

# Senator Bob Margett



## Capitol Update

### Senate Republican Budget Proposal

Today, the Senate Republicans unveiled their plans for a balanced budget. This proposal ensures that California's budget is balanced by 2004-05, and is accomplished without raising taxes or fees. Our proposal is based on a two year budget coupled with a hard freeze in spending, which would require General Fund spending in 2004-05 to be not more than in 2003-04.

#### Background

Table 1 shows the Legislative Analyst's Office's (LAO) estimate of how the Governor's Budget proposals would affect General Fund revenues, expenditures and ending reserves.

	<u>2002-03</u>	<u>2003-04</u>	<u>2004-05</u>	<u>2005-06</u>
Carry in balance	-\$2,135	-\$4,489	\$2,968	\$4,353
Revenues and Transfer	<u>72,964</u>	<u>70,643</u>	<u>73,293</u>	<u>79,012</u>
<b>Total Resources</b>	<b>\$70,829</b>	<b>\$66,154</b>	<b>\$76,261</b>	<b>\$83,365</b>
<b>Expenditures</b>	<b><u>\$75,318</u></b>	<b><u>\$63,186</u></b>	<b><u>\$71,908</u></b>	<b><u>\$75,961</u></b>
Ending Fund Balance	-\$4,489	\$2,968	\$4,353	\$7,404
Encumbrances	<u>-1,402</u>	<u>-1,402</u>	<u>-1,402</u>	<u>-1,402</u>
<b>Reserve</b>	<b>-\$5,891</b>	<b>\$1,566</b>	<b>\$2,951</b>	<b>\$6,002</b>

#### Senate Republican Plan

Table 2 displays the Senate Republican proposal for a balanced budget that minimizes financial harm to local governments and contains *no tax or fee increases* (and eliminates the proposed Community College fee increase from \$11

to \$24 per unit). To accomplish this, the proposal extends the budget planning time frame for one additional year and makes a variety of other adjustments, discussed in detail below.

	<u>2002-03</u>	<u>2003-04</u>	<u>2004-05</u>	<u>2005-06</u>
<b>RESOURCES</b>				
Carry in balance	-\$2,135	-\$5,783	-\$2,986	\$2,110
Revenues and Transfers	72,964	70,643	73,293	79,012
Total Resources	\$70,829	\$64,860	\$70,307	\$81,122
<i>Reject Indian Gaming Revenue</i>	0	-1,500	-1,500	-1,500
<i>Accept Transportation Loan Forgiveness</i>	0	0	650	0
<i>PERS Contribution Special Fund</i>	0	1,000	0	0
<i>Local Government Contribution</i>	500	500	500	0
<b>RESOURCES, REVISED</b>	<b>\$71,329</b>	<b>\$64,860</b>	<b>\$69,957</b>	<b>\$79,622</b>
<b>EXPENDITURES</b>				
	\$75,318	\$63,186	\$67,846	\$67,846
<i>Reject Realignment / Taxes</i>	0	8,154	0	0
<i>Reject Williamson Act Elimination</i>	0	39	0	0
<i>Accept Prop. 42 Transportation Suspension</i>	0	0	0	0
<i>Reject Redevelopment ERAF Shift</i>	500	250	0	0
<i>Reject the Elimination of VLF Subvention</i>	1,265	2,929	0	0
<i>Reject Fees, Restore General Fund</i>	29	595	0	0
<i>Accept PERS/STRS Bond Funding</i>	0	0	0	0
<i>Shift Medi-Cal to Cash Basis</i>	0	-1,100	0	0
<i>Proposition 98 June Deferral</i>	0	-1,100	0	0
Subtotals, Expenditures	\$77,112	\$72,953	\$67,846	\$67,846
<i>7-percent Across-the-Board Reduction</i>	\$0	-\$5,107	\$0	\$0
<b>REVISED EXPENDITURES</b>	<b>\$77,112</b>	<b>\$67,846</b>	<b>\$67,846</b>	<b>\$67,846</b>
Ending Fund Balance	-\$5,783	-\$2,986	\$2,110	\$11,776
Encumbrances	1,402	1,402	1,402	1,402
<b>RESERVE</b>	<b>-\$7,185</b>	<b>-\$4,388</b>	<b>\$708</b>	<b>\$10,374</b>

**Indian Gaming Revenues.** The Budget assumes the receipt of \$1.5 billion in General Fund revenues from new Tribal-State gaming Compacts with various Indian tribes. Senate Republicans do not believe that this level of revenue will be realized; therefore it is not included as a revenue source.

**Transportation Loan Forgiveness.** The Budget proposes to forgive a \$500 million loan repayment from the General Fund to the Transportation Congestion Relief Fund (TCRF) in fiscal year 2003-04. Senate Republicans propose to defer loan repayment for two years rather than forgive the loan. This will increase General Fund resources by \$650 million in 2004-05.

***PERS/STRS Contribution Special Fund.*** The additional resources associated with this proposal are described below, together with the expenditure reductions component. In addition, Senate Republicans propose to restore the Tier 2 retirement benefit package for new employees. Tier 2 – which is a reduced package of retirement benefits that applies to new employees – was adopted in the late 1980's as a long-term cost-saving measure, but abandoned in the late 1990's when the PERS fund was awash in stock market gains. The elimination of Tier 2 was fiscally imprudent and is one of the major reasons that the state's PERS contributions are now slated to rise dramatically.

***Local Government Contribution.*** The Budget proposes over \$5 billion in shifts from local government in 2002-03 and 2003-04. Assuming the proposed shifts continue into the next year, the local government burden would be \$8.6 billion (exclusive of the \$1 billion in deferral of mandate payments). Senate Republicans do not support the proposed shifts from local government. Instead, Senate Republicans propose to negotiate with local governments a more reasonable, three-year, \$500 million- per-year contribution to the budget solution. This will provide local governments the flexibility to plan how best to contribute. In addition, the Budget proposes to defer approximately \$1 billion in reimbursements for state mandated programs. Senate Republicans propose to eliminate the mandates, thereby giving local government the flexibility to reduce costs.

***Realignment/Taxes.*** The Budget proposes \$8.2 billion of General Fund savings in 2003-04 due to the shift of responsibility of various programs to local governments. Local governments would receive revenues from a variety of tax increases to pay for these new costs. Legislative Counsel has opined that the proposed sequestration of the new revenues from Proposition 98 is unconstitutional. Therefore, the Budget overestimates the new revenue that would be available for non-Proposition 98 purposes by \$3.5 billion. Senate Republicans do not support the realignment and its associated tax increases.

***Williamson Act.*** The Budget proposes to repeal the \$39 million Williamson Act Open Space Subvention Program effective 2003-04. Senate Republicans do not support this proposal.

***Proposition 42 Transportation Funding.*** The Budget proposes to suspend the \$1.1 billion transfer from the General Fund to transportation funds in fiscal year 2003-04, which would otherwise occur pursuant to Prop. 42. Senate Republicans accept the Budget proposal but would defer, rather than suspend, the transfer. In addition, Senate Republicans propose that transportation efficiency improvements be included in the final budget package.

**Redevelopment Funds.** The Budget proposes to shift \$500 million in low-income housing set-aside funds to ERAF in 2002-03 and to permanently shift \$250 million (and growing) in redevelopment property tax increment beginning in 2003-04. Senate Republicans do not support this proposal.

**VLF Subvention.** The Governor's Budget proposes to eliminate the major portion of the VLF subvention to local governments, for a General Fund spending reduction of \$1.3 billion in 2002-03 and \$3 billion 2003-04. Senate Republicans do not support this proposal.

**Fee Increases.** The Budget proposes fee increases that result in General Fund expenditure reductions totaling \$29 million in 2002-03 and \$596 million in 2003-04. Senate Republicans do not support these fee increases. (See attachment for fee detail.)

**PERS/STRS.** The Budget assumes that the State will issue Pension Obligation Bonds to pay the \$1.5 billion General Fund contribution to PERS and STRS in the 2003-04 fiscal year. This proposal results in a one-time General Fund savings of \$1.5 billion. Senate Republicans include this savings. In addition, the Senate Republican plan adds to the Governor's proposal by increasing the size of the Pension Obligation Bond to include all special fund contributions to PERS/STRS in the 2003-04 fiscal year. In return, the special funds will make their 2003-04 fiscal year contribution to the General Fund, thereby generating a one-time General Fund revenue increase of \$1 billion in the 2003-04 fiscal year. (Note: the additional benefit from the special funds component appears in the resources portion of the table.)

**Shift Medi-Cal to Cash Basis.** Senate Republicans propose to return Medi-Cal to a cost-based accounting methodology, consistent with the way the state accounts for debt service payments on General Obligation bonds. Currently, Medi-Cal attributes costs to the year in which services are provided, which is an accrual basis of accounting. Attributing costs to the year in which payment for services is made (cash-based accounting) will result in a one-time General Fund savings of \$1.1 billion. This accounting change will have no effect on services or on the timing of payments to providers.

**Proposition 98 Deferral.** The Senate and the Assembly have already passed bills to defer the final apportionment to schools from June 25th to July 2nd (thus into the following fiscal year), for a General Fund savings of approximately \$1.1 billion in 2002-03. In order to avoid suspending Prop-98 in 2002-03, the Senate Republican proposal reflects these one-time savings in 2003-04.

**Seven-Percent Across-the-Board Reduction.** In order to balance the budget with the above adjustments, it is necessary to implement a General Fund reduction of seven percent, or \$5.1 billion beginning in 2003-04.

**Multi-year Budgeting and Spending Freeze.** Finally, Senate Republicans propose a two-year budget coupled with a hard freeze in spending, which would require General Fund spending in 2004-05 to be no more than in 2003-04. Together with the adjustments detailed above, this will result in a budget that balances in 2004-05.

**Fee Detail**

The Governor's budget assumes that fee increases will generate approximately \$1.3 billion. Of this amount, approximately \$29 million in fiscal year 2002-03 and \$596 million in 2003-04 would offset General Fund costs. Rejection of these fee increases would add \$596 million to General Fund expenditures in 2003-04. These fee increases are as follows:

	<u>(dollars in thousands)</u>
<b><u>Education - \$365.5 million</u></b>	
Community college tuition	\$365,278
Community college facilities plan fee	240
<b><u>Business - \$121.3 million</u></b>	
Air pollution permitting fee	10,000
Pesticide permitting/licensing & examination	10,555
Waste water discharge permitting	13,620
Physician training fee	4,498
Workers' compensation administration	75,759
Social services licensing (foster care homes, child care facilities, senior care facilities)	6,843
<b><u>Consumer - \$108.9 million</u></b>	
Trial court fees (filing motions, security, etc.)	66,200
Appellate filing fee	2,100
HCD employee housing enforcement	721
HCD migrant services	625
Fishing, hunting license	2,000
Park use fees	20,000
California State Library service fee	15,145
Earthquake insurance policy fee	884
Veterans' medical care	1,150
<b>TOTAL</b>	<b>\$595,618</b>

If you have any questions please feel free to contact my office at 916-445-2848.

## MOST RECENT LEGISLATIVE ALERT

### *Leg Alert for March 14, 2003*

#### **Budget Watch**

Ending a weeks-long budget stalemate, on Monday the Assembly approved \$3.3 billion in current year cuts that Governor Davis said he would sign. The Assembly's action comes after the Davis Administration and State Controller Westly agreed that the Vehicle License Fee (VLF) can be raised without a vote of the Legislature. Lawyers for both Davis and Westly issued a joint opinion that concludes that the VLF can be raised if state revenues fall below a specified level, which they currently have. Assembly Speaker Herb Wesson stated upon learning of the opinion: "Our comfort level is elevated to the point that we believe [the tax hike] is inevitable and it will in fact occur." It is estimated that the VLF will increase by an average of \$105 by the end of June, giving the state \$4 billion in revenue.

Republicans were not happy with the opinion or the actions the Democrats took on Monday and promised to challenge the fee increase in court. "Don't count on that money," said Assembly Member Ray Haynes, Republican from Riverside County, "It's a pipe dream." Assembly Republican Leader Dave Cox said: "Governor Davis and legislative Democrats today [Monday] worked out a secret backroom deal to triple the car tax without a legislative vote or public input."

Also this week, Republicans, expressing concerns that lawmakers are way behind schedule in closing California's budget hole, proposed giving Governor Davis the power to cut programs from the current year budget without approval by the Legislature. Governor Davis supports this authority, a power former governors enjoyed, and included the proposal in his proposed 2003-04 state budget. Democrats, by and large, think this is a bad idea and will block any such authority, arguing that it gives the Governor too much power over matters that are rightly within the legislative process.

To round-out a busy budget-related week of activities, Assembly Speaker Wesson announced yesterday that he will not allow policy committees to hear any non-budget related bills until the last week in March. The Speaker said this will give the Assembly more time to focus on the budget void of the normal committee hearing schedule. Not a big thing as most legislators do not set their bills until early April anyway.

#### **Budget by Initiative?**

Numerous unions and advocacy groups have taken the first steps toward qualifying a ballot initiative that would reduce from two-thirds to 55% the voting threshold California lawmakers need to pass a state budget or raise taxes. Legislative Democrats support the lower vote requirements, while Republicans hate it. Assembly Member Dave Cox said Assembly Republicans "stand absolutely opposed to lowering the voting threshold," maintaining it protects taxpayers. "Reducing it would be a slap in their face," Cox said.

The Service Employees International Union is spearheading the ballot measure, which has the support of the California Teachers Association and other unions, along with Health Access coalition and the League of Women Voters of California. Titled the "Budget Accountability Act," the measure would not change Proposition 13's property tax limitations or voting thresholds. This claim drew the following response from Jon Coupal,

president of the Howard Jarvis Taxpayers Association: "I think California voters will see this as a pig in a poke – a disguised effort for more government spending." Coupal said the initiative should be called the "Tax Increase Act of 2003."

The initiative must gather 598,105 valid signatures to qualify for next year's election and contains language that would prohibit legislators and the governor from collecting their salaries and expenses for every day they miss the budget deadline and require the Legislature to remain in session until the budget is passed. Stay tuned on this one...

**Report Your Local Outreach Progress**

Remember to report your local outreach progress! The fight has already begun to protect local funding from state budget cutbacks. Building statewide influence begins at the local level, and we need your help! We hope you have taken the time to review your local outreach packet. This information was created to help direct your outreach effort as you begin meeting with community members to build a strong local presence. Please visit our website ([www.csda.net](http://www.csda.net)) to access copies of the materials and to keep us up-to-date on your activities and the outcome of your meetings. If you have any questions about this program, please contact Geoffrey Neill toll free at 877.924.CSDA or via email at [gneill@csda.net](mailto:gneill@csda.net).

To: eminter@placentiallibrary.org  
From: gneill@csda.net  
Subject: CSDA Weekly Legislative Update  
Date: Fri, 07 Mar 2003 11:03:22 -0800



## **CSDA Weekly Legislative Update for March 7, 2003**

### **Budget Watch**

The week started with Senate and Assembly Democrats blasting the Senate Republican budget plan unveiled late last week. Legislative Democrats declared that the plan to solve the budget crisis by slashing programs by another 7% across-the-board could force the early release of 23,000 prisoners, close some of the state's universities and turn state-supported nursing home residents out on the street. Senate President Pro Tem John Burton said that parts of the plan are unrealistic and liable to cause even greater financial damage to people who depend on state spending.

Numerous Assembly/Senate budget subcommittees also commenced hearings this week on the Governor's proposed 2003-04 state budget, but it appears that major decisions from the subcommittees will be held until Governor Davis releases his May Revision, expected around May 14<sup>th</sup>.

### **Local Government Committee Holds Fiscal Reform Informational Hearing**

On Wednesday the Assembly Local Government Committee and the Assembly Budget Subcommittee #4 held an informational hearing entitled: *FISCAL STRUCTURAL REFORM: IF NOT NOW, WHEN?* Numerous witnesses, including Department of Finance Director Steve Peace, encouraged the Committee to continue to consider past structural reform proposals and new ideas as well. One proposal that was included in the Committee's briefing packet was a recommendation the Legislative Analyst's Office made in 2000 that proposed that all of the property tax revenues currently allocated to independent special districts be shifted to cities and counties and they, in turn, contract with special districts for specified services. The proposal was not discussed, but the mere fact that it was in the Committee members' briefing packet is of some concern. Proposals that were discussed include giving property taxes back to local government as a dollar-for-dollar trade for sales tax, which would give more special districts, cities and counties more predictability; a Constitutional Amendment that would guarantee no further raiding of local government coffers by the state; reassessing business properties periodically; and Assemblyman Canciamilla's proposal to shift to a two-year budget process.

The Committee indicated that it intends to explore a variety of proposals over the next few months and CSDA will continue to monitor the Committee's activities with great care.

### **Bills, Bills, and More Bills**

For those that keep track of such things, the total number of bills introduced this year (as of 2/28) is 2,909 – 1,799 Assembly measures and 1,110 Senate measures.

### **Special District Fact Sheets**



Has your district completed a special district fact sheet that you use in your outreach activities? CSDA would like to have some great examples of district fact sheets to share with others who want to prepare one for their district. Please send your example to Geoffrey Neill by email ([gneill@csla.net](mailto:gneill@csla.net)), fax (916.442.7889) or by mail to the address listed below. For information about how to prepare a fact sheet for your district, consult your Local Outreach Packet. For copies of the documents contained in the packet, visit [www.csla.net](http://www.csla.net), click on the red bar near the top that says 'Click here to report on your Local Outreach progress,' then click the 'Local Outreach Packet' link on the left side.

### **Government Affairs Day – April 1<sup>st</sup> and 2<sup>nd</sup>**

#### Confirmed speakers:

- ! **Steve Peace**, Director, California Department of Finance
- ! **Dan Walters**, syndicated political columnist for newspapers across California
- ! **Jonathan Coupal**, President, Howard Jarvis Taxpayers Association
- ! **Jean Ross**, founding Executive Director, California Budget Project
- ! **Ralph Heim**, CSDA's Legislative Advocate

Come and hear about the state of California politics from those who know it best! And don't forget to make appointments to visit your legislators! CSDA would like to coordinate group visits, so please contact Geoffrey Neill for further information at 877.924.CSDA, or email him at [gneill@csla.net](mailto:gneill@csla.net). Register **today** either through CSDA's website ([www.csla.net](http://www.csla.net)) or by filling out the brochure you received in the mail. Time is running out!

#### **Report Your Local Outreach Progress**

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*If other people affiliated with your district would like to start receiving this notice via email, please contact Geoffrey Neill at 877.924.CSDA or [gneill@csla.net](mailto:gneill@csla.net).*

**\*\*This update is brought to you exclusively as a CSDA member benefit\*\***  
CSDA...keeping special districts informed!

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**Leg Alert for February 28, 2003****Budget Watch**

On Monday the Senate passed a number of bills relating to budget cuts proposed by Governor Davis as part of his mid-year budget reduction package. The bills passed by the Senate total some \$3.5 billion in cuts and are viewed as an attempt to "jump-start" the larger budget deficit, now estimated at \$26 billion to \$35 billion. The Assembly adjourned Thursday without considering the bills passed by the Senate.

**Senate Republicans Release Budget Proposal**

Late Wednesday, Senate Republican Leader Jim Brulte released the Senate Republican's budget proposal, which includes the following proposal: Senate Republicans propose to negotiate with local governments a more reasonable (than Governor Davis' proposals), three-year, \$500 million-per-year contribution to the budget solution. This will provide local governments the flexibility to plan how best to contribute. In addition, the Governor's budget proposes to defer approximately \$1 billion in reimbursements for state mandated programs. Senate Republicans propose to eliminate the mandates, thereby giving local government the flexibility to reduce costs.

According to Senator Brulte, the Senate Republicans' plan will include a constitutional amendment to "protect local government revenues." Brulte indicated that more details relative to the constitutional amendments would be forthcoming in the very near future.

**Vehicle License Fee Disjoined from Budget Cut Proposals**

The mid-year budget reduction bills passed by the Senate on Monday removed the "joining" language added in the Assembly. As passed by the Assembly, the budget reduction bills would only become operative if the VLF is increased to the 2% level. The Governor opposed this "joining," as did the Assembly/Senate Republican Caucus' and that "joining" language was deleted on the Senate Floor prior to passage.

Regarding the VLF, most political observers now believe the VLF "trigger" will be pulled later this Spring. As reported last week, Senator Tom McClintock and others have vowed to challenge the matter in court and possibly file an initiative to totally repeal the VLF. Stay tuned on this one...

**Legislative Committee Review New Legislation**

CSDA's Legislative Committee met yesterday to review over 200 bills that were introduced by the February 21 bill introduction deadline. Scores of bills relating to PERS, labor relations, bond acts, LAFCO, and water-related issues were discussed and positions and priorities assigned. The Committee will meet again on March 21 to complete review of the new legislation. A detailed report on all significant legislation will be presented during CSDA's Government Affairs Day April 1 and 2, so please make every effort to attend. Given the state of the budget crisis and the ever-changing dynamics of the budget process, this year's Government Affairs Day will be among the most important in recent memory and afford you the opportunity to discuss priority legislation with your legislators.

**Report Your Local Outreach Progress**

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information was created to help direct your outreach effort as you begin meeting with community members to build a strong local presence. Please visit our website ([www.csda.net](http://www.csda.net)) to access copies of the materials and to keep us up-to-date on your activities and the outcome of your meetings. If you have any questions about this program, please contact Geoffrey Neill toll free at 877.924.CSDA or via email at [gneill@csda.net](mailto:gneill@csda.net).

# NEWS FROM THE CAPITOL: Legislative Updates 2003

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March 4, 2003

TO: CLA MEMBERS/ SYSTEMS/ NETWORK CONTACTS

FROM: Mike Dillon, Lobbyist; Christina Dillon, Lobbyist

RE: NEWS FROM THE CAPITOL – ACTION REQUESTED

## **I. GOVERNOR'S BUDGET PROPOSAL ELIMINATES TRANSACTION BASED REIMBURSEMENT FUNDS**

You may recall from our January memo regarding the Governor's 2003-04 Budget, that Governor Davis proposes to eliminate all \$12.1 million in funding for the Transaction Based Reimbursement (TBR) program. The Governor proposes to replace state funding for the program with a "fee-based approach" which would require that libraries begin charging a \$1 fee per item for direct loans, and a \$5 fee per item for Inter-Library Loans. The Governor's announcement garnered immediate opposition from those in the library community, who believe that the proposal threatens the fundamental concept of a cooperative and seamless library lending program in California. Further, the proposal potentially jeopardizes matching LSTA grant monies, if the \$12.1 million is eliminated by the legislature or Governor.

