



Orange County Public Law Library

515 North Flower Street
Santa Ana, CA 92703-2354
(714) 338-6790
www.ocpll.org

Brendan E. Starkey
Director

Hon. Robert A. Knox, President
Hon. Michele Bell
Hon. William Claster
Sherry L. Leysen, Esq.
Hon. Elizabeth G. Macias
Hon. Glenn R. Salter
Sup. Vicente F. Sarmiento

NOTICE OF MEETING

Please be advised that the Board of Trustees of the Orange County Public Law Library will meet at the law library Tuesday, March 19, 2024 at 12:15 p.m.

Agenda

- I. Discuss Informative Matters
- II. Minutes of February 20 Meeting
- III. Consent Calendar: Investment Reports
- IV. Complaint Process Update
- V. Consider Directors & Officers Insurance Renewal
- VI. Budget Update
- VII. Comments from Trustees and Staff
- VIII. Public Comment per Government Code § 54954.3

Supporting documentation is available for review in the Law Library Administrative Offices, Monday-Friday, 8 a.m.- 5 p.m., except where exempt from disclosure.

Those requiring accommodations under the Americans with Disabilities Act should contact the Law Library Administrative Offices at least 24 hours prior to the meeting at (714) 338-6803. Later requests will be accommodated to the extent feasible.

Agenda I

Informative Matters

The county reversed \$26,530.18 in maintenance charges to the library for work done this fiscal year. With this and the \$25,705.13 reimbursement received last month for maintenance charges from last fiscal year, the library's maintenance expenses, as listed in budget objects 1400 and 1402, are where they should be.

The director attended the 52nd Institute of the Southern California Association of Law Libraries in Santa Barbara. The theme was AI Unleashed: Practical and Ethical Applications for Legal Libraries. Surveys show that a majority of law practice areas across the United States are using some form of generative artificial intelligence for tasks such as drafting and summarizing legal material, information extraction, e-discovery, and legal research. Presenters agreed that, at the moment, commonly used AI platforms function best when performing defined tasks within a constrained data set, such as summarizing a specific set of documents. The larger the data set and the more complicated the task, such as conducting open-ended research in a relatively unconstrained data set, the more prone AI is to "hallucination." Attendees agreed that, as with prior advances in research technology, educated and careful use is required.

The director will attend the Council of California County Law Librarians' spring meeting and legislative day in Sacramento April 2-3.

Attachments:

Agenda I Informative Matters

Agenda II February Minutes

Agenda III Consent Calendar

Agenda V D&O Insurance Renewal

Financial Statement

Filing Fee Statistics

Submitted Warrant List

CAL-Card Log

Building and Security Event Log

New Acquisitions List



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Minutes of Meeting

Board of Trustees
Orange County Public Law Library

The Board of Trustees of the Orange County Public Law Library met February 20, 2024 at 12:15 p.m. at the law library.

Present: Sherry Leysen, Esq., Hon. Michele Bell, Hon. William Claster, Hon. Robert A. Knox, Hon. Elizabeth G. Macias, Hon. Glenn Salter, and Brendan Starkey. Yasie Goebel and Manuel Escamilla were also present.

Absent: Supervisor Vicente F. Sarmiento.

President Knox called the meeting to order at 12:17 p.m.

Agenda VII Public Comment per Government Code § 54954.3. Agenda item VII was taken out of order. Rualta Jagot addressed the board about perceived mistreatment by library staff.

Agenda I Discuss Informative Matters. The director discussed developments at the library since the last board meeting.

Agenda II Minutes of January 16 Meeting. Judge Macias moved that the minutes be approved. Judge Bell seconded the motion, which passed unanimously.

Approved 6-0

Agenda III Consent Calendar. There being no objection, Ms. Leysen, Judge Knox, and Judge Macias were appointed to the Personnel Committee, Ms. Leysen serving as chair; Judge Bell, Judge Claster, and Judge Salter were appointed to the Finance Committee, Judge Bell serving as chair; and summary investment reports from the Local Agency Investment Fund and the Orange County Investment Pool for January were deemed received and filed.

Approved 6-0

Agenda IV Mid-Year Budget Review. The director informed the board that the library is in good financial condition, with income outpacing expenditures and expenditures on target for the year. He noted that (1) line 7670 Miscellaneous

February 20, 2024 Minutes

Revenue is much higher than budgeted because a reimbursement from the county for maintenance erroneously charged to the library in FY2022-23 was logged there and (2) charges to lines 0206 Retiree Medical and 0319 Unit Employee Insurance are higher than anticipated and staff would investigate.

Agenda V Consider FY2023-24 CWCAP Charges. Judge Claster moved to approve payment of \$14,001 to the Countywide Cost Allocation Plan for services by the Auditor-Controller. Judge Bell seconded the motion, which passed unanimously.

Agenda VI Comments from Trustees and Staff. There were no comments from trustees or staff.

The board adjourned at 12:59.

I hereby certify that the foregoing minutes were prepared and certified by me.

The foregoing minutes are hereby approved.

Brendan E. Starkey
Recording Secretary

Hon. Elizabeth G. Macias
Secretary

Agenda III

Consent Calendar

Attached are summary investment reports from the Local Agency Investment Fund and the Orange County Investment Pool for February.



PMIA/LAIF Performance Report as of 3/13/24



Quarterly Performance Quarter Ended 12/31/23

| | |
|--|---------------------|
| LAIF Apportionment Rate ⁽²⁾ : | 4.00 |
| LAIF Earnings Ratio ⁽²⁾ : | 0.00010932476863589 |
| LAIF Administrative Cost ^{(1)*} : | 0.29 |
| LAIF Fair Value Factor ⁽¹⁾ : | 0.993543131 |
| PMIA Daily ⁽¹⁾ : | 3.96 |
| PMIA Quarter to Date ⁽¹⁾ : | 3.81 |
| PMIA Average Life ⁽¹⁾ : | 230 |

PMIA Average Monthly Effective Yields⁽¹⁾

| | |
|-----------------|--------------|
| February | 4.122 |
| January | 4.012 |
| December | 3.929 |
| November | 3.843 |
| October | 3.670 |
| September | 3.534 |

Pooled Money Investment Account Monthly Portfolio Composition ⁽¹⁾ 2/29/24 \$164.3 billion

