



CITATIONS

OCTOBER - TWO THOUSAND TWENTY THREE

MIKE PERCY
 2023 JAMES D. LOEBL PRO BONO
 AWARD RECIPIENT

By Alfred Vargas

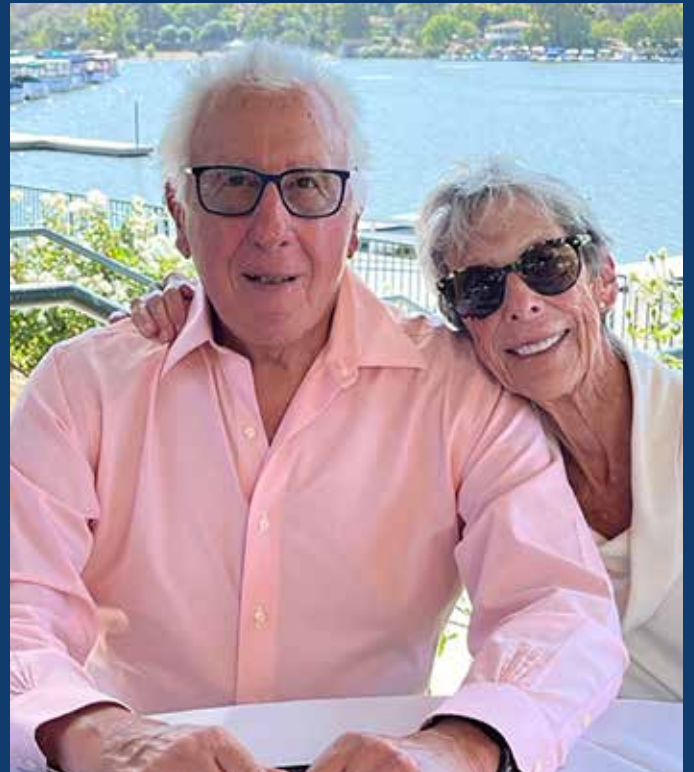
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BRADLEY DAVID MARCUS
 RECIPIENT OF THE 2023 VERNA R. KAGAN
 PRO BONO SERVICE AWARD

By Donald Greenberg

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PRESIDENT'S MESSAGE

by Brian C. Israel

I have no idea how or why lawyer jokes became “a thing,” but it’s no doubt that lawyer jokes are “a thing.” It’s not hard to hypothesize a reason, but there’s really no need to go there. Regardless, I heard a lawyer joke the other day that made me laugh.

Why are lawyers buried 12 feet under after they die?

Because deep down, they really are good people. (Cue the drums: Ba dum tss)

Speaking of burials and the dead, we are now in October, which means Halloween is right around the corner. It’s the one time of year where I buy candy (maybe this is a slight exaggeration). It’s also the time of year where I feel less guilty eating an insane amount of chocolate (anyone else a Reese’s fan?) I mean, who doesn’t enjoy all the scary things that Halloween has to offer? There’s also less guilt eating as much chocolate as I do in October, since everyone else is doing it.

Does anyone else notice how Halloween decorations seem to be popping up earlier and earlier every year? Many of our neighbors had full-fledged haunted houses as early as Labor Day. With that said, Christmas decorations are already beginning to take over and push aside Halloween decorations in stores. Is this a trick, or a treat?

Besides Halloween, October is one of my favorite months due to the amount of sports on television. There’s Major League Baseball playoff games, NFL and college football, soccer, NHL, and the start of the NBA season. As you know by now, go Lakers! If I didn’t have two kids and a job, I’d have little reason to leave the couch. Well, I would maybe go for a hike (as highlighted in last month’s CITATIONS) or play basketball, but you get the gist.

Speaking of playing basketball, or any other activity which you may find yourself participating in, getting out there can be such a great networking tool. While at California Western School of Law, I played in the basketball intramural league. Currently, I have several pickup games that I play in when I have the time, which have provided me an opportunity to meet some fellow local attorneys and other professionals. I

have found that when you have an overlap where you can do something you enjoy and have it enhance your professional life, it brings an added element that brings further joy. Some of you out there may have activities that bring the same sort of satisfaction — I encourage you to continue pursuing your passions with an open mind about how it can enhance your practice.