On February 14, 2003, the CLA Legislative Committee, Chaired by Anne Cain, voted to support a statewide grass roots effort to educate local officials, state legislators, library patrons, and affected entities, regarding the Governor's plan to eliminate the TBR. The massive outreach effort is being spearheaded by Linda Crowe, BALIS/PLS/SVLS System Director.

This morning, we delivered 120 letters – one to each member of the State Legislature, urging they oppose the Governor's drastic action (please see the attached). The purpose of the letter was to provide basic information to the legislators regarding TBR and to inform them that you will be contacting them to share your concerns about the fate of the program. Please note that in addition to the more than thirty new members of the legislature who may not be familiar with library services delivery and library funding, we anticipate that this will be an important educational opportunity for all members of the legislature. Since the TBR has never been threatened to this extent in its 30 years of existence, and has been a reliable and effective program, the legislature is not going to be familiar with the TBR, its impact locally, and why a shift to a fee-based system is not an acceptable option for the library community. We encourage you to contact your legislator via phone or mail and share your concerns.

(FOR YOUR INFORMATION, THE LETTER THAT THE DILLONS SENT TO THE LEGISLATURE FOLLOWS)

## **II. BUDGET SUBCOMMITTEES TO BEGIN HEARINGS THIS WEEK**

This week the Senate and Assembly Budget Subcommittees will begin holding hearings regarding the Governor's 2003-04 Budget. The Budget Subcommittees on Education Finance will hear the issue of the Public Library Foundation (proposed reduction of \$15.8 million) and the Transaction Based Reimbursement (proposed elimination of all funding - \$12.1 million, and a shift to fee-based charges of \$1 for each direct loan, and \$5 for each Inter-Library Loan) during the same hearing. The Senate has set its hearing for both issues on **Monday, April 28, 2003 at 1:30 p.m.** The Assembly schedule has not been set as of this writing.

Please take a moment today and write the members of the Budget Subcommittees if you are impacted by one or both of these issues. You may recall that the recommendations of the subcommittees are crucial to the process, as the members may choose to 1) reject the Governor's proposal, 2) accept the Governor's proposal, or 3) offer a compromise proposal of some dollar amount in between. Success at the subcommittee level is a critical first step.

Senate Budget Subcommittee Number One on Education Finance  
Chair, Senator Jack Scott  
Senator Bob Margett  
Senator John Vasconcellos

Assembly Budget Subcommittee Number Two on Education Finance  
Chair, Assemblyman Joe Simitian  
Assemblywoman Wilma Chan  
Assemblywoman Lynn Daucher  
Assemblywoman Jackie Goldberg  
Assemblywoman Carol Liu  
Assemblywoman Sharon Runner

Sample address:

The Honorable Jack Scott  
Chair, Senate Budget Subcommittee Number Two on Education Finance  
State Capitol  
Sacramento, CA. 95814

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#### DILLON LETTER TO LEGISLATORS

March 4, 2003

The Honorable \_\_\_\_\_  
California State [Assembly/ Senate]  
State Capitol  
Sacramento, CA. 95814

Dear [Assemblymember] [Senator] \_\_\_\_,

**ALERT – LIBRARY LENDING PROGRAM DECIMATED IN GOVERNOR’S BUDGET**

As the lobbyists for the California Library Association (CLA), we wanted to alert you to an issue that is proposed for elimination in the Governor’s 2003-04 Budget, that will have a significant impact in the way that library services are delivered in California. Your constituents in the library community will be contacting you in the coming weeks to discuss with you the Governor’s proposal to eliminate all funding for the **Transaction Based Reimbursement** program (TBR) in the State Library Budget (\$12.1 million). We thought that it would be helpful to provide you with background information regarding this issue. CLA is strongly opposed to the Governor’s proposed action.

For thirty years, Californians have had the opportunity to use any library in the state to check out books and materials. Due to a seamless system, called Transaction Based Reimbursement, a library patron is not penalized if they live in one city or county, but choose to use the services of another city or county library system. Many patrons find it is more convenient to use a library where they work, attend school, or to seek different services, collections, or hours. Under current law, the TBR program allows a patron to check out a book in a jurisdiction where they do not reside, without having to pay a fee to do so. This is called a “direct loan.”

The Governor’s January Budget calls for the elimination of the entire \$12.1 million to support this important program that was put in place so that libraries would be encouraged to cooperatively, not competitively, share their existing resources. Under the Governor’s plan, a child, for example, would be charged one dollar for every book or material that he or she checked out using a library that is not in the jurisdiction where the child resides. CLA believes that this shift to a fee-based system would be a significant and unfair burden on those who need libraries the most, and who can least afford to pay for them, i.e., students, seniors or parents on a modest income, the unemployed seeking job training materials, etc. Not only do the fees become a barrier to usage, but symbolically, the Governor’s proposal flies in the face of the premise of free library service. The removal of all TBR funds from the State Budget means that dominant libraries in wealthy communities will deny out-of-area residents from borrowing entirely at their library. This shifts the concept of a “free library system” to a system of the “haves” vs. the “have nots.”

In addition, the TBR monies help to meet the matching requirement for federal grant dollars. Thus, elimination of the TBR, also means the elimination of a large portion of federal matching grant dollars – a double-hit to the program.

We have encouraged your local library community constituents to contact you and share their personal city and county library budget impacts with you in the coming days. We hope that you will agree with them, that libraries are a fundamental cornerstone to improving literacy, providing research opportunities, and enhancing children’s education. The elimination of the TBR will significantly undermine the effective and efficient sharing of resources between libraries and patrons.

NOTE: The Transaction Based Reimbursement item is scheduled to be heard in the Budget Subcommittee on Education Finance in the Senate and Assembly when the State Library Budget is considered. Your assistance would be greatly appreciated.

Sincerely,

MICHAEL F. DILLON

CHRISTINA DILLON

CLA Lobbyist

CLA Lobbyist





To: eminter@placentialibrary.org  
From: gneill@csda.net  
Subject: CSDA Weekly Legislative Update  
Date: Fri, 21 Mar 2003 09:44:01 -0800



## Budget Watch

On Tuesday Governor Davis signed the budget reduction package of bills passed by the Legislature last week. While far short of the reductions Governor Davis sought back in January, the total mid-year reductions contained in the bill package totals \$3.3 billion. In signing the bills, Governor Davis stated: "There is still difficult work ahead, but I commend the members of the Legislature for taking this important step."

Assembly Republican Leader Dave Cox said of the bills signing: "These reductions should have been enacted sooner and they are woefully short of what is necessary to keep California out of bankruptcy."

The only other budget-related issues this week of note were a meeting of the "Big 5," which took place yesterday and from which few details emerged. Additionally, Speaker Wesson announced that no policy committee would meet next week, affording the budget subcommittees to concentrate on their work.

Finally, while not specifically related to the state budget but newsworthy nevertheless, was the sudden resignation this week of Mike Gotch, Governor Davis' Legislative Secretary. No public reason given for Gotch's resignation.

## Bill of the Week

Starting today, each week this space will report on a bill (or two) that is of special interest to CSDA. As the legislative year progresses, we will expand the list of important bills to better inform CSDA's membership of such bills and their status. This weeks "bill of the week" is **Assembly Bill 208** by **Assembly Member Harman**, relating to local agency formation.

Assembly Bill 208 is sponsored by the California Association of Local Agency Formation Commissions and states in part: **This bill would provide that a successor agency may not be prevented from continuing to perform any or all functions of the extinguished local agency, regardless of whether the successor agency had previously performed that function.** Sounds reasonable-right? Consider the fact that this issue was raised by Cal-LAFCO during the hearings conducted by the Commission on Local Governance for the 21<sup>st</sup> Century, whose report led to the enactment of the Cortese-Knox-Hertzberg Local Government Organization Act of 2000, **and was rejected by the Commission.** Assembly Bill 208 seeks to grant LAFCOs that power to extinguish a special district through a dissolution proceeding.

With this new authority, a LAFCO could name a successor agency to perform a function that the Legislature may not have provided statutory authority to the successor agency to perform. An example would be combining a sanitation district with a water district. CSDA's Legislative Committee is meeting today and will consider AB 208 and no doubt assume a strong oppose position.

## Government Affairs Day – April 1<sup>st</sup> and 2<sup>nd</sup>



CSDA's Government Affairs Day will prepare you to deal with all the changes this year has to offer, and equip you to plan for your district's future. CSDA is sending out the rallying cry for all special district representatives to embrace their roles as crucial elements of the government system, and to understand that only when working together can we truly fulfill our legislative potential. There will be several informational segments, including presentations by CSDA's inimitable Legislative Advocate Ralph Heim and the syndicated political columnist Dan Walters. And, perhaps most importantly, you get the opportunity to visit with your legislators! CSDA would like to coordinate group visits with legislators, so please contact Geoffrey Neill for further information at 877.924.CSDA, or email him at [gneill@csda.net](mailto:gneill@csda.net). Register today either through CSDA's website ([www.csda.net](http://www.csda.net)) or by filling out the brochure you received in the mail.

### Report Your Local Outreach Progress

Remember to report your local outreach progress! The fight has already begun to protect local funding from state budget cutbacks. Building statewide influence begins at the local level, and we need your help! We hope you have taken the time to review your local outreach packet. This information was created to help direct your outreach effort as you begin meeting with community members to build a strong local presence. Please visit our website ([www.csda.net](http://www.csda.net)) to access copies of the materials and to keep us up-to-date on your activities and the outcome of your meetings. If you have any questions about this program, please contact Geoffrey Neill toll free at 877.924.CSDA or via email at [gneill@csda.net](mailto:gneill@csda.net).

If you or members of your Board or staff would like to start receiving this notice via email please contact Geoffrey Neill at 877.924.CSDA or [gneill@csda.net](mailto:gneill@csda.net).

**\*\*This update is brought to you exclusively as a CSDA member benefit\*\***

CSDA...keeping special districts informed!

1215 K Street, Suite 930 \* Sacramento, CA 95814  
(916) 442-7887 \* (916) 442-7889 fax  
(877) 924-CSDA \* [www.csda.net](http://www.csda.net)



To: "MCLS/SLS/SSCLS Directors" <mclshq@mcls.org>  
Cc: "Susan McGlamery" <smcglamery@mcls.org>, "bchute" <bchute@mcls.org>, "bcusten" <bcusten@mcls.org>, "bgallardo" <bgallardo@mcls.org>, "cbonnefil" <carol@247ref.org>, "ccarlisle" <ccarlisle@mcls.org>, "hdaniels" <hdaniels@mcls.org>, "jlambert" <jlambert@mcls.org>, Subject: FW: NEWS FROM THE CAPITOL

-----Original Message-----

From: owner-calix@listproc.sjsu.edu  
[mailto:owner-calix@listproc.sjsu.edu] On Behalf Of Susan Negreen  
Sent: Friday, March 21, 2003 11:23 AM  
To: CLA Listserve- CALIX  
Subject: NEWS FROM THE CAPITOL

March 20, 2003

TO: CLA MEMBERS/ SYSTEMS/ NETWORK CONTACTS

FROM: Mike Dillon, Lobbyist  
Christina Dillon, Lobbyist

RE: NEWS FROM THE CAPITOL

#### I. SENATE BEGINS HEARINGS ON \$2 BILLION LIBRARY BOND BILL

SB 40 by Senator Dede Alpert, principal co-author Assemblywoman Lois Wolk, and coauthor, Assemblyman Abel Maldonado, was heard in the Senate Education Committee last week. The bill seeks to provide \$2 billion in General Obligation bonds for the purpose of financing the construction and renovation/remodel of libraries throughout California, if approved by the voters in the 2004 direct primary election.

SB 40 contains the same 35% local match requirement as is currently found in the existing library bond, provides up to \$25 million to encourage the development of joint use projects between libraries and school districts or higher education, and would allow unfunded Cycle 3 applicants to get "first call" on new bond act funds, without having to complete a new application.

Remaining funds would be available to any additional applicants.

During the hearing in Senate Education, Senator Alpert, the Senate



representative on the current bond board, told the committee members that it was "amazing the number of worthy applicants before us. It is a shame we can't fund all of them. We are seeing a great support for libraries throughout the state."

The California Library Association, the bill's sponsor, was represented by the following individuals who testified in support: Anne Cain, CLA Legislative Chair and Contra Costa County Library Director; Susan Hildreth, San Francisco County Library Director; and Margaret Donnellan Todd, Los Angeles County Library Director. All three individuals testified as to the tremendous need for more library bond funding, and the appeal of the Cycle 3 "first call" component. Alameda County's lobbyist and the lobbyist for the Coalition For Adequate School Housing also testified in support.

Two Republican members of the committee asked Senator Alpert to continue to work with their caucus to ascertain what the state would be able to absorb in terms of bonded indebtedness capacity. Chairman, Senator John Vasconcellos, has instituted a "suspense file" process in his committee, whereby bills with an appropriation of \$500,000 or more, will be automatically set aside so that measures with cost implications can be considered together and then moved forward on a priority basis. We believe that because Senator Alpert is a member of the Senate Education Committee, and because SB 40 is a top priority measure for her, the bill will be sent to the Senate Appropriations Committee (which she chairs) in April. In the meantime, CLA members are encouraged to begin writing the Senate Appropriations Committee members during April, to urge their strong support of SB 40. (The committee analysis for the Senate Education Committee only indicated a few letters of support. Members of the CLA Legislative Committee will be contacting library directors in the next few weeks to ask them to write letters and contact their legislators.) Members of the Senate Appropriations Committee are:

Senator Dede Alpert (Chair)  
Senator Jim Battin (Vice Chair)





Senator Sam Aanestad  
Senator Roy Ashburn  
Senator Debra Bowen  
Senator John Burton, Senate President pro Tem  
Senator Martha Escutia  
Senator Ross Johnson  
Senator Betty Karnette  
Senator Mike Machado  
Senator Kevin Murray  
Senator Chuck Poochigian  
Senator Jackie Speier

## II. AB 222-CORBETT HAS BEEN SET FOR HEARING IN ASSEMBLY

Assemblywoman Ellen Corbett, the Assembly representative on the current library bond board, has also expressed her concern over the lack of available bond monies for library construction grants. As a result, she has introduced AB 222, a library bond measure on the Assembly side. CLA and the State Library have been involved in a series of meetings with the Assemblywoman's staff for several months. While the bill in print mirrors that of Senator Alpert's SB 40, Assemblywoman Corbett's staff has indicated that the direction of their measure will be somewhat different, including features such as a higher bond dollar amount. The Assemblywoman has also informed us that she has been in contact with Senator Alpert about their joint effort.

AB 222-Corbett has been scheduled for hearing in the Assembly Local Government Committee on Wednesday, April 9, 2003. The CLA Legislative Committee has taken a "support/work with author" position on the measure.

We will forward you additional information about potential amendments to AB

222 when they are available. Please take a moment today to write the members of the Assembly Local Government Committee and urge their support of

AB 222-Corbett. Members are:

Assemblyman Simon Salinas (Chair)  
Assemblywoman Sally Lieber (Vice Chair)  
Assemblywoman Lynn Daucher  
Assemblywoman Bonnie Garcia  
Assemblyman Jay LaSuer  
Assemblyman Mark Leno  
Assemblyman Gene Mullin



Assemblyman Darrell Steinberg  
Assemblywoman Patricia Wiggins

Sample address:

The Honorable Simon Salinas  
Chair, Assembly Local Government Committee  
State Capitol  
Sacramento, CA. 95814

### III. BUDGET BATTLE CONTINUES

In recent weeks, a few Republicans and Democrats in the Assembly have banded together to pursue possible budget solutions on their own. Additional legislators we have talked to have expressed dissatisfaction with the apparent lack of progress towards an eventual budget solution. Partly in response to this discontentment, Assembly Speaker Herb Wesson has cancelled all policy committees for next week to allow the Budget subcommittees to direct their focus toward current and Budget Year problems... and the problems remain huge.

Earlier this week, we were told by a key official in the Department of Finance that another \$2.5 billion must be cut from the current year budget within the next few weeks, otherwise the money will have gone out as scheduled, thereby making next year's problem that much worse.

### IV. PLF AND TBR STILL AT RISK

Thanks to the Budget subcommittee's refusal to cut the Public Library Foundation (PLF) in the current year, as requested by the Governor in December, this year's PLF allocation was distributed to public libraries at the end of February 2003, as scheduled and required by law. As reported previously, the Governor's proposed mid-year cuts would have reduced the \$31.5 million to \$15.7 million, with the \$15.7 million being continued for the upcoming Budget Year. In addition, the Governor proposed eliminating the entire \$12.1 million currently going for Transaction Based Reimbursement (TBR), for 2003-04.

In arguing for restoration of the TBR and PLF with one of the Department of Finance officials with responsibility for education and library issues, he



responded, "Libraries are a local function. With all we are cutting at the State level, we have to take that point of view."

The library community has previously been asked to write, call, or visit their local legislators as well as the members of the Senate and Assembly Budget Subcommittees on the TBR and PLF. Several of the legislators we have checked with indicate they have heard very little from the library community. If you have not already done so, please take that action today. The library issues are not scheduled to be heard for several weeks, however that timetable could always be moved up on short notice at the direction of the committee chairs (particularly in light of this recent development on the Assembly side to concentrate their efforts regarding immediate Budget cuts). Thanks for your help - letters do make a difference!

Susan Negreen, CAE  
Executive Director  
California Library Association  
snegreen@cla-net.org  
916-447-8541

-----calix-+  
Views expressed on CALIX are the opinion of the sender and do not necessarily reflect the position of the California Library Association.

How to get off CALIX: Subscribers are strongly encouraged to keep abreast of CLA and California library news via this mailing list. To sign off from the list, send email to listproc@listproc.sjsu.edu with the following request: SIGNOFF CALIX or UNSUBSCRIBE CALIX in the body of the message. Make sure your subject line is blank and nothing other than the command is in the body of the message.

-----calix--



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**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

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**TO:** Library Board of Trustees  
**FROM:** Elizabeth D. Minter, Library Director *EDM*  
**SUBJECT:** Two Percent Assessment Appeal Case  
**DATE:** March 24, 2003

**BACKGROUND:**

No new information has been received since the last report on February 24, 2003.

Neither the Orange County Board of Supervisors nor the Independent Special Districts of Orange County have recommended any specific action to local jurisdictions.

The initial impact (one-time cost) of the property tax refund for Placentia Library District in Fiscal Year 2002-2003 would be approximately \$186,000. For each year the refund is delayed the amount would increase by approximately \$77,000, plus interest. This is a significant increase over the previous estimate.

The ongoing impact (permanent loss) on future revenue would be a loss of approximately \$77,000 per year.

**RECOMMENDATION:**


Receive & File





Agenda Item 25

TO: Library Board of Trustees

FROM: Jim Roberts, Public Services Manager/Literacy Coordinator 

DATE: March 17, 2003

SUBJECT: Status of Placentia Library Literacy Services (PLLS) Partnerships with the Community.

Provided below is a list of active PLLS partnerships/coalitions in the community. Those with an asterisk (\*) are pending and have not yet begun.

- Placentia Rotary Reading Enrichment Program (PRREP) is a coalition of the Placentia/Yorba Linda Unified School District, Placentia Rotary and the PLLS. We currently have 61 high school volunteer tutors participating in PRREP.
- Reach Out and Read is a national pediatric literacy program and a partnership with St. Jude Medical Center. At Whitten Center, two PLLS volunteers read to children of low income parents while the children are waiting to see the pediatric nurse.
- Spanish Literacy is a coalition with Placentia Human Services, Placentia Head Start, and the Library and offers Spanish literacy classes to an under-served population.
- Federal Work Study (FWS) is a partnership between Western State University College of Law and the Library where qualified FWS students work part-time at the Library, primarily tutoring children. PLLS presently has eight FWS staff.
- Cal State Fullerton and PLLS have two partnerships:
  1. The Department of Human Services Intern Program, and 2. Service Learning.
- PLLS and Fullerton College have a Service Learning partnership. Several instructors require 10-40 hours of community service and PLLS is a participating agency.
- Starbucks and PLLS formed a partnership in FY 2002-03 by writing and receiving a grant for \$10,000 to provide materials and services to children. We plan to continue that partnership in FY 2003-04.
- \*Two months ago, PLLS contacted Troy Tech, a specialized program at Troy High School, to be listed as a community partner in their intern program. Juniors at Troy Tech have a 150 hour intern requirement. Although we have not had any interns from Troy Tech to date, PLLS is now listed as an eligible agency.
- \*PLLS is also listed as a participating agency for interns with Valencia High School's Val Tech, but since Val Tech started this school year, there won't be any potential interns until school year 2004-05.
- \*Potential *EVEN START* collaboration with Ruby Drive Elementary School during FY 2003-04.



March 18, 2003

To: Placentia Library District  
From: Saundra Stark  
Re: Special Districts Workers Compensation Authority

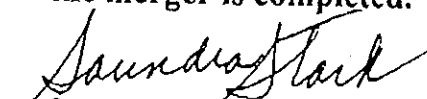
On February 10 - 12, 2003, I attended meetings of both the Special Districts Risk Management Authority and the Special Districts Workers Compensation Authority in Sacramento. These dual meetings brought the two separate boards closer to understanding the functions, problems and concerns of each other. Since the merger of both authorities is scheduled for July 1, 2003, it is necessary that all board members are knowledgeable.

As of today March 18, 2003, SDWCA has approved the merger with a few dissenting votes. SDRMA however is still 14 votes short for approval of the merger. A telephone campaign in Sacramento will be instituted immediately.

There is a new program being developed by California Special Districts Association--CSDA Special District Governance Academy. Look for additional information by mid-year.

NAVRISK Software is a product that has been financially supported by SDRMA and is now available for sale to insurance companies. SDRMA anticipates that sale of this product will be of significant financial benefit to the organization. Further information will be provide when available.

The next meeting of joint SDWCA and SDRMA will be March 27 - 28 in Sacramento. It seems that these 2 - 3 day meetings will continue until the merger is completed.

  
Saundra Stark



March 10, 2003

To: Members, Library of California Board

From: Dr. Diana Paque, Chief  
Library Development Services

Subject: Library of California Board Actions February 19, 2003

**Purpose of the Library of California Act:**

The Legislature finds and declares that it is in the interest of the people of the state to ensure that all Californians have free and convenient access to all library resources and services that could provide essential information and enrich their lives; and, to respond fully and successfully to these information needs and to the diversity of California's population, libraries of all types and in all parts of the state must be enabled to interact, cooperate, and share resources. This policy shall be accomplished by enabling libraries of all types and in all parts of the state to provide their users with services and resources of all libraries in this state, and by assisting libraries to provide and improve services to the underserved.

**Library of California Board Mission and Vision Statements:**

*Mission Statement:* The Library of California Board builds and supports the sharing of resources among all libraries for all Californians.

*Vision Statement:* The Library of California Board will be the nationally recognized leader of a dynamic statewide system of quality library services.

