

SAN MATEO COUNTY LAW LIBRARY
710 Hamilton Street
Redwood City, CA 94063
650-363-4913
www.smclawlibrary.org

December 1, 2017

BOARD OF LAW LIBRARY TRUSTEES MEETING
CONFERENCE ROOM, SAN MATEO COUNTY LAW LIBRARY
710 HAMILTON STREET, REDWOOD CITY, CALIFORNIA 94063

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Members of the public may be heard on any item on the Agenda. Persons addressing the Board will be limited to five minutes unless the President of the Board grants a longer period of time. The Board will only allow comments by members of the public on an item on the agenda during discussion of the item.

THURSDAY, DECEMBER 7, 2017, 12:15 P.M.

AGENDA

1. CLOSED SESSION

- a. The Board will meet in closed session to discuss staffing issues. At the conclusion of the closed session the Board will report on any action taken for which a report is required by law.

2. REGULAR SESSION

- a. Approval of Minutes of the September 28, 2017 meeting. (page 1)
- b. Acceptance of Report of Expenses for Period 3 (September) and Period 4 (October) of FY 2017-2018. (pages 2-10)
- c. Discussion/Informational Updates and Policy Decisions:
 - 2018 meeting dates
 - Annual Report (pages 11-18)
 - State-wide Superior Court Filings 2011-2017 (page 19)
 - Law Library Foundation update (pages 20-23)
 - Transition to Koha Integrated Library System
 - Vacant Board of Trustee position (pages 24-36)
 - Silicon Valley Community Foundation Law Library Fund Quarter 1 Report (pages 37-39)

- d. Report of the San Mateo County Bar Association
 - e. Public open comment.
3. ADJOURNMENT

NEXT MEETING: JANUARY 25, 2018

Mark Your Calendar!

2018 San Mateo County Law Library Board of Trustees Meeting Schedule:

- February 22, 2018
- March 22, 2018
- April, 26, 2018
- May 24, 2018
- June 28, 2018
- August 23, 2018
- September 27, 2018
- October 25, 2018
- December 6, 2018

SAN MATEO COUNTY LAW LIBRARY
MINUTES OF THE MEETING OF THE BOARD OF LAW LIBRARY TRUSTEES

Date: September 28, 2017

Meeting Location: San Mateo County Law Library
710 Hamilton St., Redwood City, CA 93063

Members attending:	President Trustee:	STEVE SHAIMAN
	Trustee:	JOSEPH SCOTT
	Trustee:	V. RAYMOND SWOPE
	Trustee:	JACQUELYN BROWN
	Trustee:	CAROLE GROOM
	Secretary-Librarian, Ex-officio:	ANDREW GURTHET
		CAROLINE BRACCO

The meeting convened at 12:15 pm in Regular Session, joined by Martin Fox, Esq.

Approval of minutes for August 24 meeting. Motion to approve by Trustee Swope, second by Trustee Shaiman. Unanimous approval. Minutes moved into record.

Discussion of report of expenses for period 2 (August) of FY 2017-2018. Motion to approve by Trustee Shaiman, seconded by Trustee Groom. Unanimous approval and expense report moved into record.

Discussion and information updates: The library has changed its method of check-in for gathering statistics. Going forward it will do regular weekly snapshot statistic gathering to obtain a more accurate count of library usage. The Board next discussed potential candidates for the currently vacant Trustee position. Caroline reported on her recent attendance at the Fall CCCLL Conference. Next, the Board discussed and approved by unanimous motion to use \$3,000 from the Law Library's Silicon Valley Community Foundation fund for Koha data records migration project. Finally, Trustee Groom announced that \$100,000 from Measure K funds had been approved by the County Board of Supervisor to support the Law Library.

There was no report from the Bar Association.

Martin Fox made public comment regarding County funds for the Law Library.

Trustee Swope motioned to adjourn. Trustee Shaiman seconded. Unanimous decision to adjourn. Meeting adjourned at 1:05pm

Respectfully submitted,
Caroline Bracco
Secretary-Librarian, Ex-officio

Filing Fee Income

Filing Fees	\$41,784.06
TOTAL:	\$41,784.06

Library Generated Income

Copy Machines	\$303.65
Computer Printer	\$48.75
Conference Room	\$122.00
Overdue Fines	\$2.00
CEB Audio Check Out Fee	\$5.00
MCLE Class Charge	\$0.00
Reserve Book Fee	\$20.00
Used Book Sales	\$14.00
Lost Book Payment	\$0.00
Donations	\$0.00
Extra Computer Time	\$15.00
Vendor Credits/Refunds	\$0.00
SVCF Withdraws	\$0.00
Grants	\$0.00
Other	\$10.00
TOTAL:	\$540.40

Trial Balance Reported Income

Interest	\$0.00
Lehman Bad Debt Recovery	\$0.00
Credits/Refunds	\$0.00
Other	\$0.00
TOTAL:	\$0.00

MONTHLY TOTAL INCOME: \$42,324.46

Voucher #	Vender	Amount
11262	CalPERS (100000015009250)	\$984.43
11263	CalPERS (100000015053744)	\$1,375.72
11264	CalPERS (100000015045091)	\$350.00
11265	Blue, Shannon	\$800.00
11266	ByWater Solutions	\$7,300.00
11267	California Courts Association	\$278.00
11268	California Security	\$26.25
11269	James Publishing Corp.	\$672.18
11270	Lexis (Advance)	\$3,477.00
11271	Lexis (Matthew Bender)	\$1,872.03
11272	Treat, Richard	\$1,000.00
11273	UBS	\$617.00
11274	UC Regents (CEB)	\$1,226.21
11275	Veterans Information Services	\$60.00
11276	West Group (Thomson Reuters)	\$3,004.35
11277	West Group (Westlaw Next)	\$5,213.72
11278	Xerox	\$419.17
11279	Blake, Larry	\$57.00
11280	Bracco, Caroline	\$7,845.60
11281	Conventiti, Antonella	\$3,480.00
11282	Gurthet, Andrew	\$11,308.80
11283	Webster, Maria	\$0.00
11284	Medicare	\$321.23
11285	Active Employee Benefits	\$3,173.32
11286	Retired Employee Benefits	\$1,942.94
11287	County Charges	\$0.00

