

AGENDA

BOARD OF LAW LIBRARY TRUSTEES of the LOS ANGELES COUNTY LAW LIBRARY

REGULAR BOARD MEETING
Wednesday, September 16, 2015
12:15 PM
MILDRED L. LILLIE BUILDING
TRAINING CENTER
301 WEST FIRST STREET
LOS ANGELES, CA 90012-3140

ACCOMMODATIONS

A person with a disability may contact the Board Secretary's office at (213) 785-2511 at least 24 hours before the scheduled meeting to request receipt of an agenda in an alternative format or to request disability-related accommodations, including aids or services, in order to participate in the public meeting. Later requests will be accommodated to the extent feasible.

AGENDA DESCRIPTIONS

The agenda descriptions are intended to give notice to members of the public of a brief general description of items of business to be transacted or discussed. The posting of the recommended actions does not indicate what action will be taken. The Board may take any action that it deems to be appropriate on the agenda item and is not limited in any way by the notice of the recommended action. The President reserves the right to discuss the items listed on the agenda in any order.

REQUESTS AND PROCEDURES TO ADDRESS THE BOARD

A member of the public has the right to address the Board on agenda items or on items of interest which are not on the agenda and which are within the subject matter jurisdiction of the Board. All requests to address the Board must be submitted in person to the Board President prior to the start of the meeting. Public comments will be taken at the beginning of each meeting as Agenda Item 1.0. A member of the public will be allowed to address the Board for a total of three (3) minutes for a single item or a maximum of five (5) minutes for all items unless the President grants more or less time based on the number of people requesting to speak and the business of the Board. When members of the public address the Board on agenda items, the President determines the order in which speakers will be called. Persons addressing the Board shall not make impertinent, slanderous or profane remarks to the Board, any member of the Board, staff or general public, nor utter loud, threatening, personal or abusive language, nor engage in any other disorderly conduct that disrupts or disturbs the orderly conduct of any Board Meeting. The President may order the removal of any person who disrupts or disturbs the orderly conduct of any Board Meeting.

AGENDA MATERIALS

Unless otherwise exempt from disclosure, all materials relating to items on the agenda distributed to all, or a majority of the members of the Board less than 72 hours prior to the meeting shall be made available for public inspection at the time the writing is distributed in the Executive Office of the Law Library.



CALL TO ORDER

1.0 PUBLIC COMMENT

2.0 PRESIDENT'S REPORT

3.0 CONSENT CALENDAR

- 3.1 Approval of Minutes of the July 22, 2015, Regular Board Meeting.
- 3.2 Review of June 2015 Financials & July 2015 List of Checks and Warrants.
- 3.3 Quarterly Strategic Plan Update
- 3.4 Approval of Annual Report to the Board of Supervisors
- 3.5 ILS Upgrade Project Update

4.0 DISCUSSION ITEMS

- 4.1 Approval of Revised Borrower Rules
- 4.2 Authorization to Donate Surplus Books to the Friends of the Los Angeles County Law Library

5.0 AGENDA BUILDING

Items not on the posted agenda may be presented by a Trustee and, if requested, may be referred to staff or placed on the agenda for consideration at a future meeting of the Board.

6.0 EXECUTIVE DIRECTOR REPORT

7.0 ADJOURNMENT

The next Regular Meeting of the Board of Law Library Trustees is scheduled for Wednesday, October 28, 2015.

POSTED THURSDAY, SEPT 10, 2015 @ 5:15 P.M.

POSTED BY YRMA AYALA



AGENDA ITEM 3

CONSENT CALENDAR

- 3.1 Approval of Minutes of the July 22, 2015, Regular Board Meeting.
- 3.2 Review of June 2015 Financials & July 2015 List of Checks and Warrants.
- 3.3 Quarterly Strategic Plan Update
- 3.4 Approval of Annual Report to the Board of Supervisors
- 3.5 ILS Upgrade Project Update

MINUTES OF THE REGULAR BOARD MEETING
OF THE BOARD OF LAW LIBRARY TRUSTEES OF
LOS ANGELES COUNTY

A California Independent Public Agency Under
Business & Professions Code Section 6300 et sq.

July 22, 2015

The Regular Board Meeting of the Board of Law Library Trustees of Los Angeles County was held on Wednesday, July 22, 2015 at 12:15 p.m., at the Los Angeles County Law Library Mildred L. Lillie Main Library Building at 301 West First Street, Los Angeles, California 90012 for the purposes of considering reports of the affairs to the Library, and transacting such other business as might properly come before the Board of Trustees.

ROLL CALL/QUORUM

Trustees Present: Judge Michelle Williams Court
Judge Ann I. Jones
Judge Mark Juhas
Kenneth Klein, Esquire
Judge Dennis Landin
Susan Steinhauser, Esquire

Trustees Absent: None

Senior Staff Present: Sandra J. Levin, Executive Director
Jaye Steinbrick, Senior Director

Also Present: Marcelino Juarez, Finance Manager

President Jones determined a quorum to be present, convened the meeting at 12:15 p.m. and thereafter presided. Executive Director, Sandra Levin recorded the Minutes.

1.0 PUBLIC COMMENT

During the three (3) minute allocated, Mr. Lee Paradise commented on fundraising in addition to making comments in objection to some of the Library's business practices, and operating procedures.

2.0 PRESIDENT'S REPORT

President Jones noted that Judge Reva Goetz is retiring from the bench and therefore has retired from the Board of Trustees as well. President Jones also reported that donations have been received in Judge Jan Pluim's honor and that the meeting will adjourn in Jan Pluim's memory. President Jones also commented on the remarkable number of classes offered at the Library. ED Levin introduced 8 summer interns to the Board.

3.0 CONSENT CALENDAR

- 3.1 Approval of Minutes of the June 24, 2015, Regular Board Meeting.
- 3.2 Review of May 2015 Financials & June 2015 List of Checks and Warrants.
- 3.3 2014-15 Fiscal Year Statistics
- 3.4 Approval of Amendments to Employee Handbook

President Jones requested a motion to approve the Consent Calendar. So moved by Trustee Landin, seconded by Trustee Court. The motion was unanimously approved, 5-0.

4.0 DISCUSSION ITEMS

4.1 Revised Rules of Conduct

Trustee Steinhauser arrived and joined the meeting at 12:27 pm.

ED Levin presented the staff report, identifying the proposed changes to the Rules of Conduct. Discussion ensued.

President Jones requested a motion to approve the discussion item. So moved by Trustee Court, seconded by Trustee Landin. The motion was unanimously approved, 6-0.

4.2 125th Anniversary Celebration

ED Levin discussed several staff suggestions regarding how to commemorate the upcoming 125th anniversary of the Law Library. Trustees expressed support for a celebration and made additional suggestions including showing videos of legal pioneers and honoring founders of the Law Library.

5.0 AGENDA BUILDING

There were no items for agenda building.

EXECUTIVE DIRECTOR REPORT

ED Levin thanked Judge Plum's family and acknowledged the many donations made to the Friends of the Los Angeles County Law Library in memory of Judge Jan Plum. She also mentioned the Groundbreaking Storied Grant Project and the process of nominating and interviewing individuals.

6.0 ADJOURNMENT

There being no further business to come before the Board the meeting was adjourned in the memory of Judge Jan Plum at 12:47 p.m. The next Regular Meeting of the Board of Law Library Trustees is scheduled for Wednesday, August 26, 2015 at 12:15.

Sandra J. Levin, Executive Director and Secretary
Los Angeles County Law Library Board of Trustees

MEMORANDUM

DATE: September 16, 2015
TO: Board of Law Library Trustees
FROM: Marcelino Juarez, Finance Manager
VIA: Sandra Levin, Executive Director
RE: July & August 2015 Board Financials

Monthly Board financials for the month of July and August 2015 are currently unavailable. Instead, we intend to present a quarterly financial report at the October 28, 2015 regular meeting. This will allow reference audited FY2015 figures in our financial reports for FY2016.

Included in this packet is the provisional unaudited June 2015 and fiscal year end financials.



MEMORANDUM

DATE: September 16, 2015
TO: Board of Law Library Trustees
FROM: Sandra Levin, Executive Director
RE: Quarterly Strategic Plan Update

Each quarter we present an update on the status of all of the pending Strategic Plan projects since the Plan was adopted by the Board in 2013.

Attached is the Strategic Plan Accountability Report for the quarter ending June 30, 2015. Please note that the spreadsheet has been divided into two sections: 1) objectives still in process; and 2) objectives completed or indefinitely deferred. The number of completed projects is a testament to the dedication of the Law Library staff that – despite substantial budget cuts and reductions in staffing – they have been able to complete so many valuable extra projects. Only a very small number have been indefinitely deferred and generally those few are because of external constraints or a decision to achieve the objective in a different way.