The following actions were taken at the Library of California Board meeting in Sacramento on February 19, 2003. Board members present were: Kallenberg, President; Gaines, Vice-President; Calderon; Fong; Kastanis; Levitin; Lin; Lowenthal; Maghsoudi; Pritchard; Steinhauser; and Tuttle.

**Adoption of Agenda**

1. It was moved, seconded (Maghsoudi/Pritchard) and carried unanimously that the Library of California Board adopts the agenda of the February 19, 2003 meeting as submitted.

**Approval of Minutes**

2. It was moved, seconded (Calderon/Fong) and carried unanimously that the draft minutes of the November 19, 2002 Library of California Board meeting were approved as submitted.

## Board Actions, February 19, 2003

### Resolutions

3. It was moved, seconded (Fong/Tuttle) and carried unanimously that the Library of California Board adopts the following Library of California Board Resolutions as written; and further moved to have the resolutions entered into the record in conjunction with the minutes: Resolution 2003-01 for James Kirks on the occasion of his retirement from North State Cooperative Library System; Resolution 2003-02 for Judith Segel on the occasion of her retirement from Black Gold Cooperative Library System; Resolution 2003-03 for Victoria F. Fong in honor of her distinguished service as President of the Library of California Board; and Resolution 2003-04 for Ed E. Harris, Resolution 2003-05 for Mary I. Purucker and Resolution 2003-06 for Kim Wang on the occasion of the conclusion of their terms of service and to honor them for their distinguished service on the Library of California Board. (See Attachment A (1-6))

### Consent Calendar

4. It was moved, seconded (Gaines/Kastanis) and carried unanimously that the Library of California Board approves the Consent Calendar included with the agenda of February 19, 2003 as submitted.

### Regional Library Network Development

5. It was moved, seconded (Tuttle/Calderon) and carried unanimously that the Library of California Board approves the 5 requests for network affiliation for the potential members listed in Table A, with member services to begin immediately. (See Attachment B)

### CLSA Consolidations and Affiliations

6. It was moved, seconded (Kastanis/Lin) and carried unanimously that the Library of California Board approves the proposed change in System membership for the Dixon Unified School District Library District from the Mountain Valley Library System to the North Bay Cooperative Library System, contingent upon approval by the North Bay Administrative Council; and further moved to accept the request to waive the September 1, 2002 filing date for 2003/04 affiliations so that this request becomes effective July 1, 2003.

### Budget and Planning

7. It was moved, seconded (Steinhauser/Pritchard) and carried unanimously that the Library of California Board supports continued authorization for operation of the Library of California and for continued funding, at a minimum, at the 2002/03 level.

**Board Actions, February 19, 2003**

8. It was moved, seconded (Lowenthal/Levitin) and carried unanimously that the Library of California Board endorses continuation of current year funding levels for the interlibrary loan, equal access and universal borrowing reimbursement programs, to retain the core resource sharing functions of the California Library Services Act (CLSA) and to ensure California's ability to receive continued federal Library Services and Technology Act (LSTA) funding at the statutory level.
9. It was moved, seconded (Lowenthal/Pritchard) and carried unanimously that the Library of California Board supports a strong California State Library, continuing the 153-year tradition of information services to California state government and the people of California, and providing leadership to and fostering resource sharing among the 8000 libraries statewide.

**Legislative**

10. It was moved, seconded (Gaines/Lowenthal) and carried unanimously that the Library of California Board supports the 2003 reauthorization of the Library Services and Technology Act (LSTA).
11. It was moved, seconded (Maghsoudi/Lowenthal) and carried unanimously that the Library of California Board supports SB 40 (Alpert) and AB 222 (Corbett) that propose a public library construction bond measure for 2004.
12. It was moved, seconded (Kastanis/Lin) and carried unanimously that the Library of California Board supports the California Public School Library Act and the continuation of the budget line item to fund library materials for school libraries.
13. It was moved, seconded (Maghsoudi/Lowenthal) and carried unanimously that the Library of California Board endorses and supports the California Library Association's campaign to retain CLSA funding for reimbursement for interlibrary loan, equal access and universal borrowing services; and, further, that the LoC Board will actively participate in this campaign.

Attached also is the Library of California Board meeting schedule including a calendar of meetings, events, and deadlines for 2003. (See Attachment C)

Board Actions, February 19, 2003

Attachment C

**LIBRARY OF CALIFORNIA BOARD MEETING SCHEDULE FOR 2003**

February 18-19, 2003	Sacramento
May 28-29, 2003	Sacramento
August 20-21, 2003	Sacramento
November 18-19, 2003	Ontario

**CALENDAR OF MEETINGS/EVENTS/DEADLINES FOR 2003**

February 27	Gold Coast Library Network, Board of Directors, Santa Barbara Public Library
February 27	Santiago Library System, Administrative Council, Orange County Public Library
February 28	Black Gold Cooperative Library System, Administrative Council, Santa Maria Public Library
March 3	4 <sup>th</sup> 2002/03 CLSA Direct Loan Sample data due at State Library
March 14	North State System Advisory Board and Council of Librarians, Tehama County Library
March 19	Golden Gateway Library Network, Board of Directors (Annual meeting)
March 20	Gold Coast Library Network, Board of Directors (Annual meeting), Santa Barbara Public Library, Faulkner Gallery
March 28	Black Gold Cooperative Library System, Administrative Council, Lompoc
April 15	3 <sup>rd</sup> quarter 2002/03 ILL claims due at State Library
April 24	Santiago Library System, Administrative Council, Mission Viejo Library
May 9	North State System Advisory Board and Council of Librarians, Mt. Shasta Branch Library
July 15	4 <sup>th</sup> quarter 2002/03 ILL claims due at State Library

Arroyo Seco Board of Directors normally meets the second Thursday of the month.  
Heartland Board of Directors normally meets the first Tuesday of the month.  
Meeting dates for CLSA Systems and Regional Library Networks are subject to change.



# SPECIAL DISTRICTS FINANCIAL TRANSACTIONS REPORT COVER PAGE

## Placentia Library District

Fiscal Year           **2002**                           ID Number:           **12173004000**

Submitted by:                           **CLIENT'S COPY**

_____ Signature	_____ Title
_____ Name (Please Print)	_____ Date

Per Government Code section 53891, this report is due within 90 days after the end of the fiscal year. If filed in electronic format, the report is due within 110 days after the end of the fiscal year.

Per Government Code section 26909, a copy of the independent audit is to be filed with the Controller within 12 months after the close of the fiscal year.

**To file electronically:**

1. Complete all forms as necessary.
2. Transmit the completed output file using a File Transfer Protocol (FTP) program or via diskette.
3. Sign this cover page and mail to either address.

**To file a paper report:**

1. Complete all forms as necessary.
2. Sign this cover page, and mail completed report to either address below.

Report will not be considered filed until receipt of this signed cover page.

**Mailing Address:**

State Controller's Office  
Division of Accounting and Reporting  
Local Government Reporting Section  
P. O. Box 942850  
Sacramento, CA 94250

**Express Mailing Address:**

State Controller's Office  
Division of Accounting and Reporting  
Local Government Reporting Section  
3301 C Street, Suite 700  
Sacramento, CA 95816

**Placentia Library District**  
**Special Districts Financial Transactions Report**  
**General Information**

Fiscal Year

**Mailing Address**

Street 1   Is Address Changed?

Street 2

City  State  Zip

Email

**Members of the Governing Body**

	First Name	Middle Initial	Last Name	Title
Member	<input type="text" value="AL"/>	<input type="text"/>	<input type="text" value="SHKOLER"/>	<input type="text" value="PRESIDENT"/>
Member	<input type="text" value="GEOFF"/>	<input type="text"/>	<input type="text" value="BRAUN"/>	<input type="text" value="SECRETARY"/>
Member	<input type="text" value="GAETEN"/>	<input type="text" value="M"/>	<input type="text" value="WOOD"/>	<input type="text" value="BOARD MEMBER"/>
Member	<input type="text" value="MARGARET"/>	<input type="text" value="V"/>	<input type="text" value="DINSMORE"/>	<input type="text" value="BOARD MEMBER"/>
Member	<input type="text" value="SAUNDRA"/>	<input type="text" value="M"/>	<input type="text" value="STARK"/>	<input type="text" value="BOARD MEMBER"/>
Member	<input type="text" value="ELIZABETH"/>	<input type="text"/>	<input type="text" value="MINTER"/>	<input type="text" value="DIRECTOR"/>
Member	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Member	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Member	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Other Officials**

First Name	Middle Initial	Last Name	Title
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Report Prepared By**

First Name	Middle Initial	Last Name	Phone No
<input type="text" value="MERRIALYCE"/>	<input type="text"/>	<input type="text" value="MCHENRY, CPA"/>	<input type="text" value="(714) 449-9909"/>

**Independent Auditor**

First Name	Middle Initial	Last Name	Phone No
<input type="text" value="MERRIALYCE"/>	<input type="text"/>	<input type="text" value="MCHENRY, CPA"/>	<input type="text" value="(714) 449-9909"/>

**Placentia Library District**  
**Special Districts Financial Transactions Report - Non-Enterprise Activity**  
**Revenues, Expenditures, Sources and Uses**

Fiscal Year	2002		
	General and Special Revenue Funds	Debt Service Funds	Capital Projects Funds
	A	B	C
Non-Enterprise Activity	Library Services		
<b>Taxes and Assessments</b>			
Current Secured and Unsecured (1%)	1,117,230		
Voter Approved Taxes			
Property Assessments			
Special Assessments (Mello/Roos, Mark/Roos)			
Prior Year Taxes and Assessments	27,879		
Penalties and Cost on Delinquent Taxes and Assessments			
Licenses, Permits, and Franchises			
Fines, Forfeits, and Penalties			
<b>Revenue From Use of Money and Property</b>			
Interest Income	13,464		
Rents, Concessions and Royalties			
<b>Federal</b>			
Aid for Construction			
Other Federal			
<b>State</b>			
Aid for Construction			
State Water Project			
Homeowners Property Tax Relief	16,101		
Timber Yield			
Other State	125,235		
<b>Other Governmental Agencies</b>			
Redevelopment Pass-Through			
Other	157,237		
<b>Charges for Current Services</b>			
<b>Contributions From Property Owners</b>			
<b>Self Insurance Only</b>			
Member Contributions			
Claim Adjustments			
Other Revenues	13,167		
<b>Total Revenues</b>	<b>\$1,470,313</b>	<b>\$0</b>	<b>\$0</b>
<b>Expenditures</b>			
Salaries and Wages	645,467		
Employee Benefits	161,084		
Services and Supplies	629,430		
Self Insurance Only - Claims Paid			

**Placentia Library District**  
**Special Districts Financial Transactions Report - Non-Enterprise Activity**  
**Revenues, Expenditures, Sources and Uses**

Fiscal Year	2002		
	General and Special Revenue Funds	Debt Service Funds	Capital Projects Funds
	A	B	C
Contributions to Outside Agencies			
<b>Debt Service</b>			
Retirement of Long-Term Debt	60,000		
Interest on Long-Term Debt			
Interest on Short-Term Notes and Warrants			
<b>Fixed Assets</b>			
<b>Other Expenditures</b>			
<b>Total Expenditures</b>	\$1,495,981	\$0	\$0
<b>Revenues Over (Under) Expenditures</b>	(\$25,668)	\$0	\$0
<b>Financing Sources and Uses</b>			
Proceeds of Long-Term Debt			
Proceeds of Refunding Debt			
Payments to Refunded Debt Escrow Agent			
Inception of Lease Purchase Agreements			
Other Financing Sources			
Other Financing Uses			
Operating Transfers In (Intra-District)			
Operating Transfers Out (Intra-District)			
<b>Total Other Financing Sources (Uses)</b>	\$0	\$0	\$0
<b>Revenues/Sources Over (Under) Expenditures/Uses</b>	(\$25,668)	\$0	\$0
<b>Fund Equity, Beginning of Period</b>	\$759,746	\$0	\$0
Prior Period Adjustments			
Residual Equity Transfers			
Other			
<b>Fund Equity, End of Period</b>	\$734,078	\$0	\$0

**Placentia Library District**  
**Special Districts Financial Transactions Report**  
**Consolidation of Fund Equities and Transfers**  
**Consolidation of Fund Equities and Transfers**

Fiscal Year 2002

	General and Special Revenue Funds	Debt Service Funds	Capital Projects Funds	Enterprise Funds
<b>Consolidation of Fund Equities</b>				
Non-Enterprise Activities	\$734,078	\$0	\$0	
<b>Enterprise Fund Equities</b>				
Airport				\$0
Electric				\$0
Harbor and Port				\$0
Hospital				\$0
Waste Disposal				\$0
Water				\$0
<b>Total Ending Fund Equities</b>	<b>\$734,078</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

	Transfers In A	Transfers Out B	Net C
<b>Consolidation of Transfers In and Transfer Out</b>			
General and Special Revenue Funds	\$0	\$0	
Debt Service Funds	\$0	\$0	
Capital Projects Funds	\$0	\$0	
<b>Enterprise Activities</b>			
Airport	\$0	\$0	
Electric	\$0	\$0	
Harbor and Port	\$0	\$0	
Waste Disposal	\$0	\$0	
Water	\$0	\$0	
<b>Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

**Placentia Library District**  
**Special Districts Financial Transactions Report**  
**Appropriations Limit Information**  
**Appropriations Limit Information**

Fiscal Year 2002

Appropriations Limit as of the End of the Fiscal Year	2,511,659
Total Annual Appropriations Subject to the Limit as of the End of the Fiscal Year	1,432,721
Amount (Over) Under the Appropriation Limit	\$1,078,938

**Placentia Library District**  
**Special Districts Financial Transactions Report - Long-Term Debt**  
**General Obligation Bonds, Revenue Bonds, Certificates of Participation and Other**

<b>Fiscal Year</b>	2002
District-wide or Improvement District/Zone	District-wide
Improvement/Zone (If Applicable)	
Type of Debt	Other Long-Term Indebtedness
Activity	Library Services
Purpose of Issue	Building
Nature of Revenue Pledged	NONE
Percent of Pledge	0.00
Year of Authorization	1972
Principal Amount Authorized	1,000,000
Principal Amount Issued	1,000,000
Beginning Maturity Date	1972
Ending Maturity Date	2004
<b>Principal Amount Unmatured, Beginning of Fiscal Year</b>	<b>\$270,000</b>
Adjustments - Increase (Decrease)	
Principal Amount Issued During Fiscal Year	
Principal Amount Matured During Fiscal Year	
Principal Amount Defeased During Fiscal Year	60,000
<b>Principal Amount Unmatured, End of Fiscal Year</b>	<b>\$210,000</b>
Principal Amount in Default, End of Fiscal Year	
Interest in Default, End of Fiscal Year	
Amount Held in Bond Reserve	

**Placentia Library District**

**Special Districts Financial Transactions Report - Lease Obligations**

**Lease Obligations**

<b>Fiscal Year</b>	2002
<b>Activity</b>	Library Services
<b>Purpose of Lease</b>	EQUIPMENT
<b>Original Term of Lease - Number of Years</b>	14
<b>Type of Lease</b>	Rental
<b>Name of Lessor</b>	ABN AMRO INC.
<b>Total Principal and Interest Unmatured, Beginning of Fiscal Year</b>	
<b>Principal Payment During Fiscal Year</b>	14,623
<b>Interest Payment During the Fiscal Year</b>	14,947
<b>Adjustments - Increase (Decrease)</b>	376,940
<b>Total Principal and Interest Unmatured, End of Fiscal Year</b>	\$347,370
<b>Total Unmatured Principal (Only) End of Fiscal Year</b>	



Placentia Library District  
Special Districts Financial Transactions Report - Consolidated Balance Sheet

Assets

Assets	2002					Total Memorandum Only
	General and Special Revenue Funds	Debt Service Funds	Capital Projects Funds	Enterprise Funds	General Fixed Assets	
Cash and Cash Equivalents	748,644					\$748,644
Taxes Receivable	20,090					\$20,090
Interest Receivable						\$0
Accounts Receivable						\$0
Loans, Notes, and Contracts Receivable	78,617					\$78,617
Due from Other Funds						\$0
Inventory of Materials and Supplies						\$0
Other Current Assets						
Lease Payments Receivable						
Unearned Finance Charges						
Investments	35,000					\$35,000
Restricted Assets						
Deferred Charges						
Unamortized Discount on Long-Term Debt						
Other Assets	18,914					\$18,914
<b>Fixed Assets</b>						
Land					81,498	\$81,498
Buildings and Improvements					1,446,425	\$1,446,425
Equipment					589,103	\$589,103
Construction in Progress						\$0
<b>Total Fixed Assets</b>				\$0	\$2,117,026	\$2,117,026
Accumulated Depreciation						\$0
<b>Net Fixed Assets</b>				\$0	\$2,117,026	\$2,117,026
<b>Other Debits</b>						
Amount Available in Debt Service Funds					210,000	\$210,000
Amount to be Provided				\$0	\$2,117,026	\$3,228,291
<b>Total Assets</b>	\$901,265	\$0	\$0	\$0	\$2,117,026	\$3,228,291

Placentia Library District  
Special Districts Financial Transactions Report - Consolidated Balance Sheet

Fiscal Year	2002	General and Special Revenue Funds	Debt Service Funds	Capital Projects Funds	Enterprise Funds	General Fixed Assets	General Long-Term Debt	Total Memorandum Only
<b>Liabilities and Equity</b>								
Accounts/Warrants Payable		19,742						\$19,742
Loans and Notes Payable								\$0
Interest Payable - Matured/Accrued		2,992						\$2,992
Other Current Liabilities		23,907						\$23,907
Compensated Absences Payable		45,473						\$45,473
Due to Other Governments		75,073						\$75,073
Due to Other Funds								\$0
Long-Term Debt								\$0
General Obligation Bonds								\$0
Revenue Bonds								\$0
Certificates of Participation								\$0
Special Assessment								\$0
Federal								\$0
State								\$0
Time Warrants								\$0
Other Long-Term Indebtedness							210,000	\$210,000
Unamortized Premium on Long-Term Debt								
Advances for Construction								
Deferred Revenue								\$0
All Other Non-Current Liabilities								
<b>Total Liabilities</b>		\$167,187	\$0	\$0			\$210,000	\$377,187
<b>Fund Equity</b>								
Contributed Capital								
Investments in General Fixed Assets					2,117,026			\$2,117,026
Retained Earnings								
Reserved								
Unreserved								
<b>Fund Balances</b>								
Reserved		18,914						\$18,914
Unreserved Designated		189,522						\$189,522
Unreserved Undesignated		525,642						\$525,642
<b>Total Fund Equity</b>		\$734,078	\$0	\$0	\$0	\$2,117,026		\$2,851,104
<b>Total Liabilities and Fund Equity</b>		\$901,265	\$0	\$0	\$0	\$2,117,026	\$210,000	\$3,228,291

Placentia Library District

**Special Districts Financial Transactions Report**

Detailed Summary of Footnotes For Fiscal Year 2001-02

Forms	Column	Additional Details	Footnotes
<b>Lease Obligations</b>			
Adjustments - Increase (Decrease)	A	LEASE_PURPOSE = 'EQUIPMENT' and ACTIVITY_CODE = 'Library Services'	TOTAL PRINCIPAL AND INTEREST UNMATURED, BEGINNING OF FISCAL YEAR

**Supplement to the Annual Report of Special Districts  
For the Fiscal Year Ended June 30, 2002**

Special District ID Number	12173004000
Name of District	Placentia Library District
Address	411 E. Chapman Ave.
City, State, Zip	Placentia, CA 92870

The U. S. Bureau of the Census requests the following information about the fiscal activities of your government for the 2001-2002 fiscal year (defined from July 1, 2001 through June 30, 2002). Governments furnishing this information will no longer receive U. S. Bureau of the Census Form F-29 or F-32, Survey of Local Government Finances. If you have any questions, please contact:

U. S. Bureau of the Census  
Jeffrey Little  
1-800-242-4523

**A. Personnel Expenditures**

Report your government's total expenditures for salaries and wages during the year, including amounts paid on force account construction projects.

200	\$645,467
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**B. Cash and Investments Held at the End of the Fiscal Year**

Report separately for each of the three types of funds listed below, the total cash on hand and on deposit and investments in Federal government, Federal agency, State and local government and non-governmental securities. Report all investments at par value. Include in the sinking fund total any mortgages and notes receivable held as offsets to housing and industrial financing loans. Exclude accounts receivable, value of real property and non-security assets.

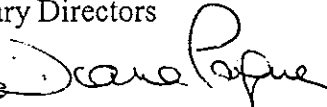
1. Sinking funds - Reserve held for redemption of long term debt.	W01	\$ 0.00
2. Bond funds - Unexpended proceeds from the sale of bond issues held pending disbursement.	W31	\$ 0.00
3. All other funds - Exclude employee retirement funds.	W61	\$ 0.00



CALIFORNIA  
STATE LIBRARY  
FOUNDED 1850

## MEMORANDUM

TO: Public Library Directors

FROM: Diana Paque   
Chief, Library Development Services

DATE: February 14, 2003

SUBJECT: Public Library Fund Allocations, 2002-03

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The certification process of local revenue for the allocation of the 2002-03 Public Library Fund (PLF) has been completed and payment to local libraries has been initiated for allotments at the level of \$31,532,000, as appropriated in the FY 2002-03 enacted budget.

The list of public libraries qualifying, together with their PLF allocations for 2002-03, is attached.

If you have questions or need further information, please contact Sharon Gomez at (916) 653-6492, email [sgomez@library.ca.gov](mailto:sgomez@library.ca.gov) or Jay Cunningham at (916) 653-8112, email [jcunningham@library.ca.gov](mailto:jcunningham@library.ca.gov).