Total: \$56,804.95

Income for July, Period 3: \$42,324.46

Difference: -\$14,480.49

EXPENSES Period 3, September	September		Actual Fiscal YTD	Budgeted Fiscal YTD	Annual Budget 2017-2018
	September	September			
SALARIES					
Full time	\$19,154.40		\$44,238.40	\$41,000.00	\$164,000.00
Part time	\$3,537.00		\$7,001.00	\$8,250.00	\$33,000.00
Medicare	\$321.23		\$719.58	\$700.00	\$2,800.00
		\$23,012.63		\$51,958.98	\$199,800.00
BENEFITS					
Retirement	\$984.43		\$3,735.87	\$6,400.00	\$25,600.00
Unfunded Accrued Liability	\$1,375.72		\$2,436.87	\$4,125.00	\$16,500.00
Active Employee Benefits	\$3,173.32		\$9,519.96	\$10,000.00	\$40,000.00
Retired Employee Benefits	\$1,942.94		\$5,828.82	\$6,250.00	\$25,000.00
		\$7,476.41		\$21,521.52	\$107,100.00
PRINT/ELECTRONIC RESOURCES					
New Books	\$0.00		\$0.00	\$0.00	\$0.00
Print Resources	\$6,958.01		\$23,095.18	\$23,875.00	\$95,500.00
Electronic Resources	\$8,845.48		\$25,730.38	\$28,375.00	\$113,500.00
		\$15,803.49		\$48,825.56	\$209,000.00
OPERATIONAL EXPENSES					
Binding	\$0.00		\$0.00	\$0.00	\$0.00
Insurance (Property, Casualty, WC)	\$0.00		\$4,408.00	\$1,500.00	\$6,000.00
Copy Machines	\$419.17		\$1,249.70	\$1,275.00	\$5,100.00
Capital Improvements	\$0.00		\$0.00	\$0.00	\$0.00
Office Supplies	\$0.00		\$157.32	\$375.00	\$1,500.00
Use Tax	\$0.00		\$0.00	\$0.00	\$0.00
Tech Support	\$1,000.00		\$3,000.00	\$3,000.00	\$12,000.00
Support Software	\$7,300.00		\$7,520.00	\$2,500.00	\$10,000.00
Building Maintenance	\$643.25		\$1,486.26	\$2,300.00	\$9,200.00
CitiBank Transfers	\$0.00		\$0.00	\$750.00	\$3,000.00
Services	\$1,150.00		\$2,750.00	\$2,325.00	\$9,300.00
Educational/Professional	\$0.00		\$0.00	\$112.50	\$450.00
Dues	\$0.00		\$0.00	\$187.50	\$750.00
Travel Expenses	\$0.00		\$0.00	\$550.00	\$2,200.00
Promotional	\$0.00		\$0.00	\$50.00	\$200.00
Miscellaneous	\$0.00		\$0.00	\$125.00	\$500.00
		\$10,512.42		\$20,571.28	\$60,200.00
TOTALS		\$56,804.95		\$142,877.34	\$576,100.00

CASH ON HAND REPORT

FY 2016-2017

PERIOD	TOTAL INCOME	TOTAL EXPENSES	CASH ON HAND
July	\$45,166.47	\$16,286.98	\$201,871.50
August	\$48,827.55	\$69,785.41	\$180,913.64
September	\$42,324.46	\$56,804.95	\$166,433.15
October			
November			
December			
January			
February			
March			
April			
May			
June			
July Interest			
TOTALS	\$136,318.48	\$142,877.34	
Average/Month	\$45,439.49	\$47,625.78	
Difference/Month	\$2,186.29		

Filing Fee Income

Filing Fees	\$49,298.29
TOTAL:	\$49,298.29

Library Generated Income

Copy Machines	\$434.85
Computer Printer	\$111.50
Conference Room	\$225.00
Overdue Fines	\$0.00
CEB Audio Check Out Fee	\$4.00
MCLE Class Charge	\$0.00
Reserve Book Fee	\$60.00
Used Book Sales	\$113.00
Lost Book Payment	\$0.00
Donations	\$0.00
Extra Computer Time	\$10.00
Vendor Credits/Refunds	\$0.00
SVCF Withdraws	\$7,300.00
Grants	\$0.00
Other	\$43.00
TOTAL:	\$8,301.35

Trial Balance Reported Income

Interest	\$601.20
Lehman Bad Debt Recovery	\$0.00
Credits/Refunds	\$0.00
Other	\$0.00
TOTAL:	\$601.20

MONTHLY TOTAL INCOME: \$58,200.84

Voucher #	Vender	Amount
11288	CalPERS (100000015040451)	\$984.43
11289	CalPERS (100000015040466)	\$984.43
11290	CalPERS (100000015079112)	\$1,375.72
11291	Blue, Shannon	\$800.00
11292	California Security	\$26.25
11293	Courtroom Compendiums	\$170.00
11294	Lexis (Advance)	\$3,650.00
11295	Lexis (Matthew Bender)	\$1,872.03
11296	OCLC	\$236.80
11297	Office Depot	\$238.12
11298	Office Depot	\$18.82
11299	Office Depot	\$4.77
11300	Treat, Richard	\$1,000.00
11301	UBS	\$617.00
11302	UC Regents (CEB)	\$2,508.77
11303	West Group (Thomson Reuters)	\$2,721.67
11304	West Group (Westlaw Next)	\$5,213.72
11305	Xerox	\$418.70
11306	Blake, Larry	\$57.00
11307	Bracco, Caroline	\$5,230.40
11308	Conventiti, Antonella	\$2,400.00
11309	Gurthet, Andrew	\$7,539.20
11310	Webster, Maria	\$0.00
11311	Medicare	\$212.99
11312	Active Employee Benefits	\$3,173.32
11313	Retired Employee Benefits	\$1,942.94
11314	County Charges	\$0.00

Total: \$43,397.08

Income for July, Period 4: \$58,200.84

Difference: \$14,803.76

EXPENSES Period 4, October	October		Actual Fiscal YTD		Budgeted Fiscal YTD		Annual Budget 2017-2018	
SALARIES								
Full time	\$12,769.60		\$57,008.00		\$54,666.67		\$164,000.00	
Part time	\$2,457.00		\$9,458.00		\$11,000.00		\$33,000.00	
Medicare	\$212.99		\$932.57		\$933.33		\$2,800.00	
		\$15,439.59		\$67,398.57		\$66,600.00		\$199,800.00
BENEFITS								
Retirement	\$1,968.86		\$5,704.73		\$8,533.33		\$25,600.00	
Unfunded Accrued Liability	\$1,375.72		\$3,812.59		\$5,500.00		\$16,500.00	
Active Employee Benefits	\$3,173.32		\$12,693.28		\$13,333.33		\$40,000.00	
Retired Employee Benefits	\$1,942.94		\$7,771.76		\$8,333.33		\$25,000.00	
		\$8,460.84		\$29,982.36		\$35,700.00		\$107,100.00
PRINT/ELECTRONIC RESOURCES								
New Books	\$0.00		\$0.00		\$0.00		\$0.00	
Print Resources	\$7,272.47		\$30,367.65		\$31,833.33		\$95,500.00	
Electronic Resources	\$8,863.72		\$34,594.10		\$37,833.33		\$113,500.00	
		\$16,136.19		\$64,961.75		\$69,666.67		\$209,000.00
OPERATIONAL EXPENSES								
Binding	\$0.00		\$0.00		\$0.00		\$0.00	
Insurance (Property, Casualty, WC)	\$0.00		\$4,408.00		\$2,000.00		\$6,000.00	
Copy Machines	\$418.70		\$1,668.40		\$1,700.00		\$5,100.00	
Capital Improvements	\$0.00		\$0.00		\$0.00		\$0.00	
Office Supplies	\$261.71		\$419.03		\$500.00		\$1,500.00	
Use Tax	\$0.00		\$0.00		\$0.00		\$0.00	
Tech Support	\$1,000.00		\$4,000.00		\$4,000.00		\$12,000.00	
Support Software	\$236.80		\$7,756.80		\$3,333.33		\$10,000.00	
Building Maintenance	\$643.25		\$2,129.51		\$3,066.67		\$9,200.00	
CitiBank Transfers	\$0.00		\$0.00		\$1,000.00		\$3,000.00	
Services	\$800.00		\$3,550.00		\$3,100.00		\$9,300.00	
Educational/Professional	\$0.00		\$0.00		\$150.00		\$450.00	
Dues	\$0.00		\$0.00		\$250.00		\$750.00	
Travel Expenses	\$0.00		\$0.00		\$733.33		\$2,200.00	
Promotional	\$0.00		\$0.00		\$66.67		\$200.00	
Miscellaneous	\$0.00		\$0.00		\$166.67		\$500.00	
		\$3,360.46		\$23,931.74		\$20,066.67		\$60,200.00
TOTALS		\$43,397.08		\$186,274.42		\$192,033.33		\$576,100.00

