



AGENDA

Board of Library Trustees
Community Facilities District (CFD) Committee | Altadena Library District
Virtual – Zoom – April 12, 2023 – 3:00 p.m.

IMPORTANT NOTICE REGARDING APRIL 2023 CFD COMMITTEE MEETING

This meeting will be conducted in a hybrid fashion, utilizing teleconference, electronic, and in-person means consistent with the State of California Executive Order N-29-20 dated March 17, 2020, regarding the COVID-19 pandemic and Altadena Library District Board of Trustees' Resolution 2021-05. The live stream of the meeting may be viewed by visiting the Altadena Library District's YouTube channel at the following URL <https://www.youtube.com/c/AltadenaLibrary>

SUBMISSION OF PUBLIC COMMENT: For those wishing to make Public Comments at the April 12, 2023 Meeting, you may present your comments in-person during the meeting, or submit by email to be read aloud at the meeting. For emailed comments, if multiple comments are submitted, only the first comment will be read aloud during the meeting. Email and Electronic Comments submitted online will be accepted up to two (2) hours prior to the start of the meeting. Email comments can be submitted to hello@altadenalibrary.org with the subject line: "Public Comment". Electronic Comments may also be submitted online at www.altadenalibrary.org/publiccomment. If you wish to make your public comment during the live meeting, please state so in your email. If you would like to make your comment virtually, you may also select on the form "Yes – I want to provide this comment in real-time and need the Zoom link" in the online form.

Email and Electronic Comments will be submitted to the legislative body and shall become part of the record of the meeting.

If you are unable to submit via email, online, or attend the meeting in-person, you can call in to (626) 798-0833 ext. 103, during the corresponding item of the agenda. For public comment on any non-agenda item, please plan to call at 3:00 pm.

PUBLIC REQUESTS FOR DOCUMENTS: The District provides a public inspection copy of all materials included in the agenda packet distributed to the Board members. Members of the public who wish to obtain a copy of any document may do so by completing a Request for Public Document form and submitting it to Administration who will arrange for the documents to be copied at a charge of 15¢ per page. Request forms are available at the District Administration offices.

In compliance with the Americans with Disability Act, if you need special assistance to participate in the meeting, please contact Library Administration at (626) 798-0833 x103 at least 48 hours prior to the meeting so the Altadena Library District may make reasonable arrangements to ensure accessibility to the meeting.

LAND ACKNOWLEDGEMENT: The Altadena Library District acknowledges its presence on the traditional, ancestral, and unceded land of the Gabrielino Tongva peoples. Altadena is located on the stolen homelands of the Xaxaamonga (Hahamongna) tribal band. The traditional territory of the Gabrielino Tongva is referred to as Tovaangar, which includes the areas currently known as Los Angeles County, Riverside County, West San Bernardino County, parts of Orange County as well as the four southern Channel Islands. Entities such as the U.S. government and non-Native settlers have subjected the Gabrielino Tongva peoples to historic and continuing injustices, including genocide, forced displacement, and cultural and linguistic erasure. Altadena Library commits to learning, educating, and informing its staff and residents of present-day Altadena about

the rich histories, vibrant communities, and culture of Gabrielino Tongva people, present and past, through our collection development, resources, and program offerings.

- I. **Call to Order**
 - a. Land Acknowledgement
- II. **Open Session**
 - a. Roll Call
 - b. Approval/Reordering of Agenda Items
 - c. Adoption of Agenda
 - d. Public Comment on Non-Agenda Items
- III. **Consent Calendar**
 - a. Approval of Minutes – Regular Meeting held December 14, 2022 **PAGES 3 - 5**
- IV. **Unfinished Business**
 - a. None
- V. **New Business**
 - a. Continuing Disclosure Annual Report for CFD No. 2020-1 **(Informational) PAGES 6 - 31**
 - b. Resolution of the Altadena Library District Board of Trustees, Levying Special Taxes within Altadena Library District Community Facilities District No. 2020-1 (FACILITIES AND SERVICES) **(Action) PAGES 32 - 35**
 - c. CFD Budget for Fiscal Year 2023 **(Action) PAGES 36 - 39**
 - d. Tax Lien Exemption Form **(Action) PAGES 40 - 42**
- VI. **Announcements & Planning**
 - a. Proposed Future Agenda Items
- VII. **Adjournment**
 - a. Adjournment



MINUTES

Board of Library Trustees
Community Facilities District (CFD) Committee | Altadena Library District
Virtual – Zoom – January 11, 2023 – 3:00 p.m.

IMPORTANT NOTICE REGARDING JANUARY 11, 2023 CFD COMMITTEE MEETING

This meeting will be conducted in a hybrid fashion, utilizing teleconference, electronic, and in-person means consistent with the State of California Executive Order N-29-20 dated March 17, 2020, regarding the COVID-19 pandemic and Altadena Library District Board of Trustees' Resolution 2021-05. The live stream of the meeting may be viewed by visiting the Altadena Library District's YouTube channel at the following URL <https://www.youtube.com/c/AltadenaLibrary>

SUBMISSION OF PUBLIC COMMENT: For those wishing to make Public Comments at the January 11, 2023 Meeting, you may present your comments in-person during the meeting, or submit by email to be read aloud at the meeting. For emailed comments, if multiple comments are submitted, only the first comment will be read aloud during the meeting. Email and Electronic Comments submitted online will be accepted up to two (2) hours prior to the start of the meeting. Email comments can be submitted to hello@altadenalibrary.org with the subject line: "Public Comment". Electronic Comments may also be submitted online at www.altadenalibrary.org/publiccomment. If you wish to make your public comment during the live meeting, please state so in your email. If you would like to make your comment virtually, you may also select on the form "Yes – I want to provide this comment in real-time and need the Zoom link" in the online form.

Email and Electronic Comments will be submitted to the legislative body and shall become part of the record of the meeting.

If you are unable to submit via email, online, or attend the meeting in-person, you can call in to (626) 798-0833 ext. 103, during the corresponding item of the agenda. For public comment on any non-agenda item, please plan to call at 3:00 pm.

PUBLIC REQUESTS FOR DOCUMENTS: The District provides a public inspection copy of all materials included in the agenda packet distributed to the Board members. Members of the public who wish to obtain a copy of any document may do so by completing a Request for Public Document form and submitting it to Administration who will arrange for the documents to be copied at a charge of 15¢ per page. Request forms are available at the District Administration offices.

In compliance with the Americans with Disability Act, if you need special assistance to participate in the meeting, please contact Library Administration at (626) 798-0833 x103 at least 48 hours prior to the meeting so the Altadena Library District may make reasonable arrangements to ensure accessibility to the meeting.

LAND ACKNOWLEDGEMENT: The Altadena Library District acknowledges its presence on the traditional, ancestral, and unceded land of the Gabrielino Tongva peoples. Altadena is located on the stolen homelands of the Xaxaamonga (Hahamongna) tribal band. The traditional territory of the Gabrielino Tongva is referred to as Tovaangar, which includes the areas currently known as Los Angeles County, Riverside County, West San Bernardino County, parts of Orange County as well as the four southern Channel Islands. Entities such as the U.S. government and non-Native settlers have subjected the Gabrielino Tongva peoples to historic and continuing injustices, including genocide, forced displacement, and cultural and linguistic erasure. Altadena Library commits to learning, educating, and informing its staff and residents of present-day Altadena about

the rich histories, vibrant communities, and culture of Gabrielino Tongva people, present and past, through our collection development, resources, and program offerings.

I. Call to Order

- a. Land Acknowledgment
Trustee Andruess read the Land Acknowledgement.

