



# FRESNO COUNTY PUBLIC LAW LIBRARY ANNUAL REPORT 2021

The following annual report for the fiscal year ended June 30, 2021 is prepared pursuant to Sections 6349 and 6350 of the Business & Professions Code and was submitted to the Fresno County Law Library Board of Trustees on October 17, 2023

---

Joseph Kalet  
Law Library Director  
Secretary to the Law Library Board of Trustees

## TABLE OF CONTENTS

- ❖ Page 1      Cover page
- ❖ Page 2      Table of contents
- ❖ Page 3 - 5    Summary of 2021-2022
- ❖ Page 4      New offerings to patrons
- ❖ Page 6 - 7    Financial Summary
- ❖ Page 8      Financial Statements
- ❖ Page 8      Notes to Financial Statement
- ❖ Page 8 - 10   Post-Employment Benefits (CERBT/OPEB)
- ❖ Page 10     Board of Trustees and Law Library Staff

# SUMMARY OF 2021-2022

## General

Public law libraries in California serve as legal information service centers. We educate the public to ensure that they can access and utilize information to support all those seeking access to justice. This year was an exceptionally strong year for law library operations and many positive things were accomplished. This report provides a brief overview of the year and serves to meet the requirements of Business and Professions Code 6349.

## Service Highlights

The law library saw 4,368 patrons during the fiscal year and provided reference assistance for 2,756 of them. This represents an increase in walk-in patrons, online and phone call requests. These in-person and e-services include but are not limited to assistance by telephone, zoom online meetings, teleconferences, e-chat services, and legal document delivery provided by law library staff. The law library in partnership with the County Courts and Central California Legal Services (CCLS) offer a guardianship clinic for Fresno County, although this clinic stopped in-person meetings at the end of March 2020. Nevertheless, an online webinar has been completed and is available online for free. This online clinic provides prospective guardians with education, training, and document filing assistance for their guardianships. These partner collaborations are working together to increase outreach and coordination. Previous to the Covid-19 pandemic, this led to more frequent clinic offerings and increased patron assistance. Presently the online clinic participants still represent the majority of the guardianship filings in the county.

E-Chat Services, aka "Ask A Law Librarian". Law library reference staff continue to participate in the state-wide online legal reference e-chat service.

"Ask-Now" <https://calcountylawlib.libanswers.com/>. This free online platform connects patrons from all over the state with resources and services to assist them with their legal questions. During the 2021-2022 calendar year, the Ask-Now service answered 10,275 reference requests. This was a large increase over the prior year, with most increases attributed to a large number of individuals sheltering at home and inquiring about an array of legal issues, including Landlord-Tenant, Marital Separations-Dissolutions-Divorce, Child Support Modifications, and Criminal matters, etc.

## Operating Highlights

- **Supplemental Funding** - After years of advocacy by the Council of California County Law Libraries (CCCLL), of which Fresno is a member and our Law Library Director is on the executive board, the State of California provided the second support funding to county law libraries. This was the third time the state acknowledged and supported the efforts of law libraries since the dire filing fee reductions of the past decade. As a result, Fresno received \$389,272.69 in supplemental funding for the year. This allowed the law library to address long term financial concerns, improve resources, and build a powerful and strong fiscal footing to stand on.
- **Services offered during the Covid-19 Pandemic**. Our staff were sheltering at home and the director worked in the law library every day. We never stopped our services to the community. Utilizing Microsoft Teams all staff members worked extensively from home. We stayed in daily/hourly contact and had a MS Teams meeting every day at 11:00 am. We had prepared for this as director was told very early on that county law libraries in CA. needed to be ready to shut down. During the shutdown, we offered assistance by telephone, email, Ask-A-Librarian, and resources for our English and Spanish speaking patrons. We are fortunate to have three fluent Spanish speaking staff members. Some law libraries in small, medium, and even large counties were completely shut down and unable to assist patrons. The double whammy for many of these counties was the loss of almost 60% of their trained staff. When they finally opened back up, many could offer services by appointment only. To this day, many law library's struggle to remain fully staffed and operational. During the pandemic, our law library did not lose any staff members and we were available to assist patrons every day during the shutdown.
- **Collection Highlights**

Titles Reported July 1, 2021	3,529
Titles added Fiscal Year 2021-2022	4
Titles withdrawn	8
Titles June 30, 2022	3,525
Total Volumes	38,629
Microfiche Volumes	50,647
Circulation	789
In-house Circulation	1,733

The law library continues to improve and modernize its operation. In 2020 we installed a point-of-sale system for paying with a debit or credit card. We also offer our patrons the online Lexis-Nexis/Matthew Bender Digital Library collection as well as free access to other computer assisted legal research tools such as Westlaw, CEB, HeinOnline and others.

