emergencies	
Ambulance	100%
Emergency Room	\$15 Network, \$40 Out of Network
Mental Health	
in patient	100% Hospital, \$20 Dr. Visit
out patient	\$20/Visit, Max 20 Visits/Yr
Substance Abuse	(Detox Only)
in patient	100%
out patient	Not Covered
Pharmacy	\$10 Co-Pay

*Final rates and benefits are subject to final underwriting approval by the carriers. This is for illustration purposes only and does not constitute coverage.



HOSPITAL COMPARISON



HMO Hospital Comparison For Orange County

City	Hospital	CareAmerica	FHP	Pacificare	TakeCare
Anaheim	Anaheim Memorial		X		
	Humana - West Anaheim				
	Martin Luther Hospital	X	X	X	X
	Pioneer Hospital		X	X	X
	Western Medical				
	Brea Community	X			
	Neuro Psych				
	Verdugo Hills			X	
	Fountain Valley Regional	X	Specialty Contract	X	X
	FHP Hospital		X		
Fullerton	St. Jude Hospital		Specialty Contract	X	
	Garden Grove Hospital	X	X	X	X
Garden Grove	AMI Medical Center				
	Humana - Huntington Beach				
Huntington Beach	Huntington Memorial Hospital				
	Irvine Medical Center		X	X	X
La Habra	Friendly Hills Regional M.C.	X	X	X	X
La Palma	La Palma InterCommunity	X		X	
Los Alamitos	St. Mary Medical Center		X	X	X
Laguna Hills	Saddleback Memorial		X	X	
Mission Viejo	Mission Community	X	X	X	X
Newport	Hoag Memorial Presbyterian	X	3/1/93	X	
Orange	Care Unit				
	Chapman General			X	X
	CHOC		Specialty Contract		
	Linda Vista Community				
	St. Joseph	X	X	X	
	UCI		Specialty Contract		
Placentia	Placentia - Linda Community				
	Costal Communities	X		X	X
Santa Ana	Doctors Hospital of Santa Ana				
	Santa Ana Hospital M.C.				
	Valley Hospital M.C.				
	Western Medical Center				X
San Clemente	Samaritan Medical Center			X	X
South Laguna	South Coast Medical Center	X		X	
Tustin	Health Care Medical Center			X	
Westminster	Humana Hospital Westminster				
Directory Date:		10/92	1/93	8/92	8/92



ASSUMPTIONS



Placentia Library


ASSUMPTIONS

- (1) The Kaiser rates are valid until March 1, 1993. After this date the rates will change.
- (2) For TakeCare, the group must submit a DE3-B form at time of enrollment.
- (3) PacifiCare's rates are based on an assumption of the employer contributing 75% of the employee rate. Also, PacifiCare must be the only HMO in place.
- (4) Final rates and benefits are subject to final underwriting approval by the carriers. This is for illustration only and does not constitute coverage.





TO: Library Board of Trustees

FROM: Elizabeth D. Minter, Library Director 

DATE: February 16, 1993

SUBJECT: **Contract with the Anaheim Public Library, City of Anaheim, for Management of the Automated Library System .**

BACKGROUND:

Placentia Library District's automation services for circulation, the public catalog, acquisitions, and serials are provided through a contract with the Anaheim Public Library. Anaheim, Placentia and Yorba Linda public libraries, including Anaheim's branches and bookmobile, are all included on this system.

While the three participating libraries function, more or less, as a consortium for sharing this system, there is no formal joint powers agreement. The equipment and software contracts are actually negotiated and held by the Anaheim Public Library. Placentia and Yorba Linda libraries participate through the purchase of services.

Attachment A shows the basis for the distribution of the costs to the three participating agencies. Placentia Library District's cost for the current fiscal year is \$38,152.83. Based upon information provided by Anaheim Public Library last summer \$30,000 was budgeted in account 190-000 to cover this expense. Approximately \$25,000 remains in this line item for the current year. The balance will have to come from savings in other areas of the budget.

The contract is Attachment B.

RECOMMENDATION:

Approve Contract for Automated Library Services with the City of Anaheim and Authorize Signature by Library Board President. }

APL - 54.41%
PL - 21.24%
YL - 24.35%

TOTAL - 100.00%

Page 1 of 2

CONSORTIUM CONTRACT

Maintenance (Annual)

Caere	\$2,111/year
Dynix Software Maintenance Exhibit B	\$18,226/year
Dynix Maintenance Category 2 Equip.	\$18,270/year
Sparing Plan (Dynix)	\$2,244/year
60/40 Plan (Dynix)	\$2,688/year
CPU Hardware (Dynix)	\$16,992/year plus
V mark (25x\$48)	1,200 YL
licenses (19x\$48)	912 PL
Digital based on equipment per site	\$9,252/year

Capital (Common)

Brodart (2 mux & 2 modems)	\$5,926.25 over 5 years \$1,185.25/year
Dynix Payment Schedule	\$396,573.00 over 5 years \$79,314.60/year

N/A Phone Lines

Brodart: APL pays \$1,285.82 per month for 5 ports/YL and PL pay directly for their own

Page 2 of 2

	APL	PL	YL
ANNUAL (Maintenance)	\$32,589.89	\$13,038.37	\$14,902.73
COMMON (Capital)	43,341.11	17,339.66	19,819.06
DIGITAL	6,408.00	504.00	2,340.00
V Mark/Licenses	3,984.00	912.00	1,200.00
<hr/>			
Sub Total	86,323.00	31,794.03	38,261.79
x 20% overhead	--	6,358.80	7,652.35
<hr/>			
Grand Total	86,323.00	38,152.83	45,914.14
<hr/>			

FORMULA FOR PERCENTAGES

Terminals/ports	
Central	43
Haskett	8
Euclid	9
Sunkist	9
Canyon	13
Schools	1
	—
total APL	83
Placentia	19
Yorba Linda	25
Shared Equipment	22
Placentia + shared	41
Yorba Linda + shared	47
APL + shared	105
	—
total	193

formula: (Library + shared) x 100 - 193

A G R E E M E N T

THIS AGREEMENT, dated for purposes of identification only this _____ day of _____, 1992, is made and entered into by and between the

CITY OF ANAHEIM, a municipal corporation, hereinafter referred to as "CITY,"

A
N
D

PLACENTIA LIBRARY DISTRICT, hereinafter referred to as "DISTRICT"

W I T N E S S E T H:

WHEREAS, the City has implemented an Automated Library System for its own use; and

WHEREAS, the System implemented is capable of processing multiple jurisdictions; and

WHEREAS, the DISTRICT desires that the CITY provide automated library services.

NOW, THEREFORE, FOR AND IN CONSIDERATION OF THE MUTUAL PROMISES, COVENANTS AND CONDITIONS HEREIN CONTAINED, THE PARTIES HERETO AGREE AS FOLLOWS:

1. GENERAL

The CITY will provide automated library system services to the DISTRICT consisting of the Dynix System as implemented for CITY by Dynix, Inc. and the Interactive Access System as implemented for City by the Brodart Company.

OFFICE OF THE CITY ATTORNEY
CITY OF ANAHEIM
200 S. ANAHEIM BOULEVARD, SUITE 356
ANAHEIM, CALIFORNIA 92805
(714) 254-5169
FAX (714) 254-5123

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1 2. ONLINE SERVICES

2 A. Circulation

- 3 (1) Interactive recording of charge and
4 discharge transactions.
5 (2) Validation of patron status upon charging
6 items.
7 (3) Daily identification of reserved items.
8 (4) Calculation of fines owed upon discharging
9 items.
10 (5) Inquiry capability for item and patron
11 status.
12 (6) Entry capability for bibliographic
13 records, items or patrons.
14 (7) Ability to search for items in the
15 bibliographic database by author, title,
16 subject, keywords ISBN and other means of
17 access.

18 B. Catalog

- 19 (1) Ability for public and staff to search
20 catalog by author, title, subject and
21 keywords.
22 (2) Ability to qualify searches by author's
23 first name, publication date of work,
24 media type, etc.
25 (3) Ability to display full or shortened
26 bibliographic record.
27 (4) Availability of item-specific status
28

1 information at the inquiring library.

2 (5) Availability of item-specific status
3 information at other holding libraries.

4 (6) Display of complete copy information for
5 each item.

6 3. BATCH SERVICES

7 A. Automated printing of overdue notices, bills,
8 reserve pick-up notices and reserve cancellation notices.

9 B. Automated system statistics as provided by the
10 Dynix system.

11 C. Automated generation of various reports upon
12 request.

13 4. MISCELLANEOUS SERVICES

14 A. Availability of electronic mail system to allow
15 telecommunication of messages.

16 B. Offline backup system for circulation downtime.

17 C. Dual capability of microcomputers to function
18 as stand-alone computers and as communicating terminals.

19 D. Availability of LC/MARC and Brodart databases
20 for identification of bibliographic records for monographs,
21 serials and audio-visual materials.

22 5. SERVICE CHARGES AND COSTS

23 The DISTRICT shall:

24 A. Reimburse CITY for the procurement of
25 terminals, bar-code scanners, microcomputers, printers,
26 modems, multiplexors and other such equipment used solely by

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the DISTRICT.

B. Procure and pay for telephone lines necessary to communicate with the Central Computer Equipment installed at the CITY.

C. Procure and pay for bar-code labels and any other supply items used at the DISTRICT.

6. PAYMENT

A. DISTRICT shall pay CITY as follows for the use of the system:

1. An annual fee based on a percentage of annual operating costs attributable to services delivered to DISTRICT including, but not limited to, maintenance of the mainframe and other hardware and software, administrative overhead, data processing charges, costs of telephone lines to Brodart and other costs and fees incurred in the operation and maintenance of the system. DISTRICT's percentage of shared annual operating costs will bear the same relationship to the total of those costs as DISTRICTS's usage will bear to the total usage of the system. The formula used to calculate DISTRICT's percentage will be comprised of the following components: library holdings, bibliographic titles, number of borrowers, circulation and number of cabled terminals serviced by the On-Line System.

2. An annual fee based on a percentage of common capital costs prorated over a period of five (5) years. The same formula described in Paragraph 6.A. above will be

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ANAHEIM, CALIFORNIA 92805
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1 used to calculate the percentage of capital costs attributed
2 to DISTRICT.

3 B. In addition to the above annual fees, custom
4 work requested by DISTRICT will be charged to the DISTRICT at
5 an agreed-upon hourly rate. The hourly rate will be forty-
6 five dollars (\$45.00) during the first year of this Agreement
7 and will be subject to further negotiation in subsequent
8 years.

9 C. DISTRICT shall pay CITY within thirty (30) days
10 after submission to DISTRICT of invoices itemizing services.

11 7. TERM AND TERMINATION

12 A. This Agreement shall commence upon execution by
13 CITY and shall continue from year to year unless terminated by
14 either party pursuant to the terms of Paragraph 7B below.