CASH ON HAND REPORT

FY 2016-2017

PERIOD	TOTAL INCOME	TOTAL EXPENSES	CASH ON HAND
July	\$45,166.47	\$16,286.98	\$201,871.50
August	\$48,827.55	\$69,785.41	\$180,913.64
September	\$42,324.46	\$56,804.95	\$166,433.15
October	\$58,200.84	\$43,397.08	\$181,236.91
November			
December			
January			
February			
March			
April			
May			
June			
July Interest			
TOTALS	\$194,519.32	\$186,274.42	
Average/Month	\$48,629.83	\$46,568.61	
Difference/Month	-\$2,061.23		

Law Library CitiBank Account Expenditures/Deposits FY17-18

Transaction Type	Date	Amount	Comments
Beginning FY17-18 balance	7/1/17	\$6,107.29	
Service Charge	7/10/17	-\$24.19	
Withdraw (credit card payment to Earthlink)	7/17/17	-\$19.95	Monthly website hosting charge
Withdraw (credit card payment to Amazon)	7/25/17	-\$13.97	Purchase of 'How to Change Your Name in California'
Withdraw (credit card payment to AT&T)	8/2/17	-\$65.00	Monthly telephone/internet charge
Withdraw (Check 127 to CalPERS)	8/2/17	-\$1.24	Payment of late fee
Withdraw (Check 128 to CalPERS)	8/2/17	-\$0.01	Payment of late fee
Service Charge	8/8/17	-\$22.16	
Withdraw (Check 129 to CalPERS)	8/7/17	-\$1.80	Payment of late fee
Check 130 voided			
Withdraw (Check 131 to ALM)	8/7/17	-\$177.41	Purchase of index to Jury Verdict Searches
Withdraw (Check 132 to Caroline Bracco)	8/7/17	-\$641.01	Reimbursement for AALL Conference costs
Withdraw (Check 133 to CCCLL)	8/7/17	-\$100.00	CCCLL Fall Conference registration
Withdraw (credit card payment to Earthlink)	8/17/17	-\$31.95	Monthly website hosting charge
Withdraw (credit card payment to Gracie's)	8/24/17	-\$94.20	Board lunch
Withdraw (credit card payment to Safeway)	8/24/17	-\$26.88	Board lunch
Withdraw (Check 134 to Cavanaugh/Habel Insurance)	9/1/17	-\$81.00	WC audit premium
Withdraw (credit card payment to AT&T)	9/5/17	-\$65.00	Monthly telephone/internet charge
Withdraw (Check 135 to CalPERS)	9/5/17	-\$1.80	Payment of late fee
Withdraw (credit card payment to Coconut's Fish Café)	9/12/17	-\$12.44	CCCLL Spring Conference meal
Withdraw (credit card payment to Earthlink)	9/17/17	-\$19.95	Monthly website hosting charge
Withdraw (credit card payment to Lawdable Press)	9/21/17	-\$85.80	Purchase of Litigation By The Numbers
Withdraw (credit card payment to Safeway)	9/28/17	-\$22.55	Board lunch
Withdraw (credit card payment to AT&T)	10/5/17	-\$65.00	Monthly telephone/internet charge
Withdraw (Check 136 to Caroline Bracco)	10/5/17	-\$360.79	CCCLL Spring Conference lodging/meals/mileage
Service Charge	9/8/17	-\$23.41	
Withdraw (Check 137 to CalPERS)	10/17/17	-\$0.01	Payment of late fee / 100000014951557
Withdraw (Check 138 to CalPERS)	10/17/17	-\$10.81	Payment of late fee / 100000015022882
Withdraw (Check 139 to SydneyPLUS)	10/18/17	-\$2,400.00	Payment for catalog record export
Withdraw (credit card payment to Earthlink)	10/17/17	-\$19.95	Monthly website hosting charge
Withdraw (credit card payment to AT&T)	11/2/17	-\$65.00	Monthly telephone/internet charge
Deposit	11/2/17	\$2,400.00	
Withdraw (Check 141 to Andrew Gurthet)	11/7/17	-\$32.71	Zipcar to SMBCA Community Law Night
Service Charge	10/11/17	-\$22.73	
Withdraw (credit card payment to Earthlink)	11/17/17	-\$19.95	Monthly website hosting charge

Total \$ 3978.62



ANNUAL REPORT
(California Business & Professions Code Section 6349)

SAN MATEO COUNTY LAW LIBRARY
BOARD OF LAW LIBRARY TRUSTEES

FISCAL YEAR
JULY 1, 2016 TO JUNE 30, 2017

Andrew Gurthet, Director
San Mateo County Law Library
710 Hamilton Street
Redwood City, California 94063
650-363-4913
www.smclawlibrary.org

MISSION

IT IS THE MISSION OF THE SAN MATEO COUNTY LAW LIBRARY TO ASSIST EVERY MEMBER OF THE SAN MATEO COUNTY COMMUNITY, WHETHER ATTORNEYS OR THE GENERAL PUBLIC, IN THEIR EFFORTS TO EFFECTIVELY USE THE LEGAL SYSTEM, FREE OF CHARGE.

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ABOUT THE SAN MATEO COUNTY LAW LIBRARY

The San Mateo County Law Library is one of 58 county law libraries in the State of California. The Law Library is open to all members of the public, free of charge, and is funded per the California Business and Professions Code almost exclusively from civil court filing fees. Specifically, the San Mateo County Law Library receives \$38.50 for each civil complaint or answer litigants files in the San Mateo County Superior Court, unless it is a Small Claims complaint or answer, of which the San Mateo County Law Library receives \$3.00

EXECUTIVE SUMMARY FOR FISCAL YEAR 2016-2017

The San Mateo County Law Library was established in 1916 with the help of the San Mateo County Bar Association. At the time, the Law Library consisted of a small room containing a few hundred law books in the original County Courthouse on Broadway Street in downtown Redwood City. There was no librarian and the room was locked; each member of the County Bar Association was given a key for access.

Since that time, the Law Library has grown considerably! The highlights for this fiscal year include:

- The San Mateo County Law Library's Foundation held two successful fundraising events, one in October 2016 and one in May 2017. Additionally, Foundation members attended and advocated before many of the local bar events, including those events of the Family Law Section, the Barristers, and the Estate Planning/Probate Section. These efforts by the Foundation raised sufficient funds for the Law Library to restore its Immigration Law materials (cut in 2015) as well as hire a part-time grant writer to assist the Law Library in applying for potential grants in FY17-18.
- The Law Library continued to participate in the Council of California County Law Library's efforts to lobby state officials for a one time budget appropriation to support local county law libraries, including the San Mateo County Law Library. Unfortunately, an appropriation for county law libraries was not included in the State's 2017 final budget.