Patrons, lawyers, judges, and especially our "pro-per" or "pro-se" patrons utilize this excellent legal resource that helps the helpless, directs the misdirected and offers kindness, empathy and caring to our Fresno community. The term "pro per" is an abbreviation of the Latin phrase "in propria persona," meaning "in their own person," and it refers to a situation where litigants represent themselves, without a lawyer. The Sixth Amendment guarantees criminal defendants the right to representation by counsel, and although the Sixth Amendment does not explicitly refer to self-representation, that right is necessarily implied. Thus, a defendant may elect to waive the right to counsel and represent themselves. We want to be equally available to all members of community in whatever legal matter they may be facing or researching. We also continue reaching out to other agencies, county service providers, colleges, and universities in order to raise awareness that the County Law Library is here for everyone in our wonderful Fresno Community.

Joseph Kalet  
Law Library Director  
Fresno County Public Law Library

# FINANCIAL SUMMARY

## Fresno County Public Law Library FY 2021-2022 Financial Report

**2021-2022 fiscal year was positive.**

This was due to the following:

- Continued strict cost controls
- Increasing interest rate for monies on deposit
- State of California provided supplemental funding of \$389,272.69
- This led to a \$439,538.17 surplus for the fiscal 2021-2022 year (FY)

### Financial Statement

• Balance July 1 <sup>st</sup> , 2021 (FY)	\$ 2,420,575.79
• Balance June 30 <sup>th</sup> , 2022 (FY)	\$ 2,832,600.06
• All Income FY 2021-2022	\$ 1,090,573.64

### Reserves

• Insurance Retention	\$ 5,000.00
• Unemployment Insurance Reserve	\$ 5,000.00
• Filing Fee Set Aside & Other Reserve	<u>\$ 565,700.14</u>
• <b>Reserve Balance</b>	<b>\$ 575,700.14</b>

### Other Funds Held by Law Library

• Revolving Fund {Account: 040-970402 Bank of the West}	\$ 3,500.00
• Payroll – EFT Benefit and Tax Payments {Account: 097-091144 Bank of the West}	<u>\$ 7,144.17</u>
• <b>Other Funds Balance</b>	<b>\$ 10,644.17</b>

### Financial Statement Detail – Receipts

• Court Filing Fees	\$ 653,975.45
• Copying/printing	\$ 1,286.00
• Overdue items	\$ 275.00
• Rentals	\$ 45.00
• Interest	\$ 35,491.50
• Book sales	\$ 275.00
• CERBT Reimbursement	\$ 9,903.00
• Miscellaneous*	\$ 389,272.69
• Cancel Check Fees	<u>\$ 50.00</u>
• <b>Revenue Total</b>	<b>\$1,090,573.64</b>

{\* \$389,272.69 CA. State Budget: Supplemental funding}

## Fresno County Public Law Library FY 2021-2022 Financial Report

### Financial Statement Detail – Expenditures.

#### Library Resources

• Continuations	\$ 154,873.93
• Subscriptions	\$ 39,487.33
• E-Subscriptions	\$ 127,501.04
• Replacements (Theft - Loss)	\$ 275.00
• <b>Library Resources Total</b>	<b>\$ 322,137.30</b>

#### Personnel

• Salaries/Extra help	\$ 206,604.41
• Unfunded Accrued Liability	\$ 10,692.38
• Health Insurance- Active	\$ 14,496.62
• Health Insurance- Retirees	\$ 9,613.10
• CalPERS Reimbursement	\$ 2,469.31
• Social Security	\$ 14,486.00
• Medicare	\$ 3,388.12
• Workers Comp. Insurance	\$ 1,365.00
• EDD – Unemployment Insurance	\$ 1,539.94
• Retirement (CalPERS)	\$ 9,700.45
• Paychex/Payroll Processing	\$ 2,101.75
• MBS/Accounting/QuickBooks	\$ 2,487.42
• GASB 45 Actuarial Reports	\$ 700.00
• Memberships (AALL-CCCLL)	\$ 1,156.00
• Education/Travel	\$ 00.00
• Parking	\$ 3,042.00
• <b>Personnel Total</b>	<b>\$ 283,842.50</b>

#### Miscellaneous

• Insurance (Liability-Property)	\$ 21,522.27
• ITSD (County IT)	\$ 11,717.79
• Maintenance Equipment	\$ 861.12
• Maintenance Facility	\$ 625.00
• Copier Supplies & Maintenance	\$ 4,859.42
• Printing & Copying	\$ 165.29
• Online Library Catalog	\$ 2,400.00
• Bindery-Repair Books	\$ 92.00
• Library Supplies	\$ 115.51
• Library PR (Bar Bulletin Ad)	\$ 257.00
• Office Supplies/PPE	\$ 2,290.27
• Postage	\$ 150.00
• <b>Miscellaneous Total</b>	<b>\$ 45,055.67</b>
• <b>Total FY 2021-2022 Expenditures</b>	<b>\$ 651,035.47</b>

# FINANCIAL STATEMENTS

## NOTES TO FINANCIAL STATEMENTS

### Post-Employment Benefits

The Fresno County Public Law Library is a public agency member of the California Public Employees' Retirement System (CalPERS). The library participates in an employer/employee shared cost defined benefit pension program. Effective June 30, 2003 the library was moved to a mandated risk pool for all public agencies. The employer contribution rate for fiscal year ended June 30, 2021 was 8.12% of payroll for those employees on the payroll prior to January 1, 2013 and 7.95% of payroll for those employees on the payroll beginning January 1, 2014.