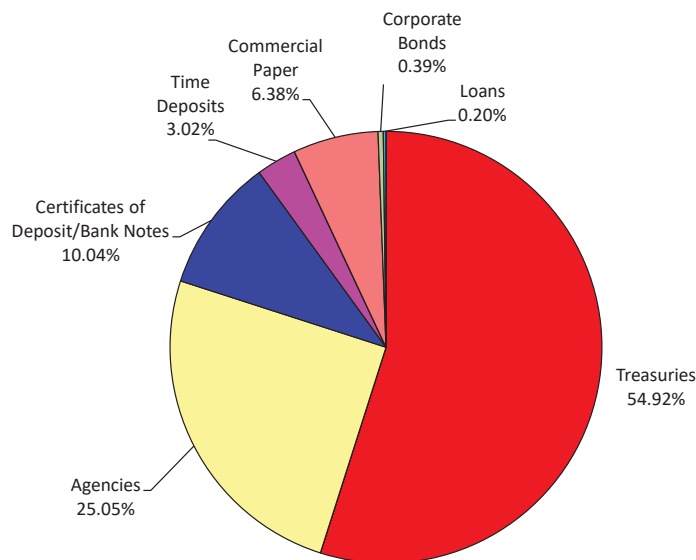


Chart does not include \$2,059,000.00 in mortgages, which equates to 0.001%. Percentages may not total 100% due to rounding.

Daily rates are now available here. [View PMIA Daily Rates](#)

Notes: The apportionment rate includes interest earned on the CalPERS Supplemental Pension Payment pursuant to Government Code 20825 (c)(1) and interest earned on the Wildfire Fund loan pursuant to Public Utility Code 3288 (a).

*The percentage of administrative cost equals the total administrative cost divided by the quarterly interest earnings. The law provides that administrative costs are not to exceed 5% of quarterly EARNINGS of the fund. However, if the 13-week Daily Treasury Bill Rate on the last day of the fiscal year is below 1%, then administrative costs shall not exceed 8% of quarterly EARNINGS of the fund for the subsequent fiscal year.

Source:

⁽¹⁾ State of California, Office of the Treasurer

⁽²⁾ State of California, Office of the Controller

California State Treasurer
Fiona Ma, CPA



Local Agency Investment Fund
P.O. Box 942809
Sacramento, CA 94209-0001
(916) 653-3001

March 01, 2024

[LAIF Home](#)
[PMIA Average](#)
[Monthly Yields](#)

ORANGE COUNTY PUBLIC LAW LIBRARY

DIRECTOR
515 NORTH FLOWER STREET
SANTA ANA, CA 92703-2354

[Tran Type Definitions](#)

Account Number: 16-30-005

February 2024 Statement

Account Summary

| | | | |
|-------------------|------|--------------------|--------------|
| Total Deposit: | 0.00 | Beginning Balance: | 5,513,976.03 |
| Total Withdrawal: | 0.00 | Ending Balance: | 5,513,976.03 |



COUNTY OF ORANGE
OFFICE OF THE TREASURER-TAX COLLECTOR
Shari L. Freidenrich, CPA, CCMT, CPFA, ACPFIM
P. O. BOX 4515
SANTA ANA, CA 92702-4515



octreasurer.com/publicfunds

February 29, 2024

ORANGE COUNTY PUBLIC LAW LIBRARY

Fund Number : 161

FEBRUARY 2024 STATEMENT

Transactions

| <u>Transaction Date</u> | <u>Transaction Description</u> | <u>Amount</u> |
|------------------------------------|---------------------------------------|----------------------|
| 02/01/2024 | January 2024 Investment Admin Fee | \$ (253.96) |
| 02/22/2024 | November 2023 Interest Paid | \$ 21,248.36 |

Summary

| | | | | | |
|-------------------|----|--------------|--------------------|----|--------------|
| Total Deposit: | \$ | 315,481.84 | Beginning Balance: | \$ | 5,937,047.12 |
| Total Withdrawal: | \$ | (170,552.79) | Ending Balance: | \$ | 6,081,976.17 |

Agenda V

Consider Directors & Officers Insurance Renewal

In 2022, the board approved a new directors & officers and employment practices liability (EPL) policy with Old Republic Insurance Company, which offered the same coverage with a more competitive rate than the previous provider. Old Republic is offering a renewal of the same coverage for \$4,737, 14% lower than budgeted and 5.24% lower than last year.

The following table lists the library's EPL premiums over the last 16 years:

| Year | Amount | Percentage Change |
|------|---------|-------------------|
| 2023 | \$4,999 | -11.38% |
| 2022 | 5,641 | -45 |
| 2021 | 10,234 | 0 |
| 2020 | 10,234 | +7.76 |
| 2019 | 9,497 | 0 |
| 2018 | 9,497 | -3.8 |
| 2017 | 9,872 | +15.5 |
| 2016 | 8,546 | 0 |
| 2015 | 8,546 | +8.69 |
| 2014 | 7,863 | +3.2 |
| 2013 | 7,619 | -29.53 |
| 2012 | 10,811 | +35 |
| 2011 | 7,985 | +24 |
| 2010 | 6,440 | +10 |
| 2009 | 5,875 | +24 |
| 2008 | 4,750 | +46 |

Old Republic is rated A+ (Superior) by A.M. Best.

In addition to the premium quoted, there is a broker fee of \$400.

Action required: motion to accept renewal proposal from Old Republic.

Staff recommendation: accept proposal.