BOARD OF TRUSTEES

Steven Schaiman, Esq., President

The Honorable Robert Foiles, San Mateo County Superior Court

The Honorable Joseph C. Scott, San Mateo County Superior Court

The Honorable V. Raymond Swope, San Mateo County Superior Court

The Honorable Carole Groom, San Mateo County Board of Supervisor

Jacquelyn Brown, Esq.

Margaret Copenhagen, Esq.

LIBRARY USAGE

Visitors

Approximately 10,600 individuals used the services and resources of the San Mateo County Law Library in FY16-17. Of those, 2,800 were local attorneys and legal professionals. This constituted approximately 35% of all library visitors. In contrast, over 7,800 members of the general public visited the Law Library in FY16-17. This constituted approximately 65% of all visitors.

VISITORS, FY16-17	
TYPE OF VISITORS	NUMBER OF VISITORS
Members of the General Public	7,800 (65%)
Attorneys and Legal Professionals	2,800 (35%)
TOTAL VISITORS FY16-17	10,600

Circulation

Patrons used over 4,800 of the Law Library's print materials in Fiscal Year 2016-2017.

CIRCULATION, FY16-17	
TYPE OF MATERIAL	NUMBER OF CHECK-OUTS
Books	93
Audio/Visual Materials	185
Reserve	61
NUMBER OF USES	
In-Library Use	4,524
TOTAL CIRCULATION FY16-17	4,863

Reference

The Law Library's staff answered over 16,200 questions by patrons in Fiscal Year 2016-2017.

Additional Services: Lawyers in the Library Program

After a 13 month hiatus caused by budget issues, the Law Library restarted its participation in the San Mateo County Library's 'Lawyers in the Library' program. As a participant, the Law Library has a lawyer come to the library for several hours (free of charge) to meet with patrons and assist them with their legal issues. This program contributes to the community's well-being by helping San Mateo County residents who cannot afford an attorney and reducing the demand placed upon the courts and bar by unrepresented litigants.

Additional Services: Lecture Series

The Law Library suspended its monthly lecture series in FY16-17 due to lack of staff necessary to sufficiently maintain the lecture series.

LIBRARY COLLECTION

Electronic Materials

The Law Library currently offers patrons free access to many electronic legal subscriptions, such as:

- AccessLaw
 - Allows electronic access to California cases, California Statutes, and US Supreme Court cases
- CEB OnLaw
 - Allows electronic access to all CEB publications
- Dissomaster
 - Electronic divorce settlement calculator
- Lexis Advance
 - Allows electronic access to all California and US primary law as well as many Matthew Bender California secondary sources.
- Martin Dean’s Essential Forms
 - Allows electronic access to basic legal forms
- Westlaw Next
 - Allows electronic access to all California and US primary law as well as many West Group California secondary sources.

Print Materials

The current print collection is unchanged for Fiscal Year 2016-2017. The Law Library has not added any new materials this past fiscal year. Additionally, though the Law Library has not removed any materials from the shelves, many of the subscriptions have been cancelled or not renewed.

FINANCIAL STATEMENT

Financial Overview

CASH IN TREASURY AS OF JUNE 30, 2016		\$223,846.98
FY 2016-2017 INCOME	+	\$526,889.54
FY 2016-2017 EXPENDITURES	-	\$574,142.25
CASH IN TREASURY AS OF JUNE 30, 2017		\$172,469.16

Income

LAW LIBRARY INCOME, FY16-17	
Income Description	Amount
Unlimited Jurisdiction Filing Fee Income	\$343,887.71
Limited Jurisdiction Filing Fee Income	\$167,358.69
Small Claims Filing Fee Income	\$3,020.70
LIBRARY GENERATED INCOME	

Copy Machines	\$4,077.38
Computer Printer	\$854.00
Conference Room Rental	\$1,406.50
Overdue Fines	\$304.00
CEB Audio Check Out Fee	\$496.00
MCLE Course Charge	\$0.00
Reserve Book Check Out Fee	\$570.00
Used Book Sales	\$857.00
Lost Book Payment	\$5.00
Donations	\$124.00
Extra Computer Time	\$115.00
Vendor Credits	\$1,352.00
Grants	\$0.00
Other	\$80.00
OTHER INCOME	
Interest	\$1,431.56
Lehman Bad Debt Recovery	\$0.00
Refunds	\$0.00
Other	\$0.00
TOTAL INCOME FY16-17	\$526,889.54

Expenditure

LAW LIBRARY EXPENDITURES, FY16-17	
SALARIES	
Full Time	\$183,929.33
Part Time	\$12,571.70
Medicare	\$2,710.08
BENEFITS	
Retirement	\$41,050.95
Health Benefits (for active employees)	\$46,616.60
Health Benefits (for retired employees)	\$21,998.04
LIBRARY PRINT AND ELECTRONIC RESOURCES	
New Books	\$147.90
Print Subscriptions	\$90,885.48
Electronic Subscriptions	\$108,208.52
OPERATIONAL EXPENSES	
Binding	\$0.00
Insurances	\$5,277.00
Copy Machine Lease and Upkeep	\$5,077.45
Capital Improvements	\$650.00
Office Supplies	\$1,410.72
Use Tax	\$0.00

Technology Support	\$12,000.00
Support Softwares	\$8,386.13
Building Maintenance	\$9,204.65
Petty Cash	\$3,700.00
General Services	\$15,120.91
Educational & Professional Training	\$3,00.00
Association Dues	\$740.00
Travel Expenses	\$1,279.59
Promotional Materials	\$194.65
Catering Expenses	\$1,105.91
Miscellaneous Expenses	\$1,576.59
TOTAL EXPENDITURES FY 16-17	\$574,142.25

Respectfully submitted,

BOARD OF LAW LIBRARY TRUSTEES OF THE SAN MATEO COUNTY LAW LIBRARY

by _____

Andrew Gurthet, Secretary

STATE OF CALIFORNIA
COUNTY OF SAN MATEO

ANDREW GURTHET, SAYS:

That I am the Secretary of the Board of Law Library Trustees of the San Mateo County Law Library and the Director in charge of the San Mateo County Law Library; that I prepared the foregoing report and know the contents of the report and financial statements; that the report is true to the best of my knowledge except as to those matters which at my request were furnished by the County Controller and the County Treasurer of San Mateo County and over which I have no control. I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Andrew Gurthet
Signed this 6th day of October, 2017