Although this item is for information only and is not an action item, we invite any questions you may have.



Los Angeles County Law Library Strategic Plan
Accountability Report

GOAL	PROJECT	COORDINATOR(S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
C1(A)	Track usage, visitors and performance metrics						
C1(A)	Track usage, visitors and performance metrics	Ralph Stahlberg & Channa Cajero	Identify technology needed	9/30/2013	Y		
C1(A)	Track usage, visitors and performance metrics	Ralph Stahlberg & Channa Cajero	Research methods available	10/31/2013	Y		
C1(A)	Track usage, visitors and performance metrics	Ralph Stahlberg & Channa Cajero	Formally implement programs	11/30/2013		12/31/2015	Recommendations forthcoming. Planning and implementing programs pending ILS upgrade project T1(B).
C1(A)	Track usage, visitors and performance metrics	Ralph Stahlberg & Channa Cajero	Evaluate results	12/31/2013		12/31/2015	
C1(A)	Track usage, visitors and performance metrics	Ralph Stahlberg & Channa Cajero	Completion	1/31/2014		12/31/2015	
C1(B)	Conduct patron surveys and focus groups regarding legal resource materials needs						
C1(B)	Conduct patron surveys and focus groups regarding legal resource materials needs	Channa Cajero	Identify users	12/31/2013	Y		
C1(B)	Conduct patron surveys and focus groups regarding legal resource materials needs	Channa Cajero	Set up and hold focus groups	12/31/2013	Y	2/15/2014	
C1(B)	Conduct patron surveys and focus groups regarding legal resource materials needs	Channa Cajero	Draft and distribute surveys to user groups	2/28/2014	Y	2/28/2015	Item completed 3/8/2015. Survey availability extended to allow for additional responses. Survey dates: February 3 - March 8, 2015.
C1(B)	Conduct patron surveys and focus groups regarding legal resource materials needs	Channa Cajero	Evaluate results	3/31/2014		6/30/2015	Evaluation underway.
C1(B)	Conduct patron surveys and focus groups regarding legal resource materials needs	Channa Cajero	Completion	3/31/2014		7/31/2015	Extended date reflects new deadline to draft and distribute survey to user groups.
C1(C)	Develop a comprehensive strategy for collection assessment and evaluation						
C1(C)	Develop a comprehensive strategy for collection assessment and evaluation	Channa Cajero	Evaluate methods available	12/31/2013	Y		
C1(C)	Develop a comprehensive strategy for collection assessment and evaluation	Channa Cajero	Select useful tools and technology	12/31/2013	Y		
C1(C)	Develop a comprehensive strategy for collection assessment and evaluation	Channa Cajero	Collect data	3/31/2014	Y	12/31/2014	Date extended pending revision of Voyager reports for this project.
C1(C)	Develop a comprehensive strategy for collection assessment and evaluation	Channa Cajero	Review results and make assessments	3/31/2014	Y	12/31/2014	Date extended pending revision of Voyager reports for this project.
C1(C)	Develop a comprehensive strategy for collection assessment and evaluation	Channa Cajero	Present recommendations	6/30/2014		8/31/2015	Target date extended to coincide with new deadline for RFP for ILS product. Some recommendations contingent upon capabilities of new system.
C1(C)	Develop a comprehensive strategy for collection assessment and evaluation	Channa Cajero	Completion	6/30/2014		12/31/2015	Target date extended to coincide with new deadline for ILS product selection for project T1(B). Some recommendations contingent upon capabilities of new system.
C1(E)	Develop resource materials and referrals for patrons needing translation						
C1(E)	Develop resource materials and referrals for patrons needing translation	Austin Stoub	Research available resources	8/30/2013	Y		
C1(E)	Develop resource materials and referrals for patrons needing translation	Austin Stoub	Contact translators, interpreters, other resources regarding potential partnerships (min 10 contacts)	9/30/2013	Y		
C1(E)	Develop resource materials and referrals for patrons needing translation	Austin Stoub	Prepare resource sheet for patrons	10/31/2013	Y		
C1(E)	Develop resource materials and referrals for patrons needing translation	Austin Stoub	Translate resource sheet	11/30/2013		7/30/2015	Underway
C1(E)	Develop resource materials and referrals for patrons needing translation	Austin Stoub	Completion	12/31/2013		7/30/2015	
C1(F)	Include tools on our website to help patrons find materials (e.g., a "Treatise Finder")						
C1(F)	Include tools on our website to help patrons find materials (e.g., a "Treatise Finder")	Austin Stoub	Research capabilities of current system	9/30/2013	Y		

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GOAL	PROJECT	COORDINATOR(S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
C1(F)	Include tools on our website to help patrons find materials (e.g., a "Treatise Finder")	Austin Stoub	Test system	10/31/2013	y	4/1/2014	
C1(F)	Include tools on our website to help patrons find materials (e.g., a "Treatise Finder")	Austin Stoub	Select areas to promote	11/30/2013	Y	4/1/2014	I have identified legal topical areas to begin and, as completed, will add additional legal topics to our treatise finder list.
C1(F)	Include tools on our website to help patrons find materials (e.g., a "Treatise Finder")	Austin Stoub	Develop content and tools	12/31/2013	Y	4/1/2014	
C1(F)	Include tools on our website to help patrons find materials (e.g., a "Treatise Finder")	Austin Stoub	Completion	12/31/2013		9/30/2015	Awaiting next website update
C1(G)	Develop, increase and advertise depository status and availability of local government agency legal material						
C1(G)	Develop, increase and advertise depository status and availability of local government agency legal material	Esther Eastman	Research other library methods	12/31/2014	Y	12/31/2014	s:\ADMINISTRATIVE_SERVICES\MANAGEMENT TEAM\Strategic Planning\docslibsurvey.xlsx
C1(G)	Develop, increase and advertise depository status and availability of local government agency legal material	Esther Eastman	Select methods in consultation with communications	12/31/2013	Y		This is ongoing as themes present themselves; i.e. Constitution Day exhibit in September; Bill of Rights Day in December.
C1(G)	Develop, increase and advertise depository status and availability of local government agency legal material	Esther Eastman	Explore digitizing unique local government publications	3/31/2014	Y	6/30/2015	Limited interest externally. Will continue to explore options, especially in-house. Request to be included in Jaye's exploratory digitization committee.
C1(G)	Develop, increase and advertise depository status and availability of local government agency legal material	Esther Eastman	Develop training classes for specialized government databases	6/30/2014	Y	12/31/2014	Developed an ongoing Pacer class to be held at the Main Library, monthly. Would like to develop further classes in the future related to free government databases.
C1(G)	Develop, increase and advertise depository status and availability of local government agency legal material	Esther Eastman	Identify all state, county and city directives and/or laws for inclusion in OPAC or a libguide	9/30/2014		12/31/2015	This project has grown. The initial part requires an intern for extensive web searching and data entry of state primary documents. It is on hold for an intern in summer or fall 2015. Separately, I am creating a libguide for federal primary resources and I have updated the library website's government documents page. Will update resource guide for local government agencies. The date of completion should be extended to December 2015.
C1(G)	Develop, increase and advertise depository status and availability of local government agency legal material	Esther Eastman	Completion				
C1(H)	Establish material loan program between Main and branch locations						
C1(H)	Establish material loan program between Main and branch locations	Linda Heichman	Needs assessment	3/31/2014	Y	3/31/2015	Committee has been formed (Linda, Christine, Jennifer); possibilities under discussion.
C1(H)	Establish material loan program between Main and branch locations	Linda Heichman	Pilot loan program	6/30/2014		3/31/2016	Push back because has to do with change of policies which all need to be created and SL advised not to begin any new big projects now that involve policies and procedures making. Delivery mechanisms are limited and getting books out to locations and protocols for return and delivery. Cost involved in transport of materials, etc. Questions raised by team: Christine and Jennifer - scope, demand for service, staff time and availability, policy/procedure changes which may require board approval. We are on hold with new things (budget).
C1(H)	Establish material loan program between Main and branch locations	Linda Heichman	Launch formal material loan program	9/30/2014		7/1/2016	Consider for FY17. Limited capacity for new projects during FY16 per ED.
C1(H)	Establish material loan program between Main and branch locations	Linda Heichman	Evaluate loan program	3/31/2015		4/1/2017	
C1(H)	Establish material loan program between Main and branch locations	Linda Heichman	Completion			4/1/2017	
C2(A)	Encourage donations of FCIL materials from other libraries and formalize LLMC collaboration						
C2(A)	Encourage donations of FCIL materials from other libraries and formalize LLMC collaboration	Neel Agrawal	Finalize LLMC agreement re donation, storage and scanning of materials	6/30/2013	Y		