15 B. Either CITY or DISTRICT may terminate this
16 Agreement upon giving the other party at least sixty (60)
17 days' prior written notice.

18 C. In the event of termination, CITY shall provide
19 DISTRICT, at cost, a computer tape containing a copy of all of
20 DISTRICT patron records, title records and associated item
21 records.

22 D. In the event of termination, DISTRICT shall pay
23 the DISTRICT's share of fees and costs outlined in Paragraph
24 6, pro-rated to the date of termination.

1 CITY shall not maintain any record of individual patron
2 readership of books checked out beyond ninety days.

3 11. ENTIRE AGREEMENT

4 This writing constitutes the entire agreement
5 between the parties with respect to the subject matter hereof,
6 and supersedes all oral or written agreements which may have
7 been entered into between the parties. No modification or
8 revision shall be of any force or effect, unless the same is
9 in writing and executed by the parties hereto.

10 12. ASSIGNMENT

11 Neither DISTRICT nor CITY may assign or transfer
12 this Agreement, or any part thereof, without the written
13 consent of the other party.

14 13. DESIGNATION OF AGENTS

15 The Library Director, or his or her designee, shall
16 represent the CITY in all matters pertaining to this
17 Agreement.

18 14. NOTICES

19 Notices and communications concerning this Agreement
20 shall be sent to the following addresses:

21 CITY

22 City of Anaheim
23 Attention: City Clerk
24 200 South Anaheim Blvd.
25 Anaheim, CA 92805

DISTRICT

26 Placentia Library
27 District
28 Attn: Clerk of the Board

Either party may, by notice to the other party,
change the address specified above. Service of notice or

1 communication shall be complete when received at the
2 designated address.

3 15. EFFECTIVE DATE AND AUTHORITY

4 CITY and DISTRICT's signators represent that the
5 signators hold the positions set forth below their signatures
6 and that the signators are authorized to execute this
7 Agreement on behalf of DISTRICT and to bind DISTRICT hereto.

8 The effective date of this Agreement shall be the
9 latest date of execution hereinafter set forth opposite the
10 names of the signators hereto. In the event DISTRICT fails to
11 set forth a date of execution opposite the name(s) of
12 DISTRICT's signator(s), DISTRICT hereby authorizes CITY, by
13 and through its representative, to insert the date of
14 execution by DISTRICT's signator(s) as the date said
15 Agreement, as executed by DISTRICT, is received by CITY.

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OFFICE OF THE CITY ATTORNEY
CITY OF ANAHEIM
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1 IN WITNESS WHEREOF, the parties hereto have caused
2 this Agreement to be executed on the dates hereinafter
3 respectively set forth.

4 CITY OF ANAHEIM,
5 a municipal corporation

6 By _____
7 Mayor

8 DATE OF EXECUTION:
9 _____

10 ATTEST:
11 _____
12 City Clerk
13 "CITY"

14 PLACENTIA LIBRARY DISTRICT

15 DATE OF EXECUTION:
16 _____

17 By _____
18 Printed Name _____
19 Title _____

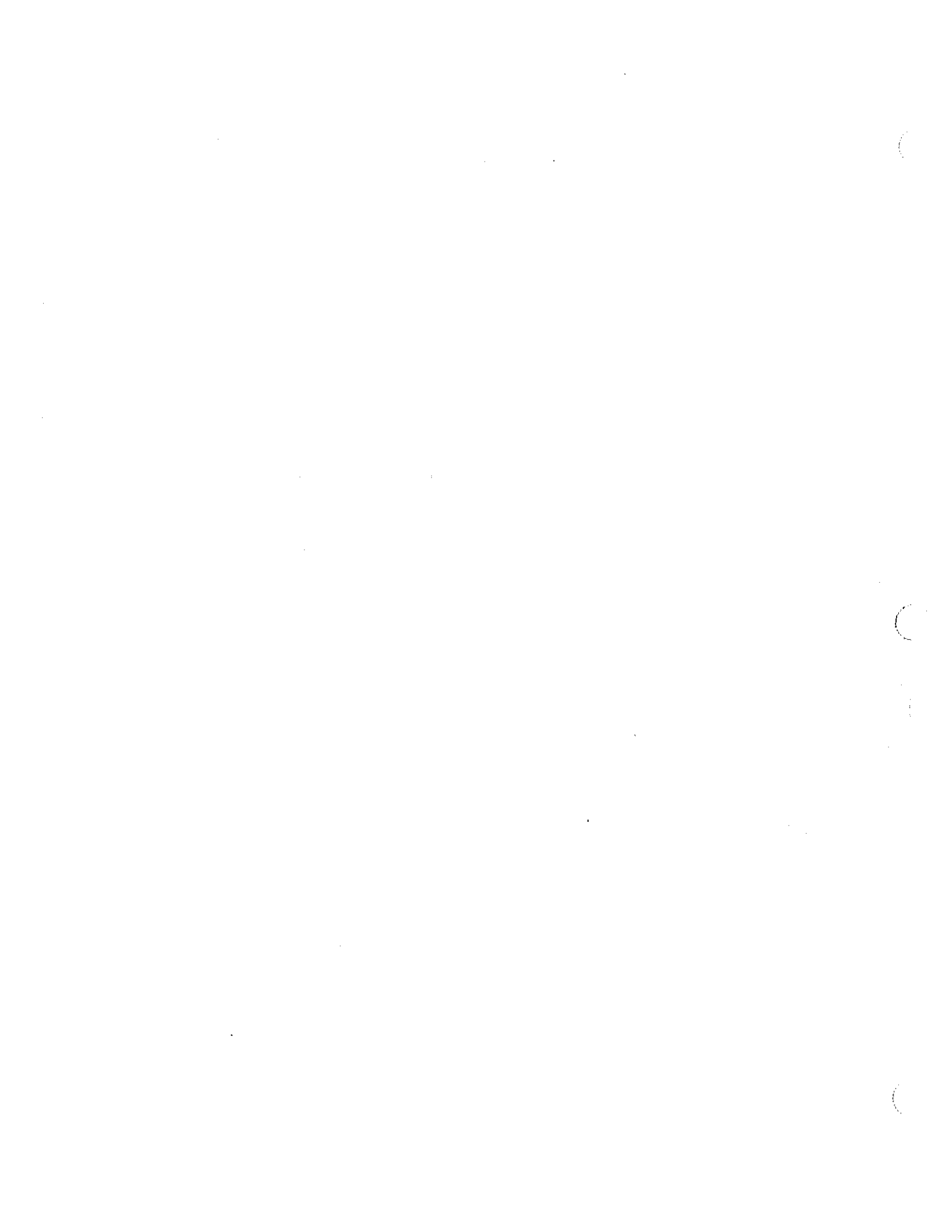
20 "DISTRICT"

21 APPROVED AS TO FORM:
22 JACK L. WHITE, CITY ATTORNEY

23 By _____

24 Date _____
25 EME:lm
26 48PLACT.14
27 102992

OFFICE OF THE CITY ATTORNEY
CITY OF ANAHEIM
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ANAHEIM, CALIFORNIA 92805
(714) 254-5169
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TO: Elizabeth Minter, Library Director
FROM: Suad Ammar, Principal Librarian ^{SA}
DATE: February 5, 1993
SUBJECT: Program Committee Report for the month of January.

Humanities Discussion Series: On January 27th, the Library received a letter of approval from the California Council for the Humanities, to the request for the mini-grant, for the project "Longing for Community: Dream or Nightmare."

The Committee, consisting of Pat Irot, Dixie Shaw, and Suad Ammar, will now proceed with the plans as outlined in the initial timetable.

Libraries Change Lives: The Program Committee is working hard on launching a powerful campaign for both, the National and local writing contests connected with this year's National Library Week's theme, "Libraries Change Lives."

Suad Ammar made a presentation at the Chamber Breakfast, on January 28th, introducing the concept of National Library Week, elaborating on this year's theme, explaining the general rules of the contest, encouraging the members to enter it and soliciting donations and prizes for the winners.

Flyers and fact sheets are available for distribution at the Library and will be sent to various clubs, organizations, businesses and churches, as well as the School District and the PTA Council.

Two street banners have been ordered to be hung, one over the intersection of Kraemer and Yorba Linda Blvds, and the other over the intersection of Chapman and Placentia Avenues, from mid February to mid April.

The Program Committee has written a request for \$750.00 to the Friends of the Library, to cover the cost of the banners.

Tax Forms Distribution Services: The Library continues to provide tax forms in the lobby. Clearly identified stacks of forms are replenished daily, patrons may either help themselves to the available forms or make copies from the Reproducibles conveniently located close to the copiers.

In addition to the forms , the 1992 Tax Preparation software has been installed in the public computer, and various tax information resources are available in the Reference Department.

Locations and telephone numbers of free tax preparation assistance programs are available for patrons who need them.

Tax distribution will continue until 11:00 pm on Wednesday, April 14th. and the public will be informed of the additional hours through the local media channels.

PLACENTIA LIBRARY DISTRICT		
PROGRAM STATISTICS		
DEPARTMENT	JANUARY 93	
	# PROGRAMS	# ATTENDEES
ADULT SERVICES	0	0
CHILDREN'S SERVICES		
Grandparents and Books	4	46
FFL Story Hour	2	36
Visits by Classrooms	7	236
Story Hours	2	15
Story Hours Ages 3-5	4	74
Toddler Times Age 2	2	53
After School Specials Ages 7-10	2	36
LITERACY SERVICES		
PLLS Holiday Party	1	31
FFL Christmas Party	1	57
Tutor Workshops	N/A	N/A
Tutor Workshop Followup	N/A	N/A
Tutor inservice	N/A	N/A
Student Support Group	N/A	N/A



TO: Elizabeth Minter, Library Director

FROM: Melanie Daniels, ^{MD}Literacy Coordinator

DATE: February 11, 1993

SUBJECT: Placentia Library Literacy Services Report

PROGRAM STATISTICS

Active tutors: 58

Active students: 78

Inactive tutors: 32

Students waiting to be matched: 29

Percentage of tutors reporting: 95%

Tutoring hours reported: 470.5

Other volunteer hours reported: 328.5 (includes workshop hours)

Total reported volunteer hours: 799

ACTIVITIES/PROGRAMS

Continuing Education Series for Tutors - Evelyn Renner presented "ESL Techniques" on January 16. Of the 26 tutors in attendance, 8 were paying guests from other literacy programs.

Tutor and Student Support Groups - A combined meeting was held on January 18; a total of 7 tutors and students attended. Several people called to cancel their RSVP due to the tornado watch in effect that evening.

ESL Small Group - Tutor Sean Levin began tutoring a small group of 7 ESL students on January 18. The group meets Monday evenings.

Tutor Training Workshop - Of the 22 people originally registered, 17 trainees began the workshop on January 21. Since the workshop started, 1 person has dropped. It is anticipated that 16 tutors will graduate February 11.