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February 29, 2024

Assets

Current Assets

| | | |
|---|---------------------|-------------------------|
| Operating Cash—County Treasury | \$ 6,081,976.17 | |
| Petty Cash—Union Bank | 22,935.28 | |
| Local Agency Investment Fund (LAIF) | | |
| Designated Reserve: Casualty Loss | \$ 500,000.00 | |
| Designated Reserve: Employee Benefits | 173,588.64 | |
| Designated Reserve: Facility Needs | 1,522,785.00 | |
| Designated Reserve: Insurance | 137,500.00 | |
| Designated Reserve: Technology Upgrades | 100,000.00 | |
| Refundable Deposits | 170,135.34 | |
| Operating Reserve | 2,909,967.05 | |
| Total LAIF | 5,513,976.03 | |
| Total Current Assets | | \$ 11,618,887.48 |

Fixed Assets

| | | |
|---------------------------|-----------------|----------------------|
| Books | \$ 8,893,406.33 | |
| Equipment | 3,333,842.64 | |
| Total Fixed Assets | | 12,227,248.97 |

Total Assets

\$ 23,846,136.45

Liabilities

Current Liabilities

| | | |
|----------------------------------|--------------|----------------------|
| Accounts Payable | \$ 31,816.15 | |
| Payroll Payable | 95,571.88 | |
| Total Current Liabilities | | \$ 127,388.03 |

Noncurrent Liabilities

| | | |
|-------------------------------------|-------------------|----------------------|
| Employee Benefits | \$ 173,588.64 | |
| Refundable Deposits | 200,135.34 | |
| Total Noncurrent Liabilities | 373,723.98 | |
| Total Liabilities | | \$ 501,112.01 |

Capital

23,345,024.44

Total Liabilities and Capital

\$ 23,846,136.45

The Board of Trustees established reserve funds to ensure long-term financial stability and orderly provision of services. These provide for replacement of equipment, expansion of the existing facility, earthquake self-insurance, and other future capital requirements. The library does not charge depreciation.

February 2024

| Revenue | February | FYTD | Budget | % of BUD | BUD @ 8 MOS |
|----------------------------|----------------------|------------------------|------------------------|-----------------|------------------------|
| 6610 Interest (on Cash) | \$ 22,195.96 | \$ 142,541.85 | \$ 105,750.00 | 135% | \$ 70,500.00 |
| 7430 Court Filing Fees | 256,864.52 | 2,002,573.04 | 2,750,000.00 | 73% | 1,833,333.33 |
| 7570 Library Services | 46.00 | 2,211.00 | 2,060.34 | 107% | 1,373.56 |
| 7590 Fee-based Services | 10.00 | 248.00 | 2,800.00 | 9% | 1,866.67 |
| 7670 Miscellaneous Revenue | 9.00 | 35,256.66 | 10,000.00 | 353% | 6,666.67 |
| TOTAL | \$ 279,125.48 | \$ 2,182,830.55 | \$ 2,870,610.34 | 76% | \$ 1,913,740.23 |

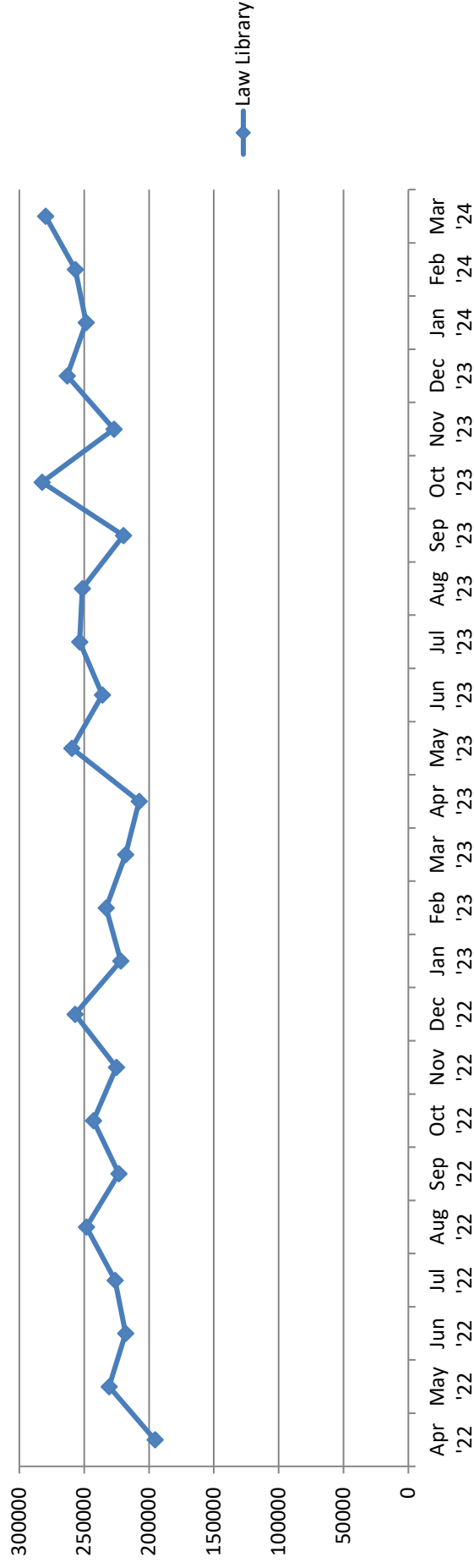
| State Supplemental Funding | February | FYTD | Budget | % of BUD | BUD @ 8 MOS |
|-----------------------------------|-----------------|---------------|---------------|-----------------|--------------------|
| 6970 State, Other | \$ - | \$ 180,952.60 | n/a | n/a | n/a |