Los Angeles County Law Library Strategic Plan
Accountability Report

GOAL	PROJECT	COORDINATOR(S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
C2(A)	Encourage donations of FCIL materials from other libraries and formalize LLMC collaboration	Neel Agrawal	Create a set of expectations and anticipations for potential FCIL donations	9/30/2014		9/30/2015	Delayed due to other priorities and transitions at LLMC
C2(A)	Encourage donations of FCIL materials from other libraries and formalize LLMC collaboration	Neel Agrawal	Identify priority acquisitions (see C2(D))	12/31/2014	Y		Primary law not held by LALL is priority.
C2(A)	Encourage donations of FCIL materials from other libraries and formalize LLMC collaboration	Neel Agrawal	Outreach to libraries with priority FCIL materials to donate	12/31/2014		10/1/2015	Under discussion with LLMC.
C2(A)	Encourage donations of FCIL materials from other libraries and formalize LLMC collaboration	Neel Agrawal	Completion	3/31/2015		1/1/2016	
C2(B)	Conduct user needs survey and research to develop and expand FCIL programming						
C2(B)	Conduct user needs survey and research to develop and expand FCIL programming	Neel Agrawal	Identify patron groups	3/31/2014	Y		
C2(B)	Conduct user needs survey and research to develop and expand FCIL programming	Neel Agrawal	Create survey	5/31/2014		11/1/2015	Commenced informally; formal survey deferred in light of other projects/priorities and pending evaluation of ongoing programming
C2(B)	Conduct user needs survey and research to develop and expand FCIL programming	Neel Agrawal	Send survey	6/30/2014		12/1/2015	Deferred until after completion of other patron surveys
C2(B)	Conduct user needs survey and research to develop and expand FCIL programming	Neel Agrawal	Hold focus groups	7/31/2014		2/1/2016	
C2(B)	Conduct user needs survey and research to develop and expand FCIL programming	Neel Agrawal	Assessment	12/31/2014		2/1/2016	
C2(B)	Conduct user needs survey and research to develop and expand FCIL programming	Neel Agrawal	Completion	3/31/2015		3/31/2016	
C2(C)	Purchase FCIL materials that supplement FCIL programming						
C2(C)	Purchase FCIL materials that supplement FCIL programming	Neel Agrawal	Identify programs	12/31/2013	Y		
C2(C)	Purchase FCIL materials that supplement FCIL programming	Neel Agrawal	Identify appropriate materials	3/31/2014	Y		
C2(C)	Purchase FCIL materials that supplement FCIL programming	Neel Agrawal	Revise collection development policy for FCIL (see C2(D))	6/30/2014		5/1/2016	Deferred in light of budget and other projects/priorities
C2(C)	Purchase FCIL materials that supplement FCIL programming	Neel Agrawal	Purchase after evaluating current library holdings	9/30/2014		8/1/2016	
C2(C)	Purchase FCIL materials that supplement FCIL programming	Neel Agrawal	Completion	9/30/2014		9/30/2016	
C2(D)	Undertake a collection assessment, developing country profiles and working with expert practitioners and academics to identify the most significant materials						
C2(D)	Undertake a collection assessment, developing country profiles and working with expert practitioners and academics to identify the most significant materials	Neel Agrawal	Create template for priority materials for systematic review	12/31/2013	Y		
C2(D)	Undertake a collection assessment, developing country profiles and working with expert practitioners and academics to identify the most significant materials	Neel Agrawal	Begin country review	1/15/2014	Y		
C2(D)	Undertake a collection assessment, developing country profiles and working with expert practitioners and academics to identify the most significant materials	Neel Agrawal	Evaluate results	2/15/2014		9/1/2015	Still need to complete country surveys. Need additional volunteers or staffing for country surveys.
C2(D)	Undertake a collection assessment, developing country profiles and working with expert practitioners and academics to identify the most significant materials	Neel Agrawal	Revise collection development policy	3/31/2014		11/31/2015	Still need to complete country surveys. Need additional volunteers or staffing for country surveys.
C2(D)	Undertake a collection assessment, developing country profiles and working with expert practitioners and academics to identify the most significant materials	Neel Agrawal	Completion	9/30/2014		1/1/2016	Still need to complete country surveys. Need additional volunteers or staffing for country surveys.
C2(E)	Build strong relationships with vendors around the world						
C2(E)	Build strong relationships with vendors around the world	Shohreh Saljooghi	Create a map/locator connecting regions with vendors	3/31/2014		10/30/2015	delayed due to the unresponsiveness or the delays in receipt of response from some of the FCIL vendors
C2(E)	Build strong relationships with vendors around the world	Shohreh Saljooghi	Organize site visits and training sessions to strengthen relationships (at least 1 per vendor)	6/30/2014		10/30/2015	ongoing
C2(E)	Build strong relationships with vendors around the world	Shohreh Saljooghi	Identify best practices and business models for complex business transactions with foreign vendors	9/30/2014		10/30/2015	researching best practices regarding payment, minimizing delays and ensuring accuracy of global acquisitions
C2(E)	Build strong relationships with vendors around the world	Shohreh Saljooghi	Present recommendation	11/30/2015			

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C2(E)	Build strong relationships with vendors around the world	Shohreh Sajjooghi	Completion	11/30/2015			
C3(A)	Develop digitization and archiving plan for the next 20 years						
C3(A)	Develop digitization and archiving plan for the next 20 years	Jaye Steinbrick	Assemble committee of stakeholders / departments	2/1/2014	Y	3/1/2015	
C3(A)	Develop digitization and archiving plan for the next 20 years	Jaye Steinbrick	Identify what is currently being digitized and by whom	5/1/2014	Y	6/30/2015	
C3(A)	Develop digitization and archiving plan for the next 20 years	Jaye Steinbrick	Determine collection & priorities to be scanned	9/1/2014		10/1/2015	Deferred until fully staffed and Navision and ILS software upgrades underway
C3(A)	Develop digitization and archiving plan for the next 20 years	Jaye Steinbrick	Present draft of plan to staff for evaluation	10/31/2014		12/31/2015	
C3(A)	Develop digitization and archiving plan for the next 20 years	Jaye Steinbrick	Create scan program for image storage and accessibility.	2/1/2015		3/1/2016	
C3(A)	Develop digitization and archiving plan for the next 20 years	Jaye Steinbrick	Completion	3/1/2015		4/1/2016	
C3(B)	Develop a rare book storage and access plan						
C3(B)	Develop a rare book storage and access plan	Betsy Warner	Review LALL's former rare book access plan	9/30/2013	Y		
C3(B)	Develop a rare book storage and access plan	Betsy Warner	Review rare book access plans from other institutions	1/30/2014	Y		
C3(B)	Develop a rare book storage and access plan	Betsy Warner	Confer with affected staff	3/31/2014		8/30/2015	Available space will be reevaluated upon return of books from Bonhams.
C3(B)	Develop a rare book storage and access plan	Betsy Warner	Recommend a new rare book storage and access plan	6/30/2014		10/31/2015	
C3(B)	Develop a rare book storage and access plan	Betsy Warner	Completion	6/30/2014		10/31/2015	
C3(C)	Conduct a space needs assessment for the collection						
C3(C)	Conduct a space needs assessment for the collection	Betsy Warner	Evaluate current space needs	12/31/2014		12/31/2015	Waiting on completion of retro Cataloging project.
C3(C)	Conduct a space needs assessment for the collection	Betsy Warner	Project space needs for next 5-10 years	6/30/2015		3/31/2016	
C3(C)	Conduct a space needs assessment for the collection	Betsy Warner	Present draft of space needs assessment & recommendations	8/30/2015		4/30/2016	
C3(C)	Conduct a space needs assessment for the collection	Betsy Warner	Completion	8/30/2015		6/30/2016	
C3(D)	Establish a schedule and conduct a regular, periodic inventory of collection materials						
C3(D)	Establish a schedule and conduct a regular, periodic inventory of collection materials	Marcelino Juarez	Assemble project team and develop detailed scope, methodology, and schedule	10/31/2014	Y		Recurring as recommended by auditors (sampling once/5 yrs) plus annual RR inventory
C3(D)	Establish a schedule and conduct a regular, periodic inventory of collection materials	Marcelino Juarez	Commence inventory process and debug issues or problems	12/31/2014		10/15/2015	Deadline extended due to personnel transitions.
C3(D)	Establish a schedule and conduct a regular, periodic inventory of collection materials	Marcelino Juarez	Complete and document inventory	5/31/2015		3/31/2016	Deadline extended due to personnel transitions.
C3(D)	Establish a schedule and conduct a regular, periodic inventory of collection materials	Marcelino Juarez	Report to auditor	9/30/2015		9/30/2016	
C3(D)	Establish a schedule and conduct a regular, periodic inventory of collection materials	Marcelino Juarez	Completion	10/31/2015		9/30/2016	
C3(E)	Develop a plan for the preservation of gazettes and other loose periodicals						
C3(E)	Develop a plan for the preservation of gazettes and other loose periodicals	Betsy Warner	Survey other libraries to find out if they are binding or preserving with some other method.	6/30/2014		8/30/2015	Research methods including shrink wrapping
C3(E)	Develop a plan for the preservation of gazettes and other loose periodicals	Betsy Warner	Compare costs for different methods of preservation.	1/30/2015		10/31/2015	
C3(E)	Develop a plan for the preservation of gazettes and other loose periodicals	Betsy Warner	Initiate preservation plan.	6/30/2015		6/30/2016	
C3(E)	Develop a plan for the preservation of gazettes and other loose periodicals	Betsy Warner	Completion	6/30/2015		12/31/2016	
Comm1(B)	Maintain security levels in a respectful and non-threatening manner						
Comm1(B)	Maintain security levels in a respectful and non-threatening manner	Facilities Manager	Gather input from staff via survey on possible improvements.	7/15/2013		10/15/2015	Facilities Manager position currently vacant. Will address upon completion of RFP for new security contract
Comm1(B)	Maintain security levels in a respectful and non-threatening manner	Facilities Manager	Amend current post orders	9/30/2013		10/31/2015	Facilities Manager position currently vacant. Will address upon completion of RFP for new security contract