In reflecting on my love of sports and how it can overlap with the legal profession, I was both fascinated and surprised to learn about a few individuals in the sports world who have law degrees (including some who actually practiced law).

Steve Young, a three time Super Bowl winning quarterback for the San Francisco 49ers, obtained a juris doctor from his undergrad alma mater, Brigham Young University, following his football career. He is a member of both the pro football Hall of Fame and college football Hall of Fame and was a longtime announcer as part of ESPN. He also won an MVP award in the NFL. I have no idea how he got a law degree with his long and busy resume, but it surely makes my jaw drop. I know several 49ers fans who are members of the Ventura County Bar Association – maybe you’ll enjoy this tidbit of knowledge.

For baseball fans, there are a few interesting stories out there with overlaps in the legal field. There are many Dodgers fans who are members of the Bar, and this first one is for you. Branch Rickey was the President, General Manager, and part-owner of the Brooklyn Dodgers. His list of accomplishments is long, and it should be mentioned that one of those accomplishments includes serving in the Army.

But, before his time in baseball, Rickey earned a law degree from Michigan and practiced in Idaho for two years before moving on to various positions in baseball, including with the Dodgers. Most importantly, he signed Jackie Robinson, who broke the color barrier in baseball. Rickey once said, “I may not be able to do something about racism in every field, but I can sure do something about it in baseball.” There are so many members of

the Bar who share a similar passion for equality. I am proud to know many of you, including some on the Board of Directors.

There are various other individuals worthy of mention who were both sports stars and lawyers. However, I wanted to finish up with Tony La Russa, who both played in and managed in Major League Baseball. He won several World Series managing various teams. In 1988, Dodgers fans may remember him for losing the World Series to the Dodgers as manager of the Oakland Athletics. Kirk Gibson’s mystical home run during that series, and Vin Scully’s goosebump inducing call of that play, will forever be part of Dodgers and baseball lore. The following year his Athletics again made the World Series. This time they played their Bay Area rival, the San Francisco Giants. This time his team won, but the series was marked by the Loma Prieta earthquake, delaying the series.

La Russa earned a Juris Doctor degree from Florida State University College of Law and passed the Florida Bar in 1980. In a now-favorite quote of mine, La Russa exclaimed, “I decided I’d rather ride the buses in the minor leagues than practice law for a living.” I think we all feel that way sometimes.



Brian C. Israel is an associate attorney at Norman Dowler, LLP in Ventura. His practice focuses on estate planning, probate, and trust administration. He can be reached at bisrael@normandowler.com or at 805-654-0911.

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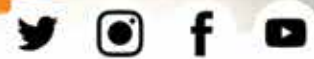
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MIKE PERCY – 2023 JAMES D. LOEBL PRO BONO AWARD RECIPIENT

By Alfred Vargas



The Ventura County Bar Association honors **Mike Percy** as the 2023 recipient of the James D. Loebel Ventura County Legal Aid Pro Bono Award.

Percy entered this world and was raised in Oak View. As a teenager in the '60s, he recounts working as a gas station service attendant back in the days when that entailed pumping gas, checking oil, washing windows and generally greeting customers with a smile and a quick step.

He worked in the Ventura oil fields for a short spell before joining the Army in 1975. He served his country in a military police capacity and received an Honorable Discharge after three years. While still in the Army, the Ventura County Sheriff's Office hired him as a deputy. He took terminal leave from the Army to attend the Sheriff's Academy.

As a deputy sheriff, Percy patrolled the Ojai area. He recounts coming upon a traffic accident when longtime Ojai resident, the late **Judge Richard D. Love**, happened onto the scene and asked Percy if he could help. Percy, busy attending to the accident, seized the opportunity and "instructed Judge Love to go direct traffic." Which he did. (Judge Love was appointed to the Ojai Justice Court in 1955 and served as a Superior Court Judge from 1966 to 1981.)

While working out of the Ojai Sheriff's substation and attending classes at Ventura College, a.k.a. (in Percy's words) "Telegraph Tech," he met his future lovely wife, Leslie, in a theater arts appreciation class. On the first day of class Percy noticed Leslie sitting on the far side of the room, and, she being the prettiest girl in the class, on the second day, he changed his seat to sit next to her. The rest is history, culminating in their marriage in 1980.