II. Open Session

- a. Roll Call

Trustee Andruess called roll call. Community Member Colliflower responded as present. Trustee Lim was not present. Quorum was confirmed.

- b. Approval/Reordering of Agenda Items
- c. Adoption of Agenda

Moved by Member Colliflower to adopt the agenda.

Seconded by Trustee Andruess

Roll Call Vote:

Trustee Andruess: Aye

Trustee Lim: Absent

Member Colliflower: Aye

- d. Public Comment on Non-Agenda Items
No public comment made

III. Consent Calendar

- a. Approval of Minutes – Regular Meeting held October 03, 2022
- b. Approval of Minutes - Regular Meeting held December 14, 2022

Moved by Member Colliflower to adopt the agenda.

Seconded by Trustee Andruess

Roll Call Vote:

Trustee Andruess: Aye

Trustee Lim: Absent

Member Colliflower: Aye

IV. Unfinished Business

None

V. New Business

- a. About the CFD Committee (**Informational**)

Trustee Boon joined the meeting at 3:12pm.

- b. Capital Fund & Bond Proceeds Financial Update (**Informational**)

- c. SB 165: Local Agency Special Tax and Bond Accountability Act report for Altadena Library District CFD No. 2020-1 **(Informational)**
- d. CFD Meeting Schedule for 2023 **(Action)**

Moved by Member Colliflower to approve the meeting schedule for 2023

Seconded by Trustee Andrues

Roll Call Vote:

Trustee Andrues: Aye

Trustee Lim: Aye

Member Colliflower: Aye

- e. Citizen Oversight: Altadena Town Council Liaison Appointment process **(Action)**

Moved by Member Colliflower to approve the citizen oversight appointment process.

Seconded by Trustee Andrues

Roll Call Vote:

Trustee Andrues: Aye

Trustee Cervantes: Absent

Member Colliflower: Aye

VI. Announcements & Planning

- a. Proposed Future Agenda Items

VII. Adjournment

- a. Adjournment

The meeting was adjourned at 3:37pm



**BOARD OF LIBRARY TRUSTEES – CFD COMMITTEE MEETING
ITEM V.A. STAFF REPORT FOR APRIL 2023**

DEPARTMENT: Agenda Item V.a.

MEETING DATE: April 12, 2023

PREPARED BY: Nikki Winslow

LOCATION: Main Library Community Room

TITLE: Continuing Disclosure Annual Report for: Community Facilities District No. 2020-1 (Facilities and Services)

The Community Facilities District No. 2020-1 (Facilities and Services) for Altadena Library District is required to provide a Continuing Disclosure Annual Report each year. This year the report was due on March 1, 2023. It was prepared by NBS, our CFD Administration Firm and reviewed by Eide Bailly, our accounting firm, for accuracy.

The purpose of this report is to provide information to bondholders for the Altadena Library District Community Facilities District No 2020-1 (Facilities and Services) 2022 Special Tax Bonds (the “Bonds”) in order to comply with the provisions contained in the Continuing Disclosure Agreement (the “Disclosure Agreement”). The Disclosure Agreement was executed and delivered by the Altadena Library District Community Facilities District No. 2020-1 (Facilities and Services) (the “District”) for the benefit of the owners and beneficial owners of the Bonds and to assist the participating underwriters in complying with Securities and Exchange Commission Rule 15c2-12(b)(5).

The report was disseminated, as required by the Disclosure Certificate, via the Electronic Municipal Market Access (EMMA). NBS will also post the report on the NBS website or any other Internet information sources that provide disclosure information to the general public, and disseminate via e-mail, facsimile and mail to requesting parties. SEC regulations make it unlawful to make material misstatements or omissions in connection with the purchase or sale of any security.

ALTADENA LIBRARY DISTRICT

Continuing Disclosure Annual Report For:

**Community Facilities District No. 2020-1
(Facilities and Services)**

Fiscal Year Ended June 30, 2022

Prepared by:



Corporate Headquarters
32605 Temecula Parkway, Suite 100
Temecula, CA 92592
Toll free: 800.676.7516

ALTADENA LIBRARY DISTRICT

\$21,125,000
ALTADENA LIBRARY DISTRICT
COMMUNITY FACILITIES DISTRICT NO. 2020-1
(FACILITIES AND SERVICES)

CUSIP NO.⁽¹⁾

<u>MATURITY</u>	<u>CUSIP</u>	<u>MATURITY</u>	<u>CUSIP</u>
2023	021358AA4	2032	021358AK2
2024	021358AB2	2033	021358AL0
2025	021358AC0	2034	021358AM8
2026	021358AD8	2035	021358AN6
2027	021358AE6	2036	021358AP1
2028	021358AF3	2037	021358AQ9
2029	021358AG1	2042	021358AR7
2030	021358AH9	2049	021358AS5
2031	021358AJ5	2052	021358AT3

⁽¹⁾ CUSIP® is a registered trademark of the American Bankers Association. CUSIP Global Services (CGS) is managed on behalf of the American Bankers Association by S&P Global Market Intelligence. CUSIP® numbers are provided for convenience of reference only. This data is not intended to create a database and does not serve in any way as a substitute for the CGS database. None of the Underwriters, the Agency, Bond Counsel, Disclosure Counsel, Dissemination Agent, or the Municipal Advisors are responsible for the selection or correctness of the CUSIP® numbers set forth above

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1. INTRODUCTION

The purpose of this report is to provide information to bondholders for the Altadena Library District Community Facilities District No 2020-1 (Facilities and Services) 2022 Special Tax Bonds (the “Bonds”) in order to comply with the provisions contained in the Continuing Disclosure Agreement (the “Disclosure Agreement”). The Disclosure Agreement was executed and delivered by the Altadena Library District Community Facilities District No. 2020-1 (Facilities and Services) (the “District”) for the benefit of the owners and beneficial owners of the Bonds and to assist the participating underwriters in complying with Securities and Exchange Commission Rule 15c2-12(b)(5).

2. CONTENT OF ANNUAL REPORT

2.1 Audited Financial Statements

Refer to Appendix A for the Audited Financial Statements for the Fiscal Year ended June 30, 2022.

2.2 Principal Amount of Bonds Outstanding

The principal amount of the Bonds outstanding as of September 2, 2022 was \$21,125,000.

2.3 Fund Balances

The table below provides the balance in each fund under the Fiscal Agent Agreement.

Fund	Balance as of September 2, 2022
Special Tax Fund	\$0.00
Administrative Expense Fund	22,965.45
Debt Service Fund	0.00
Capitalized Interest Fund	10.91
Rebate Fund	0.00
Redemption Fund	0.00
Project Fund	22,239,954.72
Cost of Issuance Fund	2,010.07

2.4 Reserve Fund Balance and Reserve Requirement

As of September 2, 2022, the balance in the Reserve Fund was \$1,234,200.00; funded by an insurance policy from Assured Guaranty Municipal Corporation Bond Insurance. As of September 2, 2022, the reserve requirement of \$1,234,200.00 was met. The reserve requirement is the lesser of: (i) maximum annual debt service for the Bonds, (ii) one hundred twenty-five percent (125%) of average annual debt service for the Bonds, or (iii) ten percent (10%) of the original issue price of the Bonds.

2.5 Share of Special Taxes by Property Type

The below table shows the Share of Special Taxes by Property Type:

Property Type ⁽¹⁾	FY 2022-23 Number of Parcels ⁽²⁾	FY 2022-23 Building SqFt ⁽²⁾	FY 2022-23 Units ⁽²⁾	FY 2022-23 Maximum Special Tax ⁽³⁾	% of FY 2022-23 Maximum Special Tax
Single Family Residential Property	12,260	21,190,120	0	\$2,138,952	82.20%
Apartment Property	966	0	3,047	357,806	13.75
Commercial Property – Less than 10,000 SqFt	253	0	0	87,978	3.38
Commercial Property – Greater than 10,000 SqFt	37	0	0	17,397	0.67
Exempt	746	0	0	0	0.00
Totals	14,262		0	\$2,602,133	100.00%

(1) Assigned by the CFD Administrator according to the Rate and Method using County Assessor's secured roll data for Fiscal Year 2022-23.