Los Angeles County Law Library Strategic Plan
Accountability Report

GOAL	PROJECT	COORDINATOR(S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
Comm1(B)	Maintain security levels in a respectful and non-threatening manner	Facilities Manager	Implement improvements	10/31/2013		12/31/2015	
Comm1(B)	Maintain security levels in a respectful and non-threatening manner	Facilities Manager	Complete regular training sessions with security staff	12/31/2013		12/31/2015	
Comm1(B)	Maintain security levels in a respectful and non-threatening manner	Facilities Manager	Completion	12/31/2013		2/28/2016	
Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Establish rapport with bar association leaders	6/31/14	Y		Selected: WLALA, Westwood, KABA, BWLALA, SFVBA, GBA, SGVBA
Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Select target organizations	6/31/14	Y	9/30/2014	Extended then completed; LACBA campaign and redesigned tiered membership program. Further implementation pending coordination with other departments on bar association-related objectives.
Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Conduct needs assessments	9/30/2014	Y		
Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Establish interest level and engagement	10/31/2014		8/30/2015	Discuss collaboration opportunities with local bar associations
Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Devise mutually beneficial options with participants	10/31/2014		12/31/2015	
Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Create and formalize agreements	11/30/2014		3/31/2016	
Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Implement program	12/31/2014		4/30/2016	LACBA campaign implemented.
Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Assess results	1/31/2015		7/31/2016	
Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Completion	2/28/2015		9/30/2016	
Comm1(E)	Continue and refine Members Program						
Comm1(F)	Automate parking reservations						
Comm1(F)	Automate parking reservations	Jaye Steinbrick	Assess parking requirements with staff	9/1/2013	Y		
Comm1(F)	Automate parking reservations	Jaye Steinbrick	Acquire online reservation software	10/1/2013	Y		
Comm1(F)	Automate parking reservations	Jaye Steinbrick	Installation and customization of software	11/29/2013		8/30/2015	Partially completed
Comm1(F)	Automate parking reservations	Jaye Steinbrick	Begin parallel testing of new system	12/2/2013		10/1/2015	
Comm1(F)	Automate parking reservations	Jaye Steinbrick	Begin using new self-reservation system	1/1/2014		10/1/2015	
Comm1(F)	Automate parking reservations	Jaye Steinbrick	Completion	12/31/2013		12/31/2015	
Comm1(G)	Resume used book sales						
Comm1(G)	Resume used book sales	Shohreh Saljooghi	Evaluate prior process for book sales, document possible efficiencies	7/15/2013	Y		
Comm1(G)	Resume used book sales	Shohreh Saljooghi	List and price current materials available for sale, place on sale shelves.	8/15/2013	Y		ongoing
Comm1(G)	Resume used book sales	Shohreh Saljooghi	Identify channels for announcing to various layers of the community	8/15/2013		10/30/2015	need to work on various internal and external protocols
Comm1(G)	Resume used book sales	Shohreh Saljooghi	Establish parameters for online sale and identify available venues	3/31/2014		10/30/2015	delayed due to the complexities and protocols
Comm1(G)	Resume used book sales	Shohreh Saljooghi	Assess	6/30/2014		10/30/2015	
Comm1(G)	Resume used book sales	Shohreh Saljooghi	Completion	8/30/14		10/30/2015	
Comm2(B)	Make presentations to potential users off-site						
Comm2(B)	Make presentations to potential users off-site	Austin Stoub	Identify potential users	9/30/2013		9/30/2015	Deferred until after other strategic plan priorities. Will develop a committee to help define parameters.
Comm2(B)	Make presentations to potential users off-site	Austin Stoub	Identify presenters	9/30/2013		9/30/2015	
Comm2(B)	Make presentations to potential users off-site	Austin Stoub	Present to test sites	10/31/2013		12/31/2015	
Comm2(B)	Make presentations to potential users off-site	Austin Stoub	Evaluate effectiveness	11/30/2013		1/31/2016	
Comm2(B)	Make presentations to potential users off-site	Austin Stoub	Recommend program parameters	12/31/2013		2/28/2016	
Comm2(B)	Make presentations to potential users off-site	Austin Stoub	Completion	12/31/2013		6/30/2016	
Comm2(C)	Collaborate with Grand Park on programming and shared outreach						
Comm2(C)	Collaborate with Grand Park on programming and shared outreach	Sandi Levin	Attend regular meetings with Grand Park staff to share information/opportunities	7/1/2013	Y		We attend as invited.
Comm2(C)	Collaborate with Grand Park on programming and shared outreach	Sandi Levin	Establish a regular mechanism for sharing outreach and promotional information	12/31/2013	Y		
Comm2(C)	Collaborate with Grand Park on programming and shared outreach	Sandi Levin	Participate in at least one joint event	6/30/2014		12/31/2015	Established collaboration (and reimbursement) for GP events; joint events delayed due to transitional issues at GP
Comm2(C)	Collaborate with Grand Park on programming and shared outreach	Sandi Levin	Completion	6/30/2014		1/31/2016	

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Comm2(G)	Coordinate programs with downtown arts community (e.g., Artwalk)						
Comm2(G)	Coordinate programs with downtown arts community (e.g., Artwalk)	Jaye Steinbrick	Contact Art-Walk coordinators to identify 2014 opportunities	9/1/2013	Y		
Comm2(G)	Coordinate programs with downtown arts community (e.g., Artwalk)	Jaye Steinbrick	Attend regular Art-Walk & Community Meetings to promote 2014 library involvement.	11/1/2013	Y		
Comm2(G)	Coordinate programs with downtown arts community (e.g., Artwalk)	Jaye Steinbrick	Develop a partnership recommendation	1/1/2014	Y	5/14/2014	Ongoing - Met with DTLA board members to determine ways we might work together and cross-promote events using social media
Comm2(G)	Coordinate programs with downtown arts community (e.g., Artwalk)	Jaye Steinbrick	Completion	2/1/2014		12/31/2015	Other art programs offered; DTLA still pending
Comm3(C)	Expand librarian training workshops						
Comm3(C)	Expand librarian training workshops	Linda Heichman	Develop slate of workshops.	12/31/2013	Y	3/31/2014	Full year of public classes launched @ partnerships; public librarians at partnerships are attending these classes. Codes issued for public library partner staff to attend LALL public classes free of charge (initiated FY14)
Comm3(C)	Expand librarian training workshops	Linda Heichman	Develop web-based public librarian training	8/31/2014		7/1/2016	In FY15, additional on-ground classes added at public library partnerships. No technical infrastructure in place for web-based. Possibility of talking with InfoPeople. CMeanwhile pursue discussions with LAPL .
Comm3(C)	Expand librarian training workshops	Linda Heichman	Launch web-based public librarian training	6/30/2016		1/1/2017	
Comm3(C)	Expand librarian training workshops	Linda Heichman	Completion	7/31/2016		1/1/2017	
Comm3(F)	Develop a continuing education series on legal topics for non-lawyers						
Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Identify potential stakeholders	3/30/2015	Y		Civil lawsuits basics and summer series for small business owners and entrepreneurs
Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Build rapport with prospective participants	3/30/2015	Y		Civil lawsuits basics and summer series for small business owners and entrepreneurs
Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Conduct needs assessment	3/30/2015	Y		Civil lawsuits basics and summer series for small business owners and entrepreneurs
Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Develop methodology for identification of speakers	6/30/2015	Y		
Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Build list of potential speakers	6/30/2015	Y		
Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Calendar classes	9/30/2015	Y		
Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Implement programs	9/30/2015			
Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Completion	10/31/2015			
Comm4(A)	Create a mobile eBranch to deploy at events						
Comm4(A)	Create a mobile eBranch to deploy at events	Linda Heichman	Analyze fixed eBranch locations and develop mobile eBranch model	3/31/2015		7/1/2016	Budget constraints. Per ED, reevaluate FY17 depending on budget. No new eBranches in FY16 per ED.
Comm4(A)	Create a mobile eBranch to deploy at events	Linda Heichman	Secure funding/partners/landing spaces for mobile eBranch	6/30/2015		1/1/2017	
Comm4(A)	Create a mobile eBranch to deploy at events	Linda Heichman	Launch mobile eBranch	6/30/2016		7/1/2017	
Comm4(A)	Create a mobile eBranch to deploy at events	Linda Heichman	Completion	7/31/2016		7/1/2017	
Comm4(B)	Broadcast professional development and general public webinars						
Comm4(B)	Broadcast professional development and general public webinars	Jaye Steinbrick	Work with staff to determine pilot content	2/1/2014		9/1/2015	Delayed due to staff vacancies. Will reevaluate in light of other priorities and potential video projects.
Comm4(B)	Broadcast professional development and general public webinars	Jaye Steinbrick	Create pilot class on video	4/1/2014		11/1/2015	