After seven years of deputy sheriff patrol work, Leslie enrolled Percy at the Ventura College of Law in 1985. During that time, he participated in the free legal aid clinic. He joined the bar in 1989 and was immediately hired by the law firm of Cunningham and Lansden. In 2003, he opened up his own solo practice and maintained it until he reached his thirtieth year in 2019.

During most of that time his secretary and friend, Doni Messi, held down the administrative side of his practice. While Percy did take typing in junior high school, he admittedly was not very good at it, and up until the very end used a Dictaphone which Messi would transcribe. For those younger members of the bar, a Dictaphone was an analog device which used small magnetic cassette tapes to record dictation. Think, old-school Siri.

Percy is a lifelong, avid collector of California plein air art, Western Art, Sheffield knives, books, movies and several other things, all of which drive Leslie crazy. His home, home office and storage spaces are full of his collections to the point where Leslie worries that there won't be room left for her.

Percy is also a voracious reader. He is a Civil War buff. His home contains several rooms dedicated to particular subject matters. One holds his Army and Civil War books. The non-fiction room holds histories and yet another room holds his fiction collection.

When asked if his mustache was modeled after Wyatt Earp, Percy replied, "Perhaps." But it could also be modeled after Bass Reeves, a Black U.S. Marshal from 1875,

who is the basis for a new television series this Fall.

Percy said he has never represented anyone in criminal court, which is not surprising given his law enforcement background. He limited his practice to family law.

Percy is a private person. Those who know him would agree he never does anything for the sake of garnering accolades, and gives freely of his time. He is the standard by which integrity should be measured.

While Percy retired from the practice of law in 2019, he still maintains his law license, seemingly to continue his volunteer work with VCLA. He has provided VCLA with countless hours of volunteer time. He is happy to do so, but will politely decline if asked to don a tie and jacket for a court appearance. He says he is truly retired.

His life's milestone inures to VCLA's benefit and to the unnamed individuals he counsels at the Free Legal Aid Clinic and by assignment at the Family Justice Center.

No person traverses the world alone. Percy and Leslie have been married for 43 years. She supports his endeavors. They still live in Ventura County. They have a rescue dog, Sophie, who never grew out of being a puppy. Both are Percy's grounding sources of joy. Both share equally in Percy's recognition of the James D. Loebel award.



Alfred Vargas holds the current stewardship of Ventura County Legal Aid as Executive Director. He is a former co-editor of Citations Magazine.



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Former Kern County Superior Court Commissioner

Mr. Khoury has more than 20 years in the legal industry, culminating most recently, with a position as a Court Commissioner in Kern County where he presided over a very diverse calendar. During his time on the bench in Kern County, Mr. Khoury also created a civil mediation program for limited civil, small claims, unlawful detainer, and civil harassment matters. He also served as a mandatory settlement conference judge for unlimited civil matters.

Prior to taking the bench, Anthony ran a successful law practice for over a decade, specializing in civil, business, and employment law litigation. During that time he represented both plaintiffs and defendants. Despite his extensive experience as a trial attorney, Anthony's reputation was that of a staunch, but pragmatic, advocate—often receiving praise from colleagues, opposing attorneys, and judicial officers alike, for his exemplary ethics conduct, courteous and affable demeanor, and his ability to get cases settled.

Mr. Khoury's practice areas include: employment, business/contractual, family law/divorce mediation, personal injury, bad faith/insurance coverage, class actions, and construction defect.



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BRADLEY DAVID MARCUS – RECIPIENT OF THE 2023 VERNA R. KAGAN PRO BONO SERVICE AWARD

By Donald Greenberg



The very deserving recipient of Ventura County Legal Aid's 2023 **Verna R. Kagan Pro Bono Service Award** is **Bradley David Marcus**.

A graduate of UCLA and Southwestern School of Law, Brad was admitted to the California Bar in 1962. He worked initially for a private practice attorney, and then as "house counsel" for a liability insurance company, before beginning his own private practice in 1965. He was a civil litigation attorney for over 30 years specializing in plaintiff and defense personal injury, medical malpractice, and business litigation cases. He also had five years of criminal law and family law experience. His breadth of knowledge and experience, and his calm style and solid judgment, have made him an extremely valuable "pro bono" contributor over the years.

Brad served as a judge pro tem off and on for some 45 years – 15 of those years in Ventura County where he handled the ever challenging but vital small claims calendar. He was a volunteer arbitrator for 40 years. He served on the Federal Indigent Defense Panel providing pro bono representation for needy persons accused of federal crimes.