(2) The special tax is levied per building square foot for Single Family Residential Property, per unit for Apartment Property, and per parcel for Commercial Property.

(3) Does not account for up to \$190,740 in special tax exemptions of Very Low-Income Property.

2.6 Share of District Bonds by Property Type

The below table shows the Share of District Bonds by Property Type:

Property Type ⁽¹⁾	FY 2022-23 Maximum Special Tax ⁽²⁾	Share of Bonds	FY 2022-23 Assessed Value ⁽³⁾
Single Family Residential Property	\$2,138,952	82.20%	\$6,503,746,312
Apartment Property	357,806	13.75	520,480,108
Commercial Property – Less than 10,000 SqFt	87,978	3.38	144,028,403
Commercial Property – Greater than 10,000 SqFt	17,397	0.67	140,521,948
Exempt	0	0.00	230,046,407
Totals	\$2,602,133	100.00%	\$7,538,823,178

(1) Assigned by the CFD Administrator according to the Rate and Method using County Assessor's secured roll data for Fiscal Year 2022-23.

(2) Does not account for up to \$190,740 in special tax exemptions of Very Low-Income Property.

(3) Per the Los Angeles County Assessor's roll data for Fiscal Year 2022-23, with a January 1 valuation date. Assessed value does not reflect any changes made to the valuation after July as a result of assessment appeal, correction or any other changes.

2.7 Historical and Current Assessed Valuation⁽¹⁾

The below table shows the Historical and Current Assessed Valuation:

Fiscal Year ⁽²⁾	Land Value	Structure Value	Total Value
2018-19	4,176,502,760	2,341,932,705	6,518,435,465
2019-20	4,445,327,150	2,442,049,052	6,887,376,202
2020-21	4,690,337,073	2,555,206,180	7,245,543,253
2021-22	4,894,222,077	2,644,053,478	7,538,275,555
2022-23	4,894,430,723	2,644,392,455	7,538,823,178

(1) Includes all property within the boundary of the CFD, Including Exempt Property.

(2) Per the Los Angeles County Assessor’s roll data for Fiscal Year 2022-23, with a January 1 valuation date.

Assessed value does not reflect any changes made to the valuation after July of each Fiscal Year as a result of assessment appeal, correction or any other changes.

2.8 Largest Taxpayers

The below table shows the percent of the Fiscal Year 2022-23 Maximum Special Tax based on property ownership status as of July 2022:

Property Owner ⁽¹⁾	Property Type ⁽²⁾	FY 2022-23 Number of Parcels ⁽³⁾	FY 2022-23 Building SqFt ⁽³⁾	FY 2022-23 Units ⁽³⁾	FY 2022-23 Maximum Special Tax ⁽⁴⁾	% of FY 2022-23 Maximum Special Tax
WASHINGTON BOULEVARD PARTNERS	Apartment	2	0	122	\$14,340	0.55%
ACRES PROPERTIES LLC	Apartment	2	0	60	7,053	0.27
GROUP III SGV PROPERTIES LTD	Apartment	1	0	47	5,525	0.21
FUJIOKA FAMILY LTD PTNSHP	Apartment	2	0	40	4,702	0.18
HPA COLUSA LLC	Apartment	3	0	39	4,584	0.18
CAMERON JOHN K JR & MARGARET K	Single Family Residential	42	40,999	0	4,182	0.16
POSAMAR LLC	Apartment	1	0	35	4,114	0.16
1968 N LAKE AVE LLC	Commercial & Single Family Residential	18	17,420	4	3,168	0.12
HASSAN AHMED M & MAGDA A	Apartment	1	0	26	3,056	.012
MAYER ASSETS GROUP THREE LP	Apartment	1	0	24	2,821	0.11
Total Top Ten Owners	Various	73	63,209	393	\$53,545	2.06%
All Others	Various	14,189	21,045,911	2,671	2,548,589	97.94
Totals		14,262	21,109,120	3,064	\$2,602,134	100.00%

(1) Per County Assessor's secured roll data for Fiscal Year 2022-23, as of July 2022.

(2) Assigned by the CFD Administrator according to the Rate and Method using County Assessor's secured roll data for Fiscal Year 2022-23, as of July 2022.

(3) The special tax is levied per building square foot for Single Family Residential Property, per unit for Apartment Property, and per parcel for Commercial Property.

(4) Does not account for up to \$190,740 in special tax exemptions of Very Low-Income Property.

2.9 Delinquency/Foreclosure Proceedings

The following table shows the Fiscal Year 2021/22 delinquency rate as of December 31, 2022.

FY 2021/22 Levy⁽¹⁾	FY 2021/22 Delinquencies⁽¹⁾	FY 2021/22 Delinquency Rate⁽¹⁾	FY 2021/22 Delinquent Parcels⁽¹⁾
NA	NA	NA	NA

1. The initial levy was Fiscal Year 2022-23.

No foreclosure proceedings have been initiated by the Altadena Library District.

3. SIGNIFICANT EVENTS

The District shall give, or cause to be given, notice to the Repository of the occurrence of any of the following events with respect to the Bonds in a timely manner not more than ten (10) business days after the occurrence of the event:

1. Principal and interest payment delinquencies;
2. Unscheduled draws on debt service reserves reflecting financial difficulties;
3. Unscheduled draws on credit enhancements reflecting financial difficulties;
4. Substitution of credit or liquidity providers, or their failure to perform;
5. Adverse tax opinions or the issuance by the Internal Revenue Service of proposed or final determinations of taxability or of a Notice of Proposed Issue (IRS Form 5701-TEB);
6. Tender offers;
7. Defeasances;
8. Ratings changes;
9. Bankruptcy, insolvency, receivership or similar proceedings;
10. Default, event of acceleration, termination event, modification of terms, or other similar events under the terms of Financial Obligation of the obligated person, any of which reflect financial difficulties;

Note: For the purpose of the event identified in subparagraph (9), the event is considered to occur when any of the following occur: the appointment of a receiver, fiscal agent or similar officer for an obligated person in a proceeding under the U.S. Bankruptcy Code or in any other proceeding under state or federal law in which a court or governmental authority has assumed jurisdiction over substantially all of the assets or business of the obligated person, or if such jurisdiction has been assumed by leaving the existing governmental body and officials or officers in possession but subject to the supervision and orders of a court or governmental authority, or the entry of an order confirming a plan of reorganization, arrangement or liquidation by a court or governmental authority having supervision or jurisdiction over substantially all of the assets or business of the obligated person.

The District shall give, or cause to be given, notice of the occurrence of any of the following events with respect to the Bonds, if material, in a timely manner not more than ten (10) business days after the occurrence of such event:

1. Unless described in (5) above, notices or determinations by the Internal Revenue Service with respect to the tax status of the Bonds or other material events affecting the tax status of the Bonds;
2. The consummation of a merger, consolidation or acquisition involving an obligated person or the sale of all or substantially all of the assets of the obligated person, other than in the ordinary course of business, the entry into a definitive agreement to undertake such an action or the termination of a definitive agreement relating to any such actions, other than pursuant to its terms;
3. Appointment of a successor or additional trustee or the change of the name of a trustee;

4. Nonpayment related defaults;
5. Modifications to rights of Owners of the Bonds;
6. Bond calls;
7. Release, substitution, or sale of property securing repayment of the Bonds; and
8. Incurrence of a Financial Obligation of the obligated person, or agreement to covenants, events of default, remedies, priority rights, or other similar terms of a Financial Obligation of the obligated person, any of which affect security holders.