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Comm4(B)	Broadcast professional development and general public webinars	Jaye Steinbrick	Review pilot with staff for final edits	4/29/2014		11/15/2015	
Comm4(B)	Broadcast professional development and general public webinars	Jaye Steinbrick	Make pilot class available online	6/1/2014		12/1/2015	
Comm4(B)	Broadcast professional development and general public webinars	Jaye Steinbrick	Develop program to review and expand content	6/30/2014		6/30/2016	
Comm4(B)	Broadcast professional development and general public webinars	Jaye Steinbrick	Completion	12/31/2014		8/30/2016	Ongoing
Comm4(C)	Provide public computer classes for basic skill development						
Comm4(C)	Provide public computer classes for basic skill development	Sonny Lew	Create three proposed 30 minute computer class outlines	10/1/2013		11/30/2015	Delayed to other projects/weekly help desk duties. Looking into online computer tutorials.
Comm4(C)	Provide public computer classes for basic skill development	Sonny Lew	Schedule the first of three rotating classes, one per month	1/1/2014		12/30/2015	
Comm4(C)	Provide public computer classes for basic skill development	Sonny Lew	Assess effectiveness and recommend ongoing program parameters	2/28/2014		4/1/2016	
Comm4(C)	Provide public computer classes for basic skill development	Sonny Lew	Completion	3/31/2014		9/30/2016	
Comm4(D)	Outreach to prison inmates and other homebound people						
Comm4(D)	Outreach to prison inmates and other homebound people	Ralph Stahlberg	Identify user groups	1/1/2015	Y		
Comm4(D)	Outreach to prison inmates and other homebound people	Ralph Stahlberg	Determine information needs	3/3/2015	Y		Completed for prisoners; partially completed for homebound b/c runs large gamet
Comm4(D)	Outreach to prison inmates and other homebound people	Ralph Stahlberg	Research methods to fulfill identified needs	6/30/2015		8/15/2015	Research begun but not completed
Comm4(D)	Outreach to prison inmates and other homebound people	Ralph Stahlberg	Create program to disseminate information to user groups	9/1/2015			Need to work with P&P and Comm to determine best outreach options
Comm4(D)	Outreach to prison inmates and other homebound people	Ralph Stahlberg	Evaluate and assess	1/1/2016			
Comm4(D)	Outreach to prison inmates and other homebound people	Ralph Stahlberg	Completion	3/31/2016			
W1(B)	Maintain high-quality, comfortable physical facilities and working conditions						
W1(B)	Maintain high-quality, comfortable physical facilities and working conditions	Facilities Manager	Survey staff / conduct needs assessment	9/1/2013		7/30/2015	Informal assessment ongoing. Formal assessment delayed and aligned with security survey. Will be reassigned to new Facilities Manager
W1(B)	Maintain high-quality, comfortable physical facilities and working conditions	Facilities Manager	Create needs list, and implement low or no-cost items	10/15/2013		8/15/2015	Informal adjustments ongoing. Balance delayed and aligned with security survey. Will be reassigned to new Facilities Manager
W1(B)	Maintain high-quality, comfortable physical facilities and working conditions	Facilities Manager	Identify funding and timeframe for additional items	12/1/2013		12/1/2015	
W1(B)	Maintain high-quality, comfortable physical facilities and working conditions	Facilities Manager	Completion	6/30/2014		3/15/2016	
W1(C)	Improve accessibility						
W1(C)	Improve accessibility	Sonny Lew	Gather input from staff/patrons/experts - complete needs assessment	2/1/2014	Y		
W1(C)	Improve accessibility	Sonny Lew	Develop accessibility checklist for use in all future projects/programs	2/15/2014	Y	6/15/2014	This project was place on hold as we evaluate new technology for accessibility. The time to evaluate products is more time consuming than originally anticipated.
W1(C)	Improve accessibility	Sonny Lew	Review accessibility software & hardware needs	3/31/2014		9/30/2015	Delayed until IT vacancies filled
W1(C)	Improve accessibility	Sonny Lew	Complete software & hardware installations	4/15/2014		12/31/2015	
W1(C)	Improve accessibility	Sonny Lew	Review facility accessibility needs – make budget recommendations	5/1/2014		12/31/2015	
W1(C)	Improve accessibility	Sonny Lew	Completion	6/30/2015		6/30/2016	
W1(D)	Automate elevator functions						
W1(D)	Automate elevator functions	Facilities Manager	Create RFP	8/1/2013	Y	1/29/2014	Preliminary bid request yielded no response. Exploring other options with updated bid package.
W1(D)	Automate elevator functions	Facilities Manager	Send approved RFP out to public bid	8/5/2013	Y	1/27/2015	Sending out revised RFP, no responses recieved from first RFP due to timing.
W1(D)	Automate elevator functions	Facilities Manager	Award Bid, begin elevator updates	8/20/2013	Y	3/25/2015	March 25th Board Meeting agenda
W1(D)	Automate elevator functions	Facilities Manager	Completion	4/1/2014		7/31/2016	
W1(E)	Draft HR Procedures Manual						