Literacy Bulletin Board - The current bulletin board solicits participation in the LVA Bowl-a-thon with the theme "Make a Strike for Literacy."

Newsletter - The January-February issue has been delayed due to the move of the newsletter volunteer to Washington. It should be distributed later this month.

CLLS MATCHING FUNDS GRANT

The required application for matching funds from California Library Literacy Services was submitted February 4. The grant will provide up to \$12,528 to supplement materials, operations, and equipment costs in the operation of PLLS.

STAFFING

Yvonne Flores and Patty Lopez from the JTPA/Jobs Plus program continue to help in the office weekday afternoons and evenings. Marie Catalano, a Human Services intern from CSUF, will be working with PLLS 8 hours per week. She has begun assisting with learner assessment and will also help Gwen Joseph with the Families for Literacy component of our program. Joe Parsons, a community service volunteer, will donate 75 hours to PLLS before the end of March.

NETWORK ACTIVITY

As of this date, 15 agencies have registered as participants in the Volunteer Fair that the Library is co-sponsoring with the Placentia Community Service Organization Network on February 27, 1993, from 10am to 1pm.

The Southern California Library Literacy Network met on Tuesday, January 19, at the Santa Fe Springs Library. State Librarian Gary Strong addressed the network and highlights of SCLLN's joint ventures and media campaigns were featured. Placentia Library District was represented by Elizabeth Minter, Peggy Dinsmore, and Melanie Daniels.

The Orange County Literacy Network met on Friday, February 5 at the Orange County Public Library's administrative headquarters in Santa Ana. OCLN is currently evaluating its objectives and searching for replacements for 3 board vacancies. A subgroup of OCLN named Workplace Literacy Providers of Orange County (WPLPOC) met on January 21; Placentia Library District was represented by Elizabeth Minter, Peggy Dinsmore, and Melanie Daniels. The group tentatively plans to provide a forum for the exchange of ideas and resources. A followup meeting is set for March 3.

UPCOMING ACTIVITIES

PLLS Tutor and Student Support Groups will hold a joint meeting on Monday, January 18, from 6 to 8pm.

TO: Elizabeth Minter, Library Director
FROM: Lusi Garcia, Literacy Clerk
DATE: February 12, 1993
SUBJECT: Placentia Library Literacy Services Report

To the best of my knowledge there are 3 tutors whom we have not been able to make contact with. Attempts to contact these 3 tutors are listed below and remain unsuccessful to date.

Ricki Moore (528-0266)
Called 2/10/93 - afternoon; left message
Called 2/11/93 - afternoon; left message
Called 2/12/93 - morning; left message

Matthew Bruce (524-0916)
Called 2/10/93 - afternoon; No answer
Called 2/11/93 - afternoon; No answer
Called 2/12/93 - morning; No answer

John Hopkins (524-2712)
Called 2/10/93 - afternoon; left message
Called 2/11/93 - afternoon; left message
Called 2/12/93 - morning; left message

TO: Elizabeth Minter, Library Director
FROM: ^{WJ}Gwen Joseph, Family Literacy Coordinator
SUBJECT: Family Literacy Project Report
DATE: February 4, 1993

Program Changes: After Christmas there was a continued run of low attendance (19-23 people per day). A class meeting was held and the following requests were made by the tutors and the students:

1. Students sign a form stating their understanding of the rules for participation in the program (ie. prompt regular attendance, calling if unable to attend, completion of homework, etc.)
2. A rule be made that if a student misses three lessons, without notifying the tutor with a valid excuse, they be asked to return their books and leave the program.
3. The program not return to 42 students but be limited to five groups of six students. (Both students and tutors had found the previous noise level distracting and disruptive and preferred the existing group situation)
4. Change the hours to 9-11 and eliminate the break.

Program Participation: There are currently 30 students active in the program. Attendance since our class meeting January 29 has been consistent. Our waiting list stands at 38.

Program Structure: The parenting section of the program has had to be changed to facilitate the increased number of people in the Friday class beginning February 26. A copy of the Friday program schedule is attached. Speakers are scheduled to talk with parents for 45 minutes to one hour. During that time the children will be allowed to use the HeadStart playground, and will have planned activities with the childcare personnel. Following the speaker will be a 30 minute family story and activity time. Some speaker programs are being conducted jointly by Families and HeadStart.

Healthy Start Grant Classes: Lynette Ward is completing arrangements for childcare and transportation, and this program continues to seek out more small group ESL tutors. Student enrollment has begun and the program will open with about 15 students. Classes are scheduled to begin on Monday, February 22. The bus will leave Ruby Drive Elementary school at 9 AM and make one stop in Placita Santa Fe before arriving at HeadStart. The bus will leave HeadStart at 11, reversing it's route. If enrollment in these classes stays low and tutors are available, it has been agreed that students could be pulled in off the HeadStart waiting list to fill in the groups.

Facilities: The Coordinator met with Glenn Parrish, Program Officer for the Fieldstone Foundation in late December. At that time he was researching community programs in Placentia. The Fieldstone Foundation gives grants and/or materials to

organizations in communities where construction is under way by its parent company Fieldstone Construction Company. At the time of that meeting the problem of facilities was discussed. The first week in February contact was made again and it was suggested that a proposal be drafted showing the costs of a portable classroom that would meet the needs of this program, HeadStart and the City of Placentia. The Coordinator is currently researching the possibility of such a joint venture.

The Coordinator is also researching portable dividers that could be used to help divide up the room area. Visual and auditory distractions are an on-going problem.

Lending Library: The lending library opened on Thursday, January 31. The bookcase was donated from the Friends of the Library store room. Books for all ages of children, and parenting materials are available in English and Spanish. Arrangements are being made to move on of the encyclopedias from the Children's Department to HeadStart. Many of the books were donated or purchased at a greatly reduced price from Scholastic Book Fairs, Inc., in Anaheim. More materials are needed, especially books with tapes, however the community is thrilled with just having easy access to such materials.

FAMILY LITERACY FRIDAY PROGRAM SCHEDULE

All meeting times are 9:30 -11:00 AM in Room 3, Placentia HeadStart, unless stated otherwise.

Buses for all field trips leave promptly and will not wait.

All programs will be in Spanish and English, and are led by qualified speakers.

Special activities will be provided for the children over 2 during the first hour on days with speakers. The last 30 minutes will be a joint activity with your child including a storytime and book giveaways.

January 29 -- Library *

Police station tours (must sign up in advance)

February 5 -- Planned Parenthood (contraception, clinic services,
family planning options)

February 12 -- Child Development and Discipline Techniques

February 19 -- Pizza Hut field trip

February 26 -- Oak Canyon Nature Center field trip

9AM - 11:30AM (limited to 30 people)

March 5 -- Library *

March 12 -- Placentia Police Department (Keeping your
neighborhood safe)

March 19 -- Discovery Museum field trip (limited to 35 people)

9:15AM - 11:30AM

March 26 -- Library *

April 2 -- Family Easter Party at HeadStart

April 9 -- NO MEETING

April 16 -- Placentia Police Department (Gang patrol officers)

April 23 -- Library *

April 30 -- La Habra Children's Museum field trip

9:30 AM - 11:45 AM (limited to 35 people over 2 years of age)

May 7 -- Placentia Linda Hospital (Poisons and how to keep your
home safe for children)

May 14 -- Placentia Police Department (Chief Ortega)

May 21 -- Orange County Health Care (Drug and Alcohol abuse in
children and adults)

May 28 -- Library *

June 4 -- Family picnic in the park (LAST MEETING)

*Library field trips give you a chance to learn about the library and check out books. Children have a 30 minute storytime with the Children's Librarian while the adults are shown a specific area of the library and what they can find there (like Children's books, video tapes, magazines and newspapers, reference material, fiction and non-fiction books). Adults are taught how to use the computer system. Adults who do not have library cards should bring a California ID OR a California drivers license OR a green card OR two official bills (Gas Co., Electric Co., telephone co., etc.) with your last name and current address listed.

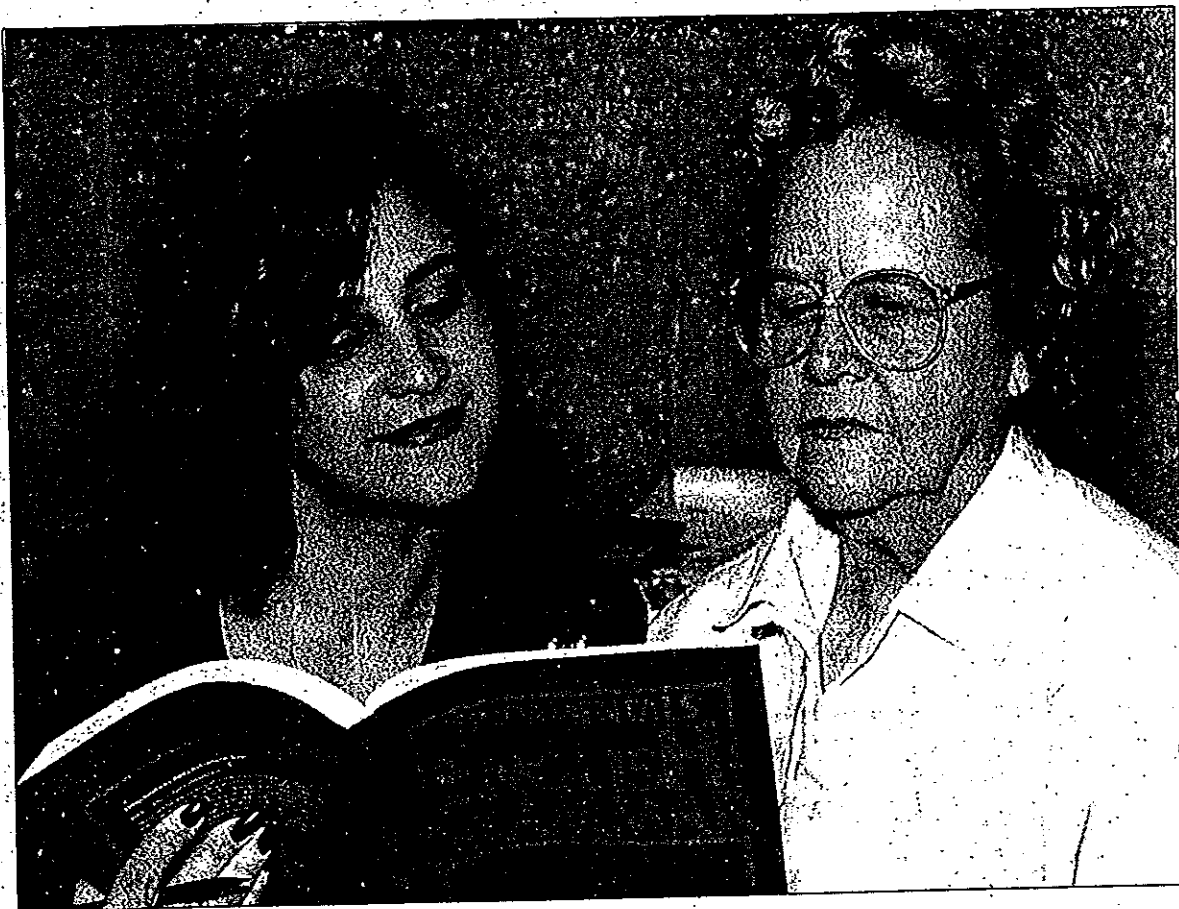
TO: Library Board of Trustees
FROM: Karen Cushing KC
DATE: February 9, 1993
SUBJECT: Publicity Materials produced for January 1993

The Program Committee has continued to keep busy throughout the month of January developing flyers, materials and press releases to advertise Winter library events. This includes: Winter Story Hours, Friends of the Library Book Sale and Annual Meeting, Literacy Tutor Training Workshop, Budget Information for the public, Black History Month, and National Library Month's "Libraries Change Lives" Writing Contest.