4. CONCLUDING STATEMENT

This Continuing Disclosure Annual Report was prepared on behalf of the Altadena Library District in accordance with the Fiscal Agent Agreement of the Bonds, in order to provide required information to the owners and beneficial owners of the Bonds. Such required information may include, but not be limited to, annual financial information, certain operating information and disclosures concerning specific events.

NBS has relied upon information provided by sources which are believed to be reliable without independent verification. The reader understands and agrees that NBS is entitled to rely on all information and documents supplied to NBS by the Altadena Library District or any of its agents or contractors and other government sources or proxies thereof as being accurate and correct and NBS has no obligation to confirm that such information and documentation is correct and that NBS has no liability if such information is not correct.

The information contained within this report, has been reviewed, approved, and authorized for dissemination by the Altadena Library District.

ALTADENA LIBRARY DISTRICT



Ashley Watts, Assistant Library District Director

APPENDIX A: AUDITED FINANCIAL STATEMENTS

The following pages provide the Audited Financial Statements for the Fiscal Year Ended June 30, 2022.

Altadena Library District
Annual Report

July 1, 2021 - June 30, 2022



MESSAGE FROM THE DIRECTOR



I must begin by acknowledging my gratitude to you – our amazing community – for your support of the Altadena Library District over the past year.

Thank you to our Board of Trustees and our volunteers for your passion, commitment, and ongoing efforts for our libraries. Thank you to our Friends and Foundation for your enthusiastic advocacy and unwavering support. Thank you to our highly capable, dedicated staff for using your talents and skills to provide tremendous service to our patrons daily. Thank you to local businesses, nonprofits and organizations who partner with us for events and programs that engage our community. And finally, thank you to the thousands of patrons who proudly champion our libraries and bring value to all we do.

It is thanks to this incredible support that we have been able to fully embark on our next chapter, a renovation project to repair, modernize, and improve both buildings so that we can provide all residents of our community with full access to everything our libraries offer.

Our progress in this complicated process is significant. In the past year, we brought Anderson Brulé Architects onboard the project and established a focus group with community representatives who provide invaluable feedback and local perspective. We further increased efforts to garner resident input through an online survey and virtual town halls, and we engaged expert consultants to conduct utility surveys, seismic and other evaluations in preparation for the building upgrades.

Respectfully,

A handwritten signature in black ink, appearing to read 'Nikki Winslow', written in a cursive style.

Nikki Winslow
District Director

After successfully negotiating the challenges of the past two years, I am thrilled about the future we envision for the Altadena Libraries. Our plan to ensure continuity of library services during future building closures includes the addition of a second mobile library, exploring local options for a satellite facility, and embracing innovative methods to meet our community's needs, such as library materials vending machines. In the near term, we endeavor to continue building community engagement through expanded outreach programs (such as an updated Read Local, Shop Local), targeted communications, and enhanced resources (watch for our fabulous new Fab Lab).

It is an honor to serve the giving residents and organizations of Altadena, and we are focused on making our community a place where all are learning, growing, and thriving together.

ALTADENA LIBRARY DISTRICT BOARD OF TRUSTEES

FISCAL YEAR 2021-2022

Terry Andrues
Jason Capell
Rushmore Cervantes
Katie Clark
Kameelah Waheed Wilkerson

2021-2022 Highlights

The Altadena Library District's strategic framework and priorities – *we are ... curious, connectors, and neighbors* – helps guide our operations, programs and services. These are just a few of the highlights that demonstrate our staff's amazing efforts during the 2021-2022 fiscal year.

July 2021

The Curiosity Connection, the District's mobile library and engine for community engagement, became a regular attendee at community events, including the wildly popular summer concert series hosted by the Rotary Club of Altadena at Farnsworth Park.

Families were invited to stroll the grounds of the Main Library, enjoying the StoryWalk® of "Family Reunion" by Chad and Dad Richardson, a poetic depiction of a Black American extended family that celebrates the importance of kinship and inter-generational ties.

The annual summer reading program wrapped up, during which Altadena Libraries distributed more than 600 kits to children and teens and held 68 virtual and in-person programs with 1,000 attendees.



Our Mission

The Altadena Library District brings people and ideas together.



(Right) Concert goers enjoy the show at Farnsworth Park. Staff member distributes library program information to a Concerts in the Park attendee.



2021-2022 Highlights

September 2021

As part of a blooming partnership with L.A. Compost and Arlington Garden in Pasadena, Altadena Libraries hosted an afternoon of garden fun with sun prints and zines, learning the ABCs of compost, and a plant-based scavenger hunt.

The teen volunteer program officially relaunched.

Back as an in-person event, Taste of 'Dena was a resounding success. Over 100 people attended, and thanks to the generosity of our neighbors and community, the Altadena Library Foundation raised more

than \$30,000 to help support the library and its programs and services.

October 2021

More than 400 community members celebrated the 30th

anniversary of the reopening of the Bob Lucas Memorial Library and Literacy Center on October 16. Several members of Bob Lucas' family spoke at the event and presented the District with a \$2,000 donation.



Photo by Deb Squared Photo

(Clockwise from top) Library staff guide children in a scavenger hunt at the Arlington Garden in Pasadena on September 18, 2021. Several generations of Bob Lucas' family attend the 30th anniversary of the reopening of the branch library named in his honor. Children and families enjoy crafts and other fun during the Bob Lucas Library celebration.

International chanteuse Morganne kicked off the **return of the Second Saturday concert series** with a night of electric fusion jazz, Latin, and blues music in the Main Library parking lot.

The Altadena Historical Society presented an author talk and book signing at the Main Library. Writer Paul Rollins discussed his book "Letters from the Sphinx," a history of the William Allen family, early Altadena pioneers.

November 2021

Autumn fun kicked off with a nod to nature with the Fall Frolic program.



Registered community members voted at the libraries and Patticakes for their Altadena Town Council representative.

Author and social change advocate Ariel Henley discussed her memoir, "A Face for Picasso: Coming of Age with Crouzon Syndrome," with the Altadena Library.

December 2021

Altadena Library participated in the **first annual**

Altadena Sip and Shop, a holiday shopping event at Mariposa Junction (Lake and Mariposa). Hundreds of people from the community turned out to enjoy music, food trucks, and fun!



Building Projects Progress

Thanks to the incredible support of the community through the passage of Measure Z in 2020, the Altadena Library District has embarked on an ambitious multi-year project to repair, modernize, and improve the Main and the Bob Lucas Memorial Library. The project has been dubbed: The Next Chapter for the Altadena Libraries.

In late 2021, the District hired Anderson Brulé Architects (ABA) as the architectural firm for the renovation project. ABA assisted in the development of a survey that was shared with the community.



The District's Ad-Hoc Facilities Committee established a Community Focus Group (CFG), a small group of community representatives that provide feedback and assist in identifying when wider community engagement is helpful. They met in December 2021 and in the following months.

Consultants were engaged to conduct fire flow testing, hazardous materials surveys, and underground utility surveys at both locations. In addition,

topographical and geotechnical surveys were conducted for the Bob Lucas Library, and the Main Library received a Tier 3 (Seismic) evaluation.

The District and ABA shared design schematics for the Bob Lucas Library with the CFG and hosted Town Hall meetings with the wider community in March 2021.

January 2022

Though the library buildings closed for a few weeks, the collection, services, and other library resources were fully available to patrons with curbside services, electronic access, and remote reference support.