Year	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Superior Courts										
Civil Cases										
Civil Unlimited			220,631	204,178	196,994	199,537	193,190	192,761	201,390	
Civil Limited			720,308	688,434	603,097	554,858	486,597	375,178	352,562	
Small Claims			211,987	192,577	183,957	168,063	155,428	150,382	158,347	
Subtotal:			1,152,926	1,085,189	984,048	922,458	835,215	718,321	712,299	
Criminal Cases										
Felonies			248,340	241,069	243,270	260,461	272,610	214,088	200,200	
Misdemeanors			1,323,154	1,259,257	1,047,594	926,169	915,568	922,730	841,716	
Infractions			6,698,721	6,206,615	5,607,727	5,050,151	4,907,906	4,424,870	3,904,965	
Subtotal:			8,270,215	7,706,941	6,898,591	6,236,781	6,096,084	5,561,688	4,946,881	
Family Law										
Family Law (Marital)			154,534	154,279	160,593	140,180	138,968	138,121	138,520	
Family Law Petitions			298,137	292,648	277,207	248,907	242,518	242,039	249,329	
Subtotal:			452,671	446,927	437,800	389,087	381,486	380,160	387,849	
Juvenile Law										
Juvenile Delinquency			90,303	73,231	62,937	52,732	45,824	40,726	35,287	
Juvenile Dependency			37,084	39,003	39,040	44,882	46,889	44,679	43,674	
Subtotal:			127,387	112,234	101,977	97,614	92,713	85,405	78,961	
Probate and Mental Health										
Probate (estate, guardianship and conservatorship)			42,220	42,453	42,781	41,419	44,298	44,456	47,170	
Mental Health			15,802	17,852	19,643	25,013	27,377	29,718	33,154	
Total			10,061,221	9,411,596	8,484,840	7,712,372	7,477,173	6,819,748	6,206,314	
			See Notes Below:							
Subtotal: Civil, Family Law and Probate			1,435,830	1,381,992	1,280,672	1,184,901	1,105,571	992,555	988,971	
Subtotal: Small Claims			211,987	192,577	183,957	168,063	155,428	150,382	158,347	
Subtotal: Other			8,413,404	7,837,027	7,020,211	6,359,408	6,216,174	5,676,811	5,058,996	
Published Total			10,074,941	9,425,508	8,498,331	7,726,025	7,488,900	6,832,710	6,217,800	

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SAN MATEO COUNTY LAW LIBRARY FOUNDATION POST-HOLIDAY MIXER

GUEST SPEAKER AND GUEST OF HONOR
STEVE WAGSTAFFE
SAN MATEO COUNTY DISTRICT ATTORNEY

COME CHASE THOSE POST HOLIDAY BLUES AWAY!
ENJOY COCKTAILS, REFRESHMENTS, AND HORS-DOEUVRES WITH YOUR FRIENDS AND COLLEAGUES
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5:00PM TO 7:00PM
WEDNESDAY, JANUARY 24, 2018
ROTUNDA OF THE SAN MATEO COUNTY HISTORICAL MUSEUM
2200 BROADWAY, REDWOOD CITY, CALIFORNIA 94063

RSVP TO: ANDREW GURTHET, AGURTHET@SMCLAWLIBRARY.ORG



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Executive Director Elijah Merrin

Health Equity

“I believe that the most important work we can do is to address the health disparities that exist in our country.”

After working in the field for over 20 years, Merrin has seen the impact of health disparities on the lives of many people. He has seen how these disparities can lead to poor health outcomes and even death. He has seen how these disparities can be addressed through community-based programs and professional development.

He has seen how these disparities can be addressed through community-based programs and professional development.

He has seen how these disparities can be addressed through community-based programs and professional development.

He has seen how these disparities can be addressed through community-based programs and professional development.

Elijah Merrin

Executive Director
Health Equity



1000 17th Street, NW
Washington, DC 20036

(202) 777-1177

www.ejbmerrin.com

“I think like an IMMS grant leader, asking for all the questions that a grant might ask. He stays abreast of trends in the field so that he can help gauge a likelihood for funding. Elijah worked with our team and helped us to refine and submit our proposal. He made us follow a process of deliberation so that in every short order we were able to submit a proposal that would stand out from the pack.”

Golden Bailey, Executive Director
National Stembook Center

Work Record

The Sanna Bay Band, Botanical and Saint Lucia Biosphere Reserve, and a number of seven government ministries.

Events on the island of working with 30,000. They had started in 1990 and LYLES, one from the national biodiversity center on the

Two from the US Forest Service.

Two of my LYLES grants were posted to the LYLES website as illustrative examples for other applicants.

Have helped eight nonprofit organizations secure over 2.5 million in grants.



Case Statement Worksheet

Every fundraising campaign begins with a case statement, which literally "makes the case" for why your organization deserves funding. Once the themes of the case statement have been worked out within your group, you can adapt the case language for your fundraising and marketing materials: grant proposals, fundraising letters, brochures, newsletters, press releases, etc.

The components of the case, as outlined below, are adapted from *Fundraising for Social Change* by Kim Klein. Working individually or with other people from your organization, use this worksheet to begin to prepare your case statement.

Organization:

1. **Mission (or purpose).** Why does your group exist? What's the need? In other words, what problem are you trying to solve?
2. **Goals.** What do you hope to accomplish over the long run? In other words, what do you plan to do about why you exist?
3. **Objectives.** List your objectives -- specific, measurable, and time-limited -- that demonstrate how your goals will be met. (The more specific, the better.)
4. **Organizational History.** What have you accomplished so far? What is your competence? What are you most proud of?
5. **Structure of the organization.** Describe board and staff roles. Who's involved? What's their expertise? Why are they the right people to run this effort? How are decisions made?
6. **Fundraising plan.** How much money will you need to meet your goal? Over what period of time? What are the different components of your fundraising plan -- foundation grants, etc...

Potential Trustee

Paul Wilkins

Ariel Rief

Jeff Loew

Jeff Windsor

Walt Sheflo

Jeff Haden

Chuck Finney

Mary Pryce



An Experienced and Proven Litigator

About Paul Wilkins

A Northern California native, Paul received his undergraduate degree from the University of Southern California and earned his law degree at the University of the Pacific. Paul has spent his entire career in the courtroom. He started as a prosecutor at the Los Angeles County District Attorney's Office where he quickly learned the essentials of criminal law and how to effectively try a case before a jury. However, Paul discovered that he had a passion for helping those who had found themselves lost in the legal system and wanted to give them the quality of representation they deserved. He and his wife subsequently moved to San Mateo County, where he joined a criminal defense practice and developed strong connections in the local legal community. He continued to build those relationships and broadened his experience as an associate attorney with a reputable law firm in San Mateo County, where he practiced trust and estate litigation. There he found another area of law that allowed him to use his courtroom skills to effectively advocate for the rights of his clients.

As a former deputy district attorney and civil litigator, Paul has seen cases from all sides of the table. With long-standing relationships among Bay Area prosecutors, attorneys and judges, Paul has successfully negotiated and argued numerous cases to a successful resolution. Many cases are resolved favorably for his clients without going to trial, which is highly preferred. However, if a trial is in his client's best interest, Paul is well versed in jury dynamics and experienced in making convincing cases in court.

Paul has been able to use his experience as a trial attorney to provide exceptional representation to those who need it. He is committed to finding just resolutions for each of his clients so that they can get back to what matters most to them in life.

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"Our American freedom and the stability of our criminal justice system is premised on a fundamental right we all share—the right to a worthy defense. I have a passion for the courtroom and I am proud to use my negotiation and trial advocacy skills to provide my clients a worthy defense. Along with my family, my clients are my top priority."



ARIEL RIEF, ESQ.
(pronounced R-E-L Ryfe)

EXPERIENCE

Former DA on Your Side

Before opening my own law practice in January 2016, I was a criminal prosecutor—a Deputy District Attorney for Amador County (2012-2015) and Santa Barbara County (2011-2012)—where I was in court on a daily basis and successfully litigated hundreds of cases each year, which included a wide range of misdemeanor and felony cases.