He volunteered with California Rural Legal Assistance ("CRLA") in Oxnard for more than five years. He volunteered with "Kids in Need of Defense" (KIND) for a number of years and, about 5 years ago, successfully handled an administrative "asylum" case for a young person from El Salvador. He has been a volunteer in the VCBA emeritus attorney program for over 15 years. During all these years he has capably assisted innumerable deserving individuals.

He has attended numerous "continuing education" classes for "emeritus" and VCBA volunteer attorneys – all to be better able to help people needing legal assistance. He has participated in learning about DACA (via the presentations provided by **Vanessa Frank** and others). He was a regular volunteer at the VCLA law library clinics from the very beginning up until the COVID pandemic. He was a mock trial scorer for many years.

For fun and to better serve persons with limited English-speaking skills, he added to the 4 years of Spanish he had in high school, college courses in Spanish at Ventura College, Cal State Channel Islands, private classes and even several intensive "immersion" sessions in Mexico. He wanted to be certain that he and some of the clients he was helping were fully understanding one another!

In addition to all of this, he served on the board of his temple for 9 years, as the president for one year, and on the temple's personal committee. He served fifteen

years on the board of the Channel Islands Maritime Museum. And, he has been a valued member of the VCLA Inc. board (VCBA's pro bono program board) for the last 3 years and is currently serving in his first year as the Board Secretary.

Brad is an outstanding yet modest individual. The above is about all I could "wring" out of him with aggressive and relentless questioning!!!

Along with others, I had the privilege of working with Verna Kagan. I think Verna would be extremely pleased that Brad Marcus is the recipient this year of the Verna R. Kagan Pro Bono Service Award named and presented in her honor.



Don Greenberg is, among other things, a former city attorney for the City of Ventura and senior assistant county counsel for the County of Ventura. He has been involved in the VCBA "pro bono" and legal aid programs for 17 years.



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SPOTLIGHT ON KELLY BERLINGERI, CIVIL CASE MANAGEMENT ATTORNEY

By *Christal Joy Porter*.



The Superior Court of California, County of Ventura welcomed **Kelly A. Murphy-Berlinger** [pronounced Berlin (like Germany) and Jerry (like Ben & Jerry's ice cream)] to join the bench in 2022 as permanent Judge Pro Tempore/Civil Case Management Attorney. Berlinger has spent most of her life in Ventura County, growing up in Simi Valley. Berlinger attended the University of California, Santa Barbara and double majored, earning Bachelor of Arts degrees in both Environmental Studies and Geography. Berlinger's excitement to have a career in saving the environment continued beyond college when she worked as a Legal Assistant/Office Manager for an environmental attorney, and later as an intern for the United States Environmental Protection Agency in Washington, D.C. In December 2000, Berlinger graduated from California Western School of Law, and was admitted to the State Bar of California in 2001.

Taking a hard pivot from the environmental sector, Berlinger began her legal career practicing at an insurance defense firm in Ventura County. For the next several years, Berlinger made appearances in nearly every courthouse from Santa Barbara County to San Bernardino County. During her time practicing insurance defense, Berlinger acquired an extraordinary knowledge of civil litigation and procedure.

As life would have it, Berlinger's father experienced health challenges and was diagnosed with alcohol induced dementia necessitating a conservatorship appointment to care for his needs. Berlinger was unfamiliar with this area

of practice and decided to seek legal counsel for help with the conservatorship. Berlinger hired attorney **Roger L. Lund** (now the Honorable Judge Roger L. Lund presiding over Ventura's Probate Court) to represent and guide her in obtaining a conservatorship for her father. Berlinger's encounter with Judge Lund, now her mentor, and the Probate Court, sparked an exciting interest in trust and estates work, particularly a love of accountings. Soon, Berlinger began contracting for trust and estates attorneys specializing in preparation of court fiduciary accountings. This contract work soon evolved into Berlinger running her own trusts and estates practice for about fifteen years.