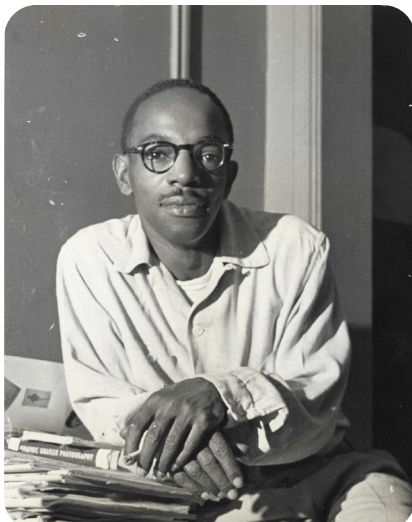


The Library of Things special collection continued to grow, adding items like the Digital Documentarian Kit (a digital camera, wireless shooting grip, microphone, and accessories). By spring, the collection expanded to include puppetry kits and additional fun and useful items.

February 2022

Outdoor storytimes and virtual programming returned, including the popular “Quiet Space” evening meditation series.

In honor of Black History Month, Altadena Library District **blogged about four African Americans, both past and present, who made a significant impact or contribution to Altadena.** Those included were literacy gladiator Bob Lucas, artist/activist Charles White,



educator and civil rights activist Ellen Garrison Clark, and Michelle Hoskins, dedicated library staff member who retired in February after 42 years of service to the community.

March 2022

Altadena Library began a partnership with Huntington Hospital to offer patrons free health counseling and screenings once a month.

In honor of World Puppetry Day, Altadena Library showcased puppet programs on how to make a rod puppet, how to tell a story with puppets, and a performance by The Bob Baker Marionette.

Classical music returned to the library with the popular Mt. Lowe Chamber Players performing Bach, Sousa, and other composers on March 27.

The Altadena Chamber of Commerce, with support from Altadena Libraries, hosted a Women in Science virtual talk with keynote speaker Jocelyn Ferguson, chief development officer at Huntington Medical Research Institutes.

April 2022

The Altadena community celebrated National Library Week with a bookmark contest, special storytimes with the Altadena Library Foundation and Friends of the Altadena Library, and connecting with the Curiosity Connection at community businesses.

Young nature lovers learned about **metamorphosis in a hands-on program** raising butterflies at Bob Lucas Memorial Library.

Bob Lucas
Journalist, photographer,
editor, writer, and literacy advocate



(Above) Peter J. Harris, Poet Laureate Editor in Chief
Photo by Tiffany Judkins
(Right) Carla R. Sameth, Poet Laureate for Community Events



Peter J. Harris and Carla R. Sameth were announced as the new Altadena Poets Laureate for 2022-24 during the annual Poetry & Cookies event.

District staff shared information about library programs and services during the first Night Market.

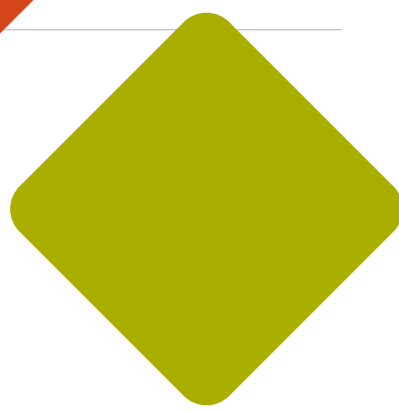


Program participants and library staff release butterflies at the Bob Lucas Memorial Library.





Author panel at LitFest Pasadena



May 2022

LitFest Pasadena brought together acclaimed authors and new voices in powerful literary and social conversations attended by dozens of community members at the Altadena Library.

Adult learners and volunteer literacy tutors attended a celebration lunch at the Bob Lucas Memorial Library and Literacy Center.

The Altadena Libraries – in partnership with Altadena Historical Society, LA Conservancy, and Sapphos Environmental – hosted a **Juneteenth Celebration to honor the legacies and lives of Altadena African Americans** and their contributions to the community. The Ellen Garrison Clark scholarship was also awarded to two local high school students.

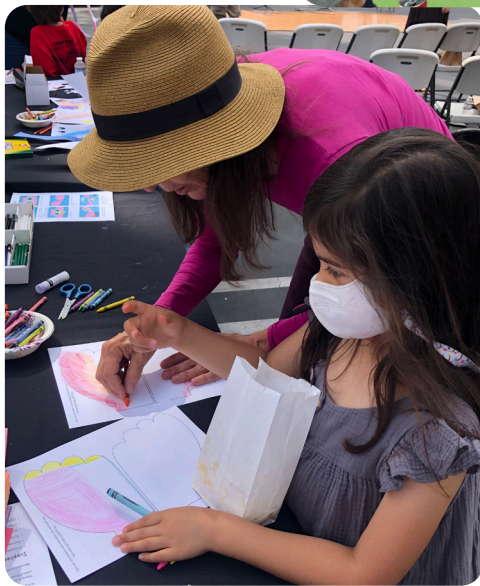


June 2022

The District launched **summer reading programs for children, teens, and adults with a grand kickoff celebration** at the Main Library. It featured games, crafts, food, and amazing performances by Ballet Folclórico do Brasil and musician Michael Haggins.



(Clockwise from top) Assemblymember Chris Holden presents proclamations to the Ellen Garrison Clark Scholarship awardees at the 2022 Juneteenth Celebration. Ballet Folclórico do Brasil performs. Patrons enjoy crafts and fun at the summer reading kickoff event. Adult learners and volunteer tutors lunch together in celebration at the Bob Lucas Memorial Library.