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GOAL	PROJECT	COORDINATOR(S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
W1(E)	Draft HR Procedures Manual	Terri Daniels/Lisa Curtin	Outline Procedures Manual organization and content; develop a table of contents.	9/30/2013	Y		
W1(E)	Draft HR Procedures Manual	Terri Daniels/Lisa Curtin	Outline each chapter	11/30/2013	Y	5/31/2014	
W1(E)	Draft HR Procedures Manual	Terri Daniels/Lisa Curtin	Write draft	1/31/2014		10/1/2015	Extended due to personnel changes and transitions
W1(E)	Draft HR Procedures Manual	Terri Daniels/Lisa Curtin	Solicit feedback from ED, Sr. Director, and other directors	2/28/2014		10/15/2015	
W1(E)	Draft HR Procedures Manual	Terri Daniels/Lisa Curtin	Incorporate suggestions into final draft	3/31/2014		11/1/2015	
W1(E)	Draft HR Procedures Manual	Terri Daniels/Lisa Curtin	Completion	4/30/2014		12/31/2015	
W2(C)	Evaluate feasibility and cost of alternative scheduling options (e.g., flexible scheduling, adjusted shift lengths, shortened work weeks)						
W2(C)	Evaluate feasibility and cost of alternative scheduling options (e.g., flexible scheduling, adjusted shift lengths, shortened work weeks)	Marcelino Juarez	Poll directors and employees about desirable alternative work arrangements	12/31/2013		6/30/2016	Project deferred. Lower priority due to limited staffing and position eliminations.
W2(C)	Evaluate feasibility and cost of alternative scheduling options (e.g., flexible scheduling, adjusted shift lengths, shortened work weeks)	Marcelino Juarez	Analyze costs and feasibility and write proposal	2/28/2014		12/31/2016	
W2(C)	Evaluate feasibility and cost of alternative scheduling options (e.g., flexible scheduling, adjusted shift lengths, shortened work weeks)	Marcelino Juarez	Discuss proposal with union	3/31/2014		2/28/2017	
W2(C)	Evaluate feasibility and cost of alternative scheduling options (e.g., flexible scheduling, adjusted shift lengths, shortened work weeks)	Marcelino Juarez	Implement program	6/30/2014		4/30/2017	
W2(C)	Evaluate feasibility and cost of alternative scheduling options (e.g., flexible scheduling, adjusted shift lengths, shortened work weeks)	Marcelino Juarez	Completion	7/31/2014		6/30/2017	
W2(D)	Provide stretch classes or other physical activities at break times						
W2(D)	Provide stretch classes or other physical activities at break times	Executive Assistant	Research and propose a stretch program to ED	3/31/2014		9/30/2015	Pushed back due to change in staffing
W2(D)	Provide stretch classes or other physical activities at break times	Executive Assistant	Enlist employee leaders or acquire video classes	5/31/2014		10/31/2015	Pushed back due to short staffing and other HR and Administrative priorities
W2(D)	Provide stretch classes or other physical activities at break times	Executive Assistant	Develop a schedule	6/30/2014		11/30/2015	Pushed back due to short staffing and other HR and Administrative priorities
W2(D)	Provide stretch classes or other physical activities at break times	Executive Assistant	Completion	7/31/2014		12/31/2015	
W3(A)	Cross-train employees in related positions						
W3(A)	Cross-train employees in related positions	Terri Daniels/Lisa Curtin	Work with directors to identify opportunities for cross-training	2/28/2015		HOLD	Postponed due to personnel changes and transitions
W3(A)	Cross-train employees in related positions	Terri Daniels/Lisa Curtin	Develop and document a plan and timeline for each area	4/30/2015		HOLD	Postponed due to personnel changes and transitions
W3(A)	Cross-train employees in related positions	Terri Daniels/Lisa Curtin	Ensure plans are implemented	7/31/2015		HOLD	Postponed due to personnel changes and transitions
W3(A)	Cross-train employees in related positions	Terri Daniels/Lisa Curtin	Assess success of cross-training and revise as necessary	9/30/2015		HOLD	Postponed due to personnel changes and transitions
W3(A)	Cross-train employees in related positions	Terri Daniels/Lisa Curtin	Completion	10/31/2015		HOLD	Postponed due to personnel changes and transitions
W3(B)	Evaluate and improve process efficiency in all library functions						
W3(B)	Evaluate and improve process efficiency in all library functions	Marcelino Juarez	Work with directors to map function processes	12/31/2013		12/31/2015	No longer feasible due to staffing changes and position eliminations. A limited scope version will be incorporated into FY17 budget planning
W3(B)	Evaluate and improve process efficiency in all library functions	Marcelino Juarez	Analyze process maps within and between departments and identify opportunities for streamlining, simplification, automation, or elimination	3/31/2014		2/15/2016	Limited scope
W3(B)	Evaluate and improve process efficiency in all library functions	Marcelino Juarez	Benchmark other libraries/organizations and document best practices and appropriate metrics	3/31/2014	N		Limited scope
W3(B)	Evaluate and improve process efficiency in all library functions	Marcelino Juarez	Implement no-cost improvements.	5/31/2014		6/30/2016	Limited scope
W3(B)	Evaluate and improve process efficiency in all library functions	Marcelino Juarez	Propose and budget for other improvements including costs and impacts on other departments	5/31/2014		6/30/2016	Limited scope
W3(B)	Evaluate and improve process efficiency in all library functions	Marcelino Juarez	Plan, document, and implement process changes and success metrics	9/30/2014		9/30/2016	Limited scope

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W3(B)	Evaluate and improve process efficiency in all library functions	Marcelino Juarez	Review changes and revise as necessary. Document revisions.	12/31/2014		12/31/2016	Limited scope
W3(B)	Evaluate and improve process efficiency in all library functions	Marcelino Juarez	Completion	1/15/2015		6/30/2017	
W3(C)	Merge Programs & Partnerships and Reference functions						
W3(C)	Merge Programs & Partnerships and Reference functions	Sandi Levin	Reconfigure desk/office locations	9/1/2013	Y		
W3(C)	Merge Programs & Partnerships and Reference functions	Sandi Levin	Adjust reference desk schedule	9/1/2013	Y		
W3(C)	Merge Programs & Partnerships and Reference functions	Sandi Levin	Develop project teams comprised of both groups	12/31/2013	Y		
W3(C)	Merge Programs & Partnerships and Reference functions	Sandi Levin	Conduct cross-training	12/31/2013		7/31/2015	Partially complete; balance deferred due to constraints on HR resources
W3(C)	Merge Programs & Partnerships and Reference functions	Sandi Levin	Completion	2/28/2014		7/31/2015	
W4(C)	Expand the high school intern program						
W4(C)	Expand the high school intern program	Shohreh Saljooghi	Coordinate and complete current pilot project (4 interns)	8/2/2013	Y		ongoing
W4(C)	Expand the high school intern program	Shohreh Saljooghi	Identify partner organizations to maximize recruitment opportunities	3/31/2014		9/30/2015	LAEP seems to be the leading institution in downtown Los Angeles for this purpose. Testing coordinated high school volunteer intern program with FLACCL as well
W4(C)	Expand the high school intern program	Shohreh Saljooghi	Build and refine program components	4/30/2014	Y	11/15/2015	
W4(C)	Expand the high school intern program	Shohreh Saljooghi	Document procedures for expanded program	5/31/2014		12/15/2015	
W4(C)	Expand the high school intern program	Shohreh Saljooghi	Completion	6/30/2014		12/31/2015	
W4(E)	Conduct a space needs assessment for employee workspaces						
W4(E)	Conduct a space needs assessment for employee workspaces	Sandi Levin & Jaye Steinbrick	Interview directors	9/30/2013	Y		
W4(E)	Conduct a space needs assessment for employee workspaces	Sandi Levin & Jaye Steinbrick	Survey staff	10/31/2013	Y	5/28/2014	Commenced but not completed.
W4(E)	Conduct a space needs assessment for employee workspaces	Sandi Levin & Jaye Steinbrick	Analyze trends, future projects and anticipated changes	12/31/2013	Y	7/25/2014	
W4(E)	Conduct a space needs assessment for employee workspaces	Sandi Levin & Jaye Steinbrick	Draft report with recommendations	1/31/2014		12/1/2015	Partially complete; undergoing refinement due to staffing changes
W4(E)	Conduct a space needs assessment for employee workspaces	Sandi Levin & Jaye Steinbrick	Completion	2/28/2014		12/31/2015	
W4(F)	Install document management and/or collaboration software						
W4(F)	Install document management and/or collaboration software	Sonny Lew & Jaye Steinbrick	Acquire licensing	7/31/2013	Y		
W4(F)	Install document management and/or collaboration software	Sonny Lew & Jaye Steinbrick	Meet with staff and vendor to create implementation plan	11/15/2013		9/30/2015	Project on hold until IT vacancies are filled
W4(F)	Install document management and/or collaboration software	Sonny Lew & Jaye Steinbrick	Install software including required workflow definitions	12/1/2013		12/31/2015	
W4(F)	Install document management and/or collaboration software	Sonny Lew & Jaye Steinbrick	Completion	2/1/2014		3/31/2016	
T1(A)	Develop eBranches for distribution throughout the County						
T1(A)	Develop eBranches for distribution throughout the County	Linda Heichman & Jaye Steinbrick	SWOT assessment based upon pilot program	3/31/2014	Y	6/30/2015	Pilot program established and preliminary usage data collected. Project will continue until budget allows for augmentation
T1(A)	Develop eBranches for distribution throughout the County	Linda Heichman & Jaye Steinbrick	Develop additional technology and tools	6/30/2014		10/1/2016	Per ED, reevaluate FY17 depending on budget. No new eBranches in FY17.
T1(A)	Develop eBranches for distribution throughout the County	Linda Heichman & Jaye Steinbrick	Pilot new tools	9/30/2014		1/1/2017	
T1(A)	Develop eBranches for distribution throughout the County	Linda Heichman & Jaye Steinbrick	Launch "next phase" eBranch	12/31/2014		6/30/2017	
T1(A)	Develop eBranches for distribution throughout the County	Linda Heichman & Jaye Steinbrick	Recommend program for ongoing implementation	3/31/2015		12/31/2017	
T1(A)	Develop eBranches for distribution throughout the County	Linda Heichman & Jaye Steinbrick	Completion	6/30/2015		12/31/2017	
T1(B)	Develop next-generation collection management practices, including replacement of Voyager (Integrated Library Systems software)						