Please see attached materials.

We continue to advertise all events on our own Placentia Library Cable Station - Station #69. If you have cable at home, you may want to watch this!

The hardest decision



Jack Hancock/North County News
Literacy Volunteers of America aide Harriet Boone, right, and Iranian immigrant Masheed Ghazi work on the Fundamentals of English Grammar in the Placentia Library. Ghazi, separated from her daughters for several years, has established a new life in north Orange County.

Woman's road to America took a heartbreaking route

By Barbara Glasone
North County News

As Iraqi jets pounded Tehran with bombs in 1985, Masheed Ghazi and her family crouched regularly for two hours in the bedroom closet, bound by fear.

Toddlers Mahsa and Negeen cried out as explosions pierced the night sky.

Ultimately, the then-25-year-old mother buried her emotions as she handed her oldest daughter to a stewardess on a plane headed for Germany. Two years later, the scene was repeated when little Negeen tearfully left her mother's arms at 2 in the morning to board her flight to freedom.

The children were destined for Ghazi's parents' home where any threats of harm were quickly dissolved by grandparents' hugs.

"It was the hardest decision of my life," said Ghazi, gazing through the dining room window in her well-furnished Placentia apartment. "But with the ayatollah and his new regime, there was a constant fear something would happen to entire families."

In the seven years since her daughters and husband were separated by warfare, Ghazi has adapted to independence, reunions and an American lifestyle far removed from her Middle Eastern roots. In the process, she said, a parent must sometimes cast aside self-interests and do what's best for the family.

The young wife, recently laid off in the Bank of America merger, spent a recent afternoon recounting the years when a sense of abandonment fed personal guilt.

"My father was working for the Iranian army when the revolution started," Ghazi explained. "When the ayatollah came into power, he made it clear he didn't like the shah's army. He was always questioning the soldiers, asking where they went, what they did, how much money they had."

"So, my parents fled to Germany," she said.

Ghazi said she later visited her husband's family in Gorgan, a southeastern coastal town in Iran. "They couldn't figure out how I could send my girls away. I

told them I was seeing a lot of people die, families split. It was no joke. It was real. Sending my daughters away was the only way out."

For two years, Ghazi regularly visited the German consul's office in Tehran, pleading for a one-month visa to Germany. She and her husband were spending one half of his monthly engineering salary on phone calls to Germany.

In 1988, Ghazi was granted permission to travel. "I couldn't believe how much the girls had grown, how beautiful they were," she recalled. "I knew I never wanted to leave them again."

When the Iran-Iraq turmoil

Please see 'GHAZI/10

GHAZI:

FROM 8

ended, Ghazi's husband begged for her to return to Tehran.

"I knew I couldn't go back," she said. The children had everything in Germany, including a new language. And my parents were planning to visit my brothers in New Mexico. I thought maybe we could go along."

The family contacted the American consul in Frankfurt, impressing the officials with pictures of Ghazi's father with the shah. In August 1988, Ghazi, her daughters and her parents left Germany, headed for a new life in America.

"I was determined to get my own apartment," Ghazi said. "After 15 days in Albuquerque, I found a job in a jewelry factory and a two-bedroom apartment for \$400."

Two years later, after securing a visa in Turkey, Ghazi's husband Farsheed flew to America.

When he couldn't find work in New Mexico, the family came to Anaheim. Ghazi enrolled in Regional Occupational Program accounting classes, preparing her for a bank teller job. She also signed up at Fullerton College.

After moving one year later to Placentia, she noticed the Literacy Volunteers of America information

posted at Placentia Public Library.

"I knew I needed to learn the language a lot better," Ghazi said. "Now Mrs. Harriet tutors me."

Harriet Boone, a retired Orange Unified District English teacher living in Yorba Linda, said she was excited to work with Ghazi.

"Masheed waited six months to

get into the program," Boone said. "She's so eager to be literate in a language, and be able to carry on conversation and work in computer programs."

While her husband continues to look for an engineering job, Ghazi realizes her continuing education will pay off.

pacific clippings

post office box 11789
santa ana, calif. 92711

Placentia News
Weekly

JAN 07 1993

Library offering class for beginning tutors

A volunteer opportunity will be offered graduates of Placentia Library Literacy Services' at an 18-hour workshop beginning Jan. 21 at

the Placentia Library. The workshop will be held from 6 to 9 p.m. Mondays and Thursdays and is free of charge to volunteers making a six month commitment to the program.

Upon completion of the training, volunteers are matched with adult learners seeking to improve their basic reading, writing or conversational English skills.

The class, which is taught in cooperation with Literacy Volunteers of America, gives volunteers the skills needed to tutor an adult a basic literacy skills on a one-to-one basis. Tutors meet with their assigned students two hours weekly and spend an additional one to two hours preparing lessons.

No special skills are needed to be an effective literacy tutor beyond patience, the desire to help someone, and the ability to speak, read and write English.

To enroll or for more information about the program, call the Library's Literacy Center at (714) 524-8408.

pacific clippings

post office box 11789
santa ana, calif. 92711

Yorba Linda Star
Weekly

DEC 31 1992

Library offering class for beginning tutors

337
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pacific clippings
post office box 11789
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Placentia News
Weekly

JAN 07 1993

**Friends of Library
to sponsor book sale**

332
The Placentia Friends of the Library will have a used book sale at the Placentia Public Library on Friday from 2 to 6 p.m. and Saturday from 10 a.m. to 4 p.m. Sunday at 411 E. Chapman Ave., Placentia.

The annual meeting of the group will feature a reading of Eudora Welty's work presented by Joseph Arnold of California State University, Fullerton at 7:30 p.m. Jan. 28 at the library.

For information, call 528-1906.

pacific clippings
post office box 11789
santa ana, calif. 92711

Los Angeles Times
OC Edition
Daily

DEC 31 1992

Friends of the Placentia Library will hold a used book sale fund-raiser Jan. 8 and 9 at the library, 411 E. Chapman Ave., Placentia. Hours are 2 to 6 p.m. Friday and 10 a.m. to 4 p.m. Saturday. (714) 528-1906.

pacific clippings
post office box 11789
santa ana, calif. 92711

Los Angeles Times
OC Edition
Daily

JAN 7 1993

BENEFITS

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pacific clippings
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Placentia News
Weekly

DEC 24 1992

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Weekly

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pacific clippings
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santa ana, calif. 92711

Los Angeles Times
OC Edition
Daily

DEC 24 1992

PLACENTIA *332*

Placentia Library (411 E. Chapman Ave., Placentia, [714] 528-1906). Open 10 a.m. to 8:45 p.m. Monday through Thursday; 10 a.m. to 5:45 p.m. Friday and Saturday.

pacific clippings
post office box 11789
santa ana, calif. 92711

Los Angeles Times
OC Edition
Daily

DEC 31 1992

PLACENTIA *332*

Placentia Library (411 E. Chapman Ave., Placentia, [714] 528-1906). Open 10 a.m. to 8:45 p.m. Monday through Thursday; 10 a.m. to 5:45 p.m. Friday and Saturday.

pacific clippings

post office box 11789
santa ana, calif. 92711

Placentia News
Weekly **JAN 07 1993**

LIBRARIES

Trustee applications available

North County News *3/2*

Applications from the public for the position of trustee of the Placentia Library District are being accepted in the library director's office through 5 p.m. Jan. 14.

The term of the office will be until December 1994.

Trustees of the Placentia Library District are elected officials who serve without pay. They determine the policies and regulations of the library.

They also are responsible for maintaining the total effectiveness of the library's policies, services and needs.

Applications and a copy of the Placentia Library District Trustee Handbook may be picked up at the Library Director's Office or at the library book return desk.

Interviews will be held at 8 a.m. Jan. 16.

The new trustee will be installed at the regular board meeting on Monday, Jan. 18 at 7:30 p.m.

The qualities being sought in candidates are:

- Understanding of cultural, so-

cial and economic conditions in the community;

- Appreciation of the role of the library as an educational center for the whole community;

- Ability to help make the library appreciated and respected in the community;

- Availability to give time and effort required for board and committee meetings;

- Willingness to keep informed on library trends, developments and progress so that the program will constantly grow according to modern requirements; and
- Willingness to present the library's fiscal, building and program needs to appropriating bodies and the community.

For information, call Library Director Elizabeth Minter, 528-1925.

December 17, 1992 Placentia News-Times A11

COMMUNITY

Evans presents certificates to reading participants

North County News

Gold medalist Janet Evans presented certificates to about 70 children Saturday as part of the library's 1992 summer reading program.

More than 260 children were finalists in the program. Finalists read 25 or more books.

Last summer, the library had a display of Janet Evans memorabilia while she was swimming in the 1992 Summer Olympics in Barcelona, Spain.

Children made her a good luck banner and wrote personalized messages. The banner was sent to her.

Placentia Library Lost

\$127,967

and it may be more tomorrow . . .

The 1992-1993 State Budget Isn't Equitable

More than 20% of California's special districts have been exempted by the Legislature from the revenue reduction provisions of the 1992-1993 State Budget because they serve more than one county or meet other exclusionary criteria.

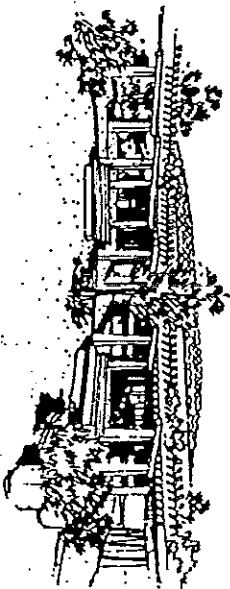
Not all independent special districts are being treated the same by the Budget Legislation.

The Budget Legislation assumes that Placentia Library District is receiving all or part of its \$400,947 contribution to the Special District Augmentation Fund, when, in fact, the Orange County Supervisors have allocated \$0.00.