EDUCATION

- J.D., University of San Diego School of Law
- B.A., University of California, Los Angeles

ADMISSIONS

- State Bar of California
- United States District Court - Southern District of California

MEMBERSHIPS

- California State Bar (CSB)
- CSB Criminal Law Section
- San Mateo County Bar Association (SMCBA)
- San Mateo County Private Defender Program Member
- SMCBA Criminal Law Section, Co-Chair
- SMCBA Barristers Section, Boardmember
- Palo Alto Area Bar Association
- PAABA Criminal Law Section

CLERKSHIPS

- San Diego County District Attorney's Office
- United States Attorney's Office, Criminal Division, Major Frauds Section (San Diego, CA)
- San Diego City Attorney's Office, Civil Division
- Thorsnes Bartolotta McGuire LLP (San Diego, CA)

LAW SCHOOL HONORS

- "First Place" in three Mock Trial competitions
- "Best Closing Argument" Award
- "Honors" (top grade) in Negotiations
- "Honors" in Lawyering Skills (Legal Research, Writing, and Oral Advocacy)
- "Best [Legal] Brief" Award

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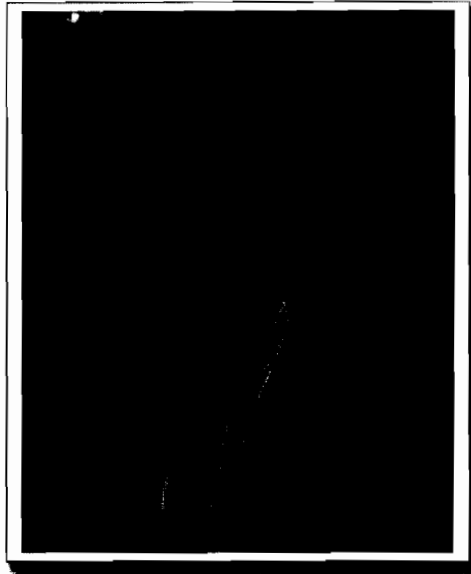


Jeffrey R. Loew, Esq.

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Jeffrey R. Loew, Esq.

Founder

As a litigation attorney, my primary areas of practice include trust and estate litigation (including will and trust contests), fiduciary litigation, and financial elder abuse actions. My practice further includes representing fiduciaries and beneficiaries in fiduciary disputes and regarding accountings; trust and probate petitions and administration; and conservatorship matters. I bring to my practice more than a decade of experience in these areas.

As an estate planner and trust administration advisor, I employ a wide range of estate planning techniques to help my clients meet their estate planning needs and wealth transfer objectives, from straightforward wills to complex trust agreements.

I am certified as a Specialist in Estate Planning, Trust and Probate Law by the State Bar of California's Board of Legal Specialization, a title held by less than half of one percent (0.5%) of practicing attorneys in California, and by only about three percent (3%) of estate planning attorneys.

I frequently speak before professional groups on issues concerning trust and estate litigation and related trust and estate matters, and in a variety of forums on general topics such as estate planning and elder abuse. I successfully represent clients at both the trial and appellate levels as well as in alternative dispute resolution, including mediation and arbitration. In addition to the areas described above, I currently serve as Chair of the Trusts and Probate section of the San Mateo County Bar Association, and on the Board of Trustees of the Silicon Valley Bar Association, where I am the judicial liaison to the San Mateo County Probate Court.

I can be contacted at jloew@loewlawgroup.com.

Specialties

Trust and Estate Litigation, Fiduciary Litigation, Estate Planning, Probate and Trust Administration, Conservatorships, General Business and Civil Litigation, and Elder Law.

Tel: 650.397.8700

Email: jloew@loewlawgroup.com



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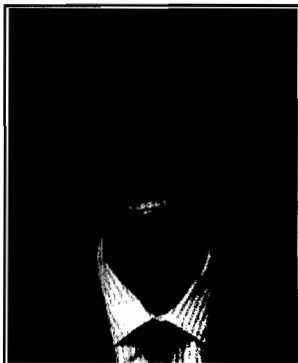
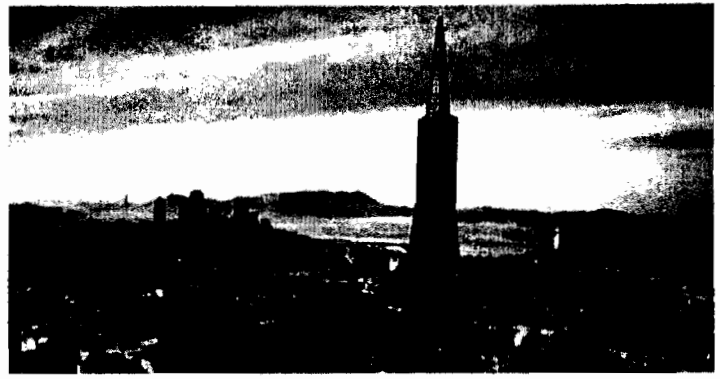
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(650) 632-4500
jeff@windsor-plc.com

Jeffrey R. Windsor
Attorney ♦ Mediator

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UT

Windsor Professional Law Corporation provides effective, reasonable, results-driven mediation and civil litigation services. Most importantly, Jeffrey R. Windsor, Principal of Windsor PLC, will listen to you. He will listen to your objectives, the nature of your dispute, and help you navigate the clearest path through it. He has over 15 years of experience in the trenches of litigation and understands that it is often a "war" of attrition. He will assist you in evaluating the parties' respective positions and in cost-effectively achieving results.

Mr. Windsor has represented plaintiffs in personal injury, construction defect, bad faith and employment actions. He has defended large corporations, governmental entities, small businesses, architects, contractors, brokers, and individuals in construction defect, personal injury, non-disclosure, contract, fraud, and employment actions. He has litigated, managed, tried, arbitrated and settled cases ranging from multi-party, complex actions to disputes before an action has been filed. As counsel, he is committed to resolving cases early in proceedings without sacrificing his clients' interests, but, if necessary, will litigate aggressively and seek to obtain the best results for his clients. Admitted to practice in the state courts of California and Hawaii, and the United States District Courts for the Northern and Eastern Districts of California and the District of Hawaii, Mr. Windsor has tried cases to jury and bench verdicts and consistently obtained favorable results.

In addition to being an experienced litigator, Mr. Windsor is a Certified Mediator, having trained at the Straus Institute for Dispute Resolution at Pepperdine University School of Law and the University of California - Hastings College of the Law. He has sat on both sides of the table and is able to succinctly analyze and address parties' respective strengths and weaknesses. Drawing on his skills and experience, he will listen to you, provide individualized attention and counsel, and assist you in developing creative, effective solutions to your dispute.