In 2020, Berlinger began working for the Ventura County Superior Court as the Probate Examiner and soon consistently sat as Judge Pro Tem in Probate Court, specifically on days when conservatorship accounting hearings were scheduled. In her current position as the Civil Case Management Attorney, Berlinger ensures all procedural requirements have been met before a civil case is assigned to the trial court. The impetus for this new position was the backlog of thousands of cases from the COVID period. Berlinger juggles getting both backlogged COVID-era cases, and newer cases, procedurally sound so they can proceed to settlement conferences, dismissal, or trial. Berlinger is a great fit for this position because of her attention to detail and adherence to Court rules and statutes. Though the COVID backlog remains, Berlinger is optimistic and motivated to resolve the backlog efficiently and effectively. Berlinger has also been assigned to hear Small Claims cases in Simi Valley, California.

Helpful Advice for Appearing in Courtroom 22B:

1. Timely file a Case Management Statement

- a. Must be filed 15 days before hearing.
- b. Mandatory Judicial Council Form (CM-110).
- c. Ensure statement is complete and accurate (no missed checked boxes or incorrectly checked boxes).
- d. Beneficial to Judge in preparation for hearing.

2. Check your Tentative Rulings

- a. Tentative rulings are issued in advance for each case and will provide counsel with relevant information to make the CMC hearing productive.
- b. Tentative rulings provide insight to the outcome of the hearing.
 - i. Pro Tip: consider re-bookmarking on your web browser the link for tentative ruling information; with the new online court system, the previous web pathway to access tentative rulings for civil cases is ineffective.
 - ii. Pro Tip: do not use a dash when entering your case number.

3. Get on the Case Management Hearing Calendar

- a. If your case does not have a CMC hearing date:
 - i. File a Stipulation and Order ASAP to be calendared for a CMC hearing date.

When Berlinger is not digging deep into civil procedure, she is out and about serving the community. Berlinger is a highly sought after teacher/instructor. Whether speaking to a room full of Girl Scouts, or attorneys and private fiduciaries statewide, Berlinger has a unique way of relaying information in a comprehensive and understandable way that is praised by attendees of her talks. Berlinger carries a passion for her work inside and outside of the courthouse. In her role as Permanent Judge Pro Tem and Civil Case Management Attorney, Berlinger wants to play a positive role in continuing to push the legal field towards excellence.

Fun Facts:

- Berlinger has three teenage girls, including a set of twins
- Berlinger likes to garden, read, and hang out with her kids
- Berlinger's oldest daughter, Ainsley, is a Division 1 scholarship athlete softball player.



Christal Porter is a Ventura County attorney. She can be reached at (424)416-4109.



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ASSESSOR KEITH TAYLOR TAKES HELM AS CHANGES AFFECT VENTURA COUNTY REAL PROPERTY TAX MATTERS

By Lauren E. Sims



On June 7, 2022, Ventura County voters elected Keith Taylor as Assessor. Taylor replaced longtime Assessor Dan Goodwin (first elected to the position in 1998), who vacated his seat upon retirement.

At the time of the election, Taylor was the Chief Deputy Assessor of Valuation for the Ventura County Assessor's office, having assumed that role in November, 2018. Prior to joining the Ventura County Assessor's office, Taylor worked in the Santa Barbara County Assessor's office for many years, starting out as an Auditor-Appraiser and ultimately being promoted to Chief Deputy Assessor in July, 2013. A Camarillo resident, Taylor earned his B.A. in Business Economics from UCSB, and holds an Advanced Certified Property Tax Appraiser certificate from the California Board of Equalization. In addition, Taylor was a three-term president of the Southern Chapter of the Society of Auditor-Appraisers, and is a member of the International Association of Assessing Officers (IAAO).

Taylor steps into the role of Ventura County Assessor (hereafter, "Assessor") as a number of substantial changes are occurring with respect to assessment matters both in Ventura County and more broadly in California.

Proposition 19, Generally

In November, 2020, California voters approved Proposition 19, the most significant change to the California real property tax system in decades. Proposition 19 modified certain ways in which base year values may be transferred both during life and at death. Without going into detail about how the new rules work, the primary changes can be summarized as follows:

- After Proposition 19, persons over age 55, or those who are severely and permanently disabled, may now transfer a primary residence base year value up to three times (previously this was limited to one time), to any county (previously transfers were limited to (1) intra-county transfers; and (2) transfers to counties that had adopted an ordinance allowing such transfers). Proposition 19 also liberalized the valuation rules that apply to such transfers, as a homeowner may now transfer the homeowner's base year value to a property with a higher fair market value than the current home, with an adjustment to assessed value to reflect that higher value. (Previously, the new home needed to have a value equal to or lower than the existing home to qualify.)