Because it has been receiving no Special District Augmentation Funds for the past three years, Placentia Library District has been operating 100% under the restrictions of Proposition 13.

The Budget Legislation reduces Placentia Library District's property tax percentage below pre-Proposition 13 levels when it doesn't impose the same reductions on all other special districts.

Ask for a FACT SHEET at any Library Service Desk!



If you are concerned about the impact of the State Budget on your services at Placentia Library District

or

If you would like additional information and/or

If you are willing to help

Please contact any one of the Placentia Library District Trustees:

- Peggy Dinsmore, President 528-7618
- Sandra Stark, Secretary 524-3139
- Ray Evans 996-3091
- Al Shkoler 996-0128

Al Shkolier.....996-0128
Ray Evans996-3091
Saundra Stark, Secretary.....524-3139
Peggy Dinsmore, President.....528-7618

Placenta Library District Trustees:
Please contact any one of the

If you are willing to help

If you would like additional information
and/or

or
If you are concerned about the impact of the provisions
of the State Budget on your library services



The Honorable Don Roth
Orange County Board of Supervisors
Hall of Administration
10 Civic Center Plaza
Santa Ana, CA 92701
Dear Mr. Roth:

The Honorable Ross Johnson
California State Assembly, 64th District
5160 Capitol Building
Sacramento, CA 95814
Dear Mr. Johnson:

The Honorable John Lewis
California State Senate, 35th District
3074 Capitol Building
Sacramento, CA 95814
Dear Senator Lewis:

How to Write to Your State and County Legislators

You've just lost

\$127,967

and it may be more tomorrow . .

The District's revenue loss of \$127,967 is based upon 10% of the District's total revenue, regardless of its source:

- ➔ 10% of the property tax
- ➔ 10% of the gifts received from individuals
- ➔ 10% of the fines, fees, and rentals
- ➔ 10% of the literacy grant
- ➔ 10% of the fees for children's arts and crafts programs

Proposition 13 Altered by State

Proposition 13 provided that cities, counties and special districts would have their revenues reduced proportionately. Each agency would receive the same percentage of property tax that it received before Proposition 13 — there would just be fewer dollars to distribute.

The 1992-1993 State Budget changed this basic distribution formula. For the first time since the passage of Proposition 13 the District's percentage of the property tax has been reduced and transferred to a newly established Educational Augmentation Fund.

By doing this the State frees up the money it had been giving to the schools to spend on the State's own programs.

The only tax revenue Placentia Library District receives is property tax. Unlike special districts in other counties of California, Placentia Library District receives no Special District Augmentation Funds, as described below.

County Diverts District's Augmentation Funds

The implementation of Proposition 13 in 1978 reduced Placentia Library District's property tax revenue by almost 60%.

In 1979 the Legislature passed AB 8 which shifted some of the school districts' property tax revenues to local agencies and replaced the school districts' losses with appropriations from the State General Fund.

Each county's AB 8 funds were allocated directly to the county, and each city's AB 8 funds were allocated directly

to the city. However each special district's AB 8 funds were deposited in a "Special District Augmentation Fund " in each county. The boards of county supervisors were given the authority to distribute this Fund.

Placentia Library District's contribution to the Special District Augmentation Fund in Orange County is \$400,947. In the last three years the Orange County Supervisors have allocated Placentia Library District NONE of the \$400,957 the District is contributing each year to the Fund.

Since the State Legislature granted the boards of county supervisors discretion over the distribution of the Special District Augmentation Fund, the Orange County Supervisors have chosen to fund only the districts that are under their administrative control: County Fire Department (this amount is in addition to the \$2,687,384 that the City of Placentia is paying for County fire service for the City); County Flood Control; County Harbor, Beaches and Parks; and the County Library.

The 1992-1993 State Budget Isn't Equitable

- ➔ More than 20% of California's special districts have been exempted by the Legislature from the revenue reduction provisions of the 1992-1993 State Budget because they serve more than one county or meet other exclusionary criteria.

Not all independent special districts are being treated the same by the Budget Legislation.

- ➔ The Budget Legislation assumes that Placentia Library District is receiving all or part of its \$400,947 contribution to the Special District Augmentation Fund, when, in fact, the Orange County Supervisors have allocated \$0.00.
- ➔ Because it has been receiving no Special District Augmentation Funds for the past three years, Placentia Library District has been operating 100% under the restrictions of Proposition 13.

The Budget Legislation reduces Placentia Library District's property tax percentage below pre-Proposition 13 levels when it doesn't impose the same reductions on all other special districts.

What You Can Do To Help!

Contact California Senator John Lewis
714-939-0604 or 916-445-4264
and
California Assemblyman Ross Johnson
714-738-5853 or 916-445-7448

money from the State through the Special District Augmentation Fund, should not be penalized any further until all other special districts, both independent and dependent, are operating under the same conditions.

Contact Orange County Supervisor Don Roth
714-834-3440

Tell them that ... the Legislature needs to find a way to balance the State's budget without reducing Placentia Library District's Pre-Proposition 13 share of the property tax.

Tell him that ... you want the Special District Augmentation Funds contributed by Placentia Library District to be allocated to Placentia Library District, and not used to support the dependent districts of the Orange County Supervisors.

Tell them that ... it is not fair for Placentia Library District to lose 10% of its income when over 20% of the special districts in California lost nothing.

Tell him that ... Placentia residents already spend \$2,687,384 from City tax dollars for County fire sery and they should not have to supplement it with lib funds. Also, Placentia residents receive no direct services from the Orange County Library.

Tell them that ... agencies like Placentia Library District that are already successfully living 100% under the restrictions of Proposition 13 by not receiving any bailout

FRIENDS OF THE PLACENTIAL LIBRARY BOOK SALE EARNINGS

	Annual	Ongoing	Special	TOTAL
1984	1520.45	2178.90	0	3699.35
1985	959.52	2250.68	0	3209.20
1986	1070.75	2747.47	0	3818.22
1987	1071.80	2409.73	0	3481.53
1988	1301.05	2683.70	0	3984.75
1989	1191.25	3032.24	0	4223.49
1990	1420.50	3935.26	0	5355.76
1991	884.25	5249.55	490.05	6623.85
1992	841.00	5466.00	670.00	6977.00
TOTAL	10,259.57	2,953.53	1,160.05	41,373.15

LIBRARY FRIENDS ARE SO SPECIAL

- Shauna Antley
- Chad Canter
- Ruth Cain
- Fredi Covell
- Paul Deputy
- Mae Goldbaum
- Jon Hsiao
- Mark Kim
- Salehah Ismailjee
- Jennifer Manalastes
- Joyce Matsumoto
- Nick Siedentop
- Pat Vesely

ANNUAL MEETING

January 28, 1993

6:45 P.M. Social Time
Refreshments, Conversation

7:00 P.M. Formal Welcome
Pat Irol, Friends' President
Elizabeth Minter, Library Director
Peggy Dinsmore, Trustee President

7:10 P.M. Nominating Committee
Virginia Walker, Chairperson
Presentation of Nominees and
Membership Vote

7:15 P.M. Volunteer Recognition
Diane Jackson

7:30 P.M. Speaker
Dr. J. Arnold, CSUF

8:30 P.M. Adjournment
Social Time

Renew Your Friends' Membership for
1993 tonight with our Membership
Chairperson if you are not current.

F R I E N D S
of the
L I B R A R Y

FRIENDS OF THE
PLACENTIA LIBRARY

BOARD OF DIRECTORS

1993

President	Pat Irot
Vice President	Publicity Nita Godwin
Vice President	Nominating Virginia Walker
Secretary	Joy Pinckney
Treasure	Marjorie Daily
Hospitality	Beverly Johnson
Book Sale Advisor	Ruth Cain
Historians	Cecilia Murphy Kathleen Murphy

WELCOME



The Placentia Library District

Celebrates

National Library Week 1993

April 18 - 24

"How the Library Changed My Life"

LIBRARIES CHANGE LIVES



PLACENTIA LIBRARY DISTRICT

Write a short story, a poem, an essay or a play on how the Library changed your life.

Submit it to Placentia Library District between February 16 and March 20.

Prizes for local winners will be awarded and entries may be submitted to the National contest where YOU may win a trip to New Orleans!

Local winners will be recognized on
Tuesday, April 20
7:00 PM

Library Meeting Room

411 E. Chapman Avenue, Placentia

For entry forms, contest rules and more information call 714-528-1906.

BLACK HISTORY MONTH

- J 920
ALTM Altman, Susan R. Extraordinary Black Americans From Colonial To Contemporary Times. Childrens Press, 1989.
- 940.541
B592 Biggs, Bradley. The Triple Nickles: America's First All-Black Paratroop Unit. Archon Books, 1986.
- 92
Farmer Farmer, James. Lay Bare The Heart: An Antobiography Of The Civil Rights Movement. Arbor House, 1985.
- 323.1196
HAMP Hampton, Henry. Voices Of Freedom: An Oral History Of The Civil Rights Movement From The 1950's Through The 1980's. Bantam Books, 1990.
- 92
Douglas Huggins, Nathan. Slave And Citizen: The Life Of Frederick Douglass. Little, Brown, 1980.
- J 973.049
M158 McKissack, Pat. The Civil Rights Movement In America From 1865 To The Present. Childrens Press, 1987.
- 92
Carver McMurry, Linda O. George Washington Carver, Scientist And Symbol. Oxford University Press, 1981.
- 92
DuBois Marable, Manning. W.E.B. DuBois: Black Radical Democrat. Twayne, 1986.
- YA 973.049
M528 Meltzer, Milton. Black Americans: A History In Their Own Words, 1619-1983. Crowell, 1984.
- 92
King Oates, Stephen B. Let The Trumpet Sound: The Life Of Martin Luther Kings, Jr. Harper & Row, 1982.
- 973.0496
PARI Parish, Peter J. Slavery: History And Historians. Harper & Row, 1989.
- B
HUGH v.1 Rampersad, Arnold. The Life Of Langston Hughes. Oxford University Press, 1986.
- 323.409
W724 Williams, Juan. Eyes On The Prize: America's Civil Rights Years, 1954-1965. Viking, 1987.

February 1 - 28 is Black History Month. This is a special period of time set aside to recognize the achievements and contributions by African Americans. The observance dates back to 1926. It was started by Dr. Carter G. Woodson, but in 1976 the Association for the Study of Afro-American Life and History under the direction of the late J. Rupert Picott led a successful campaign to expand the observance to the entire month of February.

PRESS RELEASE

Agenda Item 34
Attachment 0

Placentia Library District
411 East Chapman Avenue
Placentia, CA 92670

FOR MORE INFORMATION CALL:

Suad Ammar,
Principal Librarian
(714) 528-1906

The Placentia Library District is sponsoring a writing competition on the theme "How the Library Changed My Life." Submissions may be in the form of essays, poetry, short stories, plays or other forms of written expression, as long as the work pertains to the competition theme and is the original work of the entrant.

