



FRESNO COUNTY PUBLIC LAW LIBRARY ANNUAL REPORT 2022

The following annual report for the fiscal year ended June 30, 2023 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 24, 2023

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

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SUMMARY OF 2022-2023

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 5,840 patrons during the fiscal year and provided reference assistance for 4,015 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 in 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. The in-person clinics will resume approximately November 2023 and will be held at CCLS office in downtown Fresno twice monthly. This is a free service to anyone that is seeking a Guardianship.

E-Chat Services, aka "Ask A Law Librarian". Law library 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 2022-2023 calendar year, the Ask-Now service answered 18,527 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 \$455,979.17 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**. For the first six months of 2022, our staff worked from home and director worked in the law library every day. Nevertheless, we never stopped offering 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, 2022	3,525
Titles added Fiscal Year 2022-2023	4
Titles withdrawn	9
Titles June 30, 2023	3,520
Total Volumes	38,633
Microfiche Volumes	50,647
Circulation	1124
In-house Circulation	2,765

The law library continues to improve and modernize its operation. In 2022 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 all 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

The 2022-2023 fiscal year was positive. This was due to the following:

- Filing fee revenue increased 13% over the fiscal year
- Interest rate for monies on deposit increasing
- The State of California provided a supplemental support payment of \$455,979.17
- Continued cost controls
- \$566,750.37 surplus for the fiscal 2022-2023 year
- Please see financial report below:

	A	B	C	D
	FRESNO COUNTY PUBLIC LAW LIBRARY FY 2022-2023 BUDGET	PROPOSED EXPENDITURES FY 2022-2023	ACTUAL EXPENDITURES FY 2022-2023	PROPOSED EXPENDITURES FY 2023-2024
1				
2	EXPENDITURES DESCRIPTION	July 1, 2022 - June 30, 2023	July 1, 2022 - June 30, 2023	July 1, 2023 - June 30, 2024
3	CONTINUATIONS/REVISION	\$175,000.00	\$188,000.00	\$190,000.00
4	SUBSCRIPTIONS	\$40,000.00	\$32,749.00	\$35,000.00
5	E-SUBSCRIPTIONS	\$129,000.00	\$136,251.00	\$138,000.00
6	REPLACEMENT-THEFT	\$300.00	\$120.00	\$200.00
7	BINDERY-REPAIR BOOKS	\$100.00	\$117.82	\$250.00
8	LIABILITY/PROPERTY INSURANCE	\$23,000.00	\$25,469.03	\$27,555.00
9	MEMBERSHIPS/DUES	\$1156.00	\$760.00	\$760.00
10	EDUCATION/TRAVEL	\$0.00	\$350.00	\$0.00
11	ONLINE LIBRARY CATALOG	\$2,600.00	\$2,400.00	\$2,500.00
12	ITSD	\$11,800.00	\$11,053.94	\$12,000.00
13	BOARD MEETINGS (ZOOM)	\$0.00	\$180.00	\$190.00
14	OFFICE SUPPLIES/PPE	\$1000.00	\$1,620.12	\$1,700.00
15	POSTAGE	\$150.00	\$110.00	\$120.00
16	LIBRARY SUPPLIES	\$175.00	\$117.82	\$125.00
17	COPIER SUPPLIES/MAINT. (New Copier 2022)	\$2,250.00	\$1,811.50	\$1,900.00
18	PRINTING & COPYING	\$175.00	\$190.00	\$210.00
19	MAINTENANCE EQUIPMENT	\$900.00	\$1,365.00	\$1,450.00
20	MAINTENANCE FACILITY	\$650.00	\$610.00	\$675.00
21	EQUIP/FURNISHINGS (New)	\$0.00	\$0.00	\$0.00
22	LIBRARY PR (ADVERTISE IN BAR BULLETIN)	\$257.00	\$0.00	\$257.00
23	FCPLL AUDIT	\$7,600.00	\$0.00	\$7,600.00
24	ACCOUNTING	\$2500.00	\$2,625.00	\$2,700.00
25	STAFF SALARIES/EXTRA HELP	\$217,000.00	\$217,355.32	\$224,000.00
26	PAYROLL PROCESSING	\$2,300.00	\$2,482.00	\$2,600.00
27	PARKING	\$1,872.00	\$1,716.00	\$2,000.00
28	RETIREMENT	\$10,000.00	\$11,450.00	\$11,850.00
29	SOCIAL SECURITY	\$15,000.00	\$15,710.00	\$16,350.00
30	MEDICARE	\$3,810.00	\$4,133.00	\$4,450.00
31	WORKERS COMP. INSURANCE	\$2,216.00	\$2,501.00	\$2,700.00
32	EDD - UNEMPLOYMENT INSURANCE	\$1,585.00	\$1,622.00	\$1,725.00
33	GASB 45 ACTUARIAL SERVICES	\$750.00	\$800.00	\$1,500.00
34	HEALTH INSURANCE - ACTIVE	\$15,000.00	\$15,325.00	\$16,000.00
35	HEALTH INSURANCE - RETIREES	\$9,500.00	\$9,652.00	\$10,000.00
36	CALPERS REIMBURSEMENT	\$2,600.00	\$2,754.00	\$3,000.00
37	UNFUNDED ACCRUED LIABILITY	\$11,500.00	\$11,710.00	\$12,000.00
38	TOTAL EXPENDITURES [-]	\$691,746.00	\$702,610.55	\$731,367.00
39				
40	FRESNO COUNTY PUBLIC LAW LIBRARY FY 2022-2023 BUDGET	PROPOSED REVENUE FY 2022-2023	ACTUAL REVENUE 2022-2023	PROPOSED REVENUE FY 2023-2024
41	INCOME	July 1, 2022 - June 30, 2023	July 1, 2022 - June 30, 2023	July 1, 2023 - June 30, 2024
42	CIVIL FILING FEE	\$658,000.00	\$782,371.73	\$735,000.00
43	COPIER FEES	\$1,300.00	\$1,139.00	\$1,730.00
44	OVERDUES	\$300.00	\$335.00	\$395.00
45	RENTALS -CONFERENCE ROOM	\$100.00	\$125.00	\$275.00
46	INTEREST	\$38,000.00	\$28,833.00	\$34,000.00
47	BOOK SALES	\$300.00	\$358.00	\$475.00
48	CERBT WITHDRAWAL	\$10,000.00	\$0.00	\$0.00
49	MISC. (State Budget Supplemental Funds)	\$389,000.00	\$455,979.17	\$0.00
50	CANCEL CHECK FEES	\$30.00	\$0.00	\$30.00
51	TOTAL REVENUE [+]	\$1,097,250.00	\$1,269,360.92	\$771,945.00
52	TOTAL EXPENDITURES [-]	-\$691,746.00	\$702,610.55	\$731,367.00
53	POSITIVE REVENUE [+]	\$405,504.00	\$566,750.37	\$40,578.00
54				
55	ASSETS	July 1, 2022	July 1, 2023	July 1, 2024 Proposed Assets
56	LAW LIBRARY COUNTY TREASURY ACCOUNT BALANCE	\$2,823,148.93	3,368,348.34	4,357,909.15
57	INSURANCE RETENTION	\$5,000.00	\$5,000.00	\$5,000.00
58	UNEMPLOYMENT INSURANCE RESERVES	\$5,000.00	\$5,000.00	\$5,000.00
59	CIVIL FILING FEE SET ASIDE	\$565,700.00	\$565,700.00	\$565,700.00
60	BMO (FORMALLY BOTW) CREDIT CARD ACCT.	\$3,500.00	\$3,500	\$3,500.00
61	BMO (FORMALLY BOTW) RESERVE ACCT.	\$5,000.00	\$200	1000
62	BMO (FORMALLY BOTW) CHECKING ACCT.	\$7,144.00	\$33,210.44	20000
63	POSITIVE ANNUAL FUNDS [+]	\$405,504.00	\$66,750.37	\$40,578.00
64	TOTAL LAW LIBRARY FUNDS	\$3,819,996.93	4,547,909.15	\$5,198,687.15