| Operating Expenditures | February | FYTD | Budget | % of BUD | BUD @ 8 MOS |
|--|----------------------|------------------------|------------------------|-----------------|------------------------|
| 0101 Regular Salaries | \$ 95,083.70 | \$ 756,703.66 | \$ 1,235,260.10 | 61% | \$ 823,506.73 |
| 0104 Annual Leave Payoff | - | 10,222.08 | 29,557.80 | 35% | 19,705.20 |
| 0200 Retirement | - | 126,124.84 | 127,905.05 | 99% | 85,270.03 |
| 0204 Executive Deferred Compensation | 615.38 | 4,909.19 | 8,000.01 | 61% | 5,333.34 |
| 0206 Retiree Medical | 4,937.74 | 40,270.98 | 43,003.82 | 94% | 28,669.21 |
| 0301 Unemployment Insurance | - | - | 1,680.00 | 0% | 1,120.00 |
| 0304 Management Employee Insurance | 187.12 | 2,772.71 | 4,742.73 | 58% | 3,161.82 |
| 0306 Health Insurance | 14,283.82 | 107,632.31 | 189,860.59 | 57% | 126,573.73 |
| 0319 Unit Employee Insurance | 576.00 | 4,579.20 | 3,348.00 | 137% | 2,232.00 |
| 0352 Worker's Compensation—General | - | 3,526.00 | 3,515.57 | 100% | 2,343.71 |
| 0401 Medicare | 1,636.45 | 13,341.19 | 22,569.75 | 59% | 15,046.50 |
| 0403 Optional Benefit Plan | - | 11,500.00 | 11,500.00 | 100% | 7,666.67 |
| 0450 Accrued Salary & Benefits | 6,371.11 | 95,571.88 | n/a | n/a | n/a |
| 0741 Telephone—Other | - | 6,114.03 | 12,668.52 | 48% | 8,445.68 |
| 1100 Insurance | - | 24,740.00 | 33,253.00 | 74% | 22,168.67 |
| 1300 Maintenance—Equipment | 128.42 | 48,056.99 | 85,784.62 | 56% | 57,189.75 |
| 1400 Maintenance—Building | (26,414.55) | 730.60 | 16,591.00 | 4% | 11,060.67 |
| 1402 Minor Alterations & Improvements | 216.46 | 599.35 | 3,000.00 | 20% | 2,000.00 |
| 1600 Memberships | - | 610.00 | 5,140.00 | 12% | 3,426.67 |
| 1700 Miscellaneous Expense | - | 446.29 | 6,317.50 | 7% | 4,211.67 |
| 1800 Office Expense | 720.16 | 5,694.04 | 10,844.54 | 53% | 7,229.69 |
| 1801 County Publishing | (231.47) | 341.32 | 2,132.55 | 16% | 1,421.70 |
| 1802 Periodicals | 12,962.63 | 134,106.99 | 236,196.16 | 57% | 157,464.11 |
| 1803 Postage | 310.50 | 621.00 | 600.00 | 104% | 400.00 |
| 1809 Minor Equipment Controlled | - | 4,329.74 | 11,202.85 | 39% | 7,468.57 |
| 1900 Professional & Specialty Services | 264.13 | 21,389.55 | 29,329.00 | 73% | 19,552.67 |
| 1901 Databases | 17,039.77 | 203,095.04 | 323,991.55 | 63% | 215,994.37 |
| 1909 Contracts | 3,979.47 | 31,213.14 | 50,285.73 | 62% | 33,523.82 |
| 1911 CWCAP | - | - | 13,995.00 | 0% | 9,330.00 |
| 1940 County IT Charges | 547.71 | 3,833.97 | 6,788.00 | 56% | 4,525.33 |
| 2110 Short-Term Lease—Equipment | - | 4,796.79 | 10,455.70 | 46% | 6,970.47 |
| 2400 Books | 962.10 | 43,099.55 | 84,269.07 | 51% | 56,179.38 |
| 2600 Transportation & Travel—General | 2,550.00 | 9,763.12 | 18,210.00 | 54% | 12,140.00 |
| 2601 Private Auto Mileage | - | - | 500.00 | 0% | 333.33 |
| 2602 Garage Expense | - | 72.00 | 500.00 | 0% | 333.33 |
| 2700 Transportation & Travel—Meetings | - | 3,148.17 | 17,150.00 | 18% | 11,433.33 |
| TOTAL | \$ 136,726.65 | \$ 1,723,955.72 | \$ 2,660,148.20 | 65% | \$ 1,773,432.13 |

| Capital Income | February | FYTD | Budget | % of BUD | BUD @ 8 MOS |
|----------------------------|-----------------|---------------|---------------|-----------------|--------------------|
| 6610 Interest (on Reserve) | \$ - | \$ 145,779.46 | \$ 110,000.00 | 133% | \$ 82,500.00 |

| Capital Expenditures | February | FYTD | Budget | % of BUD | BUD @ 8 MOS |
|-----------------------------|-----------------|--------------|---------------|-----------------|--------------------|
| 4000 Equipment | \$ - | \$ 31,414.67 | \$ 42,547.86 | 74% | \$ 28,365.24 |