Entry forms and competition rules will be available in the Library beginning February 16, 1993. Entries may be submitted between February 16 and March 31, 1993. Winners will be announced at a recognition ceremony on Tuesday April 20th, 1993 during National Library Week April 18-24.

Library patrons fitting one of the categories listed below are encouraged to participate.

- Students in 4th through 7th grades
- Students in 8th through 12th grades
- Adults; members of the Business and Education community.
- Adult literacy students - Basic Reading
- Adult literacy students - English as a Second Language

The American Library Association (ALA) has chosen the theme "Libraries Change Lives" to celebrate National Library Week in 1993 and 1994.

The Placentia Library District is adopting the ALA's theme for its own observance of National Library Week and is sponsoring the writing competition so that library patrons may share their success stories and celebrate National Library Week in a personally meaningful way.

Every library that submits 25 or more "success stories" will receive a certificate to commemorate its participation and be entered in a Grand Prize" drawing consisting of one \$500, two \$250 and ten \$100 gift certificates for ALA Graphic materials.

All entrants are encouraged to submit their entries to ALA as well, because three people who submit outstanding stories will be selected to receive a trip for two to the 1993 ALA Annual Conference in New Orleans where they will be honored at the opening General Session.

For more information, pick up a copy of the competition entry form and rules at the Placentia Library starting February 16, 1993 or call Suad Ammar, or Melanie Daniels at (714) 528-1906.

PRESS RELEASE

Placentia Library District
411 East Chapman Avenue
Placentia, CA 92670

FOR MORE INFORMATION CALL:

Kay Schneider,
Children's Librarian
(714) 528-1906

FOR IMMEDIATE RELEASE

Winter Story Hour Schedule at the Placentia Library.

The winter schedule of programs for children ages 2 - 10 will begin January 18, 1993. There are a variety of programs to choose from each week. Come in or call 528-1906 to register.

TODDLER TIMES for children ages 2 & 3 with an adult are held on **Tuesdays at 10:30-11:00AM**. Stories, counting rhymes, songs & puppets are among the planned activities for the Toddlers.

PRESCHOOL STORY HOURS for children ages 3 - 6 years will be offered on **Monday afternoons at 1:00 - 1:45PM** and on **Wednesday mornings at 10:30 - 11:15AM**. Activities will include great stories, songs, finger puppets, flannel board stories, movies and LOTS of fun!

FIRST GRADE STORY HOURS including stories, puppets, crafts and movies will be held on **Wednesdays after school from 3:30 - 4:15PM**.

AFTER SCHOOL SPECIALS are each **Thursday after school from 3:30 - 4:30pm**. Children ages 7 - 10 enjoy stories and a variety of crafts each week. Registration Required.

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PRESS RELEASE

Placentia Library District
411 East Chapman Avenue
Placentia, Ca 92670

FOR MORE INFORMATION CALL:

Suad Ammár,
Principal Librarian
(714) 528-1906

FOR IMMEDIATE RELEASE

The Placentia Library District, in conjunction with a Healthy Start grant awarded by the federal government to the Placentia-Yorba Linda Unified School District, is offering a special homework/project assistance program to students at Kraemer Junior High School. Students working on special projects, or who require special assistance, or the use of reference materials that are not available at their school can receive help from the library staff and specially trained volunteers after school Monday through Thursday. Money from the grant will pay for a late bus pick up at the library to return students to their home areas. For more information on this program, please contact the Placentia library Literacy Services office at (714) 524-8408.

#####

PRESS RELEASE

Placentia Library District
411 East Chapman Avenue
Placentia, CA 92670

FOR MORE INFORMATION CALL:

Suad Ammar,
Principal Librarian
(714) 528-1906

FOR IMMEDIATE RELEASE

"Libraries Change Lives" Writing Competition

The Placentia Library District is sponsoring a writing competition on the theme "How the Library Changed My Life." Submissions may be in the form of essays, poetry, short stories, plays or other forms of written expression, as long as the work pertains to the competition theme and is the original work of the entrant.

Entry forms and competition rules will be available in the Library beginning February 16, 1993. Entries may be submitted between February 16 and March 31, 1993. Winners will be announced at a recognition ceremony on Tuesday April 20th, 1993 during National Library Week April 18-24.

Library patrons fitting one of the categories listed below are encouraged to participate.

Students in 4th through 7th grades

Students in 8th through 12th grades

Adults

Adult literacy students - Basic Reading

Adult literacy students - English as a Second Language

All entrants are encouraged to submit their entries to ALA as well, because three people who submit outstanding stories will be selected to receive a trip for two to the 1993 ALA Annual Conference in New Orleans where they will be honored at the opening General Session.

For more information call Suad Ammar, or Melanie Daniels at (714) 528-1906.

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TO: Library Board of Trustees

Agenda Item 35

FROM: Sal Addotta, Assistant Library Director ^{Sma}
Suad Ammar, Principal Librarian ~~SA~~

DATE: February 11, 1993

SUBJECT: Americans With Disabilities Act Compliance Report Update

BACKGROUND:

One improvement has been made since the last issue of this table in December--our public telephones are now in full compliance.

The City Advisory Committee on the Disabled is reviewing the Library's ADA Self Evaluation.

RECOMMENDATION:

Receive and file.

ADA SELF-EVALUATION

Area Surveyed	Status	Proposed Action	Target Completion Date
Parking	accessible	none	N/A
Entrance	fully accessible	automatic doors installed Feb. 1991	completed
Entryway footing	tiles partially accessible	replace as part of remodeling project	FY93-94
Restrooms	legal, but largely in- accessible	redesign as part of remodeling project	FY93-94
Drinking fountains	marginally accessible; too high; activator stiff	redesign as part of remodeling project	FY93-94
Public telephones	legal and fully accessible	telephone booth added at lower ADA height	<u>COMPLETED</u> <u>DECEMBER 92</u>
Signage	no written procedures for helping disabled	draft sign wording; produce sign(s)	in progress
Access to staff and collections	counters at Ref/Circ desks are too high for persons in wheelchairs;	<u>temporary solution</u> is to provide clip-boards and pens and pencils at Ref/Circ desks	in progress
Access to staff and collections	same as above	<u>permanent solution</u> is to lower counters at Ref/Circ	FY93-94
Telephone access for deaf users	no access	install TDD equipment	FY93-94

TO: Library Board of Trustees
FROM: Elizabeth D. Minter, Library Director *adm*
DATE: February 16, 1993
SUBJECT: Santiago Library System Report

The Council of the Santiago Library System (SLS) met on February 11, 1993.

SLS is contracting with the Metropolitan Cooperative Library System (MCLS), with member libraries in Los Angeles and Ventura Counties, for administrative services for Fiscal Year 1992-1993. This contract was arranged because SLS does not have funding adequate to hire a full time administrator unless its members begin paying dues, and qualified part time administrators are not available. SLS Council members reported that they are happy with the quantity and quality of services being provided by MCLS. SLS also contracts with MCLS for the provision of second level reference services.

The Council discussed the following options for the future of SLS:

Formal merger with MCLS or another existing library system. (strong possibility)

Dissolving SLS with no replacement system. (not likely)

Expanding SLS and hiring a staff to implement programs. (not likely)

Contracting with MCLS or another system, private sector management firm, an individual, or a member library to administer SLS. (possibility that preserves status quo)

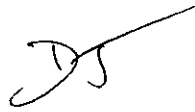
It was agreed to request the MCLS Council to consider a second year contract for administrative services. The Council also invited the Orange County Public Library to submit a proposal for providing the same services.

This issue will be discussed again at the next SLS Council meeting on April 8, 1993.



TO: Elizabeth Minter, Library Director

FROM: Dianne Jackson, Clerk II



DATE: February 16, 1993

SUBJECT: **Tax Form Distribution Service**

As of February 12, 1993, we have received the third volume of reproducibles for the Federal Tax Forms. This, along with the first two volumes is available for the public near the copy machines with a copy at the reference desk.

The Federal Tax Video is also available at the checkout desk. It circulates for one week.

We have Large Print Instructions available to patrons for circulation . They are located on the Large Print shelf.

We have received and installed the Federal tax Preparation software for the Public Computer. We are still waiting for the delivery of the California State Tax Preparation Software.



POLICY #6-82 OF THE PLACENTIA LIBRARY DISTRICT

MEETING ROOM POLICIES AND REGULATIONS

Approved: November 12, 1990

Revised: January 21, 1993

The purpose of the Library Meeting Room is to provide facilities for educational and cultural activities that are a part of the Library program. The room may also be used by community groups or organizations (businesses, realty, energy) that are educational or cultural in nature provided that these activities are nonprofit, nonpartisan, and nonsectarian. The Board of Trustees has established the following conditions to govern the use of the Meeting Room.

1. Effective May 1, 1993, a fee of \$30.00 (normally paid the day of the meeting) is charged for each meeting or event held in the Meeting Room. The fee is waived for those meetings or events sponsored by the Library Staff or Board of Trustees. The fee will also be waived for the Friends of the Placentia Library, the City of Placentia and elected public official for nonpartisan presentations and Red Cross First Aid classes for groups such as Girl Scouts, etc....
2. Application for use of the room shall be made through the office of the Library Director on the form provided for that purpose. The office should be notified 24 hours in advance of any change in a scheduled meeting. No group may reserve the Meeting Room for more than three dates per application.
3. Cancellation of meetings is a mutual responsibility. Adequate advance notice would be appreciated. Repeated failure to cancel when use is not made will be cause for forfeiture of further use.
4. A permit to use the room is not transferable.
5. Fifty per cent of the membership of any organization granted use of the Meeting Room must be residents of the Placentia Library District. Admission shall not be charged by groups using the room, except with the prior approval of the Board of Trustees, but regular fees or club dues may be collected. Exceptions to this rule may be applied to paid registrations necessary to cover expenses for institutes or special programs held in cooperation with the Library.
6. Upon reasonable notice, the Library reserves the right to require a group to reschedule or relocate within the facility if the Meeting Room is needed for Library functions.

7. Organizations using the facility are responsible for moving the chairs from the storage area and for arranging them and other furniture. Chairs are to be returned to the storage area after the meeting. If the Library staff has to set up chairs or return them, an additional fee of \$10 is charged.
8. The person who signs the application form will be deemed an official representative of the group, and liable for any damage to Library and facilities. The person signing the application form must be at least 18 years old.
9. Permission will not be granted for religious services, Sunday school classes, or to formal religious groups and organizations.
10. Permission to use the facilities will not be granted to an individual or group representing a single political party or political action group except that in the interest of civic enlightenment and public education, use may be granted for political meetings provided all factions are invited and/or represented at the given meeting.
11. No meetings or activities shall be held for the purpose of advancing any doctrine or theory subversive under the Constitution of the United States or the State of California.
12. Meals may not be served in the Meeting Room. If light refreshments are provided, the kitchenette must be left clean and in accordance with posted kitchen-use rules. The Library does not have supplies available for the serving of refreshments.
13. The Library Director has the authority to require a refundable deposit for cleaning of the carpet if the planned activity has the potential of soiling the carpet beyond normal use.
14. Alcoholic beverages are prohibited.
15. The fact that the Board of Trustees gives a group permission to use the Meeting Room in no way constitutes an endorsement of the policies or beliefs of the group by the Board or Library Staff and further, the Board or the Staff will not be held responsible for any action undertaken or administered by any organization
16. The Meeting Room cannot be used for music rehearsals and similar noise generating activities.