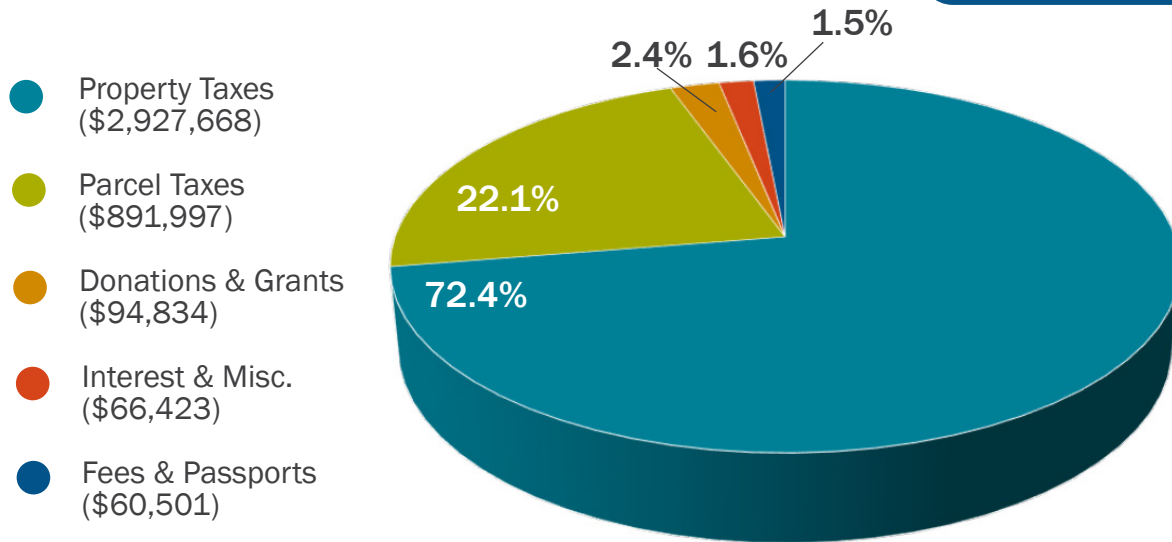


Finances

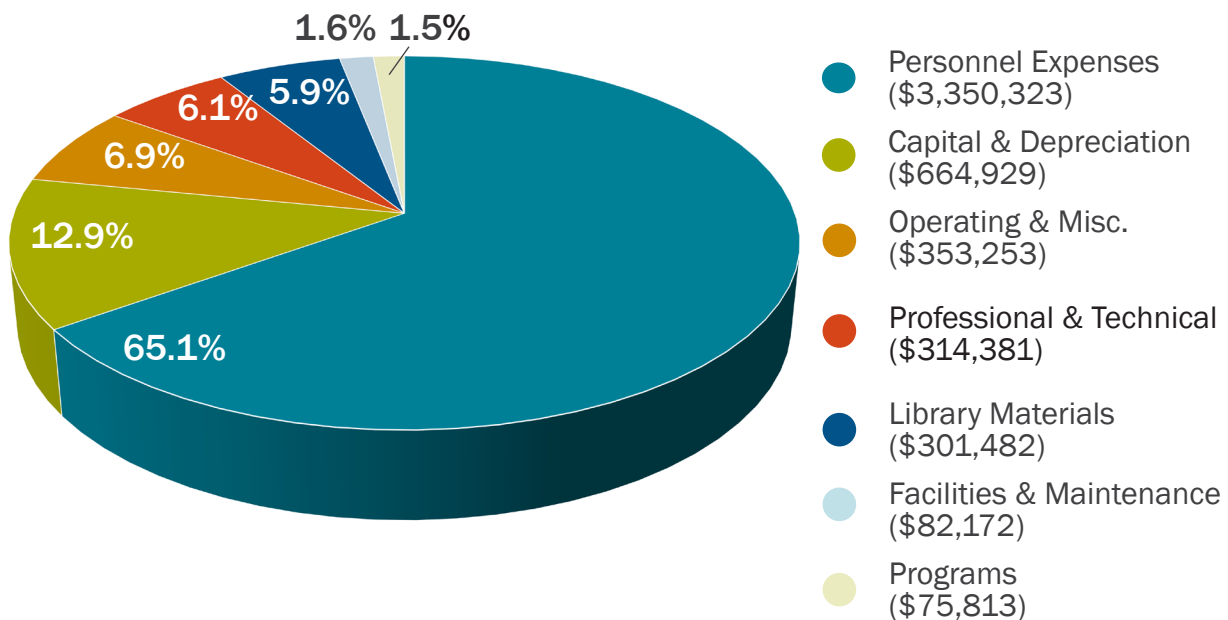
Financial Spotlight

The District sold \$21.125 million in premium bonds, netting bond proceeds of \$23 million. These funds will be used for upcoming renovations to both library buildings.

Fiscal Year 2021-22 Revenue



Fiscal Year 2021-22 Expenses



ALD By the Numbers

400,148
Virtual Visits to Library Website

74,340
Annual Number of Wireless Sessions

6,141
Annual Uses of Public Internet Computers

5,135
MONTHLY DIGITAL (AVERAGE) CIRCULATION

83,000+
YOUTUBE VIDEO VIEWS

12,380
HOURS OF YOUTUBE WATCH TIME



CIRCULATION

168,032

Number of checkouts of physical items (books, movies, music, etc.) throughout the year

VISITORS TO LIBRARIES

72,572

REFERENCE QUESTIONS ANSWERED

7,444

NEW LIBRARY CARDS ISSUED

2,334

TOTAL EVENTS/PROGRAMS

559

ATTENDANCE AT EVENTS/PROGRAMS

8,324



Friends of the Altadena Library

Established in 1959, the Friends of the Altadena Library organization is committed to supporting the District by generating public interest in our libraries, assisting with funding to purchase materials, and underwriting cultural and educational programs. Thank you to all of the Friends (July 2021-June 2022) for your dedication, hard work, and passion for our libraries!

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The Altadena Library Foundation is a nonprofit organization dedicated to supporting and enriching the facilities, services, and resources of the Altadena Libraries. We are incredibly thankful to our Fiscal Year 2021-2022 donors.

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We apologize for any errors or omissions in this acknowledgement of gifts. If you have a correction, please email us at manager@altadenalibraryfoundation.org.

Main Library

600 E. Mariposa Street
Altadena, California 91001
Phone: (626) 798-0833

Hours

Monday & Tuesday: 10:00am – 8:00pm
Wednesday – Friday: 10:00am – 6:00pm
Saturday: 10:00am – 4:00pm
Sunday: Closed

Bob Lucas Memorial Library & Literacy Center

2659 Lincoln Avenue
Altadena, California 91001
Phone: (626) 798-8338

Hours

Monday – Friday: 10:00am – 6:00pm
Saturday & Sunday: Closed

www.AltadenaLibrary.org
[@AltadenaLibrary](https://twitter.com/AltadenaLibrary)





**BOARD OF LIBRARY TRUSTEES – MEETING
ITEM V.B. STAFF REPORT FOR APRIL 2023**

REPORT: Agenda Item V.b..

MEETING DATE: April 12, 2023

PREPARED BY: Nikki Winslow

LOCATION: Library Community Room

TITLE: Resolution of the Altadena Library District Board of Trustees, Levying Special Taxes within Altadena Library District Community Facilities District No. 2020-1 (FACILITIES AND SERVICES)

BACKGROUND: Per the Ordinance “the Board, acting as legislative body of CFD No 2020-1, is hereby authorized, by resolution, to annually determine the special taxes to be levied within CFD No. 2020-1 for the current year; provided, however, the special tax to be levied shall not exceed the maximum special tax authorized to be levied.”

To pay the debt service and cover administrative costs related to the Community Facilities District, the Special Tax Lien budget has been established at \$1,256,960. Please see the Levy Worksheet following this report for a breakdown of those expenses. The data needed to establish rates on the properties in Altadena will not be released by L.A. County Assessor’s Office until late July 2023. In light of this, we have decided to use last year’s property data to establish the rates (see rates following the Levy Worksheet). Please note that these rates could change after June 30th due to Very Low Income Exemptions as well as parcel changes recorded by L.A. County Assessor’s Office. . Be aware there is a possibility that an amended resolution will need to come to the board for approval should these numbers significantly change.

The budget, along with the County Assessor’s data that includes the list of valid Parcels, the building square footage data, land use data etc, was compiled to determine the specific special tax rates that will be applied to each taxable parcel for Fiscal Year 2023-24.

FISCAL IMPACT:

No fiscal impact to the ALD Budget.

RECOMMENDATION:

Staff recommends that the Board of Trustees review and approve the Resolution, which includes the Fiscal Year 2023/24 budget and established rates, of the Altadena Library District Board of Trustees, Levying Special Taxes within Altadena Library District Community Facilities District No. 2020-1 (FACILITIES AND SERVICES).

RESOLUTION NO. 2023-03

A RESOLUTION OF THE ALTADENA LIBRARY DISTRICT BOARD OF TRUSTEES, LEVYING SPECIAL TAXES WITHIN ALTADENA LIBRARY DISTRICT COMMUNITY FACILITIES DISTRICT NO. 2020-1 (FACILITIES AND SERVICES).

NOW, THEREFORE, BE IT RESOLVED by the Altadena Library District Board of Trustees, as follows:

Section 1. The Board of Trustees (the “Board”) of the Altadena Library District (the “Library District”), has formed Altadena Library District Community Facilities District No. 2020-1 (Facilities and Services) (the “CFD No. 2020-1”), under and pursuant to the Mello-Roos Community Facilities Act of 1982 (the “Act”).

Section 2. The Board, as the legislative body of CFD No. 2020-1, is authorized under the Act to levy special taxes (the “Special Taxes”) to pay for the costs of certain services authorized under the Act.