Law Library Filing Fee Income



| Estimated Number of Payments = (Total Remittance Divided by Fee Per Filing) | | | | | 13-Mar-24 |
|---|---|------------|-------------------------|-----------------|------------------------------|
| County: Orange | | | | | |
| Collection Month: January 2024 | | | | | |
| Code Section | Abbreviated Fee Title | Fee Amount | Fee Distribution Amount | Amount Remitted | Estimated Number of Payments |
| GC 70653 | Appointment of Conservator | \$350.00 | \$35 | \$0.00 | - |
| GC 70670(a) | Family Law First Paper | \$350.00 | \$35 | \$0.00 | - |
| GC 70613(a) CCP 1161.2 | Limited >\$10K <=\$25K Unlawful Detainer | \$340.00 | \$35 | \$0.00 | - |
| CCP 116.230(d)(2); CCP 116.221 | Small Claims Amended <=\$5,000 to >\$5,000 | \$25.00 | \$2 | \$1.96 | 0.98 |
| GC 70621(a)(1) | Appeal - Limited Cases | \$325.00 | \$35 | \$0.00 | - |
| B&P 6322.1(c); cross-ref. GC 70613(b) & GC 70614(b) | Fees associated with rows 1 and 2 prior to SB 1407 amendments (Refer to the "Crosswalk of Related TC-145 Rows" tables to identify the correct row to report fees incurred in other time periods). | \$165.00 | \$8 | \$0.00 | - |
| GC 70658 70602.5 70602.6 | Subsequent Papers | \$435.00 | \$35 | \$4,023.60 | 114.96 |
| GC 70670(a) 70602.5 70602.6 | Family Law First Paper | \$435.00 | \$35 | \$1,331.23 | 38.035 |
| Lab. 98.2; cross-ref. GC 70611 70602.5 70602.6 | Appeal of Labor Commission Decision | \$435.00 | \$35 | (\$35.00) | -1 |
| GC 70656 | Petition Set Aside Estate | \$200.00 | \$35 | \$0.00 | - |
| H&S 103470 | Petition - Birth, Death, Marriage Record | \$200.00 | \$35 | \$0.00 | - |
| Prob. 7660 | Petition for Summary Probate | \$200.00 | \$35 | \$0.00 | - |
| CCP 116.230(d)(3); CCP 116.221 | Small Claims Amended <= \$1,500 to >\$5,000 | \$45.00 | \$2 | \$2.00 | 1 |
| GC 70613(b) CCP 1161.2 | Fees associated with row 31 prior to SB 1407 amendments (Refer to the "Crosswalk of Related TC-145 Rows" tables to identify the correct row to report fees incurred in other time periods). | \$195.00 | \$35 | \$0.00 | - |
| GC 70654; GC 70656; GC 70658 | Fees associated with rows 65, 67 and 69 prior to SB 1407 amendments (Refer to the "Crosswalk of Related TC-145 Rows" tables to identify the correct row to report fees incurred in other time periods). | \$180.00 | \$35 | \$0.00 | - |
| GC 70652 | Probate - Internal Affairs | \$355.00 | \$35 | \$0.00 | - |
| GC 70653 | Appointment of Conservator | \$355.00 | \$35 | \$0.00 | - |
| GC 70654 | Appointment of Guardians | \$205.00 | \$35 | \$0.00 | - |
| GC 70621(a)(1) | Appeal - Limited Cases | \$330.00 | \$35 | \$0.00 | - |
| GC 70611 | Unlimited Civil Filing | \$355.00 | \$35 | \$0.00 | - |
| GC 70613(a) CCP 1161.2 | Limited >\$10K <=\$25K Unlawful Detainer | \$345.00 | \$35 | \$0.00 | - |
| GC 70611 70602.5 | Unlimited Civil Filing | \$395.00 | \$35 | \$0.00 | - |
| GC 70613(b) 70602.5 CCP 1161.2 | Limited \$10,000 Unlawful Detainer | \$240.00 | \$35 | \$25,018.00 | 714.8 |
| GC 70650(a) 70602.5 70602.6 | First petition for letters of administration or letters testamentary, or the first petition for special letters of administration with the powers of a general personal representative pursuant to Section 8545 of the Probate Code (Refer to the "Crosswalk of Related TC-145 Rows" tables to identify the correct row to report fees incurred in other time periods). | \$435.00 | \$35 | \$5,492.90 | 156.94 |
| Lab. 98.2; cross-ref. GC 70611 | Appeal of Labor Commission Decision | \$350.00 | \$35 | \$0.00 | - |
| Veh. 14607.6(e)(4) | Petition for Vehicle Forfeiture | \$100.00 | \$35 | \$0.00 | - |
| GC 70611 | Unlimited Civil Filing | \$350.00 | \$35 | \$0.00 | - |
| GC 70613(b) CCP 1161.2 | Limited \$10,000 Unlawful Detainer | \$215.00 | \$35 | \$0.00 | - |
| GC 70614(a) | Limited Response >\$10K <=\$25K | \$325.00 | \$35 | \$0.00 | - |
| GC 70621(a)(2) | Writ petition in a limited civil case (amounts over \$10,000) (Refer to the "Crosswalk of Related TC-145 Rows" tables to identify the correct row to report fees incurred in other time periods). | \$325.00 | \$35 | \$0.00 | - |
| GC 70621(b) | Writ petition in a limited civil case (amount up to \$10,000) (Refer to the "Crosswalk of Related TC-145 Rows" tables to identify the correct row to report fees incurred in other time periods). | \$200.00 | \$35 | \$0.00 | - |
| GC 70670(b) | Fees associated with row 73 prior to SB 1407 amendments (Refer to the "Crosswalk of Related TC-145 Rows" tables to identify the correct row to report fees incurred in other time periods). | \$320.00 | \$35 | \$0.00 | - |
| GC 70621(b) | Appeal - Limited Cases | \$205.00 | \$35 | \$0.00 | - |
| H&S 103470 | Petition - Birth, Death, Marriage Record | \$205.00 | \$35 | \$0.00 | - |
| GC 70614(b) 70602.5 | Limited Response \$10,000 | \$225.00 | \$35 | \$5,056.10 | 144.46 |
| GC 70613(a) 70602.5 | Limited >\$10K <=\$25K | \$370.00 | \$35 | \$21,838.60 | 623.96 |
| GC 70670(c) 70602.5 | Family Law Response | \$395.00 | \$35 | \$0.00 | - |
| Lab. 98.2; cross-ref. GC 70611 70602.5 | Appeal of Labor Commission Decision | \$395.00 | \$35 | \$0.00 | - |
| GC 70651 70602.5 70602.6 | Probate - Opposition to Petition | \$435.00 | \$35 | \$140.00 | 4 |
| GC 70652 70602.5 70602.6 | Probate - Internal Affairs | \$435.00 | \$35 | \$1,084.30 | 30.98 |
| GC 70670(d) 70602.5 70602.6 | Marriage Dissolution Response | \$435.00 | \$35 | \$1,718.76 | 49.107 |
| GC 70650(b) (c) 70602.5 70602.6 | Probate Petitions or Objections | \$435.00 | \$35 | \$2,517.20 | 71.92 |
| GC 70655 | First Papers - Other Probate | \$350.00 | \$35 | \$0.00 | - |
| GC 70658 | Subsequent Papers | \$350.00 | \$35 | \$0.00 | - |
| GC 70670(c) | Family Law Response | \$350.00 | \$35 | \$0.00 | - |
| GC 70621(b) | Appeal - Limited Cases | \$200.00 | \$35 | \$0.00 | - |
| GC 70611; GC 70612; GC 70670(a) (c) (d); Lab. 98.2 | Fees associated with rows 26, 27, 72, 74, 75 and 84 prior to SB 1407 amendments (Refer to the "Crosswalk of Related TC-145 Rows" tables to identify the correct row to report fees incurred in other time periods). | \$320.00 | \$35 | \$0.00 | - |
| GC 70613(b); GC 70614(b) | Fees associated with rows 30 and 33 prior to SB 1407 amendments (Refer to the "Crosswalk of Related TC-145 Rows" tables to identify the correct row to report fees incurred in other time periods). | \$180.00 | \$35 | \$0.00 | - |