Post-Employment Benefits - OPEB

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 8.159% of payroll for those employees on the payroll prior to January 1, 2013 and 7.12% of payroll for those employees on the payroll beginning January 1, 2014. The library contracts with CalPERS to provide health benefits for active employees and retirees. The law library contributes toward the monthly premium at 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 Law Library elected to fully prefund the liability. The most recent actuarial provides the following financial data for September 30, 2023:

CERBT Account Update Summary

Fresno County Law Library

as of September 30, 2023



OPEB Valuation Report Summary

OPEB Actuarial Valuation Report by North Bay Pensions	
Valuation Date	7/1/2022
Measurement Date	7/1/2022
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 September 30, 2023	Strategy 1
Initial contribution (04/30/2008)	\$278,617
Additional contributions	\$3,087
Disbursements	(\$96,043)
CERBT expenses	(\$5,211)
Investment earnings	\$259,686
Total assets	\$440,136
Annualized net rate of return (04/30/2008-09/30/2023 = 15.42 years)	4.9%

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
2022-23	\$0	\$0	\$277,512	(\$5,114)	\$458,059
as of 9/30/2023	\$0	\$0	\$259,686	(\$5,211)	\$440,136

CERBT/CEPPT Investment Returns Outperform Benchmarks

Periods ended August 31, 2023

Fund	Assets	1 Month	3 Months	FYTD	1 Year	3 Years	5 Years	10 Years	ITD
CERBT Strategy 1 (Inception June 1, 2007)	\$15,284,492,297	-2.43%	3.97%	0.33%	4.78%	3.02%	4.86%	6.21%	4.93%
Benchmark		-2.45%	3.90%	0.30%	4.59%	2.82%	4.61%	5.86%	4.53%
CERBT Strategy 2 (Inception October 1, 2011)	\$1,845,156,567	-2.18%	2.45%	-0.20%	2.21%	0.70%	3.70%	5.04%	5.96%
Benchmark		-2.19%	2.41%	-0.21%	2.07%	0.56%	3.53%	4.74%	5.69%
CERBT Strategy 3 (Inception January 1, 2012)	\$777,279,443	-1.96%	1.36%	-0.53%	0.39%	-0.62%	2.90%	4.10%	4.42%
Benchmark		-1.96%	1.32%	-0.55%	0.28%	-0.71%	2.77%	3.81%	4.15%
CERBT Total	\$17,906,928,307								
CEPPT Strategy 1 (Inception October 1, 2019)	\$128,316,243	-1.83%	2.47%	0.04%	3.99%	1.10%	-	-	3.09%
Benchmark		-1.88%	2.41%	0.00%	3.74%	0.89%	-	-	2.98%
CEPPT Strategy 2 (Inception January 1, 2020)	\$45,226,251	-1.36%	0.99%	-0.25%	1.87%	-1.47%	-	-	0.26%
Benchmark		-1.39%	0.95%	-0.30%	1.80%	-1.59%	-	-	0.14%
CEPPT Total	\$173,542,494								

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

Employer Name	Fresno County Law Library	
Additions		
Contributions:		
Employer contributions - direct	\$	-
Total Additions		-
Deductions		
OPEB reimbursements - direct		-
Net investment and other (income)/expenses		66,567
Administrative expenses		126
Employer withdrawal		-
Total Deductions		66,693
Net Increase (Decrease)		(66,693)
Net Position Restricted for OPEB Benefits		
Beginning of year		497,473
End of year	\$	430,780

Employer Name	Fresno County Law Library	
Employer contributions outside of trust	\$	10,000
OPEB reimbursements outside of trust		10,000

PEOPLE

Law Library Board of Trustees

- ❖ Honorable Heather Mardel Jones, President 2019 - Current
- ❖ Honorable Gregory Fain, Vice President 2005 - Current
- ❖ Scott D. Baly, Esq., 2018 - Current
- ❖ County Supervisor Steve Brandau, 2019 - Current
- ❖ Honorable Kimberly Gaab, 2009 – 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