Section 3. The Board, pursuant to Ordinance No. 2020-01 adopted by the Board on December 14, 2020, authorized and levied the Special Taxes within CFD No. 2020-1.

Section 4. Section 53340 of the Act provides that the legislative body of a community facilities district may provide, by resolution, for the levy of the special tax in the current year or future tax years at the same rate or at a lower rate than the rate provided by ordinance, if the resolution is adopted and a certified list of all parcels subject to the special tax levy, including the amount of the tax to be levied on each parcel for the applicable tax year, is filed by the clerk or other official designated by the legislative body with the county auditor; and

Section 5. The Board desires to levy the Special Taxes within CFD No. 2020-1 for Fiscal Year 2023/24.

Section 6. The Board hereby levies the Special Taxes for Fiscal Year 2023/24 on each parcel of real property, depending on its land use classification, as follows:

Property Type	Per	Maximum Special Tax Rate	Approved Special Tax Rate
Single Family Residential Property	Building Square Foot	\$0.104	\$0.048
Apartment Property	Unit	119.89	56.26
Commercial Property less than 10,000 Square Feet	Assessor's Parcel	354.69	166.44
Commercial Property greater than 10,000 Square Feet	Assessor's Parcel	479.59	225.05

Section 7. The Administrative Services Department is hereby authorized and directed to transmit, immediately, to the Los Angeles County Auditor-Controller, a certified copy of this Resolution upon its adoption, together with a statement of the tax rate and parcel taxes fixed herein.

Section 8. The Board Secretary shall certify to the adoption of this Resolution, which shall be in full force and effect immediately upon its adoption.

PASSED, APPROVED AND ADOPTED this 12th day of April, 2023.

Jason Capell, Board President

ATTEST:

APPROVED AS TO FORM:

Kameelah Waheed Wilkerson, Board Secretary

Richard Egger, General Counsel

**Altadena Library District
Community Facilities District No. 2020-1
Fiscal Year 2023/24 Levy Worksheet**

Description	2023/24 Amount	2022/23 Amount	Difference
Principal	\$365,000.00	\$350,000.00	\$15,000.00
Interest	<u>865,950.00</u>	<u>883,450.00</u>	<u>(17,500.00)</u>
<i>Subtotal</i>	\$1,230,950.00	\$1,233,450.00	(\$2,500.00)
Agency administrative costs	\$7,096.68	\$7,401.68	(\$305.00)
Trustee/Paying Agent costs	2,700.00	2,700.00	0.00
County collection fees (1)	3,527.50	3,526.50	1.00
Arbitrage calculation costs	750.00	750.00	0.00
Continuing disclosure costs	0.00	0.00	0.00
Dissemination costs	0.00	0.00	0.00
Administration costs	11,814.00	11,000.00	814.00
Administration expenses	121.82	121.82	0.00
Other costs	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>
<i>Subtotal</i>	\$26,010.00	\$25,500.00	\$510.00
Maximum Admin Cost (2)	\$26,010.00	\$25,500.00	\$510.00
Anticipated Delinquencies (3)	\$0.00	\$0.00	\$0.00
Del. Management Charges	0.00	0.00	0.00
Rounding adjustment	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>
<i>Subtotal</i>	\$0.00	\$0.00	\$0.00
Total Annual Levy	\$1,256,960.00	\$1,258,950.00	(\$1,990.00)
County Apportionment (4)	\$1,253,432.50	\$1,255,423.50	(\$1,991.00)
Parcels Levied	13,910	13,906	4

(1) County Collection Fees are \$50 processing fee per fund and \$0.25 per parcel.

(2) Maximum administrative expense per Fiscal Agent Agreement for FY 22/23 (Initial Year) is \$25,500. Increase of 2

(3) Reasonably anticipated delinquent Special Taxes based on the delinquency rate for Special Taxes

(4) Amount to be disbursed by Tax Collector if 100% collection is made.

Levy Approval

_____ Signature

_____ Date



**BOARD OF LIBRARY TRUSTEES – CFD COMMITTEE MEETING
ITEM V.C. STAFF REPORT FOR APRIL 2023**

DEPARTMENT: Agenda Item V.c.

MEETING DATE: April 12, 2023

PREPARED BY: Nikki Winslow

LOCATION: Main Library Community Room

TITLE: Proposed Budgets for the Capital and CFD Bond Proceeds Funds

CAPITAL FUND

The proposed budget for FY2023/24 for the Capital Fund is based on projected spending on the two library building projects. These projections were provided by Jennifer Pearson of Rachlin Partners based on the most updated timeline of the project schedules at this time.

In addition to the use of bond proceeds, grant income will be used to complete renovations for the two projects. The projected interest income is approximately \$220,000. Total expenses including project management, contingencies and renovation costs are \$4,099,600. It is anticipated that this activity will draw down the capital fund to \$21,927,000.in FY2023/24.

CFD FUND

The anticipated budget needed to cover the debt service payment and associated CFD Fund related administration costs is \$1,257,000 for FY2023/34. These funds will be collected through a Special Tax Lien on Altadena property tax owners annual tax bills. More detailed information about this process can be found in Item V.b..

CFD BOND PROCEEDS

Capital activity, net of interest income and unrealized gains and losses is approximately \$177,000 for FY 2023/24. The bond proceeds balance is \$22,136,817 as of 2/28/23.

**Altadena Library District
FY 2023/24 Proposed Budget
Capital**

	A	B	C
	FY 2022/23 Projected Actuals	FY 2022/23 Adopted Budget	FY 2023/24 Proposed Budget
1 REVENUE			
2 Grant Income	3,789,800	-	-
3 Interest Income	119,500	110,000	220,000
4 TOTAL REVENUE	3,909,300	110,000	220,000
5 EXPENSE			
6 CFD Bond			
7 CFD Administration	10,400	20,000	-
8 CFD Project Management	31,200	100,000	192,000
9 Contingencies	-	50,000	192,000
10 Total CFD Bond	41,600	170,000	384,000
11 Capital Project Expenses			
12 Bob Lucas Memorial Library	137,000	200,000	2,765,500
13 Main Library	238,000	400,000	950,100
14 Total Capital Project Expenses	375,000	600,000	3,715,600
15 TOTAL EXPENSE	416,600	770,000	4,099,600
16 NET REVENUE / (EXPENSE)	3,492,700	(660,000)	(3,879,600)
17 Use Of / (Addition To) Reserves	(3,492,700)	660,000	3,879,600
18 NET BALANCE	-	-	-
19 Projected Capital Fund			
20 Beginning Capital Fund 7/1	22,313,900	21,538,700	25,806,600
21 Addition / (Drawdown) of Capital Fund	3,492,700	(660,000)	(3,879,600)
22 Ending Capital Fund 6/30	25,806,600	20,878,700	21,927,000

Altadena Library District
FY 2023/24 Proposed Budget
CFD

	A	B	C
	FY2022/23 Projected Actuals	FY 2022/23 Adopted Budget	FY 2023/24 Proposed Budget
1 REVENUE			
2 CFD 2020-1 Special Assessment	1,258,600	1,247,500	1,257,000
3 TOTAL REVENUE	1,258,600	1,247,500	1,257,000
4 EXPENSE			
5 CFD Administration			26,000
6 Debt Service Principal	-	-	350,000
7 Debt Service Interest	878,500	878,500	874,700
8 TOTAL EXPENSE	878,500	878,500	1,250,700
9 NET REVENUE / (EXPENSE)	380,100	369,000	6,300
10 Use Of / (Addition To) CFD Fund	(380,100)	(369,000)	(6,300)
11 NET BALANCE	-	-	-
12 Projected CFD Fund			
13 Beginning CFD Fund 7/1	-	-	380,100
14 Addition (Drawdown) of CFD Fund	380,100	369,000	6,300
15 Ending CFD Fund 6/30	380,100	369,000	386,400