Attachment

PUBLIC LIBRARY FUND  
 FY 2002/2003  
 (Payment Based on Population)

Library	1 Population FY 02/03	2 Local Appropriation	3 Meets MOE Y/N	4 At 100% Funding Total Cost of PLF Program 1 x \$2,289	5 Proportionally Funded Allocation 1 x 0.90050
Menlo Park	31,100	1,641,531	Y	71,188	28,007
Merced Co.	218,900	1,583,095	Y	501,062	197,127
Mill Valley	13,700	1,365,683	Y	31,359	12,337
Mission Viejo	98,300	1,898,507	Y	225,009	88,522
Modoc Co.	9,350	299,500	Y	21,402	8,420
Mono Co.	13,250	444,540	Y	30,329	11,932
Monrovia	37,950	1,202,080	Y	86,868	34,175
Monterey	29,800	2,602,498	Y	68,212	26,836
Monterey Co.	211,800	4,586,611	Y	484,810	190,733
Monterey Park (Buggerr	62,600	1,322,980	Y	143,291	56,373
Moreno Valley	146,000	1,340,413	Y	334,194	131,478
Mountain View	71,600	3,909,538	Y	163,892	64,478
Murrieta	51,600	714,400	Y	118,112	46,468
Napa City-Co.	121,975	4,146,323	Y	279,201	109,843
National City	58,100	1,533,148	Y	132,991	52,321
Nevada Co.	95,300	1,573,102	Y	218,142	85,821
Newport Beach	72,500	4,508,448	Y	165,953	65,289
Oakland	427,200	16,844,818	Y	977,861	384,708
Oceanside	167,200	4,019,889	Y	382,721	150,569
Ontario City	162,300	3,135,418	Y	371,505	146,157
Orange	132,900	3,381,931	Y	304,208	119,681
Orange Co.	1,441,400	25,893,138	Y	3,299,365	1,298,028
Orland Free	13,450	351,591	Y	30,787	12,112
Oxnard	182,000	3,099,042	Y	416,598	163,897
Pacific Grove	15,500	1,045,986	Y	35,480	13,958
Palm Springs	43,700	2,148,004	Y	100,029	39,353
Palmdale City	123,700	1,991,360	Y	283,149	111,396
Palo Alto City	60,500	6,062,811	Y	138,485	54,482
Palo Verde Valley L.D.	41,600	141,849	Y	95,222	37,462
Palos Verdes L.D.	65,900	4,195,691	Y	150,845	59,345
Pasadena	138,800	9,171,810	Y	317,713	124,994
Paso Robles	25,800	1,095,200	Y	59,056	23,234
→ Placentia L.D.	51,500	1,765,112	Y	117,884	46,377
Pleasanton	66,200	2,887,243	Y	151,532	59,615
Plumas/Sierra Co.	24,500	427,055	Y	56,081	22,063
Pomona	153,900	2,412,667	Y	352,277	138,592
Porterville	41,000	591,854	Y	93,849	36,922

**Mayor**  
**SCOTT P. BRADY**

**City Administrator**  
**ROBERT D'AMATO**



**Councilmembers:**  
**JUDY A. DICKINSON**  
**NORMAN Z. ECKENRODE**  
**CHRIS LOWE**  
**CONSTANCE UNDERHILL**

401 East Chapman Avenue - Placentia, California 92870

February 21, 2003

Ms. Elizabeth Minter  
Placentia Library District  
411 East Chapman Avenue  
Placentia, CA 92870

Dear Elizabeth:

As chairman, I would like to provide you with an update of the recent accelerated progress of the Placentia Freedom Corps.

Because funding from the state to the county to Placentia has been delayed until at least April, the plans that we formulated in the third quarter and before were temporarily placed on hold. All five members of the city council informed me that they are completely supportive of the purpose of our board, and would like to increase our visibility and efforts to attract volunteers in different capacities once the funding is secured, hopefully within the next few months. Thus, we expect to fully implement our marketing and volunteer recruitment ideas soon.

In the meantime and since the start of the year, we have made some significant progress. Michael McConaha has secured a partnership with Placentia-Linda Hospital to assemble a Medical Reserve Corps of current and retired doctors and nurses so that they can be available to assist in a time of emergency. FEMA is currently beginning their efforts to establish this program throughout the country, but we already have this implemented.

In addition, FEMA proactively asked the governor's office for our list of accomplishments two weeks ago in order to brief the White House on the efforts of a few national cities. We are pleased that they continue to recognize the responsibility Placentia has assumed with respect to the spirit of the federal initiative. Also, the Placentia Freedom Corps will be featured on the City's new web site to meet one of our objectives to inform our citizens of valuable volunteer opportunities with regards to emergency preparedness and nonprofits.

(Page Two)

In relation to these efforts, Patrick Vuong, the Placentia reporter for the Orange County Register, has written an article on what we have done in the last year, published February 20, 2003, in the "Placentia News Times".

Finally, we are re-positioning the Placentia Freedom Corps board in a slightly different direction. Because we are in consistent contact with FEMA, the Orange County Sheriff's Office, the White House, and the governor's office, we will now have biannual meetings that will host an influential decision-maker to discuss issues relating to our efforts and to identify short-term emergency-related opportunities and threats for Placentia. In addition, we want to use this time to allow for a forum of key ideas that can assist in protecting Placentia and promoting volunteer opportunities.

We are working on a few other key ideas with members of the city council and staff, and I will be providing periodic updates to keep you informed. If you have any ideas, questions, or comments, please feel free to contact me at (949) 770-0400, ext. 2528 or at [RyanJKenny@yahoo.com](mailto:RyanJKenny@yahoo.com).

Thank you for your assistance,

A handwritten signature in black ink, appearing to read "Ryan Kenny", with a long horizontal flourish extending to the right.

Ryan Kenny  
Chairman, Placentia Freedom Corps



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**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

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**TO:** Library Board of Trustees

**FROM:** Elizabeth D. Minter, Library Director *edm*

**SUBJECT:** Legislative Issues and a Review of the Status of the State Budget and State Library Budget

**DATE:** March 24, 2003

**BACKGROUND**

Trustee Wood has reported that she will be unable to attend the California Special Districts Association Legislative Days on April 1 and 2 in Sacramento. President Shkoler and Trustee Escobosa are registered to attend.

The Trustees need to report on legislative contacts during the past month.

The Legislature has been very quiet for the past several weeks. Additional information will be distributed at the Library Board meeting if it becomes available.

**RECOMMENDATION**

Action to be determined by the Library Board of Trustees.



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**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

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**TO:** Library Board of Trustees

**FROM:** Elizabeth D. Minter, Library Director

**SUBJECT:** Review of the Draft Placentia Library District Policy Manual Sections 1000 (General), 4000 (Board of Trustees) and 5000 (Board Meetings).

**DATE:** March 24, 2003

**BACKGROUND:**

At its meeting on February 24, 2003 the Library Board assigned review of Sections 1000 (General), 4000 (Board of Trustees) and 5000 (Board Meetings) for the March 24 Board meeting.

Based on information received from the Special District Risk Management Authority (SDRMA) dated March 14, 2003 a revised Policy Number 1040, Claims Against the District, is included as Attachment A. Policy Number 1040 now includes a Placentia Library District Claims Form. The letter from SDRMA is Attachment B.

**RECOMMENDATION:**

1. Adopt as first reading the policies in Sections 1000 (General), 4000 (Board of Trustees) and 5000 (Board Meetings).
2. Select sections for review at the April 21, 2003 Library Board Meeting.



# Placentia Library District

## POLICY HANDBOOK

**POLICY TITLE:** Claims Against the District  
**POLICY NUMBER:** 1040

The purpose of this policy is to provide direction to District staff for processing and resolving (if possible) account adjustment requests and property damage claims against the District. Inherent in this policy is the recognition that every adjustment request or claim will be unique, and that guidelines cannot be written to accommodate every case. Therefore, staff must use discretion and good sense in handling each claim.

### 1040.1 Property (Vehicles and Unsecured Property) Damage Claims

All claims of damage to vehicles or other unsecured property shall be submitted to the Library Director. He/she shall review the damage claim and the requested restitution. If he/she determines that the damage is the District's responsibility, he/she may authorize repairs or reimbursement of expenses to an amount not to exceed \$1,500. A report shall be submitted to the Library Board of Trustees describing the damage claim, including a description of the manner in which it was resolved.

The claim will be processed as described above if the cost of material for repairs is estimated to exceed \$1,500.

### 1040.2 Property Damage Claims on District Form

Pursuant to California Government Code Section 910.4 (a) all damage claims, including those with legal representation, must be submitted in writing on a District Claims Form. This will ensure that a claim is valid and protect important rights of the District.

Section 910.2 of the California Government Code specifies the following:

*The claim shall be signed by the claimant or by some person on his behalf. Claims against local public entities for supplies, materials, equipment or services need not be signed by the claimant or on his behalf if presented on a billhead or invoice regularly used in the conduct of the business of the claimant.*

If the claim does not meet the requirements of the California Government Code §910 and §910.2, then a letter shall be sent to the claimant informing them of this fact.

A claim may be returned to the person if it was not presented using the Placentia Library District Claims Form. Any claim returned to a person may be resubmitted using the appropriate form.

District staff shall provide no assistance to the claimant in filling out the Claims Form. Claimant must fill out the Claims Form in its entirety and submit it via mail, FAX, or personal delivery to the District office. Upon receipt, office staff shall date-stamp the document.







March 14, 2003

**RE: Recommended Claims Form**

**Dear SDRMA Member:**

The March issue of the CSDA News referred to the recent amendment to Government Code Section 910.4.(a), regarding the form required to file a claim against a public entity. Enclosed for your use is a **CLAIMS FORM** that your agency can use to be in compliance with the Government Code. This form contains the legal requirements for filing a claim with a public entity.

The amendment to Government Code Section 910.4. reads as follows:

**910.4. (a) The board shall provide form specifying the information to be contained in claims against the public entity. The person presenting a claim shall use the form in order that his or her claim is deemed in conformity with Sections 910 and 910.2. A claim may be returned to the person if it was not presented using the form. Any claim returned to a person may be resubmitted using the appropriate form.**

**(b) The amendments made to this section by the act adding this subdivision shall become operative six months after the date that act takes effect.**

This amendment will take effect on March 30, 2003.

This form is to be used on all claims including those claims with legal representation.

If you have any questions, please call SDRMA Claims Manager Dennis Timoney at 800-537-7790.

Thank You!

G:\CLAIMS\Mber letter claims ltr

**SPECIAL DISTRICT  
RISK MANAGEMENT  
AUTHORITY**

1481 River Park Dr. Ste 110  
Sacramento, CA 95815  
Tel: 916.641.2773  
Fax: 916.641.2776

CLAIMS FORM

CLAIMS FORM

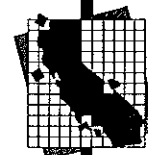
CLAIMS FORM

CLAIMS FORM

**Toll-Free Numbers**

General: 1.877.924.CSDA

SDRMA/SDWCA Claims &  
Coverages: 1.800.537.7790





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
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**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

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**TO:** Library Board of Trustees

**FROM:** Elizabeth D. Minter, Library Director 

**SUBJECT:** Resolution authorizing Placentia Library District membership in the Orange County Council of Governments

**DATE:** March 24, 2003

**BACKGROUND:**

At its meeting on February 24, 2003 the Library Board of Trustees authorized the Library Director to request membership information for the Orange County Council of Governments (OCCOG).

Attachment A is a letter from Orange County Water District Director, Philip Anthony, dated February 28, 2003, with the instructions for affiliating with the OCCOG.

**RECOMMENDATION:**

1. Authorize the Library Board President to send a letter to the Orange County Council of Governments (OCCOG) petitioning for membership for Placentia Library District.
2. Authorize the Library Board President to sign the Joint Powers Agreement after the District's request for membership is approved by the OCCOG Board of Directors.

*Directors*  
PHILIP L. ANTHONY  
WES BANNISTER  
KATHRYN L. BARR  
DENIS R. BILODEAU  
RICHARD CHAVEZ  
PAUL COOK  
JAN DEBAY  
BRETT FRANKLIN  
LAWRENCE P. KRAEMER JR.  
SHAWN NELSON



Agenda Item 33  
Attachment A  
Page 1 of 1

*First Vice President*  
BRETT FRANKLIN  
*Second Vice President*

—  
VIRGINIA GREBBIEN  
*General Manager*  
JANICE DURANT  
*District Secretary*

## ORANGE COUNTY WATER DISTRICT

*Orange County's Groundwater Authority*

February 28, 2003

Elizabeth D. Minter, Library Director  
Placentia Library District of Orange County  
411 East Chapman Avenue  
Placentia, California 92870-8236

**Subject: Membership in the Orange County Council of Governments**

Dear Elizabeth:

Sorry I missed your call, but its very good to hear that your Board is interested in joining the Orange County Council of Governments (OCCOG). Since you were going to be out of the office for several days, I thought it best just to send the information you need.

It is very easy to be a member of OCCOG. There are no dues or fees. There is no obligation to attend any meetings. You will get OCCOG Board agendas and other information, so you can selectively choose meetings or topics that are of interest to you and your District.

To become a member of OCCOG all your Board needs to do is to adopt a resolution that (1) authorizes petitioning OCCOG for your District to be accepted as a member and (2) authorizes signing the OCCOG Joint Powers Agreement after your request for membership is approved by the OCCOG Board of Directors.

When your Board takes formal action to join the OCCOG, just send me your resolution and it will have prompt attention. Call me at 714/454-2003 if you have any questions.

Sincerely,

Philip L. Anthony  
Director, Division 4  
and Chair, OCCOG

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**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

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**TO:** Library Board of Trustees  
**FROM:** Elizabeth D. Minter, Library Director  
**SUBJECT:** Designation of Poet Laureate for Placentia Library District  
**DATE:** March 24, 2003

**BACKGROUND:**

At its meeting on February 24, 2003 the Library Board of Trustees deferred action on this item and requested that it be carried forward to the March 24 Meeting.

At its meeting on January 21, 2003 the Library Board listened to a presentation by Placentia resident Meredith Karen Laskow concerning the creation of a position of Poet Laureate for Placentia Library District. She also said that she would like to apply for that appointment.

**RECOMMENDATION:**

Appoint Meredith Karen Laskow as Placentia Library District's Poet Laureate.



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**PLACENTIA LIBRARY DISTRICT BOARD OF TRUSTEES**

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**TO:** Library Board of Trustees

**FROM:** Elizabeth D. Minter, Library Director

**SUBJECT:** Travel/training authorizations for the Claims Education Day sponsored by the Special District Risk Management Authority, Tuesday, April 15, 2003, at the Buena Park Library District.

**DATE:** March 24, 2003

**BACKGROUND**

The Library Director is requesting that one or two Trustees attend the Claims Education Day. Several of the Trustees had questions about Claims processing at the January Board Meeting and this workshop will provide a good opportunity to learn firsthand about the legal requirements and liability implications. There is no charge for this workshop and participation qualifies the District for a discount in liability insurance fees. Lunch will be provided at the workshop. The workshop information is Attachment A.

**RECOMMENDATION**

Determine who will attend and authorize the travel expenses for the Special District Risk Management Authority (SDRMA) Claims Education Day on Tuesday, April 15, 2003 at a cost of mileage to be paid from the General Fund.







**SPECIAL DISTRICT RISK MANAGEMENT AUTHORITY**  
A PROPERTY AND LIABILITY PROGRAM FOR PUBLIC AGENCIES

**CLAIMS EDUCATION DAY**

**DATE:** Tuesday, April 15, 2003

**LOCATION:** Buena Park Library District  
7150 La Palma Avenue, Buena Park, California 90620-2547  
714-826-4100

**TIME:** 9:00 a.m. - 3:00 p.m.  
Lunch Provided

**COST:** No Cost to SDRMA Members

**CIP CREDIT:** Earn 1 Point for each *full-session* attended by your managerial staff or board members at an SDRMA Education Day held during the program year. A maximum of (2) CIP points (1 point per person) per program year.

**REGISTRATION:** Please complete this registration form and fax to 916-641-2776. Registration is necessary to confirm facility reservations.

**AGENDA:**

8:30 a.m.	Registration
9:00 a.m.	Insurance Market Overview/SDRMA Program Update
10:15 a.m.	Break
10:30 a.m.	Claims Process Review
12:00 p.m.	Lunch
1:00 p.m.	Employment Liability Update
3:00 p.m.	Questions & Answer

**MEMBER DISTRICT** \_\_\_\_\_

**ATTENDEE NAME**

**TITLE**

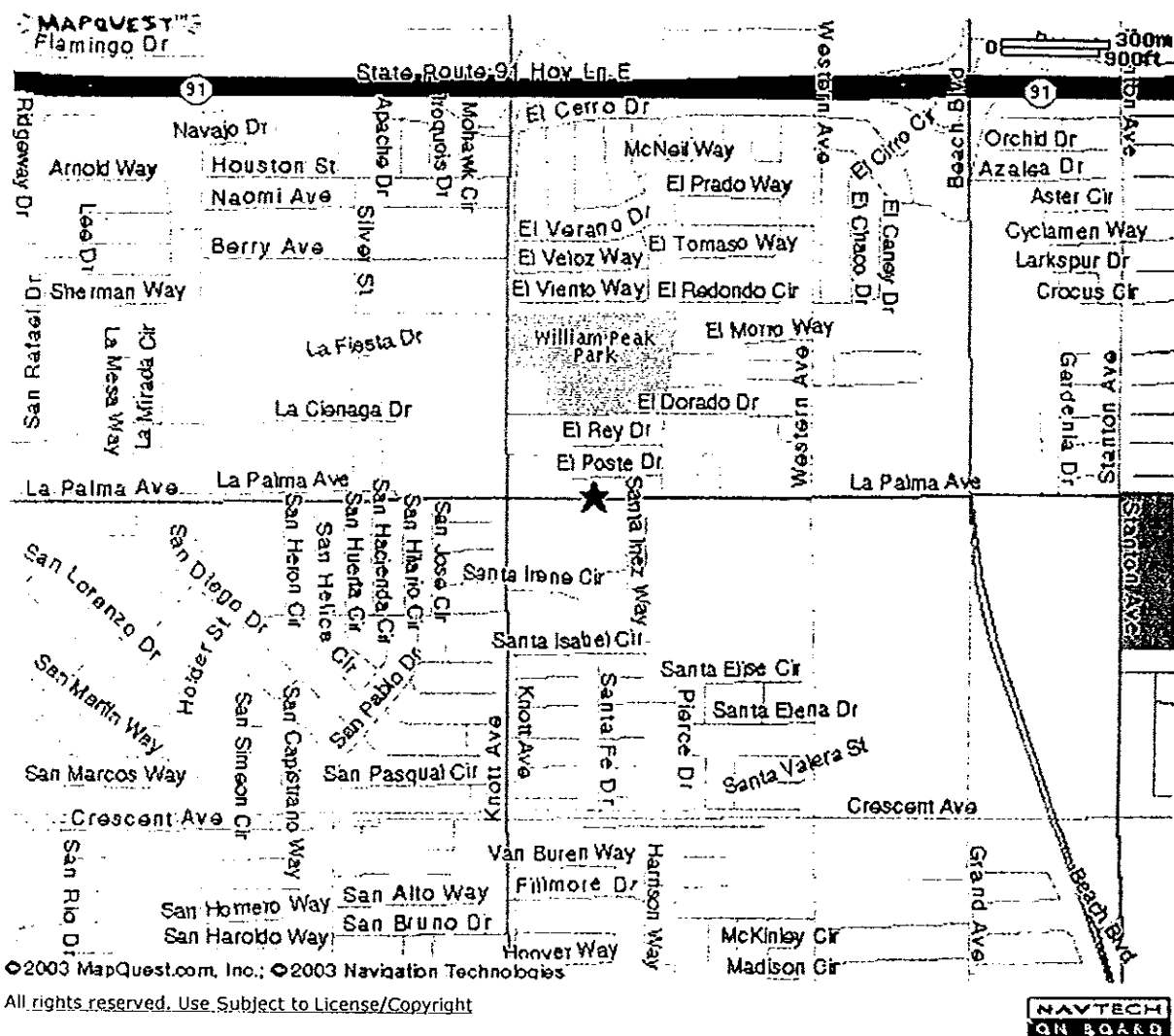
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\_\_\_\_\_

*We highly encourage your district to take advantage of these important educational and training workshop opportunities. These programs are designed to help Special District Risk Management Authority members take a proactive approach to effectively managing their risk through loss prevention and claim reduction training. On behalf of the Special District Risk Management Authority and the California Special Districts Association Alliance we look forward to seeing you on Tuesday, April 15, 2003.*

*Special District Risk Management Authority  
1481 River Park Drive, Suite 110, Sacramento, California 95815  
Toll-Free 800.537.7790 Direct 916.641.2773 Fax 916.641.2776*



**Buena Park Library District**  
7150 La Palma Ave.  
Buena Park, CA 90620-2547



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TO: Elizabeth Minter, Library Director  
 FROM: Jim Roberts, Public Services Manager *JR*  
 DATE: March 17, 2003  
 SUBJECT: Program Committee Report for the month of February.

DEPARTMENT	NUMBER OF PROGRAMS	NUMBER OF ATTENDEES
------------	--------------------	---------------------

<i>ADULT SERVICES</i>	2	23
<b><u>TYD Total</u></b>	<b>9</b>	<b>125</b>

***CHILDREN'S SERVICES***

Wed. PM Story Times	4	46
Thurs. AM Story Times	4	63
3-4 year-old music times	4	196
5-6 year-old music times	4	95
Lapsits	4	101
Class tours	1	13
Comm Center Storytimes	0	00
Head Start Storytimes	21	426
Parenting Class	0	00
<b>TOTAL FOR JANUARY</b>	<b>42</b>	<b><u>940</u></b>
<b>YTD TOTAL</b>	<b>213</b>	<b><u>5,843</u></b>

<b><i>LITERACY SERVICES</i></b>	<b><i>Feb 2002-03 FY 2002-03 YTD</i></b>	
---------------------------------	--	--

Total Tutors	177	240
Total Students	215	303
Total Hours	1,054	10,772

For more detailed literacy statistics, see Agenda Item 46, pages 2 of 3 and 3 of 3.



To: Elizabeth Minter, Library Director

From: Cyrise Smith, Children's Librarian *CMS*

Date: March 24, 2003

Subject: February Activities in the Children's Department

**Programming-** The winter programming session ended in February. There were eight storytimes, four lapsits, and eight musictimes with a total attendance of 501.

TYPE OF PROGRAM	NUMER OF PROGRAMS	TOTAL ATTENDANCE
Lapsits 2 years and under	4	52 children / 49 adults
3 - 6 year old storytimes (a.m.)	4	37 children / 26 adults
3 - 6 year old storytimes (p.m.)	4	31 children / 15 adults
MusicTime 3 - 4 year olds	4	113 children / 83 adults
MusicTime 5 - 6 year olds	4	58 children / 37 adults
<b>Totals</b>	<b>20</b>	<b>291 children / 210 adults</b>


**School Visits-** School visits have continued. One class visited the library during February. A total of 9 children participated in this visits.

**Offsite Programming-** Storytimes at the Placentia Head Start classrooms have continued. Three storytimes were performed for each of the seven Head Start classes with a combined attendance of 420.

**Reading Incentive Programs-** The In-N-Out Burger reading program "Food for Thought has been postponed by In-N-Out until March 10. The Mervyn's Big Blue Book Club began February 2. Library's are responsible for stamping book logs. All paper work and prizes will be handled by Mervyn's.