| | | | | | |
|---|---|----------|------|-------------|----------|
| | Writ petition in a limited civil case (amount over \$10,000) (Refer to the "Crosswalk of Related TC-145 Rows" tables to identify the correct row to report fees incurred in other time periods). | | | | |
| GC 70621(a)(2) | | \$330.00 | \$35 | \$0.00 | - |
| B&P 6322.1(c); cross-ref. GC 70613(b) | Limited \$5,000 | \$181.00 | \$8 | \$4,728.00 | 591 |
| B&P 6322.1(c); cross-ref. GC 70614(b) | Limited Response \$5,000 | \$181.00 | \$8 | \$64.00 | 8 |
| GC 70613(b) | Limited \$10,000 | \$205.00 | \$35 | \$0.00 | - |
| GC 70613(b) CCP 1161.2 | Limited \$10,000 Unlawful Detainer | \$220.00 | \$35 | \$0.00 | - |
| GC 70613(b) 70602.5 | Limited \$10,000 | \$225.00 | \$35 | \$32,665.73 | 933.307 |
| GC 70614(a) 70602.5 | Limited Response >\$10K <=\$25K | \$370.00 | \$35 | \$4,259.88 | 121.711 |
| GC 70670(a) 70602.5 | Family Law First Paper | \$395.00 | \$35 | \$0.00 | - |
| H&S 103470 GC 70602.5 | Petition - Birth, Death, Marriage Record | \$225.00 | \$35 | \$34.30 | 0.98 |
| GC 70652 70602.5 | Probate - Internal Affairs | \$395.00 | \$35 | \$0.00 | - |
| GC 70658 70602.5 | Subsequent Papers | \$395.00 | \$35 | \$0.00 | - |
| GC 70655 70602.5 70602.6 | First Papers - Other Probate | \$435.00 | \$35 | \$5,387.20 | 153.92 |
| GC 70611 70602.5 70602.6 | Unlimited Civil Filing | \$435.00 | \$35 | \$67,058.66 | 1,915.96 |
| GC 70650(b) (c) | Probate Petitions or Objections | \$350.00 | \$35 | \$0.00 | - |
| GC 70651 | Probate - Opposition to Petition | \$350.00 | \$35 | \$0.00 | - |
| GC 70654 | Appointment of Guardians | \$200.00 | \$35 | \$0.00 | - |
| B&P 6322.1(c); cross-ref. GC 70613(b) | Limited \$5,000 | \$176.00 | \$8 | \$0.00 | - |
| GC 70613(b) | Limited \$10,000 | \$200.00 | \$35 | \$0.00 | - |
| GC 70621 | Appeal - Limited Cases | \$100.00 | \$35 | \$0.00 | - |
| GC 70651 | Probate - Opposition to Petition | \$355.00 | \$35 | \$0.00 | - |
| GC 70658 | Subsequent Papers | \$355.00 | \$35 | \$0.00 | - |
| Prob. 7660 | Petition for Summary Probate | \$205.00 | \$35 | \$0.00 | - |
| GC 70614(a) | Limited Response >\$10K <=\$25K | \$330.00 | \$35 | \$0.00 | - |
| GC 70650(b) (c) 70602.5 | Probate Petitions or Objections | \$395.00 | \$35 | \$0.00 | - |
| GC 70670(d) | Marriage Dissolution Response | \$350.00 | \$35 | \$0.00 | - |
| CCP 116.230(b)(3); CCP 116.221 | Small Claims >\$5,000 | \$75.00 | \$2 | \$332.20 | 166.1 |
| GC 70613(a) | Limited >\$10K <=\$25K | \$325.00 | \$35 | \$0.00 | - |
| CCP 116.230(d)(1) | Small Claims Amended <= \$1,500 to <= \$5,000 | \$20.00 | \$2 | \$0.00 | - |
| GC 70613(a) CCP 1161.2 | Fees associated with row 29 prior to SB 1407 amendments (Refer to the "Crosswalk of Related TC-145 Rows" tables to identify the correct row to report fees incurred in other time periods). | \$315.00 | \$35 | \$0.00 | - |
| GC 70650(a) (c) (d); GC 70651; GC 70652; GC 70653; GC 70655 | Fees associated with rows 52, 61, 62, 63, 64 and 66 prior to SB 1407 amendments (Refer to the "Crosswalk of Related TC-145 Rows" tables to identify the correct row to report fees incurred in other time periods). | \$320.00 | \$35 | \$0.00 | - |
| GC 70621(b); H&S 103470; Prob. 7660 | Fees associated with rows 82, 92, 114 and 115 prior to SB 1407 amendments. This fee for GC 70621(b) was in effect only between January 1, 2008 and December 31, 2008 (Refer to the "Crosswalk of Related TC-145 Rows" tables to identify the correct row to report fees incurred in other time periods). | \$180.00 | \$35 | \$0.00 | - |
| GC 70621(a) | Fees associated with rows 112 and 113 prior to SB 1407 amendments (Refer to the "Crosswalk of Related TC-145 Rows" tables to identify the correct row to report fees incurred in other time periods). | \$300.00 | \$35 | \$0.00 | - |
| GC 70670(a) | Family Law First Paper | \$355.00 | \$35 | \$0.00 | - |
| GC 70670(b) | Marriage Dissolution - First Paper | \$355.00 | \$35 | \$0.00 | - |
| GC 70612 | Unlimited Civil Filing Response | \$355.00 | \$35 | \$0.00 | - |
| GC 70650(a) | First petition for letters of administration or letters testamentary, or the first petition for special letters of administration with the powers of a general personal representative pursuant to Section 8545 of the Probate Code (Refer to the "Crosswalk of Related TC-145 Rows" tables to identify the correct row to report fees incurred in other time periods). | \$355.00 | \$35 | \$0.00 | - |
| GC 70650(a) 70602.5 | First petition for letters of administration or letters testamentary, or the first petition for special letters of administration with the powers of a general personal representative pursuant to Section 8545 of the Probate Code (Refer to the "Crosswalk of Related TC-145 Rows" tables to identify the correct row to report fees incurred in other time periods). | \$395.00 | \$35 | \$0.00 | - |
| GC 70621(a)(1) 70602.5 | Appeal - Limited Cases | \$370.00 | \$35 | \$0.00 | - |
| GC 70621(b) 70602.5 | Appeal - Limited Cases | \$225.00 | \$35 | \$35.00 | 1 |
| GC 70621(b) 70602.5 | Writ petition in a limited civil case (amount up to \$10,000) (Refer to the "Crosswalk of Related TC-145 Rows" tables to identify the correct row to report fees incurred in other time periods). | \$225.00 | \$35 | \$0.00 | - |
| GC 70653 70602.5 | Appointment of Conservator | \$395.00 | \$35 | \$0.00 | - |
| GC 70654 70602.5 | Appointment of Guardians | \$225.00 | \$35 | \$349.30 | 9.98 |
| GC 70655 70602.5 | First Papers - Other Probate | \$395.00 | \$35 | \$0.00 | - |
| GC 70650(a) | First petition for letters of administration or letters testamentary, or the first petition for special letters of administration with the powers of a general personal representative pursuant to Section 8545 of the Probate Code (Refer to the "Crosswalk of Related TC-145 Rows" tables to identify the correct row to report fees incurred in other time periods). | \$350.00 | \$35 | \$0.00 | - |
| GC 70652 | Probate - Internal Affairs | \$350.00 | \$35 | \$0.00 | - |
| CCP 116.760 | Appeal - Small Claims Court | \$75.00 | \$35 | \$450.10 | 12.86 |
| GC 70650(b) (c) | Probate Petitions or Objections | \$355.00 | \$35 | \$0.00 | - |
| GC 70655 | First Papers - Other Probate | \$355.00 | \$35 | \$0.00 | - |