Education

- Santa Clara University School of Law, Santa Clara CA
 - Juris Doctor, 2000
- University of Michigan, Ann Arbor MI
 - Bachelor of Arts, 1994
- Pepperdine University School of Law, Malibu CA
 - Straus Institute for Dispute Resolution, Mediation Certification, 2012

Professional Organizations and Associations

- State Bar of California
- Hawaii State Bar Association
- U.S. District Courts for the Northern, Eastern Districts of California
- U.S. District Court for the District of Hawaii

- Dispute Prevention and Resolution, Honolulu, HI
- San Mateo County Bar Association
- Bar Association of San Francisco
- Alternative Dispute Resolution Panel Member –
 - Santa Clara County, Contra Costa County, Alameda County, Marin County Superior Courts
- Early Settlement Conference Neutral, Santa Clara County Superior Court
- Mediator, Day of Court Mediations, Alameda County Superior Court
- Discovery Facilitator, Contra Costa County Superior Court
- Discovery Pro Tem, San Francisco County Superior Court
- Fee Arbitrator, State Bar of California
- Fee Arbitrator, San Mateo County Bar Association
- Mediator, Peninsula Conflict Resolution Center

Experience

- Fotouhi Epps Hillger Gilroy Mau PC
 - December 2008 – October 2012
- Peterson Weyand & Martin LLP
 - November 2007 – October 2008
- Pierce & Shearer LLP
 - January 2007 – November 2007
- Liberty Mutual Ins. Co., Staff Counsel
 - April 2002 – December 2006

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PROVIDING LITIGATION, PLANNING AND TRANSACTIONAL SERVICES

WALTER E. SHJEFLO

Walter E. Shjeflo is a partner in Fox, Shjeflo, Hartley & Babu. His practice emphasis includes estate planning, decedents' estates, probate administration, trust administration, conservatorship, guardianship, elder law, business, bankruptcy and real estate matters in both transactions and litigation.

Walt graduated from Massachusetts Institute of Technology (B.S., 1974) and Hastings College of Law, University of California (J.D., 1977). He is admitted to practice in all state courts in California as well as the U.S. District Court, Northern District of California; U.S. District Court, Eastern District of Texas; U.S. Court of Appeals, Fifth Circuit; and the U.S. Court of Appeals, Ninth Circuit.

Walt is a member of the State Bar of California (Member, Business Litigation, Real Estate, Trusts and Estates, and Appellate Sections), the San Mateo County Bar Association and serves as a Judge Pro Tempore, Arbitrator, and Mediator.

Bar Admissions:

California, 1977

Education:

Juris Doctor, Hastings College of Law (<http://www.uchastings.edu/>), University of California, 1977

Bachelor of Science, Massachusetts Institute of Technology (<http://web.mit.edu/>), 1974

Professional Organizations/Memberships:

State Bar of California (<http://www.calbar.ca.gov/>) (Member, Business Litigation, Real Estate, Trusts and Estates, and Appellate Sections)

San Mateo County Bar Association

Biography:

Born Dickinson, North Dakota



E-MAIL ([MAILTO:WALTER.SHJEFLO@FOX-SHJEFLO.COM](mailto:WALTER.SHJEFLO@FOX-SHJEFLO.COM))

BAR ADMISSIONS:

California, 1977

EDUCATION:

Juris Doctor, Hastings College of Law, University of California, 1977

Bachelor of Science, Massachusetts Institute of Technology, 1974

PROFESSIONAL ORGANIZATIONS/MEMBERSHIPS:

State Bar of California (Member, Business Litigation, Real Estate, Trusts and Estates, and Appellate Sections)

San Mateo County Bar Association

BIOGRAPHY:

Born Dickinson, North Dakota

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[Business Transactions \(http://www.fox-shjeflo.com/practice-areas/california-business-law/transactions/\)](http://www.fox-shjeflo.com/practice-areas/california-business-law/transactions/)

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[Business Law FAQs \(http://www.fox-shjeflo.com/practice-areas/california-business-law/faq/\)](http://www.fox-shjeflo.com/practice-areas/california-business-law/faq/)

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ATTORNEY PROFILE

Meet Jeffrey B. Hayden, Attorney at Law

Attorney Jeffrey B. Hayden represents the residents of the Bay Area in California, which includes the cities in the metro areas of San Francisco, Oakland and San Jose. He focuses his practice on **criminal defense** and **juvenile offenses**. Mr. Hayden's excellent legal skills and adherence to ethics has earned him a place in Super Lawyers in 2004, 2005, 2006, 2009, 2014 and 2015, as well as San Francisco's Top Rated Lawyers 2013, 2014 and 2015. He has earned a rating of 10.0 out of 10.0 at AVVO.com, and the highest possible rating of AV-Preeminent from Martindale Hubbell.



After graduating from the University of California with a Bachelor of Arts in economics in 1986, Mr. Hayden attended the University of Southern California, Gould School of Law, earning his Juris Doctor in 1989. He has been board certified as a criminal law specialist by the The State Bar of California Board of Legal Specialization of the State Bar of California and, by appointment of the Board of Governors, was a member and former chair of the Criminal Law Advisory Commission; and now, by appointment of the Board of Trustees, is the Vice Chair of the California Board of Legal Specialization.

Before establishing his own law firm dedicated exclusively to criminal defense in 1997, attorney Jeffrey B. Hayden served in the United States District Court as a judicial law clerk for the Honorable Judge Robert P. Aguilar and the Honorable Judge James Ware in the United States District Court in San Jose, California. He also served as a Deputy Los Angeles County Public Defender for nearly five years. Since returning to the San Francisco Bay Area, Mr. Hayden has dedicated his professional career to assisting residents of San Francisco, Santa Clara County, and San Mateo County, where, having just completed his term as President of the San Mateo County Bar Association, he sits on the Board of Directors as the Immediate Past President.

Mr. Hayden is currently the Chair Elect of the Conference of California Bar Associations, the Vice Chair of the California Board of Legal Specialization, and the President Elect of the Rotary Club of Redwood City.

Education

- J.D. — University of Southern California Law Center, Los Angeles (1989)
- B.A. — University of California, Santa Cruz (1986)

Admissions

- California State Bar (1990)

Memberships

- San Mateo County and American Bar Associations
- State Bar of California (Member, Criminal Justice Section)
- The California Attorneys for Criminal Justice
- The California Public Defender's Association

Get Help Now!

Jeffrey B. Hayden is Certified Criminal Law Specialist by the Bar of California Board of Legal Specialization.

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- The National Association of Criminal Defense Lawyers
- Conference of California Bar Associations

Jeffrey B. Hayden, Attorney at Law provides exceptional legal defense to Redwood City residents accused of a criminal offense. Call (650) 368-5700 today for a free consultation.



SERVING NORTHERN CALIFORNIA

Jeffrey B. Hayden, Attorney at Law, located in Redwood City, California, provides legal services to the City and County of San Francisco, South San Francisco, Daly City, Brisbane, San Bruno, Millbrae, Burlingame, Hillsborough, San Mateo, Belmont, San Carlos, Redwood City, Palo Alto, Pacifica, Half Moon Bay, Menlo Park, Millbrae, San Bruno, Foster City, Pacifica, Half Moon Bay, Menlo Park, Atherton, Unincorporated San Mateo County, East Palo Alto, Los Altos, Los Altos Hills, La Honda, El Granada, Lagunitas, Montara, Moss Beach, Pescadero, Portola Valley, Redwood Shores, Stanford, Peninsula SF, SFO, San Francisco, and surrounding communities in Northern California.