TO: Elizabeth Minter, Library Director

FROM: Jim Roberts, Public Services Manager 

DATE: March 17, 2003

**SUBJECT: Placentia Library Literacy Services (PLLS) Activities Report for the month of February.**

**Tutor Training.** The Literacy Coordinator conducted one regular tutor training workshop and several accelerated workshops in February and seventeen tutors were trained, five adults and twelve teens. All new tutors are presently matched or are being matched. The next tutor training is scheduled for March 2, 2003.

**Families for Literacy (FFL) Program Status.** FFL tutors are now volunteering at Head Start and Ruby Drive's CBET preschool 2-3 hours a week; recruiting FFL families through parenting classes and meetings; and sharing literacy activities with the parents and children. **Black History Month** was featured this month on February 27, 2003 as FFL's second event of the fiscal year. More than ten families and over fifty family members participated in story time, dance and song, and each received a book for their home library.

**Placentia Rotary Reading Enrichment Program (PRREP).** PRREP continues to recruit high school volunteers at El Camino Real, El Dorado and Valencia High Schools. More than sixty high school students have signed up this year for PRREP, and we have over sixty matches. Most PRREP tutors meet at the Library and five tutor at Van Buren Elementary School.

**Reach Out and Read Partnership Continues.** In December, Placentia Library Literacy Services continued its partnership with St. Judes Medical Center and the Reach Out and Read Program, a pediatric-based literacy program. We want to continue to especially recognize two of our volunteers, Diane Martlaro and Petey Peterson, who go to the Whitten Center in Placentia on Monday mornings and read to children while they are waiting to see the St. Judes pediatric staff.

**English Language and Literacy Intensive (ELLI) Program Update.** Registration is now complete for the ELLI Program, and a total of 423 students at six schools are receiving tutoring. ELLI tutors are working in four kindergarten extended day programs; four CBET child care programs; two 3<sup>rd</sup> grade emerging English classrooms; and eleven kindergarten and 1<sup>st</sup> grade classrooms.

**Literacy statistics.** See Agenda Item 38, Page 2 of 3 and Page 3 of 3.

## Placenta Library Literacy Services

### Report of Growth and Progress

	Feb-02	Feb-03	YTD 2002	YTD 2003
<b>Tutors</b>				
Adult	106	108	120	142
Teen	66	69	72	98
Hours Instruction	1,054	1,027	9,836	10,772
Other Volunteer Hours	36	36	304	584
Total Hours	1,090	1,065	10,132	11,356
<b>Training Workshops</b>				
Workshops Held	2	4	16	25
Tutors Trained	8	17	88	129
<b>Students</b>				
With Adult Tutors	164	103	176	179
With Teen Tutors	71	107	93	109
In Groups	8	5	30	15
Total Active Students	243	215	299	303
<b>Families for Literacy</b>				
Family Students	8	54	26	54
Family Tutors	8	41	18	41
Hours of Instruction	32	200	332	669
<b>ELLI Program</b>				
K-6th Grade Students	190	423	190	423
Tutors for K-6th Grade	11	7	11	14
Hours of Instruction	923	208	923	1,216
<b>Total Tutors</b>	172	177	194	240
<b>Total Students</b>	248	215	299	303
<b>Total Instruction Hours</b>	1,054	1,027	9,836	10,772



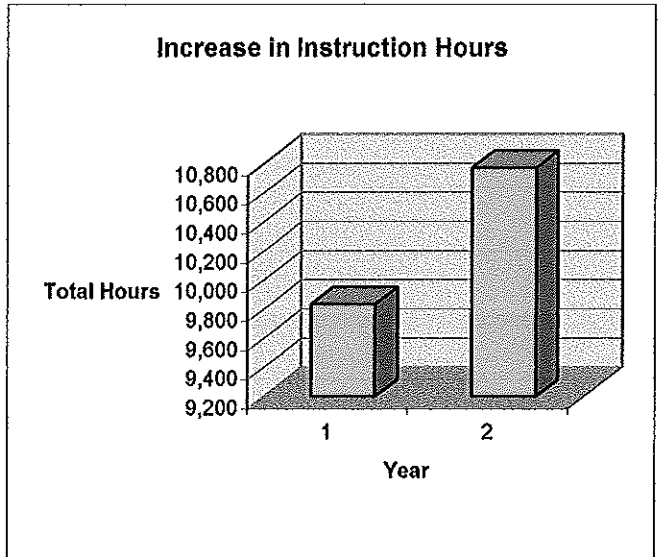
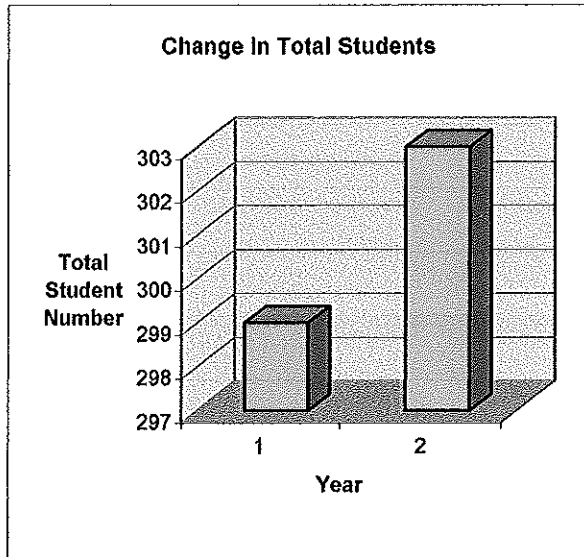


Figure 1: [Illegible text]

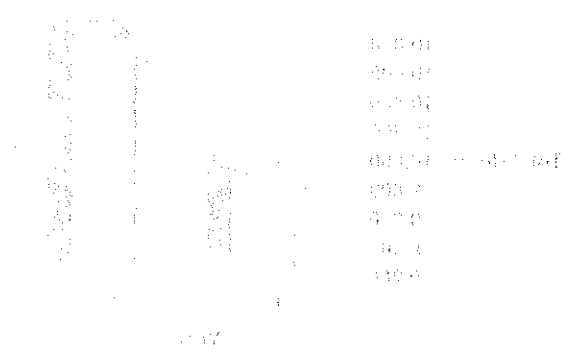
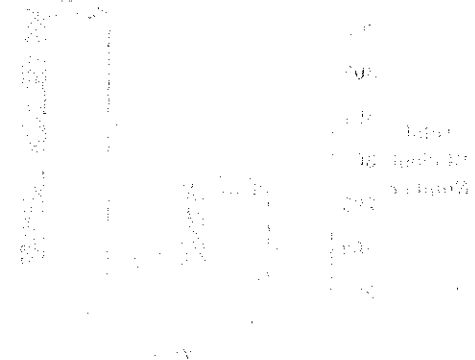


Figure 2: [Illegible text]



To: Elizabeth Minter, Library Director

From: Jim Roberts, Public Services Manager *JR*

Date: March 17, 2003


**SUBJECT: Placentia Library Web Site Development Report for the month of February.**

In February, the Placentia Library District had 5,373 "hits" on the Web Site, an average of 298 a day. The following are our year to date statistics:

Pages Visited	Sep-02	Oct-02	Nov-02	Dec-02	Jan-03	Feb-03
Borrowers	115	126	161	131	157	153
Friends	84	167	101	104	215	95
District	21	47	8	0	65	76
Fines	125	149	10	0	47	16
Foundation	77	86	69	81	73	48
History Room	42	72	68	95	89	65
Literacy/CLC Logo	96	117	98	84	101	53
Passports	113	230	235	241	383	204
Total Views Most Hits	673	994	750	736	1,130	710

Total Most Hits YTD      7,402



TO: Elizabeth Minter, Library Director  
FROM: Jillian Rakos, Volunteer Coordinator  
DATE: March 24, 2003  
SUBJECT: **Publicity materials produced for February 2003** 

**Information on the Placentia Library cable channel #53:**

1. Welcome to Placentia Library, address, website & telephone number.
2. Library Hours
3. Library Board of Trustees
4. Apply for your passport at Placentia Library
5. Literacy Services logo
6. Literacy Program asking for volunteers
7. Friends of Placentia Library Bookstore offering great bargains
8. Special Back Room Book Sale Every 2<sup>nd</sup> Sunday, Hours and Dates
9. Passport Hours
10. Silent Auction Returns

**Newspaper articles published:**

1. Orange Council approves \$44,570,000 Orange Public Library Facilities Plan
2. Literacy Tutor Training schedule (2 articles)
3. Lisa See to guest at library's luncheon (2 articles)
4. 'Lapsit' stories for ages 2 and younger; Storytimes for ages 3-6 (3 articles)
5. New City site: [www.placentia.org](http://www.placentia.org)
6. Tracing street names has its rewards

**Flyers and Notices:**

1. Foundation thank you cards, Library bookmarks, and ID cards are sent out
2. Friends membership thank you letters are sent out with membership cards
3. Second Sunday Booksale flyer
4. Library Closed for Easter

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Foothill Sentry  
 Monthly FEB 1 1 2003

**Orange Council approves \$44,570,000  
 Orange Public Library Facilities Plan**

<sup>337</sup>The Orange City Council approved a three phase \$44,570,000 Orange Public Library Facilities Master Plan not including land costs to be carried out in three phases over an 18-year build out program.

Phase 1, to be carried out from 2002 to 2007, includes a 45,000 square foot expansion of the Orange Main library costing \$16,600,000.

Phase 2, to be carried out from 2008 to 2013, calls for construction of a new 12,300 square foot East Orange branch library from 2008 to 2013 costing \$11,130,000, and expansion of the El Modena Branch to 16,100 square feet costing \$6,850,000.

Phase 3, to be carried out from 2014 to 2020 calls for relocation of the Taft Branch

Library and its expansion to 20,200 square feet at a cost of \$9,990,000.

A 20-year library facilities master plan prepared by a consulting firm showed that Orange has only 0.25 square feet of library space per capita, one of the lowest ratios of any city library in California and only about 35 per cent of what

*Continued on page 19*

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Placentia News  
 Weekly FEB 27 2003

**TODAY** <sup>337</sup>

'Lapsit' stories holds final session for ages 2 and younger has last session from 10:15 to 10:35 a.m. at the Placentia Library, 411 E. Chapman Ave. Free. Call (714) 528-1906, Ext. 212.

Story times for ages 3 to 6 has last session from 11 to 11:30 a.m. at the Placentia Library, 411 E. Chapman Ave. Free. Call (714) 528-1906, Ext. 212.

Advisory Committee on the Disabled meets at 6 p.m. at the Community Meeting Room, 401 E. Chapman Ave. Call (714) 993-8117.

Community Band meets at 6:30 p.m. in Valencia High School's Band Room, 500 N. Bradford Ave. Call (714) 993-8117.

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Placentia News  
Weekly

FEB 27 2003

### **TUESDAY 332**

Exercise classes for breast cancer survivors held at 7 p.m. at the Backs Community Building, 201 N. Bradford Ave. Classes are free and open to all fitness levels. Call (714) 524-5913.

Literacy Tutor Training sessions are held at 6 p.m. at the Placentia Library, 411 E. Chapman Ave. Call (714) 528-1906.

Yorba Linda-Placentia Toastmasters Club meets at 6:45 p.m. at Thengvall House at 5320 Richfield Road in Yorba Linda. Call (714) 524-9378.

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Placentia News  
Weekly FEB 27 2003

### **Lisa See guests at library's luncheon**

Placentia Library's annual author's luncheon is scheduled Saturday at the Alta Vista Country Club, 777 Alta Vista St.

The featured guest will be best-selling writer Lisa See, whose murder mystery "Dragon Bones" is set for an October release.

Her family memoir, "On Gold Mountain," was a national bestseller and will be the focus of her presentation. Tickets are \$35.

Information: (714) 528-1925, Ext. 201.

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Placentia News  
Weekly FEB 13 2003

## **BRIEFLY**

### **Lisa See to guest at library's luncheon**

Placentia Library's annual author's luncheon is scheduled March 1 at the Alta Vista Country Club, 777 Alta Vista St.

The featured guest will be best-selling writer Lisa See, whose murder mystery "Dragon Bones" is set for an October release.

Her family memoir, "On

Gold Mountain," was a national bestseller and will be the focus of her presentation. Tickets are \$35.

Information: (714) 528-1925, Ext. 201.

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The Register

Daily FEB 11 2003

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Placentia News  
Weekly FEB 13 2003

### **WEDNESDAY 332**

Exercise classes for seniors are held at 10 a.m. at the Senior Center, 134 Bradford St. Call (714) 986-2332.

Genealogical Society of North Orange County meets at 6:30 p.m. at the Community Center, 4501 Casa Loma Ave. in Yorba Linda. Call (714) 528-4725.

Story times for children ages 3 to 6 at 6:30 to 7 p.m. the Placentia Library, 411 E. Chapman Ave. Free. Call (714) 528-1906, Ext. 212.

Ship Modelers' Association meets at 7 p.m. at Backs Community Building, 201 N. Bradford Ave. Call Bob Beach, (714) 529-1481.

For more listings, see [www.myoc.com/community/placentia](http://www.myoc.com/community/placentia).

What's happening in your group? Call (714) 704-3796 or fax information to (714) 704-3714. Include a phone number.

## **PLACENTIA**

New city site: A new municipal Web site -

[www.placentia.org](http://www.placentia.org) - launches Monday with a livelier, more colorful appearance, improved ease of use and a lot more information, Director of Community Services Steve Pischel said. "We'll have updated and new information for each department, and it will be much easier to spot new information and hot topics," Pischel said.

- Ann Pepper  
(714) 704-3777  
apepper@ocregister.com

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Placentia News  
 Weekly FEB 20 2003

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Placentia News  
 Weekly FEB - 6 2003

**Tracing street names  
 has its rewards**

Longtime Placentia resident Marie Schmidt recently received a commendation from Mayor Scott Brady for her work updating the "Placentia Street Names" document, a record of street name origins.

"It was nice for them to acknowledge it at a special time, and I do appreciate that," Schmidt said. "I feel good about it."

Her volunteer effort involved adding 150 to 160 street names - along with the stories behind the designations - to the book that was compiled in



MARIE SCHMIDT

1982 by former city historian Victor J. Michel. She more than doubled the record.

With just two more tracts left to develop in the city, Schmidt said she hopes some of the street signs will bear the names of such pioneers as Juan Pacifico Ontiveros, who earned rights to the territory in 1837.

The 65-page book is available at City Hall for \$10 and will benefit the Historical Committee, for which Schmidt served as chairwoman and is an emeritus member.

**FRIDAY**  
 Canasta players meet at 12:30 p.m. at the Senior Center, 134 Bradford Ave. Call (714) 986-2332.

**SATURDAY**  
 Falun data, a Chinese exercise program, is offered from 8:30 to 10:30 a.m. at Tri-City Park, 2301 N. Kramer Blvd. Free. Call (714) 307-9485 or see [www.falundata.org](http://www.falundata.org).

**TUESDAY**  
 Musictime for ages 3-4 meets at 6 p.m. and ages 5-6 at 6:30 p.m. at the Placentia Library, 411 E. Chapman Ave. Call (714) 528-1906.

Placentia Planning Commission meets at 7:30 p.m. in City Hall Council Chambers, 401 E.

**MONDAY**  
 Munchin' with the Ministers fellowship group for ages 60 and older meets at 10:30 a.m. at Placentia Presbyterian Church, 849 N. Bradford Ave. Call (714) 528-1438.

**SUNDAY**  
 Life Night is held from 6:30 to 8 p.m. in St. Joseph Catholic Church's Parish Hall, 717 N. Bradford Ave. Call (714) 528-0720.

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Placentia News  
 Weekly FEB 13 2003

**TUESDAY**  
 Literacy Tutor Training sessions are held at 6 p.m. at the Placentia Library, 411 E. Chapman Ave. Call (714) 528-1906.

Yorba Linda-Placentia Toastmasters Club meets at 6:45 p.m. at Thengvall House at 5320 Richfield Road in Yorba Linda. Call (714) 524-9378.

Musictime for ages 3-4 meets from 6 to 6:30 p.m. at the Placentia Library, 411 E. Chapman Ave. Free. Call (714) 528-1906, Ext. 212.

Musictime for ages 5-6 meets from 6:30 to 7:15 p.m. at the Placentia Library, 411 E. Chapman Ave. Free. Call (714) 528-1906, Ext. 212.

City Council meets at 7:30 p.m. in the City Hall Council Chambers, 401 E. Chapman Ave. Call (714) 993-8117.

Wood Carvers meets at 7 p.m. at the Senior Center, 134 Bradford St. Call (714) 986-2332.

Huggin' Hearts Square Dance Club meets for lessons from 7:30 to 10 p.m. at Backs Community Building, 201 N. Bradford Ave. \$2 per class, \$37 for 17 classes. Call (714) 777-5639.

**WEDNESDAY**  
 MOMS Club of Placentia North meets at 10 a.m. in the Placentia-Linda Hospital meeting room, 1301 Rose Drive. For mothers north of Yorba Linda boulevard. Call (714) 528-1906.

Chapman Ave. Call (714) 993-8124.  
 Great Books Discussion Group meets at 7 p.m. at the Placentia Library, 411 E. Chapman Ave. Call (714) 528-1906.

993-1071. Neighborhood Watch Program board meets at 7:15 p.m. at the Community Meeting Room, 401 E. Chapman Ave. Call (714) 993-8225.

For more listings, see [www.myoc.com/community/placentia](http://www.myoc.com/community/placentia).

**THIS WEEK**

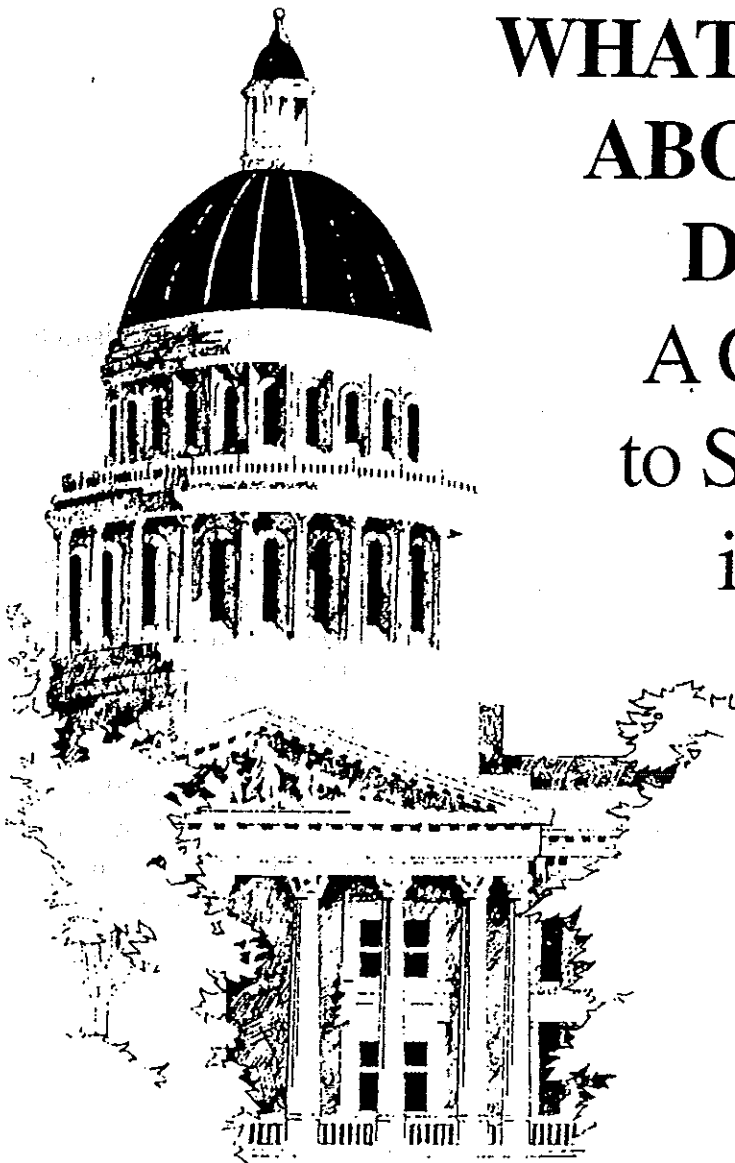
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TO: Elizabeth Minter, Library Director  
FROM: Katie Matas, Library Assistant *KUM*  
DATE: March 24, 2003  
SUBJECT: Safety Committee report for February

There was no safety committee meeting in February. The next meeting is scheduled for Wednesday, March 26, 2003 at 11:30 A.M.





# WHAT'S SO SPECIAL ABOUT SPECIAL DISTRICTS? A Citizen's Guide to Special Districts in California

**THIRD EDITION**

February 2002

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February 1, 2002

Dear Friend,

Most of us don't know much about local governments. We know less about special districts. Special district advocates hail special districts as the best examples of small-town democracy. Their critics say that special districts make local government too complex. This Third Edition of What's So Special About Special Districts? untangles the basic facts about the least known segment of local government.

Kimia Mizany wrote the Third Edition, based on the two earlier versions that April Manatt prepared for the Committee a decade ago. April wrote the First Edition during her year as a Senate Fellow and the Second Edition when she worked for the Committee. This Third Edition is the product of Kimia's work as a Senate Fellow in my office this year. It's appropriate that they share the credit for this revised edition.

As the report explains, the number of special districts has actually declined in the last 20 years. But the need to know more about these important public actors has increased. That's why I'm pleased that you have chosen to pick up this report to learn about special districts. I am convinced that readers will be better informed about the local governments that serve all of us.

Sincerely,



Tom Torlakson  
Chair

# **WHAT'S SO SPECIAL ABOUT SPECIAL DISTRICTS?**

A Citizen's Guide to Special Districts in California

Third Edition

Kimia Mizany & April Manatt

February 2002

## TABLE OF CONTENTS

Introduction.....	1
What's a special district?.....	2
What a special district is not .....	3
History of special districts in California.....	4
Statutory authority for special districts.....	4
Types of special districts.....	5
Funding special districts .....	8
Advantages and disadvantages of special districts .....	10
Frequently asked questions .....	11
Current trends and emerging trends.....	13
Appendix A: Special districts by type .....	15
Appendix B: Web sites and resources related to special districts.....	16
Appendix C: References for questions .....	17
Acknowledgements.....	18
Bibliography .....	18

## INTRODUCTION TO THE THIRD EDITION

Most Californians don't understand special districts. Most of us don't know:

- How many exist (about 3,400).
- What they do (services from A to Z: airports to zoos).
- Who runs them (it could be your next-door neighbor).
- Or even what they cost (about \$26 billion a year).

Celebrated as the best example of democracy, cursed as the worst form of fragmented government, and generally misunderstood even by the experts, special districts are California's unique contribution to local government. But what *is* so special about special districts anyway? The answer: **focused service**.