17. Personal property brought to or into the Meeting Room by any user is done so at the user's risk.
18. Permits may be revoked by the Library Director whenever there has been a violation of these rules.
19. The Meeting Room cannot be used for activities for personal profit, or, benefit, except in instances where the objectives of such event is related to the improvement or betterment of the Library. Vending of any article or service will not be permitted.
20. Evening meetings held in the Meeting Room must complete all closing requirements and vacate the room by midnight.
21. If a question should arise on the interpretation of these regulations, the matter is subject to the final decision of the Board of Trustees. These regulations may be changed or amended at any time by the Board of Trustees.
22. Capacity limitations: When used as one room, the maximum capacity will be 139 standing and seating shall be limited to 100. When the room is divided, each side will be limited to 50 people.
23. Effective May 1, 1993, the charge for use of the Meeting and Conference Rooms by the same group at the same time will be \$30.00 for each room used.
24. It is required when a group needs a key for the Meeting Room, that applicant is to sign the necessary form.
25. Organizations requiring the presence of the Page, will incur the cost of the Page's wages.

The following equipment is available to the Meeting Room:

1. 74 chairs
2. 12 tables (6' x 2 1/2')
3. 1 lectern
4. 2 wall screens
5. 1 pointer
6. Piano
7. Television set
9. 2 flags (American and State flag)
10. 1 blackboard



California
Special District
Association
915 L Street
Suite 100
Sacramento, CA
95811
916.442.7000

GOVERNOR PROPOSES "GROWTH MANAGEMENT" PLAN: CONSOLIDATION OF SPECIAL DISTRICTS

In a report released by the Office of Planning and Research this week, Governor Wilson's "Growth Management Council" proposed collapsing LAFCOs into new and re-formed regional Councils of Government (COGs). One purpose of the COGs would be to "facilitate the consolidation and elimination of unnecessary or duplicative special districts."

The report seems to imply that special districts are somehow culpable for unplanned growth and states that "... a COG could minimize adverse impacts that the current proliferation of special districts has on regional planning." The irony is that many special districts have been left out of the planning process altogether. In some instances, planning would be much more effective if special districts were consulted regarding the level of services they are able to provide.

The proposal also includes the elimination of the Special District Augmentation Fund, in favor of tax-sharing arrangements to be approved by the new COGs.

Current COGs are of a voluntary nature, and consist of county supervisors and city councilmembers. Under the new system, COG membership would essentially be mandatory. COGs would serve as regional planning agencies with the authority to certify local comprehensive plans. There was no mention of special district representation on COGs. We should be concerned that special districts are not pushed further out of the decision-making process.

CSDA Legislative Advocate Ralph Heim is meeting with business, real estate and local government representatives to coordinate our efforts against the property tax shift and the strategic growth plan. CSDA Vice-President Michael Glaze will be testifying before the Assembly and Senate Local Government Committees on

Executive Director
David Nagler

Deputy Director:
Catherine Smith

Special Events Director
Karen Roberts

Legislative Advocate

February 10th and 17th to communicate our dissatisfaction with these proposals.

It is important that you write your legislators to let them know that you oppose both the property tax shift and the proposed growth plan. LAFCO consolidation into larger COGs would result in local government which is inaccessible and unresponsive to community needs. Please communicate the fact that the \$2.6 billion shift amounts to more than the AB 8 bailout money; it is historical local revenue. Also, be sure to indicate what programs and services have been cut as a result of last year's shift, and what effect any further cuts may have.

A creative idea: Along with a notification of a rate increase, one water district mailed its ratepayers an explanation that legislative actions were the cause of the rate increase. Enclosed with the note was a postcard for the constituent to mail to their legislators, expressing their dismay with the rate increase. This caught the attention of Assemblymembers Jack O' Connell, Andrea Seastrand, and Senator Gary Hart, who will be meeting with special district representatives this weekend. A word of caution though: Please have your district's counsel review any communication with your constituents relative to the the property tax shift to ensure compliance with the State's mass mailing law. Violation of this law could result in substantial fines for your district.

I.S.C.O.C.
JANUARY, 1993
A MESSAGE FROM PRESIDENT JIM EVANS
REGARDING THE STATE BUDGET

The Governor has asked the legislature to take another \$2.6 Billion from the Counties, the Cities and the Special Districts. The CSDA has pledged to help us fight this confiscation of our funds.

I would like to suggest some things your District should consider doing.

1. Advise us and CSDA of your FAX number. CSDA will be sending out advisories as to what is going on regarding the budget process. If you do not have a fax machine maybe now is the time to get one.

2. Communicate with your state legislators. Let them know how you feel about the Governor's proposal. Also it wouldn't hurt to let CSDA know how you feel.

3. Communicate with your constituents. Let them know what's going on. Tell them to talk to their legislators.

4. Put articles in the newspaper if possible.

5. Appear on Cable TV. Get the word out. If we can help you, let us know.

We would like to get a directory out. Please furnish us up to date information as soon as possible.

My other goals for this year are:

1. To come up with a good description of Independent Special Districts. Send us your ideas please.

2. To continue to work for representation on LAFCO.

That's all for now. May you all have a great New Year.



**BRIEF OVERVIEW OF CALIFORNIA
TAXATION AND IMPLEMENTATION SCHEME**

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MCCORMICK, KIDMAN, BEHRENS & HOLZWARTH

SUZANNE M. TAGUE

January 21, 1993

1. CONSTITUTIONAL TAXING POWER AND PROP XIII

Article 13, Section 1 of the California Constitution empowers the Legislature to tax all property and to tax it in proportion to its full market value.

By initiative process, Article 13A was added to the Constitution. Section 1 of this Article adds further limits to the states ad valorem tax power by limiting the maximum amount of any ad valorem property tax on real property to one percent (1%) of the full cash value. However, the 1% limitation excludes ad valorem taxes or special assessments on indebtedness approved by voters prior to July 1, 1978 or subsequent bonded indebtedness approved by two-thirds of votes cast by voters voting in the election. These taxes may be levied in addition to the one percent (1%).

Section 2 of Article 13A defines "full cash value" as the county assessor's valuation of real property as shown on the 1975-76 tax bill, or the appraised value of the real property when purchased, newly constructed or a change in ownership has occurred after the 1975 assessment. The full cash value base may reflect from year to year the inflationary rate not to exceed 2% for any given year or reduction as shown in the consumer price index (Article 13A, Section 2(b)).

Article 13A also limited the imposition or change in any state taxes by state legislation passed by not less than two-thirds of all members elected to each of the two houses of the Legislature and specifically prohibited the State from levying any new ad valorem taxes on real property and/or sales/transaction taxes on the sale of real property (Article 13A, Section 3).

Cities, counties and special districts can, by a two-thirds vote of the qualified electors impose special taxes on the district. Cities, counties and special districts are prohibited from levying an ad valorem tax on real property (other than for bonded indebtedness approved by two-thirds (2/3) of qualified voters) or for imposing a sales/transaction tax on real property. (Article 13A, Section 4).

The one percent (1%) tax is to be collected by the counties and apportioned according to law to the districts within the counties (Article 13A, Section 1).

2. SB 154 EMERGENCY LEGISLATION FOR IMPLEMENTATION OF PROPOSITION 13

In the initial year after the passage of Proposition 13, the Legislature enacted SB 154 to provide for a temporary system of financing local government, i.e., apportioning the tax according to law.

SB 154 allocated revenues from the 1% property tax rate to all counties, cities, special districts, and school district on

a pro rata basis. The formula relied on the average percentage of all property tax revenues that each county's local agencies had collected in the three prior fiscal years. For example, if a city had generated 10% of the property tax revenue in its county, then it received 10% of the 1978-79 revenues generated in the county (Government Code, Section 26912). This formula was also adjusted for certain redevelopment agency funds previously allocated to redevelopment areas (Health & Welfare Code, Section 33670). The property tax revenues being allocated under 26912 exclude taxes levied to pay outstanding general obligation bonds levied prior to July 1, 1978 (including school bonds).

State Assistance Under SB 154

Additionally, the State provided assistance in the sum of \$878 million from the State General Fund to local governments as block grants to ensure that they would not fall below 90% of what their budgets would have been had Proposition 13 failed (Government Code, Sections 16250-16285).

3. AB 8 - "PERMANENT" ALLOCATION SCHEME FOR PROPOSITION 13

The primary provisions for the implementation of this permanent allocation system beginning with the 1979-80 fiscal year are found in Revenue & Taxation Code, Sections 90-100.

a. GENERAL PROPERTY TAX LEVY

Revenue & Taxation Code, Section 93 is the source for the levy of property taxes and levies for general obligation bond payments. This section also confirms that the interest and penalties assessed by the county for late payment of property taxes are revenues belonging to the county and are not allocated by the 1% formula (Revenue & Taxation Code, Sections 4653.6 - 4655.4 and 4658.4).

For the taxation year 1979-80, each local agency was allocated an amount of property tax revenue equal to the 1978-79 level plus the state assistance payments from the \$878 million in "block grants" (SB 154). On the other hand, the schools received an amount determined by subtracting the state assistance payments allocated to local agencies within the county (for that year) from the total property tax revenue allocated to schools within the county. The difference was the school entities' share (Revenue & Taxation Code, Section 96).

b. ANNUAL INCREMENT

The "annual tax increment" is distributed to the local agencies pursuant to the provisions of Revenue & Taxation Code, Section 98. The annual tax increment is determined by deducting from the entire amount of annual property tax revenue the share to be received by the local agencies as well as the school entities' share. The balance is the "annual tax increment" (Section 96).

The annual tax increment basically derives from additional increases in property tax revenues from the previous year due to the 2% increase and increases from reassessments due to sales and changes in ownership.

The annual increase is distributed pro rata to each tax rate area in relationship to its increased property tax values. Then within that tax rate area it is distributed to the local agencies again on a pro rata basis (Section 98, Revenue & Taxation Code).

c. SPECIAL DISTRICT AUGMENTATION FUND (SDAF)

The amount of property taxes allocated to each local agency, however, shall be reduced by an amount computed as follows:

A ratio is computed for each special district equal to the sum of the state assistance payment received by that special district in 1978-79 (under SB 154 Government Code, Section 16270) divided by the total of the state assistance payment received plus the amount of property tax revenue to the special district (i.e., the ratio is the percentage the state assistance payment was to the district's entire property tax allocations [excluding general obligation bonds and other exceptions]).