CERTIFIED CRIMINAL LAW SPECIALIST

Jeffrey B. Hayden, Attorney at Law is Certified as a Criminal Law specialist by the State Bar of California Board of Legal Specialization. With over 25 years of experience, Mr. Hayden provides exceptional, focused legal representation to clients in Redwood City and throughout the Bay Area of California in cases involving criminal offenses, including drug crimes, child abuse, domestic violence, sex crimes, attempted murder, DUI, child molestation, theft, forgery, and child pornography.

CONTACT

(650) 368-5700

Schedule a FREE Consultation!

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Mary E. Pryce

**Principal
Barulich Dugoni Law Group, Inc.**

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✉ mary@bdlawinc.com

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Practice Areas

Estate Planning, Probate and Trust Administration

Mary E. Pryce of Barulich Dugoni Law Group, Inc., received her law degree from Santa Clara University, her BA from San Jose State University and her LL.M. in Taxation from Golden Gate University. Ms. Pryce's practice focuses on estate planning, probate and trust administration. She is a Certified Specialist in Estate Planning, Trust and Probate law with the State Bar of California Board of Legal Specialization. She is a member of the National Academy of Elder Law Attorneys, Peninsula Estate Planning Council, San Mateo County Bar Association Estate Planning and Probate Section (Co-chair 2008-2009) & Chair (2010-2011), Silicon Valley Bar Association, Estate Planning, Trust and Probate Section of the California Bar Association, and the American Bar Association. She has spoken to groups and at community colleges on estate planning, gifting, and estate administration. She is also a lecturer with the California Continuing Education of the Bar and State Bar of California.

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estates in a sensitive and caring manner.

Mary Pryce is a regular presenter on the following topics:

- Fundamentals of Estate Planning
- Fundamentals of Postmortem Trust Administration
- Using Decedents' Estates Judicial Council Forms
- Litigating Creditors' Claims in Probate Court
- Recent Development in Probate, Trusts, Guardianships and Conservatorships.
- Selected Federal Tax Legislation Cases and Rulings

Practice Areas

- › Business Planning
- › Non-Profit Planning and Support
- › Taxation
- › Probate & Trust Administration
- › Probate & Trust Litigation
- › Estate Planning
- › Real Estate

Frequently Asked Questions

- › Estate Planning FAQ
- › Estate Tax Calculator
- › Understanding Funding
- › Life Insurance Trusts
- › Setup Corporate Trustees
- › Duties & Responsibilities of a Trustee

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Statement Period
July 1, 2017 through September 30, 2017

Fund Name/Number
San Mateo County Bar Association - Law Library Fund (1105)

SVCF Main Contact: Michelle Fries
Director of Nonprofit Investment Program
650.450.5504
mdfries@siliconvalleycf.org

Thank you for the privilege of working together.

Your philanthropy advisor - listed above - is here to help you make the most of our partnership. As you review your statement and make plans for your fund, always let us know what we can do. For all of the good that you do in our community and our world, thank you!

Fund Activity

	Statement Period	Y-T-D
Beginning Balance	\$221,280.46	\$206,581.39
Investment Activity		
Long-Term Growth Pool	8,268.34	24,972.85
Grants Authorized	(7,300.00)	(8,250.00)
Support Fees	(554.53)	(1,609.97)
Ending Balance	\$221,694.27	\$221,694.27

Fund Assets

Investment Pools		
Long-Term Growth Pool		221,694.27
Total Fund Assets		\$221,694.27

Restricted Balance

Total Restricted Balance		\$0.00
Balance Available for Grants		\$221,694.27



Fund Name/Number
San Mateo County Bar Association - Law Library Fund (1105)

Investment Performance

	3 Month	Y-T-D	One Year	Three Year	Five Year
Fund Returns	3.77%	12.19 %	13.85 %	5.76 %	7.76 %
This Fund's Benchmarks	4.00%	11.70 %	12.60 %	6.10 %	7.60 %

About Your Fund Statement

ACCOUNTS PAYABLE: Expenses that have been approved, but are scheduled for payment on a future date.
ASSETS TO BE INVESTED: Assets that have yet to be invested, but will be at the beginning of the following month.
GAINS OR (LOSSES) ON GIFTED ASSET: Difference in the value of property when donated and the value when liquidated.
GIFTS: Contributions/donations made to your fund.
GRANTS AUTHORIZED: Reflects all grants to qualified organizations that have been recommended by the donor and approved by Silicon Valley Community Foundation. If the grant is scheduled for payment on a future date, it will also appear in the Restricted Assets section as Grants Payable, reducing the balance available for granting.
GRANTS PAYABLE: Grants that have been approved, but are scheduled for payment on a future date.
ILLIQUID ASSETS: Donated property that has not been sold.
INTERFUND GIFTS: Transfers to your fund from another fund at Silicon Valley Community Foundation.
INTERFUND GRANTS: Transfers from your fund to another fund at Silicon Valley Community Foundation.
INVESTMENT RETURNS: Reflects the total return in the investment pool, net of investment management fees.
OTHER ADDITIONS: Deposits to your fund that do not represent a gift, i.e. partnership income, dividends/interest earned on gifted securities, other assets received in exchange for goods or services.
OTHER EXPENSES: Administrative expenses paid from your fund, i.e. legal, consulting and credit card processing fees.
RECEIVABLES: Assets in the form of obligations due from others.
RESTRICTED ASSETS: Assets that may not be used for granting purposes
SECURITIES BEING LIQUIDATED: Gifted securities pending sale or settlement.
SUPPORT FEES: An allocation to the community foundation's operating fund to enable on-going work with donors and the nonprofit community. Fees are computed and paid on a monthly basis (1/12) per the stated fee rate schedule.

Investment Information

Fund returns are net of investment fees and expenses. Periods greater than one year are annualized. This Fund's Benchmark is a composite policy benchmark return weighted by the fund's allocation to an investment pool. Each policy benchmark is comprised of market index returns weighted by the pool's strategic asset allocation target. Comparison to the benchmark is not appropriate if the fund's allocation changed during the performance period, or if the fund includes assets outside of the SVCF pools. Additional information regarding investments, performance and benchmarks is on the online portal under Investment Information. Please contact your philanthropy advisor with any questions.

Investment Pool Allocation Guidelines

Long-Term Growth: For funds seeking maximum growth. Appropriate for funds distributing less than 7% annually or that portion of a fund that can tolerate volatility and will remain invested for at least seven years to realize growth opportunities.
Social Impact: For funds seeking maximum growth from companies with strong financial and social records. Appropriate for that portion of a fund that can tolerate volatility and will remain invested for at least seven years to realize growth.
Balanced: For funds seeking more moderate levels of growth and risk. Appropriate for funds distributing over 7% annually or that portion of a fund that will remain invested for at least three years to realize return objectives.
Short-Term: For funds seeking above money market returns and can tolerate some volatility. Appropriate for funds or that portion of a fund to be distributed in one to two years.
Capital Preservation: For funds seeking stability, or the portion of a fund to be distributed within 1 year.



Statement Period
July 1, 2017 through September 30, 2017

Fund Name/Number

San Mateo County Bar Association - Law Library Fund (1105)

Detailed Schedule(s)

Grants Authorized

Date	Grant Number	Grantee	Amount
09/27/17	2017-175453	San Mateo County Law Library	(7,300.00)
			<u>(\$7,300.00)</u>