*Focused* because special districts only serve in specifically defined areas, unlike counties and cities that provide services throughout their boundaries. Special districts are also *focused* because most of them provide only a single service, allowing them to concentrate on one activity. *Service* because special districts deliver public programs and public facilities that their constituents want. Cities and counties must provide a wide variety of services, some of them mandated by the federal and state governments. Special districts provide the public services that the public wants.

This third edition of this **citizen's guide to special districts** answers many of your questions about California's most abundant form of local government. In plain language, this guide explains what special districts are, where districts came from, their legal powers, and different ways to understand them. This guide also tells you where to get more information about the special districts that serve you --- and how to form new districts in your community.

The Senate Local Government Committee first published What's So Special About Special Districts? in June 1991, the result of a research project by Senate Fellow April Manatt. In 1993, working as a Committee Consultant, Manatt produced a Second Edition. The publication has been the most popular of the Committee's citizens guides, selling hundreds of copies. Frequently cited by other authors, this report has become a standard introduction to special district government.

But much has changed since 1993. The Legislature shifted billions of dollars of property tax revenues away from local agencies, including the districts. The voters passed more initiatives, including Proposition 218 (1996). And the California economy went through a major recession and an expansion. This Third Edition documents special districts' current financial status, revisits what is and what is not a special district, explains how many services districts provide, and describes how citizens can effect changes in the districts which serve them. Revised by Senate Fellow Kimia Mizany, the Third Edition builds on the earlier explanations.

Democracy works best when people are informed about the governments that are created to serve them. This guide will make you smarter about the special districts that serve you.

## WHAT'S A SPECIAL DISTRICT?

State law defines a special district as "any agency of the state for the local performance of governmental or proprietary functions within limited boundaries" (Government Code §16271 [d]). In plain language, a special district is a separate local government that delivers public services to a particular area.

Special districts can be distinguished by their four common characteristics:

- A form of government.
- Governed by a board.
- Provides services and facilities.
- Has defined boundaries.

Inadequate tax bases and competing demands for existing taxes make it hard for cities and counties to provide all the services their citizens desire. When residents or landowners want new services or higher levels of existing services, they can form a district to pay for them. Fire districts, irrigation districts, and pest abatement districts exist today because taxpayers were willing to pay for public services they wanted. Special districts **localize** the costs and benefits of public services. Special districts allow local citizens to obtain the services they want at a price they are willing to pay.

So, what's so special about special districts? Focused services. Special districts are a type of local government that delivers specific public services within defined boundaries.

Special districts deliver highly diverse services including water, closed captioned television, mosquito abatement, and fire protection. Most special districts serve just a single purpose, such as sewage treatment. Others address a multiplicity of needs, as in the case of community service districts, which can offer up to 16 different services. Districts' service areas can range from a single city block to vast areas which cross city and county lines. For example, the Metropolitan Water District of Southern California serves nearly 17 million people in over 5,200 square miles of six counties, while County Service Area #2 in Los Angeles County serves only 25 acres.

Special districts enjoy many of the same governing powers as other cities and counties. They can enter into contracts, employ workers, and acquire real property through purchase or eminent domain. They can also issue debt, impose taxes, levy assessments, and many charge fees for their services. Special districts, like other governments, can sue and be sued. They can also adopt a seal and alter it at will!

Special districts have the **corporate power** and **tax power** but rarely the **police power**. The *corporate power* is the ability to "do things," like constructing public works projects such as dams and sewers. It's the power to deliver recreation programs and collect garbage. The *tax power* is the authority to raise money to pay for these projects and services. The *police power* is different; it's the authority to regulate private behavior to accomplish a public goal. Governments that make rules and enforce them use the police powers: zoning property, requiring business licenses, or setting speed limits. Special districts rarely have police powers. Instead, they usually build public facilities and provide services. When special districts do have police powers, they are usually related to some corporate power. Banning alcohol from a park district's picnic area is one example.



## WHAT A SPECIAL DISTRICT IS NOT

Now that we understand what special districts are, let's examine what special districts are not.

- **Special districts are not state government.**

Special districts are local agencies which provide public services to specific communities. Special districts are autonomous government entities, accountable only to the voters or landowners they serve. State government, however, oversees special districts in several ways. For example, special districts must submit annual financial reports to the State Controller. Districts must also follow the state laws pertaining to public meetings, bonded debt, record keeping, and elections.

- **Special districts are not city or county government.**

Cities and counties are *general purpose* governments. Cities and counties perform a broad array of services to protect the health, safety, and welfare of all their citizens. Special districts are *limited purpose* local governments. Special districts provide only the services their residents desire. Certain types of special districts require that the city council or county supervisors serve as their governing boards. Nevertheless, special districts remain legally separate local entities.

- **Special districts are not school districts.**

School districts exist to provide one service --- public education. Special districts provide a variety of public services, excluding education. In addition, school districts get most of their money from the state, whereas special districts rely primarily on local revenues.

- **Special districts are not "Mello-Roos" districts or benefit assessment districts.**

California law allows cities, counties, school districts, and many special districts to establish Mello-Roos districts and benefit assessment districts to finance public works and public services. Mello-Roos districts and benefit assessment districts are solely financing mechanisms and do not deliver services. Special districts use these financing mechanisms to provide public services.

- **Special districts are not redevelopment agencies.**

Cities and counties set up redevelopment agencies to eliminate blight by paying for public and private improvements and economic development. Special districts do not exist to eliminate blight. Special districts provide public services and infrastructure that help communities, but they are not in the business of direct economic development.

- **Who's in, who's out?**

Most of the data on special districts in this report comes from the annual Special Districts Annual Reports produced by the State Controller's Office. The total number of special districts included in this citizens guide (3,361) varies from the State Controller's report (4,792) because they define special districts differently. The State Controller's report has a very broad reach, including many organizations that aren't really special districts. This guide omits districts that don't share all four of the key characteristics: provides services, has boundaries, is a form of government, has a board. This citizens guide omits the 31 Air Pollution Control Districts because they are regulatory agencies not service districts. Similarly, nonprofit corporations don't appear in our count because they are corporations not governments.

## HISTORY OF SPECIAL DISTRICTS IN CALIFORNIA

Like hula hoops, martinis, and freeways, special districts became an art form in California. Special districts first arose in California to meet the water needs of farmers in the San Joaquin Valley. Frustrated by an inconsistent water supply and widely varying prices, farmers in Stanislaus County organized the Turlock Irrigation District under the Wright Act of 1887. The Wright Act allowed a majority of residents in an area to form a public entity for water delivery, and to finance its operation through bond sales. The Turlock Irrigation District made it possible for San Joaquin Valley farmers to intensify and diversify their agricultural activities.

Following the development of districts such as the Turlock Irrigation District, new water district formation shifted away from rural, agricultural lands, towards water-deficient communities in urban areas. In the early 1900s, water districts were primarily located in northern and central California. After 1950, they spread to Southern California to satisfy the suburbs' growing demand for water.

In the 20<sup>th</sup> Century, special districts increased dramatically in both number and scope. The prosperity that followed World War II increased the demand for public services of all kinds and, consequently, special districts. Special districts became a popular way to meet these incremental needs because, unlike complex municipal bureaucracies, special districts were flexible and provided desired services quickly and efficiently.

The decade after World War II saw an expansion in district activities for fire protection, sanitation, and water supply. Mosquito abatement districts, though first formed in 1915, multiplied to combat diseases inadvertently imported by returning soldiers. Hospital districts arose in 1945 because of a statewide shortage of hospital beds. Population growth in unincorporated areas spurred the development of recreation and park districts. Created to address individual service needs, special districts grew to encompass multiple needs as well. The Municipal Utility District Act of 1921 allowed special districts to diversify and address multiple needs ranging from water, power, transportation, and telephone service, as well as "all things necessary and convenient."

## STATUTORY AUTHORITY FOR SPECIAL DISTRICTS

Special districts operate either under a **principal act** or a **special act**. A *principal act* is a generic statute which applies to all special districts of that type. For example, the Fire Protection District Law of 1987 in the state Health and Safety Code governs all 386 fire districts. There are about 60 principal law statutes which can be used anywhere in the state to create a special district.

Occasionally, local circumstances fail to fit the general conditions anticipated by a principal act. In those cases, the Legislature may create a **special act** district tailored to the unique needs of a specific area. Districts which are regional in nature, have specific governing board requirements, provide unique services, or need special financing, necessitate special laws for formation. Districts formed under a special act include: the Humboldt Bay Harbor Recreation and Conservation District, the Fairfield-Suisun Sewer District, and the Alameda County Flood Control and Water District. There are about 120 special act districts.

All principal acts appear as laws in the California State codes, whereas most special acts are not codified. However, for convenience, many of the special acts for water districts appear in the Appendix to the California Water Code. For a complete listing of these acts, see Appendix A in the State Controller's Special Districts Annual Report.

### TYPES OF SPECIAL DISTRICTS

Special districts' activities are as diverse as the communities they serve. The most common type of special district in California is the County Service Area (897), while districts with unique functions include the bridge and highway authority (1).

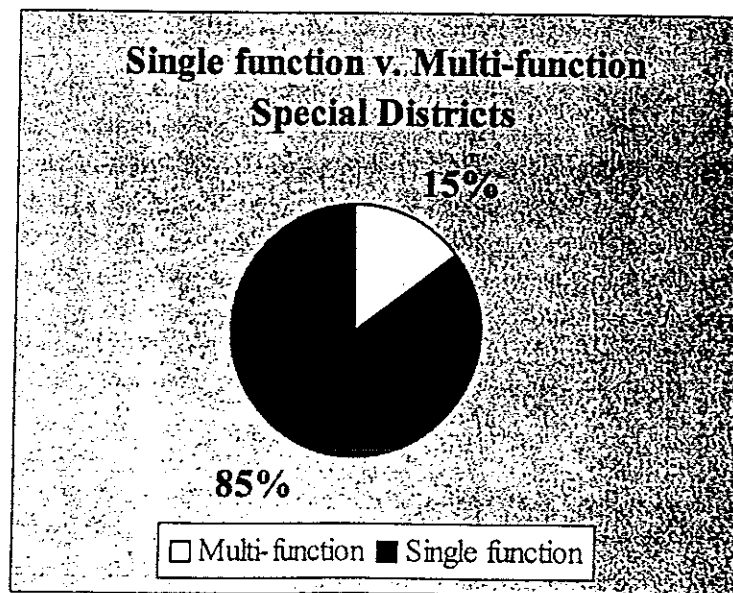
With about 3,400 special districts, it may seem overwhelming to try to understand the purpose and function of the districts. So, to simplify, let's break down the districts into pairs of categories. One way of understanding districts is to look at their various contrasting features:

- Single function versus multi-function.
- Enterprise versus non-enterprise.
- Independent versus dependent.

#### *Single Function versus Multi-Function Districts*

Nearly 85% of California's special districts perform a single function. Single function districts provide only one service such as water, sewage, or fire protection. The Happy Camp Cemetery District in Siskiyou County is an example of a single function special district. The only service that the 253 public cemetery districts can provide is cemeteries.

Multi-function districts provide two or more services. County Service Areas (CSAs) may provide any service which a county can provide. For example, CSAs provide extended police protection, enhanced library facilities, parks, and television translator services.

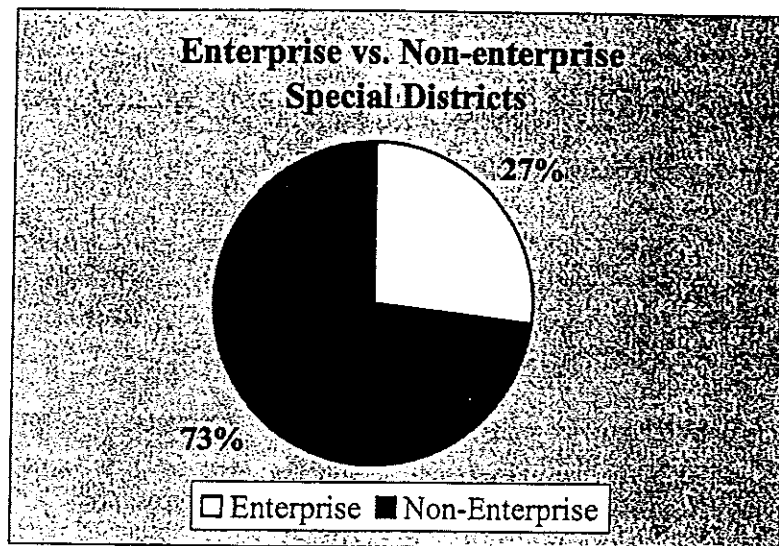


Source: 1996-97 State Controller's Special Districts Annual Report

Some multi-function districts only offer a few of the services they are authorized to provide. For example, the Buzztail Community Service District in Butte County is authorized under the Community Service District Law to provide up to 16 services and yet it offers only water service. The powers which a district is authorized to use but does not currently employ are called **latent powers**. Special districts can usually enact latent powers by vote of the district board. In some cases, however, district voters must approve new powers.

### *Enterprise versus Non-enterprise Districts*

Just over a quarter of the special districts are enterprise districts. Enterprise districts deliver services that are run like a business enterprise; they charge for their customers' services. For example, a hospital district charges room fees paid by patients, not the district's other residents. Water districts charge water rates to their customers. Virtually all water, waste, and hospital districts are enterprise districts.



Source: 1998-99 State Controller's Special Districts Annual Report

Non-enterprise districts provide services which don't lend themselves to fees. Fire protection services and mosquito abatement programs benefit the entire community, not just individual residents. No direct cost/benefit relationship exists in the services provided by non-enterprise districts. Consequently, non-enterprise districts generally don't charge user fees for their services. No one wants to put a meter on a park district's swings or charge residents to put out a house fire. Non-enterprise districts rely overwhelmingly on property taxes for their operational expenses. Services commonly provided by non-enterprise districts include fire protection, cemeteries, libraries, and police protection. Though non-enterprise districts rely primarily on non-fee revenue, certain services, such as a park district's pool, can generate a small amount of fee revenue.

### *Independent versus Dependent Districts*

About two-thirds of the state's special districts are independent districts. Independent districts have their own separate boards of directors elected by the districts' own voters. Independent districts also include districts where the appointed boards of directors serve for fixed terms. The cemetery districts are independent districts with this governance structure. Special districts' governing boards can vary with the size and nature of the district. Most districts have five-

member governing boards. Other governing boards vary from three to 11 members. The Metropolitan Water District of Southern California, which has 37 board members, is unique.

Dependent districts are governed by other, existing legislative bodies (either a city council or a county board of supervisors). All County Service Areas, for example, are dependent districts because their county boards of supervisors govern them. The Yucca Valley Recreation and Park District is governed by the San Bernardino County Board of Supervisors, making it a dependent district. The Oceanside Small Craft Harbor District is another dependent district that is run by the Oceanside City Council.

A community's registered voters usually choose an independent district's board of directors. But in some water districts, political power rests with the local landowners. Where the districts' services primarily benefit landowners' land and not people, the courts have upheld the use of these *landowner-voter districts*.

Larger independent districts often have a professional manager, similar to a city manager or a county administrator, to assist the board members. The governing boards adopt broad policies that the general managers carry out. Different types of independent special districts include library districts, resource conservation districts, and memorial districts.

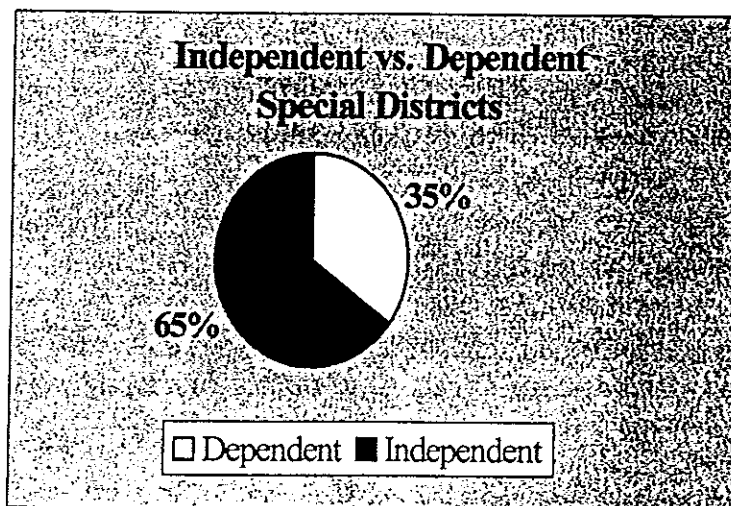
### Who has the right to vote?

The issue of landowner-voter districts was called into question in the US Supreme Court case, *Salyer Land Company v. Tulare Lake Basin Water Storage District* (1972).

The plaintiffs were landowners and resident registered voters within the District who claimed that it was unconstitutional for the District to restrict voting rights to landowners only. Further, they argued that it was inequitable that smaller landowners received fewer votes than larger landowners. The plaintiffs urged the creation of a new policy so that all residents in the District would be permitted only one vote regardless of landownership.

The defendant District argued that its services benefited the land only. Thus, any effects on non-landowner residents were indirect and did not entitle them to vote. Also, the number of votes allotted to landowners was proportional to the assessed value of the land, and therefore relative to the benefits and burdens to each landowner.

The US Supreme Court agreed with the defendant and upheld landowner-voting because the District "provides no service to the general public."



Source: 1998-99 State Controller's Special Districts Annual Report

These three distinctions about special districts are certainly not mutually exclusive. It is possible to have an independent, multifunction, enterprise special district, such as the Whispering Palms Community Service District in San Diego County. The District is *independent* because it the lo-

cal voters elect their own board of directors; it's *multifunction* because the District provides sewers, street lighting, and road maintenance; and it's *enterprise* because local officials charge their customers for the sewer services. Conversely, County Service Area # 19 in Marin County is a dependent, single function, non-enterprise district. The CSA is *dependent* because the Marin County Board of Supervisors governs it; it's *single function* because it delivers only one service; and it's *nonenterprise* because that sole service is fire protection.

### FUNDING SPECIAL DISTRICTS

Special districts generate revenue from several sources. Some collect fees to fund their activities, while others rely more heavily on property tax revenues.

Both enterprise and non-enterprise districts can issue bonds to pay for capital improvements. These bonds can pay for a new dam or purchase a new library building. Special districts' total long-term bonded debt is approximately \$13 billion. Special districts' **general obligation bonds** are backed by property taxes and require 2/3-voter approval. Special districts' **revenue bonds** are paid from user fees and don't necessarily need voter approval.

Enterprise districts rely primarily on non-tax revenues, such as user charges. Because enterprise districts' costs are directly related to the services provided, it is easy for enterprise districts to recoup their costs by collecting fees. For example, the Sacramento Municipal Utility District sells the electricity it produces to the District's customers. Enterprise revenues generated by enterprise districts in 1997-98 were nearly \$14 billion.

#### Enterprise Districts' Enterprise Revenues (1997-98) (Dollars in millions)

Water	\$ 4,802
Transit	2,436
Waste disposal	2,278
Electric utility	2,257
Hospital	1,739
Airport	169
Harbor and port	<u>139</u>
TOTAL	\$13,820

Source: 1997-98 State Controller's Special Districts Annual Report

Non-enterprise districts rarely bill the beneficiaries of their services. Non-enterprise districts rely primarily on property taxes to pay for their operation and maintenance costs. Tax revenues used by non-enterprise districts come through regular property tax allocations.

#### *Loss of Funding for Special Districts*

Many special districts have faced tough financial times over the last quarter century. Before Proposition 13, special districts received \$945 million from property taxes (1977-78). In 1978-79, their property tax revenues dropped to \$532 million, a loss of almost 50%.

Responding to this financial hardship, the Legislature created the Special District Augmentation Fund (SDAF) to provide a supplemental income for special districts. The state government sent

### **ERAF and the Fulton-El Camino Recreation and Park District**

One special district that has been particularly devastated by the ERAF shift is the Fulton-El Camino Recreation and Park District in Sacramento County.

This District lost more than \$2.9 million in property tax revenue to ERAF between 1992-93 and 2001-02. As a non-enterprise district, it cannot recover these losses with service charges.

This revenue loss has caused the District to demolish the Howe Pool, and it may have to fill another swimming pool. The District lacks money to repair aging facilities and attract quality employees. The lack of funds threatens the public safety at its recreation facilities.

state money to the SDAF in each county based on a formula in state law. The county supervisors, in turn, allocated the SDAF money to the special districts within their counties. The State took over a greater percentage of funding for schools from local governments to help local governments get through the Proposition 13 transition. This practice lasted from 1978 to 1992.

Faced with huge state budget deficits in 1992-93 and 1993-94, state officials shifted almost \$4 billion annually in property taxes from local governments (cities, counties, special districts, and redevelopment agencies) to an Educational Revenue Augmentation Fund (ERAF) in each county. The property tax revenue in the ERAF supports schools. ERAF helps the state government fulfill its constitutional duty to fund schools. When the

Legislature abolished SDAF in 1993-94, the state transferred \$244 million in special district property tax revenues to schools.

Because non-enterprise special districts rely almost entirely on property tax revenues, many were fiscally devastated as a result of the ERAF funding shifts. (See the box above.) Enterprise special districts were better able to make up for the lost revenue because they have fees that generate revenue and they rely less on property taxes.

Although state legislators have granted some partial relief to special districts, ERAF's fiscal consequences remain especially harsh for non-enterprise districts. In 2000, Governor Gray Davis vetoed a bill that would have capped ERAF shifts. In 2001, bills that would have helped fire districts, library districts, and recreation and park districts failed to pass. The ERAF issue remains unsolved.

#### ***Reserves: How much is too much?***

Special districts' financial reserves have become controversial. In 2000, a report by the Little Hoover Commission revealed that special districts reported more than \$19.4 billion in reserves to the State Controller in 1996-97. Enterprise special districts, which charge fees, hold most of the reserves.

This large dollar figure raised a red flag for policy-makers and the public. Why were the districts setting aside so much money? And how were they planning to spend it?

In response, special district leaders argued that there are legitimate reasons for these reserves. Nearly all of the money in reserves was allocated into specific funds for given purpo-

#### **Much Ado About Nothing?**

The Metropolitan Water District of Southern California (Met) entered the public spotlight when the Little Hoover Commission report revealed that it held \$4 billion in reserves.

But, according to Met, that figure actually reflected all of Met's earnings (not just cash reserves). This figure included the District's capital assets like the Colorado River Aqueduct and expensive water filtration plants. The cash reserves were actually just under \$1 billion.

As a large special district that serves the highly populated Southern California region, Met claims its reserves are a hedge against volatile water markets. Fluctuating weather patterns cause shortfalls that would create price spikes for customers in the absence of a Water Rate Stabilization fund, which uses reserve money.

ses. Large reserves are needed to accumulate the capital to pay for large public works projects. Reserves also provide a safety cushion in lean years, stabilizing consumers' rates.