The reduction is equal to the amounts to be allocated to the special district from the total of supplemental assessments (Revenue & Taxation Code, Section 75.70), property tax revenues (i.e., the district's share of the 1%), and the annual tax increment multiplied by the ratio determined above (Revenue & Taxation Code, Section 98.6).

The amount of the reduction is then deposited into the Special District Augmentation Fund (hereafter referred to as the "SDAF"). The SDAF has then been distributed to the local agencies by the county Board of Supervisors pursuant to certain criteria established in Section 98.6(h) of the Revenue & Taxation Code. However, distribution is solely in the discretion of the Board.

Multi-county districts are exempt from the SDAF. The multi-county districts receive their funds directly from the county auditor and do not participate in the SDAF thus are not required to share their funds.

This method of allocation continued with minor changes for the years 1980-84.

Revenue & Taxation Code, Section 97 establishes the base formula for years beginning 1980-81, and thereafter.

Beginning with the 1984-85 fiscal year, the maximum annual increment transferred to the SDAF is limited to the amount transferred in the 1983-84 fiscal year. Each year the prior year's

increment is added to the base revenue for the current year.

d. REDUCTION IN ALLOCATIONS TO SDAF

Thus, prior to 1984-85, a district's contribution to the SDAF grew with its assessed value while the district may not have received any funds from the SDAF. Beginning with the 1984-85 fiscal year, revenue from an independent district's growth goes directly to the district instead of into the SDAF.

AB 8 took property tax revenues payable to the State (which the State had formerly allocated to school districts) and used a portion of those funds for local agencies. The State then made up for the loss of property tax revenues to the schools with revenues from the General Fund.

The State chose this mechanism in order to avoid having to provide local bail out funding each year so that local entities could predict the type of funding that would be available to them on a continuing basis.

e. SUMMARY OF AB 8

In summary, the main provisions for distributing the 1% property tax allowed under AB 8 are as follows:

- Cities - received their 1978-79 property tax allocation plus 82.9% of the block grant aid received in 1978-79.
- Counties - received their 1978-79 property tax allocation plus the amount of the 1978-79 block grant, an increase for costs of AFDC because the State reduced its buyout from 1978-79 and a decrease compensated for with a new State grant for health services.
- Special Districts - received their 1978-79 property tax allocation plus an amount equivalent to 95% of their block grant received in 1978-79 to be distributed by the Boards of Supervisors.
- Schools - had their property tax allocations reduced by the amount the three entities above had their allocations increased. School districts, community college districts and county superintendents received the same proportion of the reduced allocation as they had of the 1978-79 property taxes. In addition, the State made available additional aid to replace the lost property tax. This aid came from the State General Fund.
- Property Tax Growth - was to be divided among jurisdictions based on their proportion of property taxes within the tax rate area in which the growth occurred.

On a continuing basis, the allocation formula required

the County Auditor to determine the proportion of tax sharing in each tax rate area and to distribute the revenue according to that proportion (Revenue & Taxation Code, Sections 97 and 98). If the property valuation grew, the increased revenue from that tax rate area would be distributed in the same proportion as each local entity had received of the 1% tax rate in the prior year. This meant that each would receive a proportionate share of increases in tax revenue.

Local agencies involved in jurisdictional changes have to negotiate the amount of property tax revenue to be transferred.

Some Health and Welfare adjustments were made to establish the counties' share of the property taxes.

The County Board of Supervisors as noted above uses certain criteria to allocate the SDAF funds among the special districts. While many variations exist, most county boards base their allocations on priorities for service or on need. In Los Angeles County, the supervisors shift contributions from the flood control district and several lighting districts to the large, dependent fire protection district. In other counties, like Lake or Marin, county supervisors return each district's contribution without exercising any independent policy judgment.

4. TAX SHIFT LEGISLATION, 1992 IMPACTS (SB 844 AND SB 617)

The recently enacted legislation (SB 844 and SB 617) provide for substantial change to the allocation system established by AB 8. Proposition 98 (Article 16, Section 8 of the California Constitution) which was enacted in 1988 and amended by Proposition 111 in 1990, provides for minimum funding level by the State of the public school system. Because of the drop in state revenues, the Legislature in order to meet the minimum funding required by Proposition 98 has attempted to shift the property tax revenues previously allocated to local agencies to the schools. Unfortunately, the monies being shifted are not from the same source of funds originally allocated from the State's portion of the property tax revenues which were "reallocated" under AB 8 but are the basic revenues from the local agencies base property tax revenues.

Under SB 844, local agencies lose funding as follows:

- (a) the amount of property tax revenue deemed allocated in the prior fiscal year to each city shall be reduced by 9%.
- (b) the amount of property tax revenue deemed allocated in the prior fiscal year to each county or city and county shall be reduced by roughly 10%.
- (c) the amount of property tax revenue deemed allocated

in the prior fiscal year to each special district shall be reduced by 35% (or potentially up to 40% if an additional 5% is need to meet school funding minimums). The loss of revenues to special districts, however, cannot exceed 10% of the district's total revenues.

As discussed above, the property tax revenues of the State which were used to supplement local agencies' lost revenues are paid into the SDAF. These are not the funds now being shifted to schools.

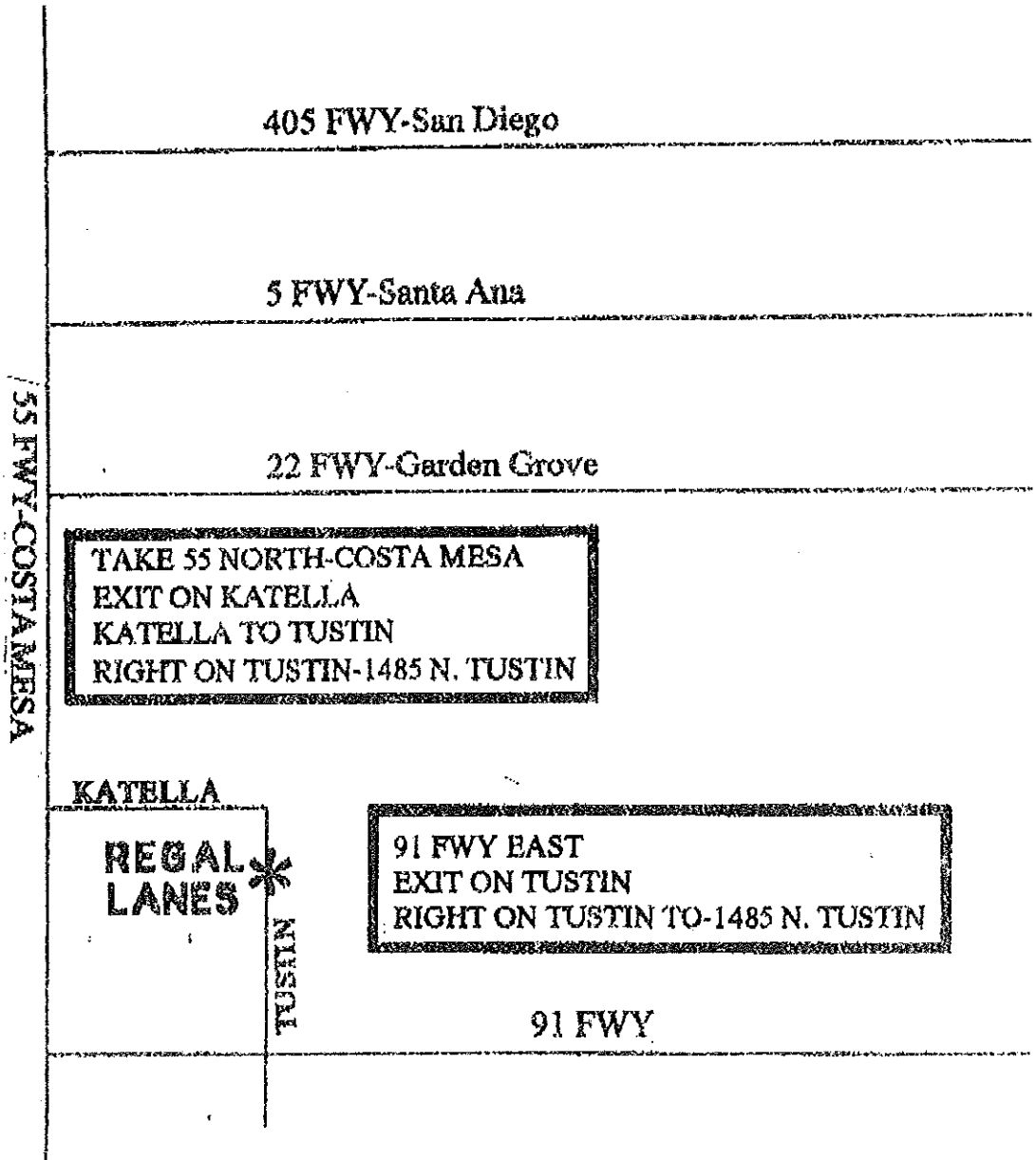
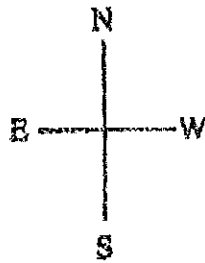
The State previously used these funds for schools and continued funding schools after this change from the State General Fund. The SDAF has been allocated, as previously discussed, by the Board of Supervisors, thus special districts may not actually receive any funds from the SDAF but will still lose 35% of their property tax revenues. In summary, the State is not taking away what it "shifted" to the local agencies under AB 8 because those funds are contained in the SDAF and are distributed to special districts in the sole discretion of the Board of Supervisors. The State is taking a percentage from every local agency whether or not they receive SDAF funds.

Interestingly, the new legislation has created an independent special district selection committee. The independent special district selection committee is a committee that consists of the presiding officer of the legislative body of each independent special district. This committee meets to recommend a particular distribution of the SDAF to the Board of Supervisors and is advisory only. The Board still has ultimate authority for distribution. It appears the legislature is now attempting to legitimize the distributions of the SDAF funds by the Board of Supervisors by having it appear that there is more participation by the districts from whom money is being stripped. This is, of course, not the case.



You've been selected to bowl at our
 newest bowling site: **Regal Lanes**
 1485 N. Tustin
 Orange, CA 92667
 Phone: (714) 997-9901

MAP:



TAKE 55 NORTH-COSTA MESA
 EXIT ON KATELLA
 KATELLA TO TUSTIN
 RIGHT ON TUSTIN-1485 N. TUSTIN

91 FWY EAST
 EXIT ON TUSTIN
 RIGHT ON TUSTIN TO-1485 N. TUSTIN

KATELLA
 REGAL LANES *

TUSTIN

91 FWY