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GOAL	PROJECT	COORDINATOR(S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
T1(B)	Develop next-generation collection management practices, including replacement of Voyager (Integrated Library Systems software)	Meiling Li	Establish committee to review requirements and begin creation of RFP	2/1/2014	Y	1/14/2015	As highlighted in staff report and discussion at 12/16/2014 Board meeting, re-aligned timeline with Accounting upgrade project to ensure compatibility and integration. Both projects underway concurrently.
T1(B)	Develop next-generation collection management practices, including replacement of Voyager (Integrated Library Systems software)	Meiling Li	Complete LC re-classification and re-labeling project	6/30/2014	Y	10/30/2014	Initial target date extended due to Impact on project workflow resulting from significant loss of key staff, but now completed
T1(B)	Develop next-generation collection management practices, including replacement of Voyager (Integrated Library Systems software)	Meiling Li	Begin public bid process	12/31/2014		7/1/2015	
T1(B)	Develop next-generation collection management practices, including replacement of Voyager (Integrated Library Systems software)	Meiling Li	RFP and vendor product demonstrations	1/31/2015		8/15/2015	
T1(B)	Develop next-generation collection management practices, including replacement of Voyager (Integrated Library Systems software)	Meiling Li	Sign contract /set implementation schedule	3/31/2015		11/30/2015	
T1(B)	Develop next-generation collection management practices, including replacement of Voyager (Integrated Library Systems software)	Meiling Li	Conduct data load tests and assess integrity	7/31/2015		2/15/2016	
T1(B)	Develop next-generation collection management practices, including replacement of Voyager (Integrated Library Systems software)	Meiling Li	Conduct staff training	8/31/2015		4/20/2016	
T1(B)	Develop next-generation collection management practices, including replacement of Voyager (Integrated Library Systems software)	Meiling Li	Go live	9/30/2015		5/1/2016	
T1(B)	Develop next-generation collection management practices, including replacement of Voyager (Integrated Library Systems software)	Meiling Li	Completion	10/31/2015		6/1/2016	
T1(C)	Develop a Law Library mobile application						
T1(C)	Develop a Law Library mobile application	Adam Rosenblum	Work with staff to determine content	7/1/2014	Y		Have spoken with Web committee and have started researching the best ways to turn website into a mobile version.
T1(C)	Develop a Law Library mobile application	Adam Rosenblum	Create beta web-app for testing	9/15/2014	Y	6/15/2015	Working with a new version of Joomla. Looking to determine what is needed to create a mobile version with the information needed.
T1(C)	Develop a Law Library mobile application	Adam Rosenblum	Staff review of content & functionality	9/30/2014	Y	7/15/2015	Mirrors website and is functional
T1(C)	Develop a Law Library mobile application	Adam Rosenblum	Go live - Make web-application available online	11/1/2014	Y	7/30/2015	
T1(C)	Develop a Law Library mobile application	Adam Rosenblum	Develop ongoing program to review and expand content	12/31/2014		8/3/2015	In process
T1(C)	Develop a Law Library mobile application	Adam Rosenblum	Completion	12/31/2014		8/31/2015	
T2(A)	Upgrade Navision	Jaye Steinbrick	Needs assessment	10/30/2013	Y	6/30/2015	Delayed due to staffing changes. Currently underway.
T2(A)	Upgrade Navision	Jaye Steinbrick	Confirm whether Navision is the right solution	11/30/2013		9/7/2015	
T2(A)	Upgrade Navision	Jaye Steinbrick	Conduct RFP	10/30/2013		10/31/2015	
T2(A)	Upgrade Navision	Jaye Steinbrick	Plan and implement data migration including software customization	1/31/2014		5/26/2016	
T2(A)	Upgrade Navision	Jaye Steinbrick	Plan for rollout and training	3/31/2014		5/31/2016	
T2(A)	Upgrade Navision	Jaye Steinbrick	Go live and document changes	4/30/2014		6/17/2016	
T2(A)	Upgrade Navision	Jaye Steinbrick	Completion	5/31/2014		6/20/2016	
T2(B)	Provide the option to pay fees, fines and charges online						
T2(B)	Provide the option to pay fees, fines and charges online	Jaye Steinbrick	Finalize PayPal account banking requirements	6/30/2013	Y		Project assigned to new IT Manager, dates updated.
T2(B)	Provide the option to pay fees, fines and charges online	Jaye Steinbrick	Determine system capabilities	7/31/2013	Y		
T2(B)	Provide the option to pay fees, fines and charges online	Jaye Steinbrick	Create workflow processing chart(s)	9/15/2013	Y		
T2(B)	Provide the option to pay fees, fines and charges online	Jaye Steinbrick	Begin programming/Implementation	10/1/2013	Y		The new website has integrated Paypal as payment option for class registration.
T2(B)	Provide the option to pay fees, fines and charges online	Jaye Steinbrick	Test and assure functionality	9/30/2013		12/31/2015	Software issues with ILS system have delayed integration with Voyager. Project will be reassigned when IT vacancies have been filled

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T2(B)	Provide the option to pay fees, fines and charges online	Jaye Steinbrick	Go live and document changes	2/1/2014		1/31/2016	
T2(B)	Provide the option to pay fees, fines and charges online	Jaye Steinbrick	Completion	2/28/2014		2/15/2016	
T2(C)	Provide the option to renew materials and manage Library user account online						
T2(C)	Provide the option to renew materials and manage Library user account online	Jaye Steinbrick & Angelica Buenrostro	Evaluate technical requirements	7/1/2013	Y		
T2(C)	Provide the option to renew materials and manage Library user account online	Jaye Steinbrick & Angelica Buenrostro	Turn-on/test Functionality	8/1/2013	Y		Database access problem arose on 1st test & needs to be addressed.
T2(C)	Provide the option to renew materials and manage Library user account online	Jaye Steinbrick & Angelica Buenrostro	Work with communications to notify borrowers	9/1/2013		3/31/2016	Software issues with ILS system continue to delay this project. Will await ILS upgrade
T2(C)	Provide the option to renew materials and manage Library user account online	Jaye Steinbrick & Angelica Buenrostro	Establish online payment options (see T2(B))	2/1/2014		5/15/2016	This function may be eliminated from project due to pending ILS upgrade
T2(C)	Provide the option to renew materials and manage Library user account online	Jaye Steinbrick & Angelica Buenrostro	Completion	2/15/2014		5/31/2016	
T2(E)	Provide catalog searching capabilities in closed stacks						
T2(E)	Provide catalog searching capabilities in closed stacks	Sonny Lew	Identify locations in the stacks for deployment	7/1/2013	Y		
T2(E)	Provide catalog searching capabilities in closed stacks	Sonny Lew	Verify and/or expand Wi-Fi coverage	9/1/2013	Y		
T2(E)	Provide catalog searching capabilities in closed stacks	Sonny Lew	Repurpose existing, available hardware as search stations	10/1/2013	Y		
T2(E)	Provide catalog searching capabilities in closed stacks	Sonny Lew	Installation and training	3/31/2014		10/31/2015	Need additional equipment, budget item. Project to be reassigned
T2(E)	Provide catalog searching capabilities in closed stacks	Sonny Lew	Completion	4/30/2014		12/31/2015	
F1(D)	Evaluate and renegotiate relationships with vendors to maximize value/resources						
F1(D)	Evaluate and renegotiate relationships with vendors to maximize value/resources	Marcelino Juarez	Working with department heads, produce a vendor contract negotiation plan including negotiation schedule, annual spend, contract renewal dates, if any, and the point person for each vendor	10/31/2013		8/31/2015	Delayed due to staffing changes. Multiple contract negotiations currently underway notwithstanding
F1(D)	Evaluate and renegotiate relationships with vendors to maximize value/resources	Marcelino Juarez	Develop a negotiation protocol for each vendor including expected outcomes	11/30/2013		8/31/2015	
F1(D)	Evaluate and renegotiate relationships with vendors to maximize value/resources	Marcelino Juarez	Evaluate interim success with vendor negotiations and revise as necessary	3/31/2014		9/30/2015	
F1(D)	Evaluate and renegotiate relationships with vendors to maximize value/resources	Marcelino Juarez	Completion	4/30/2014		11/15/2015	
F2(B)	Consider legislative proposal to authorize revenue-generating activities						
F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Confer with CCCLL directors	10/31/2013	Y		
F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Meet with CCCLL lobbyist	11/30/2013	Y		
F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Present proposal for BOT review	1/31/2014	Y		
F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Present proposal to CCCLL executive board for consideration	3/31/2014	Y		
F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Identify sponsors	4/30/2014	Y		
F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Present proposal to CCCLL at annual conference	9/30/2014	Y		
F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Lobby legislators	12/31/2014	Y		Partially complete. A portion was signed into law. Balance is slated for next session; sponsor identified
F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Completion	6/30/2015		12/31/2015	Awaiting governor's signature
F2(D)	Develop conceptual plan for café						
F2(D)	Develop conceptual plan for café	Jaye Steinbrick	Identify footprint / services	5/14/2014		7/15/2015	Delayed due to staffing vacancies
F2(D)	Develop conceptual plan for café	Jaye Steinbrick	Identify potential vendors			11/15/2015	
F2(D)	Develop conceptual plan for café	Jaye Steinbrick	Identify funding resources and partner agencies	6/14/2014		2/29/2016	