It became clear to taxpayers and legislators that special districts should improve the way they report their fiscal activities. Specifically, they need to explain the purpose of the reserves. Out of this controversy came a new law that now requires the largest special districts to report their reserves and fiscal information more descriptively to the State Controller's Office, which will post the information on its web site.

### ***LAFCO Cost-Sharing***

Starting in January 2001, cities, counties, and special districts each pay one-third of the costs of the Local Agency Formation Commission (LAFCO), where they have representation on the Commission. For decades, the county governments had always paid 100% of LAFCOs' costs. Many consider this new formula to be a more equitable way of paying for LAFCOs.

Special districts' one-third share of the LAFCO costs is divided among the districts in that county. A given district's contribution is proportionate to the district's revenue. For this reason, some special districts must pay what they say are disproportionate amounts. For example, the Sacramento Municipal Utility District, an enterprise district that serves a large number of customers, pays for nearly 85% of the special districts' share of the Sacramento LAFCO budget. Similarly, hospital districts in Sonoma County pay more than other special districts.

## **ADVANTAGES AND DISADVANTAGES OF SPECIAL DISTRICTS**

Many people disagree over the usefulness and desirability of special districts. Before you make up your own mind, consider these arguments.

### **ADVANTAGES:**

- **Special districts can tailor services to citizen demand.**

Cities and counties must protect their residents' health, safety, and welfare and, thus, must provide many services, regardless of citizen demand. Special districts, however, only provide the services that the community desires.

- **Special districts can link costs to benefits.**

General purpose local governments --- cities and counties --- levy general taxes to pay for public services. The services that taxpayers receive are not directly related to the amount of taxes they pay. In a special district, only those who benefit from district services pay for them. Those who do not benefit do not pay.

- **Special districts are responsive to their constituents.**

Because most special districts are geographically smaller and have fewer residents than counties and cities, they can be more responsive to their constituents. Small groups of citizens can be quite effective in influencing special districts' decisions.



## DISADVANTAGES:

- **Special districts can lead to inefficiency.**

Many special districts provide the same services that cities and counties provide. Overlapping jurisdictions can create competition and conflict between special districts, and also between districts and general purpose governments. In addition, when communities incorporate, some Local Agency Formation Commissions (LAFCOs) fail to dissolve the special districts that exist within the new city boundaries, resulting in duplicated services.

- **Special districts can hinder regional planning.**

Having numerous special districts can hamper planning efforts. For example, it can be difficult to organize the various water, sewer, and fire services in one region to provide equitable services for all residents. Because about 2/3 of the districts have independent governing boards, there is no single agency which can guarantee a coordination of efforts.

- **Special districts can decrease accountability.**

The multiplicity of limited purpose special districts can make it harder for citizens to gather information. Separate special districts may provide water, sewer, parks, library, and fire protection services to the same unincorporated community. Residents have a hard time finding out who's in charge. Furthermore, the narrow and technical nature of a district's activities often results in special districts with low visibility until a crisis arises. Special district elections typically have very low voter turnout. Although some view low voter turnout as a sign of voter satisfaction, representative democracy requires broad participation.

## FREQUENTLY ASKED QUESTIONS

Now that you have a basic understanding of special districts, you may have some specific questions you'd like answered. Here are nine of the most frequently asked questions.

**1. How do I find out if I live in a special district?**

The easiest way to find out if you live in a special district is to call your Local Agency Formation Commission (LAFCO). This office exists in every county and is responsible for forming and dissolving special districts within that county. You can find a directory of LAFCOs at: [www.calafco.org](http://www.calafco.org).

**2. How can I form a special district?**

District formation follows five steps:

1. Application: Registered voters in the proposed district apply to the Local Agency Formation Commission (LAFCO). The application must detail the proposed district's boundaries and services, any environmental effects, and financing options.
2. Review and approval: The LAFCO's staff studies the application, and schedules a public hearing. The LAFCO can approve or deny the proposal. If the LAFCO approves, it's time to measure protests.
3. Protest hearing: The LAFCO holds a second public hearing, this time to measure formal protests from voters and property owners. A majority protest stops the proposal, otherwise there's an election.
4. Election: Only the voters inside the proposed district's boundaries vote at this election, which usually requires majority-voter approval. If the proposal involves new special taxes, the measure needs 2/3-voter approval.

5. **Formal filing:** If the voters approve the proposed district, the LAFCO and other officials file the formal documents to start the new district.

3. **Who picks my district's governing board?**

About 2/3 of our special districts are **independent**, that is, they have independently elected or appointed boards of directors. The other districts are **dependent** districts because they depend on another local government to govern them; usually a city council or a county board of supervisors. In most independent districts, registered voters elect the governing boards. In a few types of special districts, the landowners vote. Most governing boards have five members who serve staggered, four-year terms.

4. **How can I find out who runs a special district?**

The easiest way is to call the district directly and ask who serves on the district's governing board. You can find the telephone number in the white pages of your telephone book. Also, your county clerk keeps a formal Roster of Public Agencies which lists all special districts and the names and addresses of the members of the districts' governing boards. Ask your county clerk for a copy of your county's Roster. This information may also be available on your county's web site.

5. **Can special districts tax me without my consent?**

No. Proposition 13 (1978) limited property taxes to 1% of property value. Many special districts get a share of these revenues. If a special district wants additional taxes, Proposition 13 and state law require 2/3-voter approval for "special taxes." A general obligation bond that raises property taxes also requires 2/3-voter approval.

6. **But what about special assessments? Aren't they like special taxes?**

Not really. Special districts can charge benefit assessments to pay for public works like sewers, parks, and water systems. Property owners pay benefit assessments only for the projects or services that *directly* benefit their property. The amount of the assessment must be directly related to the benefit received. Proposition 218 (1996) required local governments, including special districts, to get weighted ballot approval from property owners before they can levy benefit assessments.

7. **Suppose I don't like what a special district is doing. What can I do?**

Talk to your district representative, the district's general manager, or the district board at its next meeting. If you still aren't pleased with your district's activities, the remedy is direct democracy in the form of **initiative, referendum, and recall**.

- The **initiative** power lets citizens propose ordinances directly instead of waiting for the district board to act. Initiative drives follow this pattern: notice, petition, and election.
- **Referenda** also give citizens a direct vote in district matters. The referendum power lets citizens put recent board actions on the ballot and reject them *before* they go into effect. Referendum procedures are similar to the initiative process.
- The **recall** power allows voters to remove board members from office before the next election. Elected board members may be relieved of their duties by a process similar to those for initiatives and referendums.

**8. Why are special districts so invisible to the public?**

Special districts often escape wide public attention because their functions are narrow and technical. Special districts, however, must conform to democratic safeguards such as the Brown Act, the Public Records Act, and the Political Reform Act. For more information on access to government meetings and documents, the Senate Local Government Committee has produced citizen guides to the Brown Act, the Public Records Act, and conflict-of-interest laws. These reference books can be obtained from the Senate Publications Office at (916) 327-2155.

**9. Where can I get more information about special districts in my area?**

The following organizations can give you more information on special districts:

Resources in your city or county:

- Local Agency Formation Commission (LAFCO).
- County Board of Supervisors.
- City Council.

Resources in Sacramento:

- California Special Districts Association.
- Association of California Water Agencies.
- California Association of Sanitation Agencies.
- Mosquito and Vector Control Association of California.

Web sites for several of these above organizations appear in **Appendix B**.

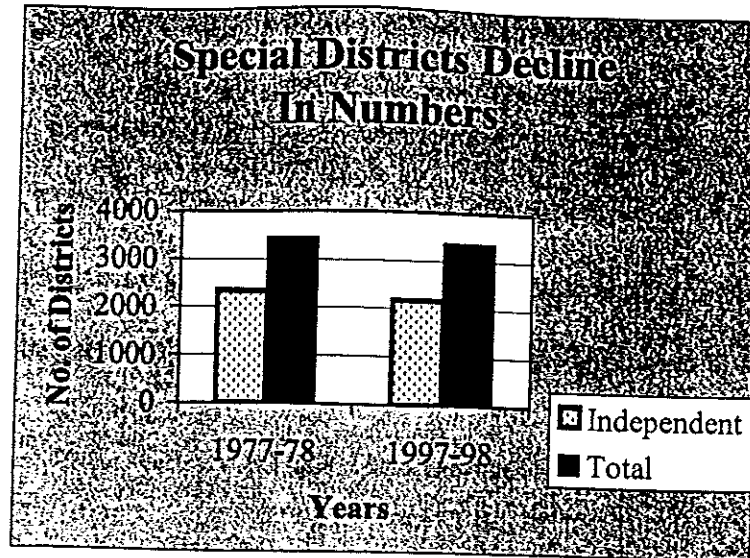
For more detailed information about the number and types of special districts around the state, you may contact the Office of the State Controller at (916) 445-3028. Every year the Controller's Office publishes a Special Districts Annual Report. You can find copies of these reports in many major public libraries.

### CURRENT ISSUES AND EMERGING TRENDS

As you are now aware, special districts are a highly diverse form of local government. Although it is difficult to generalize about trends affecting special districts, here are some general themes and issues:

- **Formation.** There is a lingering public perception that the number of special districts is growing, particularly independent special districts, contributing to increased bureaucracy and inefficiency. The truth is that the overall number of special districts has edged down from 3,454 districts in 1977-78, to 3,359 in 1997-98. And the number of independent districts has dropped by more than 150 in the past twenty years, going from 2,340 districts to 2,176 in 1997-98.

Since the 1980s, newly formed special districts have been primarily revenue-generating districts. Proposition 13's limits on property taxes forced special districts to find other ways to raise money to pay for services. Enterprise districts, as well as community service districts and county service areas, have become increasingly popular due to their flexibility, broad range of service, and ability to generate user fees.



Source: State Controller's Special Districts Annual Reports

- **Cooperation.** Special districts are overcoming their sense of isolation and are forming associations to discuss common problems and ways to improve service. Some groups represent special districts in a single county. Districts in Butte, San Diego, and Ventura County all have active groups. Statewide organizations such as the California Special District Association, the Association of California Water Agencies, and the Mosquito and Vector Control Association of California serve special districts across the state. Special district associations also exist on the national level.
- **Land use planning.** Some experts feel that public works, not public policy, determine the location, timing, and intensity of development. Because special districts are a major provider of public works such as water and sewers, they can have a significant effect on local development. Cities and counties control land use within their borders by adopting general plans. Special districts, however, can ignore or override local land use controls. Though some districts are governed by the same board or council that adopts the general plan, the majority have independent governing bodies which may have different development ideas. Though most independent districts work well with their city and county governments, the potential for inconsistency exists.

**APPENDIX A: SPECIAL DISTRICTS BY TYPE, 1998-99**

County Service Area	897
Fire Protection	386
Community Services	313
Cemetery	253
County Water	174
California Water	141
Reclamation	152
Recreation and Park	110
Resource Conservation	99
County Sanitation	91
Irrigation	97
Sanitary	76
Hospital	77
Public Utility	54
Mosquito Abatement	47
Storm Water Drainage and Conservation	49
County Waterworks	34
Municipal Water	40
Flood Control and Water Conservation	39
Water Agency or Authority	30
Memorial	27
Drainage	23
Levee	15
Harbor and Port	13
Library	13
Transit	13
Water Conservation	13
Airport	9
Water Storage	8
Citrus Pest Control	8
Waste Disposal	7
Pest Control	7
Municipal Improvement	5
Municipal Utility	5
Police Protection	3
Sanitation and Flood Control	2
Sewer	2
Water Replenishment	2
Bridge and Highway	1
Joint Highway	1
Metropolitan Water	1
Separation of Grade	1
Toll Tunnel Authority	1
<b>TOTAL</b>	<u>3,361</u>

## APPENDIX B: WEB SITES AND RESOURCES RELATED TO SPECIAL DISTRICTS

- University of California, Institute of Governmental Studies,  
California Local Government Information Web site:  
<http://www.igs.berkeley.edu:8880/library/localweb.html>

109 Moses Hall #2370  
Berkeley, CA 94720-2370  
(510) 642-1472  
(510) 643-0866

- Association of California Water Agencies (ACWA):  
<http://www.acwanet.com/generalinfo/waterlinks/index1.asp>

910 K Street, Suite 100  
Sacramento, CA 95814-3512  
(916) 441-4545

- California Special Districts Association (CSDA):  
<http://www.csda.net/links.htm>

1215 K Street, Suite 930  
Sacramento, CA 95814  
(916) 442-7887

- California Governor's Office of Planning and Research—  
Local Agency Formation Commissions (LAFCO) Directory:  
<http://ceres.ca.gov/planning/bol/1999/lafco.html>

P.O. Box 3044  
Sacramento, CA 95812-3044  
Ph: (916) 445-0613

- California Association of LAFCOs:  
<http://www.calafco.org>

c/o San Joaquin LAFCO  
1860 East Hazelton Avenue  
Stockton, CA 95205  
Ph: (209) 468-3198  
Fax: (209) 468-3199

- Text Resources:

The San Diego LAFCO publishes a LAFCO Procedures Guide which provides a general introduction to special districts and local government. Contact the San Diego LAFCO directly: County Administration Center, 1600 Pacific Highway, Room 452, San Diego, CA 92101. Ph: (619) 531-5400, Fax: (619) 557-4190.

## APPENDIX C: REFERENCES FOR QUESTIONS

The section entitled, "Frequently Asked Questions" on pages 11-13 tried to anticipate many of your questions about special districts. Here is a list of references we used to answer the questions.

Statutes are listed by code followed by section. For example, "Government Code §34601" means that you can find the statute under Section 34601 of the Government Code. When reading the code, start by looking at the back of the book in the "pocket part." The pocket section has the latest versions of the statutes, including recent amendments and deletions.

### Question #2

References:

Cortese-Knox-Hertzberg Local Government Reorganization Act  
Government Code §56000

### Question #3

References:

Uniform District Election Law  
Elections Code §10500

### Question #5

References:

California Constitution Article XIII A (Proposition 13)  
Revenue and Taxation Code §95 (property tax allocation)  
Government Code §50075 (special taxes)  
Revenue and Taxation Code §96.3 and §96.31 (bonded debt)

### Questions #6

References:

California Constitution Article XIII D (Proposition 218)  
Government Code §53753 (weighted ballots)

### Question #7

References:

Elections Code §9300 and §9340 (initiative and referendum procedures)  
Elections Code §11000 (recall procedures)

## ACKNOWLEDGMENTS

Kimia Mizany prepared the Third Edition of this citizens guide. She worked from the First and Second Editions, prepared by April Manatt, formerly a consultant to the Senate Local Government Committee. The Third Edition benefited from the generous contributions from the following individuals:

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# Board & Administrator

FOR BOARD MEMBERS

March 2003 Vol. 19, No. 7

Editor: Jeff Stratton

## The policy focus: A natural part of a board's evolution

### *Policy versus management*

A board member from an East Coast nonprofit shared a story with me recently that I think illustrates a good point about how an organization's growth can affect board members.

"We've hired our first executive director, and some members of the board are having difficulty accepting the change from being a hands-on board making management decisions, to a board that sets policy and asks staff to implement it.

"For some board members, what the executive does is just very fuzzy to them.

"We now have board members openly questioning why we are spending the money on paid staff who are doing what the board did in the past. They are

asking, 'Isn't there a better use for our resources.'" says the East Coast board member.

Boards often face this challenge at a certain point when the organization has a growth spurt. When the board commits the resources to hiring paid professional staff, it is important that all board members understand that the board will give up the hands-on decision-making responsibility for the organization's day-to-day affairs.

As a board, or as individual board members, you will no longer be paying bills, or managing volunteers. These now become the responsibilities of the executive director and his or her staff. ■

## Understand your financial responsibility

Most board members are not CPAs, bankers or financial wizards by trade. So how in the world are they supposed to understand complicated funding streams and monthly financial statements.

You don't have to figure this all out by yourself. You're not responsible for figuring out where every penny has been spent. That's your administrator's responsibility.

Your financial responsibility to the organization you serve is simply this: To

oversee and monitor the financial health of the organization. Here are the four areas that you're responsible for as a board member...

1. *You set financial policy.* This means that you determine the areas your organizational dollars will be spent. Your policy decisions will be based on the goals you have set during your planning sessions with the executive director.

*continued on next page*

*Continued from previous page*

2. *You help develop and approve the annual budget.* Your budget is the financial blueprint for the nonprofit, based on the board's broad financial policies. You must make sure there is enough money in the coming year to deliver services and meet goals and objectives for the coming year.
3. *You delegate implementation of financial policies to your chief executive officer.* It's the administrator's job to spend the organization's money—make all spending decisions—within budget limits.
4. *You monitor financial outcomes.* Board members have always been haunted by financial worries. "Is spending being done appropriately? Will there be money to meet our obligations?"

It's tempting to open up the books and seek answers. But that's not your job. Remember, you monitor results.

Instead of trying to monitor every single purchase the administrator makes, pay attention to big-picture topics by asking your administrator questions like these:

1. Are we on target with our planned expenses and revenues?
2. Are we financially solvent?

3. Will we have income to meet future expenses?

Here are three tools that can give you answers to the above questions (ask your executive director for this kind of information)...

1. *A basic financial statement.* This should summarize revenues and expenses in a way that provides a good idea of the organization's financial condition. It will give you a good understanding of how things stand.
2. *Bottom-line figures.* Rather than line-by-line explanations, ask your administrator to highlight bottom-line figures in the basic financial statement. Concentrate on total expenditures and revenues.
3. *Historical figures for comparison.* This will put the numbers into context for you. You'll want to review this month's figures and compare them to last month's, as well as the numbers from the same month last year. I would also ask to see "year-to-date" figures for the current and previous year.

Then, concentrate on changes you see. If the numbers are very different from what the board expects, start asking questions. ■

## Fund raising isn't necessarily asking for money

**N**o one likes asking for money—even when a cause is a worthy one, like your organization's. But fund raising is about much more than asking somebody to write a check. It's also about getting to that point. Here are some cultivation activities that most any board member should be able to do—painlessly.

1. Provide a prospect with "inside" information, such as good news about the organization from your executive director.
2. Introduce potential donors to the organization's management team.
3. Send personalized invitations to the organization's events and activities.
4. Ask donors to identify other potential donors.
5. Ask donors to volunteer at the organization, or help at a phone-a-thon.
6. Recruit a prospect to serve on a board committee.
7. Personally escort a "friend" of your nonprofit to a special activity at the organization.
8. Nominate someone for a special award at your organization.
9. Host a party at your home over the holidays for donors and prospects.
10. Make telephone calls, or send a note, on a special occasion like a birthday or anniversary. ■

### Developing constituents



CALIFORNIA  
STATE LIBRARY  
FOUNDED 1850

THE CALIFORNIA STATE LIBRARY

# CONNECTION

LIBRARY OF CALIFORNIA

ISSUE NUMBER 33  
March 2003

TABLE OF  
CONTENTS

*Library Profile:*  
Folsom Prison Library  
Pg. 1

The California  
Campaign for Libraries  
enters its final phase...  
*or has it?*  
Pg. 3

*Library of California News*  
New LoC board forges  
ahead despite  
state budget challenges  
Pg. 4

Irish Ambassador visits  
the State Library...  
*Erin go braugh!*  
Pg. 5

Training Corner  
Pg. 6

Calendar of events  
Pg. 8

## Library Profile:

# Folsom Prison Library

By Sarah Dalton  
Connection Editor

Libraries and prisons have opposing missions. A library represents freeing, intellectual movement - the unimpeded search

for knowledge. A prison embodies closure - the radical restriction of the human impulse. Blending the two complex organizations has been the prison librarian's tricky task since the early 19th century when social reformists pushed for libraries in prisons.

Brenda Vogel, in *Down for the Count: A Prison Library Handbook*, discusses the "dilemmas" the prison librarian faces. Censorship, of course, is one. Censoring texts that would be innocuous in the traditional library (inmates can't, for example, have books about gunsmithing or locksmithing), serving without search engines (inmates can't have access to the Internet, to online searches, or to shared databases) can, according to Vogel, grate against a librarian's "training and instincts." Censorship "denies" a librarian's "professional judgment" and "excludes collection development as a librarian's responsibility."

Another "dilemma" the prison librarian faces is how to safely and judiciously integrate inmates into the day-to-day life of the prison library, many times the most unsupervised, and therefore most desirable, spot in prison. Experts concur that though a "well-selected,

well-trained inmate staff work well" in the prison library, they also warn that "a devious and divisive inmate staff can undermine program procedures and wrest control of the program away from the librarian."



A view from the Folsom Prison Library window.

The librarians at the Folsom State Prison library have accepted their profession's "dilemmas" and built a program that works for the institution, the inmates and the staff. Folsom's librarians use their "training and instincts" (and a big dose of humor) to customize a

collection, circulation system and vocational-intern program that make the world of reading and research appealing and valuable to their patrons.

The Department of Corrections (DOC), a California state agency of 49,052 employees, oversees the libraries in California's state prisons, including Folsom. Janice Stuter, principal librarian for the DOC's Education and Inmate Programs Unit, says that today's state prison library has two roles: to provide inmates with a law library, and to support the prison's educational program. These primary services, Stuter says, "support the self-help needs of the inmates, most of whom have dropped out of high school and read below a sixth grade level and have never been in a library." As the DOC sees it, the prison library can "open up the

Please see *Library Profile*, page 2

from page 1

# Library Profile

library world" to inmates.

In Norfolk, Virginia's Prison Colony library, Malcolm X's world "opened up" as he learned to read by copying the entire dictionary, writing "a million words." In his *Autobiography*, Malcolm X recalls that while in Norfolk's library "months passed" without his "even thinking of being imprisoned." In the prison library Malcolm X had "never been so truly free."

Malcolm X's story should inspire anyone whose life's work embraces literacy and the written word, but when one visits a state prison such as Folsom, the Utopian idealism of Malcolm X's story blurs when the first iron gate slams at your back. One quickly sees how the physical proximity of inmates and barred windows test prison library theory, analysis, and legend.

## Connection Visits Folsom

When *Connection* staff visited the Folsom State Prison library in January, the day was as gray and clammy as Folsom's 107 year-old stone walls. While Janice Stuter escorted us past the inmates' yard to the modern bungalow housing the library, she laid out the traits today's prison library staff should have. Staff, according to the DOC's Stuter, should be in a state of "relaxed awareness," of alert fearlessness and control; staff shouldn't be "too nice" or talk about their "personal life"; they must be consistent and fair. And (one of the hardest things for prison librarians) staff must let go of the claustrophobic fear of being locked-in. Finally, the successful prison library staff member is not "pulled into" inmates' "games."