- Proposition 19 created the "Intergenerational Transfer Exclusion" for transfers occurring after February 15, 2021, between parents and children (or qualifying grandparents and grandchildren). For intergenerational transfers under Proposition 19, transferees may now claim an exclusion from reassessment with respect to *only* a transferor's (1) family farm; and/or (2) primary residence. As to primary residence transfers, an eligible transferee must now make the transferred property their own primary residence within one year of the transfer (and file a Homeowner's Exemption claim form to establish this fact). New transfer value limitations apply for both family farms and primary residences, and a partial reassessment will occur for property with a fair market value that is more than the assessed value at the time of transfer plus \$1,000,000 (for transfers from February 16, 2021, to February 15, 2023). The \$1,000,000 value is adjusted

for inflation every other February 16 (with the first adjustment bringing this value to \$1,022,600 for the period February 16, 2023, to February 15, 2025). (Before Proposition 19, transferors could transfer one or more primary residences of *unlimited* value with the qualifying transferee incurring no reassessment, and up to \$1,000,000 of assessed value of "other" (i.e., non-primary residence) real property.)

Following the initiative's passage, the State Board of Equalization ("BOE") has engaged in rulemaking and issued letters of guidance regarding Proposition 19's interpretation and implementation. Many resources are available on the BOE's website, which has a dedicated section dealing with Proposition 19 matters (<https://www.boe.ca.gov/prop19>). While it is anticipated that the BOE will continue to issue and post "Letters to Assessors" regarding Proposition 19, the rulemaking and interpretations issued thus far by the BOE are helpful for an immediate baseline understanding of the new law.

Taylor will be speaking on Proposition 19 at an event presented by the Real Property and Estate Planning and Probate Sections of the VCBA on October 17, 2023, at 12 p.m. Please see the flyer enclosed in this CITATIONS for additional details about this virtual presentation.

Effect of Proposition 19 on Ventura County Assessor's Office

As one can imagine, these new laws have necessitated a shifting of resources within the Assessor's office and have led to the need for enhanced systems the public may not have anticipated. For example, when a person over age 55 transfers their base year value from one county to another, an exchange of information between the assessor offices of the two counties is necessary for the transferee county to establish the owner's new base year value. But, in part because not all counties had ordinances allowing for such intercounty transfers, the systems to process those transfers may need to be updated and modernized. Some counties, for example, had been sending each other paper rather than electronically transmitting the necessary information.

Since Ventura County already had an ordinance allowing intercounty transfers, however, some systems were in place to help facilitate this change in the law. Work is underway to create a statewide database for Proposition 19 to help facilitate these information exchanges.

Adding to the complication, the “old” law still applies for transfers that occurred before the effective dates of Proposition 19’s elements (and, though not discussed here, certain rules regarding base year value transfers after calamities still apply as well, despite Proposition 19 also providing similar relief to victims of wildfires and natural disasters). With respect to the changes in intergenerational transfers, what had been referred to as simply as the “Parent-Child Exclusion” and “Grandparent-Grandchild Exclusion” still apply for qualifying transfers that occurred on or before February 15, 2021. This means that, for some time, assessors will likely be operating under both systems as claims for reassessment exclusion under the pre-Proposition 19 rules will continue to be processed (e.g., for transfers by reason of deaths that occurred prior to February 16, 2021).

The enactment of Proposition 19 has altered the numbers and types of filings that the Assessor’s office is receiving, as one would expect. Chart 1 provides some statistics regarding filings over fiscal years ending June 30, 2020, 2021, and 2022. Due to Proposition 19 becoming effective in the first half of 2021, fiscal year ending June 30, 2021, is likely an anomaly in terms of family transfers. It is clear, however, that the change in legislation is correlated with a significant decrease in claims for exclusions for transfers between generations, and an increase in claims for transfers of base year values. Given the substantial agricultural industry in Ventura County, it is interesting to note that the Assessor reports only a handful of Proposition 19 claims have been processed to date under the family farm rule.