### Post-Employment Benefits - CERBT/OPEB

The Fresno County Public Law Library is a public agency member of the California Public Employees' Retirement System (CalPERS). The library contracts with CalPERS to provide health benefits for active employees and retirees. The law library contributes toward the monthly premium in an amount not to exceed \$450 for covered members with or without dependent coverage. Members are responsible for any premium amount that exceeds the law library contribution. Beginning April 16, 2008, the Fresno County Law Library contracted with California Employers' Retiree Benefit Trust to manage post-employment benefit funds. The most recent actuary provides the following financial data:

## CERBT Account Update Summary

Fresno County Law Library

as of June 30, 2023



## OPEB Valuation Report Summary

OPEB Actuarial Valuation Report by North Bay Pensions	
Valuation Date	7/1/2021
Measurement Date	7/1/2021
Total OPEB Liability (TOL)	\$149,488
Valuation Assets	\$350,969
Net OPEB Liability (NOL)	(\$201,481)
Funded Status	235%
Actuarially Determined Contribution (ADC)	--
CERBT Asset Allocation Strategy	Strategy 1
Discount Rate	6.50%

## CERBT Account Summary

As of June 30, 2023	Strategy 1
Initial contribution (04/30/2008)	\$278,617
Additional contributions	\$3,087
Disbursements	(\$96,043)
CERBT expenses	(\$5,114)
Investment earnings	\$277,512
Total assets	\$458,059
Annualized net rate of return (04/30/2008-06/30/2023 = 15.17 years)	5.21%

## Cash Flow Summary by Fiscal Year

Fiscal Year	Contributions	Disbursements	Cumulative Investment Gains (Losses)	Cumulative Fees	Cumulative Ending Assets
2006-07	\$0	\$0	\$0	\$0	\$0
2007-08	\$278,617	\$0	(\$15,780)	(\$42)	\$262,795
2008-09	\$0	\$0	(\$74,751)	(\$215)	\$203,651
2009-10	\$3,087	\$0	(\$42,811)	(\$446)	\$238,447
2010-11	\$0	\$0	\$16,649	(\$799)	\$297,554
2011-12	\$0	(\$11,821)	\$17,090	(\$1,144)	\$285,829
2012-13	\$0	(\$11,567)	\$50,728	(\$1,607)	\$307,437
2013-14	\$0	(\$9,713)	\$107,222	(\$2,069)	\$353,756
2014-15	\$0	(\$9,577)	\$106,719	(\$2,424)	\$343,321
2015-16	\$0	(\$14,561)	\$109,942	(\$2,704)	\$331,703
2016-17	\$0	(\$15,587)	\$144,669	(\$2,996)	\$350,551
2017-18	\$0	(\$14,386)	\$172,802	(\$3,310)	\$363,985
2018-19	\$0	(\$8,832)	\$195,127	(\$3,618)	\$377,170
2019-20	\$0	\$0	\$208,623	(\$3,943)	\$390,342
2020-21	\$0	\$0	\$316,067	(\$4,323)	\$497,405
2021-22	\$0	\$0	\$249,695	(\$4,742)	\$430,615
as of 6/30/2023	\$0	\$0	\$277,512	(\$5,114)	\$458,059

### Financial Reporting

- CERBT is the Plan
  - Provides audited and compliant GASB 74 report in a Schedule of Changes in Fiduciary Net Position (FNP)
  - Published in February each year

# PEOPLE

## Law Library Board of Trustees

- ❖ Honorable Rosemary McGuire, President 2011 - 2021
- ❖ Honorable Arlan Harrell, Vice President 2019 - 2021
- ❖ Scott D. Baly, Esq., 2018 - Current
- ❖ County Supervisor Steve Brandau, 2019 - Current
- ❖ Honorable Gregory Fain, 2005 - Current
- ❖ Honorable Kimberly Gaab, 2009 – Current
- ❖ Honorable Heather Mardel Jones, 2019 – Current
- ❖ Honorable Houry Sanderson, 2022 - Current
- ❖ Joseph Kalet, Secretary 2019 – Current

## Law Library Staff

Joseph Kalet  
Director

Roland G. Cabiles  
Reference Librarian

Janette Gallardo  
Library Assistant II

Idaly Rodriguez  
Library Assistant I