Robert Morris, Folsom's senior librarian for 15 years, is not a man to get "pulled into" much of anything. Though down to earth, full of stories and one-liners, Morris has eyes in the back of his head. During the *Connection* interview in his locked, glassed-in office, Morris talked about his library's "Privilege Card" which enables inmates to checkout books. He explained that he sends overdue notices to inmates' cells and charges inmates ten-cent daily fines (any book sent back makes him happy).

As he talked though, Morris' eyes flicked through the glass, noting the sudden flood of inmate patrons into the library's central reading area: the news of visitors had



Folsom Prison library and inmate garden

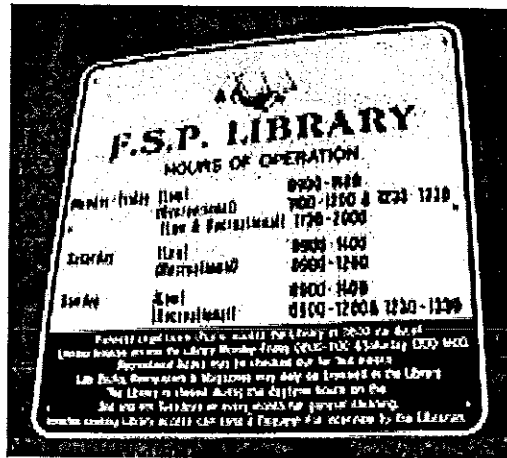
traveled fast. Morris popped up, walked into the middle of the clustered men, greeted them by name, and made it clear he was in control while he was cracking jokes. In this impromptu act, Morris had illustrated, more than his circulation statistics (16,522 fiction; 4,176 non-fiction;

1,449 law texts for 3,875 inmates for the 3<sup>rd</sup> quarter of 2003) or his 6 percent theft/loss ratio (the same as Sacramento City College's where he was principal librarian), how the successful prison library works. He had made real Vogel's idea that "the librarian who chooses to manage his or her own shop... will succeed in prison librarianship."

## Folsom Law Library

Folsom State Prison library's busiest spot is its law library. Federal law (*Bounds vs.*

*Smith* 430 U.S. 817 [1977]) requires that prisoners have "access to the courts," and many prisons, Folsom among them, have chosen to provide inmates with law libraries for that "access." Folsom's Morris concurs with Vogel's assertion that law libraries reinforce "the librarian's goal to provide information and an opportunity to read." As part of the DOC's dictate to "support the self-help needs" of the inmates, Morris has designed a *Paralegal Studies Program* in which inmates learn to locate texts and form in the law library. The law texts are in a glassed-in locked section of the library. As inmates research their cases,



Folsom Prison's library hours are posted outside the building

# The California Campaign for Libraries enters its final phase...or has it?

By Joe Burroughs

*Specialized Media Marketing & Promotions LLC and  
Campaign Contractor of the California Campaign for Libraries*

After three pilot campaigns, two research surveys, eight regional campaigns, over 40 media partners, over 5,000 television and radio Public Service Announcements (PSA), numerous events and promotions, and 112 celebrity spokespeople, the California Campaign for Libraries--perhaps better known as "The Library. Check it Out" Campaign--has entered its final phase. The PSA's began airing in the Central Valley media markets of Bakersfield, Fresno, and Sacramento on January 6, 2003 and will continue until the end of March.

Maybe the biggest challenge facing the library community in the aftermath of the statewide media campaign will be how to utilize the momentum created by an increase in library awareness and building on the development of partnerships between media companies and celebrity spokespeople. So how do individual libraries across the state of California tap into this momentum? The answer is found in three words - *PUBLIC-PRIVATE-PARTNERSHIP*.

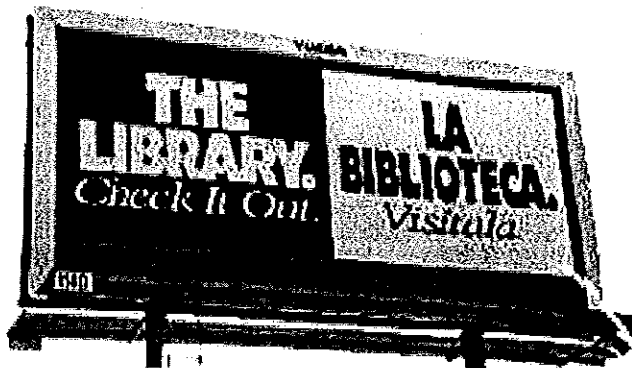
Many businesses and organizations in the private sector are eager to partner with libraries. One such company is Mervyn's®. Their new "Big Blue Book Reading Club," with free gift incentives and discounts for kids who read books, "is Mervyn's® way of showing support for and appreciation of California's Public Libraries," to borrow a phrase from one of their flyers. My seven years of experience calling on businesses and asking them to underwrite a portion of a Library Awareness Campaign tells me that these companies know that their customers value corporate citizenship nearly as much as they value price and country.

Public-Private Partnerships promises to be the legacy left by the California Campaign for Libraries. Across the state, libraries now have the opportunity to test the claim, "if you build it, they will come." Much of the work has been done. Many, many well-known Californians are now on videotape raising awareness for your libraries. The messages are simple: READ, BE CURIOUS, USE YOUR

IMAGINATION, GET A LIBRARY CARD. Perhaps in the future more businesses such as the Mervyn's® in California will create programs to reward one's usage of the library. But isn't it also conceivable that more businesses will partner with libraries to create and support library programs?

One such public library is putting these words to the test. The San Luis Obispo City-County Library is developing a

public-private community-wide partnership model from which libraries across the state can learn and emulate. Large corporations, professional organizations, public utilities, small businesses, and individuals are joining celebrities from the entertainment, sports, and literary world to further the message and raise awareness of the San Luis Obispo Public Library. The San Luis Obispo campaign will air from July through September of this



Over 220 billboards like this have been mounted around California.

year. You will have to "Check It Out."

The California Campaign for Libraries has been wildly successful. Nearly half of the thousands of library PSA's that have aired between January 2000 and today were *donated* by many of the media companies that library patrons watch every day. And these PSA's did not run in the middle of the night. Many of them aired in programs such as "Oprah," evidence that the library community should have the confidence that *many* in the private sector do support libraries and their missions in full measure.

Walt Disney once said, "There is more treasure in books than in all the pirate's loot on Treasure Island." If that's true, the library is the greatest treasure chest of all.

The California Campaign for Libraries project is supported by the U.S. Institute of Museum and Library Services under the provisions of the Library Services and Technology Act (LSTA), administered in California by the State Librarian.

*Connection* has published other articles about the Library Awareness program in the July 2000 and February, May, and August 2001 issues. For additional information, contact Kathy Low, human resource development consultant, California State Library, at (916) 653-6822 (phone), or send an email to [klow@library.ca.gov](mailto:klow@library.ca.gov).

# New LoC board forges ahead despite state budget challenges

By Chris Berger  
*Library Development Services  
California State Library*

Five new board members, appointed by Governor Gray Davis last month, attended their first Library of California board meeting on February 18-19, 2003, in Sacramento. During a general orientation for the new members, the board listened intently as Deputy State Librarian Cameron Robertson explained what he called the "quite grave" current status of the California state budget, which included drastic reductions to California State Library-funded local assistance programs for the 2003/2004 fiscal year. For local assistance programs, the proposed reduction is 66 percent overall to the Public Library Foundation (PLF) program, the California Library Services Act (CLSA), and the Library of California (LoC). He said, however, that these reductions were not final because they still had to be approved by the State Legislature. Dr. Diana Paque, Library Development Services bureau chief and former director of the LoC, also pointed out that funding for the Library of California program, overall, had been eliminated in the 2003/2004 State Budget.

Despite the grim news about the LoC's future, the board bravely forged ahead and considered numerous recommended motions from both the Legislative and Budget and Planning Committees, including opposition to legislation that would repeal the LoC Act; opposition to the elimination of current funding of around \$12 million for the interlibrary loan, equal access, and universal borrowing reimbursement programs under CLSA; and support for the reauthorization of the federal Library Services and Technology Act (LSTA) grant funding program for museums and libraries.

LoC Board President John Kallenberg also announced, during his report to the board, that Dr. Michael Keller, university librarian/director of academic information resources at Stanford University, is resigning from the board.

Here are some highlights from the LoC board meeting:

## **1. 2003/04 Budget Issues**

Through recommendations by its Budget and Planning Committee, the board voted unanimously to support continued funding of the Library of California Act at the



CALIFORNIA  
STATE LIBRARY  
FOUNDED 1850

2002/2003 level of \$1 million and to oppose repeal of the Act itself. It also unanimously recommended continuing the interlibrary loan, equal access, and universal borrowing reimbursement programs of CLSA at its current funding level of \$12 million and retaining the core resource sharing functions of CLSA.

## **2. Regional Library Network Development**

The LoC board unanimously approved the following member and participating libraries in the LoC regional library networks:

### **Cascade Pacific Library Network Members**

Hamilton Union High School District

#### *Participating Library*

Hamilton Union High School Library

### **Arroyo Seco Library Network Members**

Los Angeles Harbor College

Salvation Army-Crestmont College

The Webb Schools

#### *Participating Libraries*

Library (Los Angeles Harbor College)

Crestmont College Library/

Eftman Memorial Library

Fawcett Memorial Library (The Webb Schools)

### **Heartland Regional Library Network Members**

Kern Medical Center

#### *Participating Library*

Kern Health Sciences Library

## **3. Other Actions**

The LoC board voted unanimously to approve the following motions:

- The Dixon Unified School District Library District can change from being affiliated with the Mountain Valley Library System (MVLS) of CLSA to being affiliated with the North Bay Cooperative Library System (NBC) of CLSA beginning July 1, 2003.
- Through the recommendations of its Legislative Committee, the board supported SB 40 (Alpert) and AB 222 (Corbett) that propose a public library construction bond measure for California voter approval in 2004 to finance the construction and/or renovation of public library buildings.
- Support for continuing the budget line item in the California Public School Library Act to fund library materials for school libraries.

## Irish Ambassador visits the State Library...

 *Erin go braugh!*



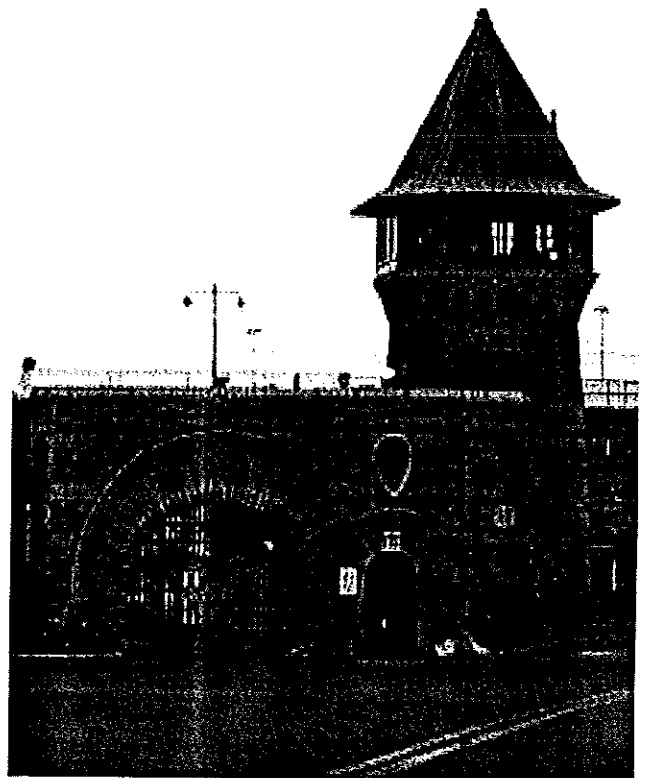
**Pictured (L-R):**  
Rich Callaghan,  
Director, University of  
Southern California  
Sacramento Center;  
Noel Fahey, Ireland's  
Ambassador to the  
United States;  
Dr. Kevin Starr, State  
Librarian of California;  
and Donal Denham,  
Consul General of  
Ireland in San  
Francisco.

### from page 2 **Library Profile**

they give the paralegals request forms through a sliding drawer and the paralegals retrieve the texts, all of which must remain on-site.

The inmate paralegals *Connection* staff met, loved their jobs and showed great respect for Morris. They told us the law library was the best place to work in Folsom prison. Afterward, Morris and Stuter reminded us that "relaxed awareness" is crucial in the elite law library too.

In the January 23, 2003 *New Yorker*, David Grann writes the tale of 79 year-old prison inmate Forrest Tucker, a lifelong bank robber who escaped from both Alcatraz and San Quentin. What fueled Tucker's fantasy of himself as the "outlaw" were "dime novels" and "pulp fiction," the most popular books in prison collections. Inmates love Louis L'Amour, for example; they also love Joe McGinnis' fictionalized true crime such as *Fatal Vision* (which fills a one-foot shelf at Folsom). "Escapist" fiction, prison librarians know, is fine as a metaphor. Their *dilemma* is when to censor the collection so that Folsom's Forrest Tuckers don't use escapist books as training manuals.



# Training Corner

Provider: **OCLC Western Service Center**  
 Course: *MARC21 Holdings Format/Serials Format*  
 Dates and locations:  
 Thursday-Friday, March 6-7, 2003,  
 Pleasant Hill, Contra Costa County Library  
[http://www.oclc.org/western/training/marc\\_holdings.htm](http://www.oclc.org/western/training/marc_holdings.htm)

Provider: **OCLC Western Service Center**  
 Course: *CatME for Original Catalogers*  
 Dates and locations:  
 Tuesday, March 11, 2003,  
 San Francisco, City College of San Francisco  
 Thursday, March 13, 2003,  
 Ontario, OCLC Western Service Center  
[http://www.oclc.org/western/training/catme\\_origcatalog.htm](http://www.oclc.org/western/training/catme_origcatalog.htm)

Provider: **OCLC Western Service Center**  
 Course: *CatME for Copy Catalogers*  
 Dates and locations:  
 Wednesday, March 12, 2003,  
 Ontario, OCLC Western Service Center  
[http://www.oclc.org/western/training/catme\\_copycatalog.htm](http://www.oclc.org/western/training/catme_copycatalog.htm)

Provider: **OCLC Western Service Center**  
 Course: *Connexion Demo*  
 Dates and locations:  
 Friday, March 14, 2003,  
 Aptos, Cabrillo College Library  
<http://www.oclc.org/western/training/connexion.htm>

Provider: **OCLC Western Service Center**  
 Course: *What is QuestionPoint?*  
 Dates and locations:  
 Tuesday, March 18, 2003,  
 Ontario, OCLC Western Service Center  
 Thursday, March 27, 2003,  
 Long Beach, Long Beach Public Library  
<http://www.oclc.org/western/training/qpoint.htm>

Provider: **OCLC Western Service Center**  
 Course: *ILL Web Basics*  
 Dates and locations:  
 Thursday, March 20, 2003,  
 Berkeley, Graduate Theological Union  
 Friday, March 28, 2003,  
 Long Beach, Long Beach Public Library  
[http://www.oclc.org/western/training/ill\\_web.htm](http://www.oclc.org/western/training/ill_web.htm)

Provider: **OCLC Western Service Center**  
 Course: *ILL Web Beyond the Basics*  
 Dates and locations:  
 Friday, March 21, 2003,  
 Berkeley, Graduate Theological Union  
[http://www.oclc.org/western/training/ill\\_webbeyond.htm](http://www.oclc.org/western/training/ill_webbeyond.htm)

Provider: **OCLC Western Service Center**  
 Course: *Cataloging With Connexion*  
 Dates and locations:  
 Friday, March 7, 2003,  
 Ontario, CA OCLC Western Service Center  
 Wednesday, March 19, 2003,  
 Ontario, OCLC Western Service Center  
 Tuesday, March 25, 2003,  
 Irvine, University of California-Irvine  
<http://www.oclc.org/western/training/CatalogConnexion.htm>

Provider: **Infopeople**  
 Course: *Getting Started with XML*  
 (with Eric Lease Morgan, Head of the Digital Access  
 and Information Architecture Department at the  
 University Libraries of Notre Dame)  
 Dates and locations:  
 Tuesday, March 11, San Francisco Public Library  
 Wednesday, March 12, California State Library  
 Friday, March 14, Cerritos Public Library  
<http://www.infopeople.org/WS/workshop/Workshop/116>

Provider: **Infopeople**  
 Course: *Developing Spanish and Latino Interest Collections*  
 Using the Web and Online Sources  
 Dates and locations:  
 Thursday, March 6, San Francisco Public Library  
 Thursday, April 3, Fresno County Public Library  
 Wednesday, April 16, San Jose Public Library  
 Thursday, May 1, Ventura County Library  
 Thursday, May 15, California State Library  
 Friday, May 23, Cerritos Public Library  
 Thursday, June 12, San Diego Public Library  
<http://www.infopeople.org/WS/workshop/Workshop/109>

Provider: **Infopeople**  
 Course: *Scanning for Preservation and Access*  
 Dates and locations:  
 Monday, March 17, California State Library  
 Tuesday, April 1, Cerritos Public Library  
<http://www.infopeople.org/workshops/index.html>

Provider: **Infopeople**  
 Course: *Training the Tech Trainer*  
 Date and Location:  
 Tuesday, April 22,  
 Contra Costa County Library - Pleasant Hill  
 Wednesday, May 7,  
 San Diego Public Library  
<http://www.infopeople.dreamhost.com/WS/workshop/Workshop/115>



**Provider: Infopeople**  
**Course:** *When Being Nice Isn't Working: Service, Safety, and Security at the Moment of Truth*

**Dates and Locations:**  
 Tuesday, March 11, 2003,  
 Contra Costa County Library - Pleasant Hill  
 Tuesday, March 25, 2003  
 Chico Branch Library  
<http://www.infopeople.org/WS/workshop/Workshop/110>

**Provider: Infopeople**  
**Course:** *Raising Private Dollars for Public Libraries*

**Dates and locations:**  
 Wednesday, April 2, San Diego Public Library  
 Monday, April 28, Sutter County Library  
<http://infopeople.org/WS/workshop/Workshop/122>

**Provider: Infopeople**  
**Course:** *Science & Technology Resources on the Internet*

**Date and location:**  
 Tuesday, March 11, 2003, San Jose Public Library  
<http://www.infopeople.org/WS/workshop/Workshop/121>

**Provider: Infopeople**  
**Distance Learning Course:**  
*Library Laws for the Web Environment*  
<http://www.infopeople.org/WS/workshop/Workshop/86>

**Provider: Infopeople**  
**Course:** *Delivering Effective Library Presentations!*

**Dates and locations:**  
 Monday, March 17, 2003,  
 Contra Costa County Library - Pleasant Hill  
 Friday, March 28, 2003,  
 Cerritos Public Library  
 Friday, April 11, 2003,  
 Mountain View Public Library  
 Thursday, April 24, 2003,  
 Fresno County Public Library  
<http://www.infopeople.org/WS/workshop/Workshop/126>

**Provider: Infopeople**  
**Course:** *What in the World is GIS? An Introduction to Geographic Information Systems for Librarians*

**Dates and locations:**  
 Monday, March 10, 2003,  
 San Francisco Public Library  
 Thursday, April 3, Cerritos Public Library  
 Friday, April 4, San Diego Public Library  
<http://www.infopeople.org/WS/workshop/Workshop/124>

**Provider: Infopeople**  
**Course:** *Building a Dynamic Web Site with Dreamweaver MX*

**Dates and locations:**  
 Friday, March 7, 2003, California State Library  
<http://www.infopeople.org/WS/workshop/Workshop/114>

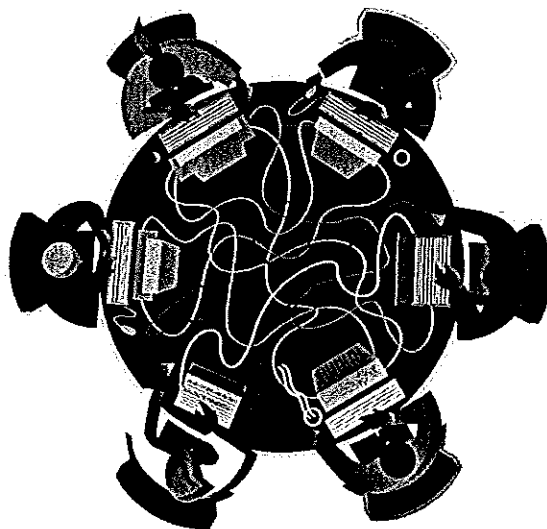
**Provider: Infopeople**  
**Course:** *Genealogy Resources on the Internet*

**Dates and locations:**  
 Tuesday, March 18, San Jose Public Library  
 Thursday, April 3, Ventura County-EP Foster Branch  
 Monday, April 21, San Diego Public Library  
 Thursday, May 8, Fresno County Public Library  
 Thursday, May 22, Los Angeles Public Library  
<http://www.infopeople.org/WS/workshop/Workshop/107>

**Provider: Infopeople**  
*presents Gary Price teaching ...*

**Course:** *There's More to Web Research than Google!*

**Dates and locations:**  
 Thursday, April 10, Fresno County Public Library  
 Friday, April 11, Los Angeles Public Library  
<http://www.infopeople.org/WS/workshop/Workshop/102>



If you would like your library-related training event included in *Connection*, please send event information to Sarah Dalton, *Connection* editor at [sdalton@library.ca.gov](mailto:sdalton@library.ca.gov)

*calendar of events*

**2003**

**March**

**March 6-8, 2003**

Public Library Association (PLA) Spring Symposium, Chicago

**April**

**April 6-12, 2003**

National Library Week

**April 10-13, 2003**

Association of College & Research Libraries (ACRL),  
11th National Conference, Charlotte, North Carolina

**May**

**May 2-7, 2003**

Medical Library Association (MLA) Annual Conference, San Diego

**May 28-29, 2003**

Library of California board meeting, Sacramento

**June**

**June 7-12, 2003**

Special Libraries Association (SLA) Annual Conference, New York City

**June 19-25, 2003**

American Library Association (ALA) Annual Conference, Toronto, Canada

**July**

**July 12-16, 2003**

American Association of Law Libraries (AALL), Annual Conference, Seattle

**August**

**August 20-21, 2003**

Library of California board meeting, Sacramento

**October**

**October 22-26, 2003**

American Association of School Librarians (AASL)  
National Conference, Kansas City, Missouri

**November**

**November 15-17, 2003**

California Library Association (CLA) Annual Conference, Ontario

**November 18-19, 2003**

Library of California board meeting, Ontario

**CONNECTION**

is the website newsletter of the  
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and the Library of California.

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*President*

Articles for inclusion in a  
future issue of the  
*Connection* are welcomed.  
Please submit articles or  
suggestions to the *Connection*  
editor, Sarah Dalton.



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and Renovation Board

<http://www.olc.library.ca.gov/board.asp>