Community Facilities District

Measure Z Bond Proceeds

March 1, 2022 through February 28, 2023

	A	B	C	D	E= A+B+C+D
	FY22	FY 23 Q1	FY 23 Q2	FY 23 Q3	Total
1 Community Facilities District					
2 Measure Z Bond Proceeds	23,761,105				23,761,105
3 Underwriter's Discount (Commission)	(87,968)				(87,968)
4 Interest Income	(16,947)	44,488	24,701	35,340	87,581
5 Unrealized Gain/(Loss)	(157,458)	(165,655)	66,711	39,683	(216,719)
6 Less Bond Interest Paid	(436,817)				(436,828)
7 Net Proceeds	23,061,915	(121,167)	91,412	75,023	23,107,171
8 Administrative CFD Costs					
9 Administration	(26,598)	(5,878)	(3,189)	-	(35,664)
10 Audit and Financial Consulting	(12,835)	-	(325)	-	(13,160)
11 Bond Issuance Costs	(295,726)	-	-	-	(295,726)
12 Total Administrative Costs	(335,159)	(5,878)	(3,514)	-	(344,550)
13 Direct Renovation Costs					
14 Project Management	(186,042)	(1,201)	(19,957)	-	(207,200)
15 Construction Cost	(21,723)	(11,889)	(1,650)	(14,021)	(49,283)
16 Architect Expenses	(205,092)	(39,881)	(46,060)	(76,968)	(368,001)
17 Legal Fees		-	-	(1,320)	(1,320)
18 Total Direct Renovation Costs	(412,857)	(52,971)	(67,668)	(92,309)	(625,804)
19 Net Activity	22,313,899	(180,016)	20,231	(17,286)	22,136,817
20 CFD Ending Balance	22,313,899	22,133,884	22,154,114	22,136,818	22,136,817



BOARD OF LIBRARY TRUSTEES – CFD COMMITTEE MEETING

ITEM V.D. STAFF REPORT FOR APRIL 2023

REPORT: Agenda Item V.d.

MEETING DATE: April 12, 2023

PREPARED BY: Nikki Winslow

LOCATION: Main Library Community Room

TITLE: Tax Lien Exemption Form

The new Special Tax Lien Exemption forms are available at the ALD Information Desks at both the Main Library and the Bob Lucas Branch Library.

Property owners who applied for the exemption last year were mailed printed forms for the current year. The letter includes instructions on how to file for a very low-income exemption from the tax and the income levels that will qualify.

The following information is available to the staff and the public on the [CFD Special Tax Lien page](#). Included in this report is also a copy of the exemption form.

How to apply for very low-income exemption

*The special parcel tax shall not be imposed as of July 1 of each applicable Fiscal Year upon any very low-income owner of a parcel used solely for owner-occupied, single-family residential purposes, **if the owner obtains an annual exemption to the special tax** (upon approval of the Altadena Library District).*

Very low-income means the parcel owner's income is equal to or lower than the U.S. Department of Housing and Urban Development (HUD) income limits used to determine eligibility for assisted housing programs as set forth in the Los Angeles-Long Beach-Glendale, California HUD Metro FMR Area rates published annually. To qualify for a Very Low-Income Exemption for an owner-occupied, single family residence, you must earn a total annual household income calculated on the number of people in the household in tax year 2021, less than:

<i>Number of People</i>	<i>Less than</i>
<i>1</i>	<i>\$41,700</i>

2	\$47,650
3	\$53,600
4	\$59,550
5	\$64,350

To apply for the exemption:

1. Download/print a copy of the [Very Low-Income Exemption Request Form](#).
2. **Complete and sign the form, attaching proof of residence and income as instructed on the form.**
3. Make a photocopy for your records.
4. Mail, fax or email the completed application with attachments to:**NBS**
Attn: Altadena Library
32605 Temecula Parkway, Suite 100
Temecula, CA 92592
Phone: (800) 676-7516
Fax: (951) 296-1998
Email: customercare@nbsgov.com

Your application must be postmarked on or before June 30, 2023.

If more need to be printed, or a patron calls and would like to print the form at home, you can find it on the CFD Special Tax Lien page:

<https://altadenalibrary.org/specialtaxlien>

Altadena Library District
Exemption Request Form for Very Low Income
Application 2023-24

This application serves to request - Altadena Library District Very Low-Income Exemption for 2023-2024.
This exemption form must be filed annually.

Very Low Income Exemption - The special parcel tax shall not be imposed upon any very low-income owner as of July 1 of each applicable Fiscal Year, of a parcel used solely for owner-occupied, single-family residential purposes, if the owner obtains an annual exemption to the special tax upon approval of the Altadena Library District. Very low-income means the parcel owner's income is equal to or lower than the U.S. Department of Housing and Urban Development (HUD) income limits used to determine eligibility for assisted housing programs as set forth in the Los Angeles-Long Beach-Glendale, California HUD Metro FMR Area rates published annually.

To qualify for a Very Low-Income Exemption for an owner-occupied, single family residence, you must earn a total annual household income calculated on the number of people in the household **in tax year 2022**, less than:

1 Person \$41,700 2 People \$47,650 3 People \$53,600 4 People \$59,550 5 People \$64,350

An application must be postmarked on or before June 30, 2023. Failure to file in time will result in rejection of your application for exemption unless good cause can be shown for failure to timely file. If your application cannot be processed, you will be notified in writing, explaining the reason and requesting the necessary information needed to process your application.

All applicants must complete the following information (Please print clearly or type):

Residential Parcel #: _____

The parcel is owner occupied: Yes No

(This 10 digit Parcel # can be found on the upper left hand corner of your Property Tax Bill.)

Property Owner's Name(s): _____

Property Address: _____

City & Zip: _____

Daytime Telephone: _____

1. PROOF OF RESIDENCE (Required)

Please attach a copy of one of the following documents that shows that the property you own is also your primary place of residence. (Check One)

Driver's License California ID Card Property Tax Bill Other Proof of Residence

2. PROOF OF INCOME (Required)

Total Household Income* \$ _____ Number of people living in household _____

*Household income is the combined gross income, including taxable and non taxable, for all persons who occupy a single family residence and does not include Federal and State income tax adjustments, deductions, exemptions or credits. ***(Please enclose in a sealed envelope a copy of your most recently filed tax return, no later than two (2) years ago, (Form 1040, 1040A or 1040EZ tax return) or Social Security Benefits Statement for all members of the household to be used for determining your income qualification for Very-Low Income exemption. This form will be stamped and kept confidential and will only be used to determine your income qualifications. Please include only the pages showing income. Social security numbers may be redacted.***

3. SIGNATURE IS REQUIRED BELOW TO PROCESS APPLICATION

I declare under penalty of perjury under the law of State of California that this claim (including any accompanying proof of age documents) and the information including my household income is, to the best of my knowledge, correct and complete. I am a resident of the property listed above.

Executed this day of _____, 20__.

Property Owner's Signature : _____

Warning: This application is subject to verification and any misrepresentations could result in a denial of the exemption.

4. MAILING ADDRESS (Before mailing, please make a photocopy for your records)

Please mail, fax or email the completed application with attachments to:

NBS
Attn: Altadena Library
32605 Temecula Parkway, Suite 100
Temecula, CA 92592

Telephone: (800) 676-7516 Fax: (951) 296-1998 Email: customercare@nbsgov.com
Altadena Library Website: altadenalibrary.org

Your application must be postmarked by June 30, 2023