| | | | | | |
|---------------------------------------|---|----------|------|---------------------|-----------------|
| GC 70656 | Petition Set Aside Estate | \$205.00 | \$35 | \$0.00 | - |
| GC 70670(d) | Marriage Dissolution Response | \$355.00 | \$35 | \$0.00 | - |
| Lab. 98.2; cross-ref. GC 70611 | Appeal of Labor Commission Decision | \$355.00 | \$35 | \$0.00 | - |
| GC 70613(a) | Limited >\$10K <=\$25K | \$330.00 | \$35 | \$0.00 | - |
| GC 70614(b) | Limited Response \$10,000 | \$205.00 | \$35 | \$0.00 | - |
| GC 70621(a)(2) 70602.5 | Writ petition in a limited civil case (amount over \$10,000) (Refer to the "Crosswalk of Related TC-145 Rows" tables to identify the correct row to report fees incurred in other time periods). | \$370.00 | \$35 | \$0.00 | - |
| GC 70670(b) | Marriage Dissolution - First Paper | \$350.00 | \$35 | \$0.00 | - |
| B&P 6322.1(c); cross-ref. GC 70614(b) | Limited Response \$5,000 | \$176.00 | \$8 | \$0.00 | - |
| GC 70612 | Unlimited Civil Filing Response | \$350.00 | \$35 | \$0.00 | - |
| GC 70614(b) | Limited Response \$10,000 | \$200.00 | \$35 | \$0.00 | - |
| GC 70613(a); GC 70614(a) | Fees associated with rows 28 and 32 prior to SB 1407 amendments (Refer to the "Crosswalk of Related TC-145 Rows" tables to identify the correct row to report fees incurred in other time periods). | \$300.00 | \$35 | \$0.00 | - |
| GC 70621(b) | Writ petition in a limited civil case (amount up to \$10,000) (Refer to the "Crosswalk of Related TC-145 Rows" tables to identify the correct row to report fees incurred in other time periods). | \$205.00 | \$35 | \$0.00 | - |
| GC 70670(c) | Family Law Response | \$355.00 | \$35 | \$0.00 | - |
| GC 70612 70602.5 | Unlimited Civil Filing Response | \$395.00 | \$35 | \$0.00 | - |
| GC 70613(a) 70602.5 CCP 1161.2 | Limited >\$10K <=\$25K Unlawful Detainer | \$385.00 | \$35 | \$8,329.30 | 237.98 |
| GC 70670(b) 70602.5 | Marriage Dissolution - First Paper | \$395.00 | \$35 | \$0.00 | - |
| GC 70670(d) 70602.5 | Marriage Dissolution Response | \$395.00 | \$35 | \$0.00 | - |
| GC 70651 70602.5 | Probate - Opposition to Petition | \$395.00 | \$35 | \$0.00 | - |
| GC 70656 70602.5 | Petition Set Aside Estate | \$225.00 | \$35 | \$0.00 | - |
| GC 70653 70602.5 70602.6 | Appointment of Conservator | \$435.00 | \$35 | \$665.00 | 19 |
| GC 70670(b) 70602.5 70602.6 | Marriage Dissolution - First Paper | \$435.00 | \$35 | \$18,195.70 | 519.877 |
| GC 70670(c) 70602.5 70602.6 | Family Law Response | \$435.00 | \$35 | \$2,339.44 | 66.841 |
| GC 70612 70602.5 70602.6 | Unlimited Civil Filing Response | \$435.00 | \$35 | \$66,666.60 | 1,904.76 |
| of Orange Total | | | | \$279,750.06 | 8,613.42 |

Submitted Warrant Lists Summary
February 2024

| | | | |
|-----------|--------------------------------------|-------------|---|
| 2/6/2024 | U.S. Bank | \$827.45 | Purchasing card payment |
| 2/7/2024 | Sharp Electronics Corp. | \$72.86 | Photocopier maintenance |
| | Wolters Kluwer Legal & Regulatory US | \$825.17 | One update |
| | Practising Law Institute | \$1,104.55 | Four updates |
| | Regents of UC-CEB | \$386.45 | One update |
| 2/14/2024 | Thomson Reuters-West | \$5,705.55 | Monthly Westlaw access |
| | American Association for Justice | \$195.00 | Annual renewal |
| | Matthew Bender & Co. | \$9,234.22 | LexisNexis Digital Library |
| | Matthew Bender & Co. | \$4,862.58 | Five updates |
| | Matthew Bender & Co. | \$68.50 | Two titles |
| | William S. Hein & Co. | \$1,850.82 | Two titles and three updates |
| | CA Workers Compensation Reporter | \$475.00 | Annual renewal |
| | Daily Journal Corp. | \$326.00 | Annual renewal |
| | The Alpha & Omega Group Security | \$3,979.47 | Security guard service |
| | American Warehouse GOL LLC | \$203.21 | Office supplies |
| 2/21/2024 | Sharp Electronics Corp. | \$55.56 | Photocopier maintenance |
| | Practising Law Institute | \$1,005.39 | Four updates |
| | William S. Hein & Co. | \$361.44 | Two titles |
| | Regents of UC-CEB | \$745.10 | Two updates |
| | Fastcase, Inc. | \$2,100.00 | Annual renewal remote access |
| 2/27/2024 | Dell Marketing L.P. | \$15,797.21 | Network hardware and supporting equipment |
| 2/28/2024 | Thomson Reuters-West | \$14,908.02 | Monthly library plan payment |
| | Regents of UC-CEB | \$1,110.92 | Three updates |