Other Changes at the Assessor’s Office

While Proposition 19 spurred the need to modify certain systems at the Assessor’s office, broader changes are also in the works. The software platforms utilized

Chart 1

Fiscal Year	2019 7/1/2019 – 6/30/2020	2020 7/1/2020 – 6/30/2021	2021 7/1/2021 – 6/30/2022	
Prop 58/193 (Parent/Child & Grandparent/Grandchild Transfers)	1497	2737	390	Intergenerational Transfers
Prop 60/90 (Base Year Value Transfers)	368	531	1248	Base Year Value Transfers
Total	1865	3268	1638	Total

by the Assessor (and Assessment Appeals Board), Auditor, and Tax Collector in Ventura County have been undergoing substantial updates, which should improve integration. If you have recently been to the Assessor’s website and tried to research a parcel’s property characteristics, you will have undoubtedly noticed changes. The transition process has taken time (and led to some delays in processing bills and refunds), but the hope is that the updated online system will make it easier for the public to obtain information.

In addition to software changes, the Assessor’s office has also increased its electronic communication capability. For example, inquiries and communications can be initiated through, and forms can be filed by, email (assessor.info@ventura.org). The Assessor currently accepts all forms by email that have the handwritten signature(s) of the applicant(s)/required signer(s) (digital signatures are not accepted at this time). Further, Assessment Appeals Applications can now be submitted through an online system with the Clerk of the Assessment Appeals Board, which allows anyone submitting multiple assessment appeals (whether for one owner with multiple years or parcels, or multiple different owners and parcels) to keep track of all appeals in one place. These changes have a common goal: ensuring that property tax assessments in Ventura County are accurate, the public has access to information (from any internet-connected device), and the system

runs efficiently between the various County offices that deal with these assessments.

Having been working in assessor offices in California for over 35 years, Taylor has seen a lot of changes and been tasked with valuing properties in a wide variety of situations, including handling decreases in value as a result of calamities or downturns in the market, and assessing unusual property types, such as rocket launch facilities. Taylor’s priority is working with the public and, especially, making sure that property owners understand the role of the Assessor and the assessment process. Taylor encourages people to not hesitate to ask questions of the Assessor’s office relating to assessments. To that end, a future article in CITATIONS will address some common questions and “dos and don’ts” relating to Assessor forms.



Lauren E. Sims is a partner at Ventura Coast Law LLP, where she handles estate planning, trust and estate administration, and real property matters (including real property tax issues). Lauren is the current leader of the VCBA Real Property Section. She can be reached at sims@venturacoastlaw.com.

O-HIGHER ED | www.ohighered.org

By Michael Strauss

Students whose parents never went to college can lack the information, guidance, and resources to get them on track to apply for college. Moreover, financially strapped Ojai Valley public schools provide limited college counseling services, so the prospects for first-generation students to access higher education are especially dim. Since its founding in 2019, O-Higher-Ed (OHE) has sought to level the playing field for all first-generation students in the Ojai Valley. At no cost to the students in its program, OHE provides high-level college counseling and preparedness training in an effort to get more first-generation kids on the path to apply and gain acceptance college.

OHE begins its training in middle school. In partnership with Matilija Middle School, where in 2019 the student population performed 19 points below the state standard for English and 43 points

below the state standard in math, OHE counselors answer common questions like what classes are needed for college readiness, and even what are bachelor's degrees, master's degrees, and endowments? Later, in high school, OHE counselors meet regularly throughout the year one-on-one with students to discuss academic progress and goal setting. OHE also provides free math tutoring services in an effort to rectify pandemic-related learning losses. In junior year, OHE counselors meet more frequently with the students, helping them build college lists and register, prepare for, and take standardized tests like the SAT. In senior year, often on a weekly basis, OHE counselors walk their students through the college-application process, including financial aid and scholarship applications. OHE also funds college visits for students and their families and ultimately helps the students decide which college is their best fit.

Since 2019, OHE has already helped 60 first-generation students get into college (see the impressive list of schools at <https://ohighered.org/college-results/>). At present, there are 86 more college-bound students in the OHE program, though many more in the Ojai Valley could benefit from OHE's assistance.

Ojai resident and VCBA member **Michael Strauss** is a supporter and legal advisor to OHE. If you would like to volunteer, contribute to, or participate in the OHE program, please contact Michael by e-mail at mike@straussmediation.com.

If you volunteer or are active with a nonprofit that you'd like to highlight, please email sandra@vcba.org.



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