**ORANGE COUNTY PUBLIC LAW LIBRARY
CAL CARD**

Month of January 2024 - February 2024

P-CARD LOG

| Card Holder | Date of Purchase | Vendor's Name | Description of Merchandise | Amount Billed |
|-----------------|------------------|---------------|----------------------------------|---------------|
| Brendan Starkey | | No Activity | | |
| Kelsey Chrisley | 1/26/24 | Amazon.com | Computer Monitor Screens | \$ 513.40 |
| | 1/28/24 | Amazon.com | Office Supplies | \$ 61.61 |
| | 2/1/24 | ILRC.org | Replacement Materials | \$ 770.93 |
| | 2/3/24 | Ralphs | Office Supplies | \$ 4.12 |
| | 2/21/24 | Pitney Bowes | Postage Refill for Postage Meter | \$ 103.50 |
| Scott Enke | | No Activity | | |
| | | | Total | \$ 1,453.56 |

TRAVEL CARD LOG

| Card Holder | Date of Purchase | Vendor's Name | Description of Merchandise | Amount Billed |
|-----------------|------------------|------------------------|----------------------------|---------------|
| Brendan Starkey | 2/9/24 | Chapter One Restaurant | New Hire Lunch Meeting | \$ 94.55 |
| | 2/21/24 | Corner Bakery | Board Meeting Lunch Order | \$ 130.00 |
| Kelsey Chrisley | | No Activity | | |
| Scott Enke | | No Activity | | |
| | | | Total | \$ 224.55 |

Building & Security Event Log

| Date | Time | Event | Response |
|------------|-----------|---|--|
| 03/04/2024 | 6:20 a.m. | Staff removed 2 gallons of water from the Floor A water collection barrel. | The source of the water identified as a leaking pipe from the Civic Center Central Utility Facility. Repairs at the CUF are ongoing. |
| 03/07/2024 | 6:35 a.m. | Staff removed 1.5 quarts of water from the Floor A water collection barrel. | |
| 03/02/2024 | 6:45 a.m. | Staff noticed leak on east side of Floor A. | Water contained with no damage to library materials. |



Orange County Public Law Library

515 North Flower Street
Santa Ana, CA 92703-2354
(714) 338-6790
www.ocpll.org

Brendan E. Starkey
Director

Hon. Robert A. Knox, President
Hon. Michele Bell
Hon. William Claster
Sherry L. Leysen, Esq.
Hon. Elizabeth G. Macias
Hon. Glenn R. Salter
Sup. Vicente F. Sarmiento

RECENT ACQUISITIONS

Antitrust law -- United States.

GEN4: KF3116 .A58 2024

[Antitrust issues in intellectual property law](#). Second edition. Shaun M. Van Horn, editor-in-chief. Chicago, Illinois: American Bar Association, Intellectual Property Law Section 2024.

Capitol Riot, Washington, D.C., 2021.

GEN3: KF32.3 .F56 2022

[Final report of the Select Committee to Investigate the January 6th Attack on the United States Capitol](#). Washington: U.S. Government Publishing Office, 2022.

COVID-19 Pandemic, 2020- -- United States.

GEN3: KF32 .O94 2022

[Preparing for and preventing the next public health emergency: lessons learned from the Coronavirus crisis: final report](#). Washington, D.C.: Select Subcommittee on the Coronavirus Crisis, 2022.

Disclosure of information -- Law and legislation -- United States.

GEN4: KF1449.A15 M37

[Master the 8-K](#). 4th edition (2024). Gary M. Brown. New York City: Practising Law Institute, 2017-

Electronic funds transfers -- Law and legislation -- United States -- States.

GEN4: KF1030.E4 B39 2024

[The ABCs of the UCC](#). Fourth edition. Thomas C. Baxter, Jr., Greg Cavanagh, Jess Cheng, Laura J. Forman and Stephanie A. Heller. Chicago, Illinois: American Bar Association, Business Law Section, 2024.

Income tax -- Law and legislation -- United States -- Periodicals.

DESK: KF6369 .A425

[Your federal income tax for individuals](#). 2023 edition. Washington, D.C.: Treasury Dept., Bureau of Internal Revenue, 1952-

MARCH 2024

Jury instructions -- United States.

GEN4: KF8984 .D42

[Federal jury practice and instructions. Civil companion handbook](#). 2023-24. St. Paul, MN: Thomson/West, 2008-

Landlord and tenant -- United States -- Popular works.

GEN4: KF590.Z9 P673 2024

[Renters' rights](#). 11th edition. Ann O'Connell and Janet Portman. El Segundo, CA: Nolo, 2024.

GEN4: KF6324 .D345 2024

[Stand up to the IRS](#). Fifteenth edition. Frederick W. Daily and Stephen Fishman. El Segundo, CA: Nolo, 2024.

Legislators -- United States -- History.

GENA: JK1161 .K64 2022

[Scenes: people, places, and events that shaped the United States Senate](#). Betty K. Koed; prepared under the direction of Sonceria Ann Berry. Washington, D.C.: U.S. Government Publishing Office, 2022.

Proxy statements -- Law and legislation -- United States.

GEN4: KF1449 .B765 2024

[Master the proxy statement](#). 3rd edition (2024). Gary M. Brown. New York City: Practising Law Institute, 2021-

Subpoena -- California -- Periodicals.

GEN3: KFC1040.5 .S56

[California subpoena handbook](#). 2023-24 edition. John M. Sink. St. Paul, MN: West Group, 1999-

Tax protests and appeals -- United States -- Popular works.

REFSH: KF6324 .D345 2024

[Stand up to the IRS](#). Fifteenth edition. Frederick W. Daily and Stephen Fishman. El Segundo, California: Nolo, 2024.

Workers' compensation -- Law and legislation -- California -- Handbooks, manuals, etc.

GEN3: KFC592 .L39

[The lawyer's guide to the AMA guides and California worker's compensation](#). 2024 edition. San Francisco, CA: Matthew Bender, 200u-.

Women lawyers -- United States -- Biography.

GEN4: KF299.W6 H475 2024

[Her story: the resilient woman lawyer's guide to conquering obstacles](#). Teresa M. Beck, Alicia M. Menendez, and Shayna M. Steinfeld, editors. Chicago, Illinois: American Bar Association, Litigation Section, 2024.

MARCH 2024