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F2(D)	Develop conceptual plan for café	Jaye Steinbrick	Present a conceptual plan to the Board of Trustees	9/1/2014		4/28/2016	
F2(D)	Develop conceptual plan for café	Jaye Steinbrick	Completion			4/28/2016	
F2(E)	Provide a notary service for a fee						
F2(E)	Provide a notary service for a fee	Executive Assistant	Identify options (in-house; contract; etc.)	3/31/2014		7/30/2015	Identified potential service partners; further work required
F2(E)	Provide a notary service for a fee	Executive Assistant	Write proposal to coordinate notary services and training	4/30/2014		9/31/2015	
F2(E)	Provide a notary service for a fee	Executive Assistant	Work with notary candidates and coordinate training	8/30/2014		12/31/2015	
F2(E)	Provide a notary service for a fee	Executive Assistant	Write policies and procedures	9/30/2014		3/31/2016	
F2(E)	Provide a notary service for a fee	Executive Assistant	Announce and roll-out	11/30/2014		6/30/2016	
F2(E)	Provide a notary service for a fee	Executive Assistant	Evaluate effectiveness and usage	2/28/2015		9/31/2016	
F2(E)	Provide a notary service for a fee	Executive Assistant	Completion	3/31/2015		12/31/2016	
F2(F)	Provide e-filing for a fee						
F2(F)	Provide e-filing for a fee	Ryan Metheny	Research court requirements, existing needs and solutions	6/30/2014		12/31/2015	Pending court technology changes
F2(F)	Provide e-filing for a fee	Ryan Metheny	Identify potential services and prospective user groups	8/30/2014		2/28/2016	
F2(F)	Provide e-filing for a fee	Ryan Metheny	Draft procedures and policy	11/30/2014		3/31/2016	
F2(F)	Provide e-filing for a fee	Ryan Metheny	Present recommendation to Board of Trustees	1/31/2015		4/30/2016	
F2(F)	Provide e-filing for a fee	Ryan Metheny	Implement	3/31/2015		7/1/2016	
F2(F)	Provide e-filing for a fee	Ryan Metheny	Assess and revise as needed	5/31/2015		9/30/2016	
F2(F)	Provide e-filing for a fee	Ryan Metheny	Completion	6/30/2015		12/31/2016	
F2(G)	Offer fee-based collection acquisition and management services to other libraries						
F2(G)	Offer fee-based collection acquisition and management services to other libraries	Sandi Levin	Assess capacity for contract services and performance standards	12/31/2013	Y		
F2(G)	Offer fee-based collection acquisition and management services to other libraries	Sandi Levin	Identify costs and constraints	12/31/2013		12/31/2015	Preliminary inquiries have not yielded favorable results. Exploring other options/avenues.
F2(G)	Offer fee-based collection acquisition and management services to other libraries	Sandi Levin	Identify potential 'customers'	1/31/2014		12/31/2015	
F2(G)	Offer fee-based collection acquisition and management services to other libraries	Sandi Levin	Negotiate test site contract /identify performance metrics	6/30/2014		12/31/2015	
F2(G)	Offer fee-based collection acquisition and management services to other libraries	Sandi Levin	Evaluate success and performance metrics	2/28/2015			
F2(G)	Offer fee-based collection acquisition and management services to other libraries	Sandi Levin	Recommend program for future contracts	4/30/2015			
F2(G)	Offer fee-based collection acquisition and management services to other libraries	Sandi Levin	Completion	5/31/2015			
F3(A)	Outreach to law firms & bar associations						
F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Establish rapport with bar association leaders	1/31/2014	Y		
F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Select target organizations to work with	3/30/2014	Y		
F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Conduct needs assessments	3/30/2014	Y		
F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Assess and document options	6/30/2014		9/30/2015	Partial. Business development for law firms and speakers bureau for library for MCLE programs; Writing for legal secretary associations, bar journals and magazines, for example, Los Angeles Lawyer and Valley Lawyer.
F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Devise mutually agreed upon programs	6/30/2014		12/31/2015	
F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Implement programs	9/30/2014		3/31/2016	
F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Assess results & recommend ongoing programs	10/31/2014		9/30/2016	
F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Completion	11/30/2014		10/31/2016	
F3(B)	Build relationships with relevant corporate entities						
F3(B)	Build relationships with relevant corporate entities	Sandi Levin	Identify candidate organizations	3/30/2014	Y	10/31/2014	Some candidates identified; further research needed
F3(B)	Build relationships with relevant corporate entities	Sandi Levin	Contact organizations and discuss opportunities (min 4)	6/30/2014		7/31/2015	Some candidates contacted; further outreach to be coordinated with FLACCL new staff
F3(B)	Build relationships with relevant corporate entities	Sandi Levin	Implement test programs	9/30/2014		7/31/2015	Commenced but not completed

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F3(B)	Build relationships with relevant corporate entities	Sandi Levin	Assess results & recommend ongoing programs	10/31/2014		9/30/2015	
F3(B)	Build relationships with relevant corporate entities	Sandi Levin	Completion	11/30/2014		11/30/2015	
F3(C)	Establish a speakers' bureau						
F3(C)	Establish a speakers' bureau	Sandi Levin	Research and review existing models	9/30/2013	Y		
F3(C)	Establish a speakers' bureau	Sandi Levin	Develop parameters, incentives and program	12/31/2013		8/31/2015	To be developed in coordination with in-house MCLE programs; delayed due to other priorities
F3(C)	Establish a speakers' bureau	Sandi Levin	Announce program	1/31/2014		10/30/2015	
F3(C)	Establish a speakers' bureau	Sandi Levin	Conduct outreach	3/31/2014		11/30/2015	
F3(C)	Establish a speakers' bureau	Sandi Levin	Launch	4/30/2014		1/15/2016	
F3(C)	Establish a speakers' bureau	Sandi Levin	Assess and revise, as needed	6/30/2014		3/31/2016	
F3(C)	Establish a speakers' bureau	Sandi Levin	Completion	9/30/2014		6/30/2016	
S1(B)	Expand legal resources available & visible on the internet						
S1(B)	Expand legal resources available & visible on the internet	Austin Stoub	Assess current internet-based resources for gaps in coverage	12/31/2013	Y		
S1(B)	Expand legal resources available & visible on the internet	Austin Stoub	Identify potential resources that can be added to collection	3/31/2014		8/31/2015	Met with reps from Ravel to discuss onsite implementation, NCLC materials will be visible and available in reading room. Budget constraints prevent adding additional remote database access. Other resources can be made available.
S1(B)	Expand legal resources available & visible on the internet	Austin Stoub	Assess technical feasibility and negotiate with vendors; budget for additional resources	6/30/2014		9/30/2015	Will meet and discuss with Ralph/CMS regarding Law Journal Press resources. Working on LibGuides and other resource guides.
S1(B)	Expand legal resources available & visible on the internet	Austin Stoub	Implement new resources on test site	9/30/2014		9/30/2015	
S1(B)	Expand legal resources available & visible on the internet	Austin Stoub	Develop metrics to evaluate user satisfaction and assess	10/31/2014		10/31/2015	
S1(B)	Expand legal resources available & visible on the internet	Austin Stoub	Launch resources on website	12/31/2014		10/31/2015	
S1(B)	Expand legal resources available & visible on the internet	Austin Stoub	Survey users for feedback on usability and revise as needed	3/31/2015		1/31/2016	
S1(B)	Expand legal resources available & visible on the internet	Austin Stoub	Completion	6/31/15		3/31/2016	
S1(C)	Create an advance reservation system for Library computers						
S1(C)	Create an advance reservation system for Library computers	Adam Rosenblum	Add option into public website	9/1/2013		8/31/2015	Implemented the basic framework, need to insert scripts into public website. Website Location not yet identified. Delayed due to IT vacancies
S1(C)	Create an advance reservation system for Library computers	Adam Rosenblum	Work with IT staff to test implementation	9/15/2013		9/15/2015	IT has implemented the basic framework. Waiting for approval before implementation and moving on to the next step. Delayed due to IT vacancies
S1(C)	Create an advance reservation system for Library computers	Adam Rosenblum	Training and testing with reference staff	9/30/2013		9/30/2015	
S1(C)	Create an advance reservation system for Library computers	Adam Rosenblum	Create promotional materials	10/1/2013		9/30/2015	
S1(C)	Create an advance reservation system for Library computers	Adam Rosenblum	Completion	11/15/2013		12/31/2015	
S1(D)	Provide self-serve scanning equipment in the Library						
S1(D)	Provide self-serve scanning equipment in the Library	Sonny Lew	Work with staff and patrons to evaluate technology requirements.	10/15/2014		3/31/2016	Defferred to fiscal year 2016-17 budget to combine with copier replacements for cost-savings and efficiency.
S1(D)	Provide self-serve scanning equipment in the Library	Sonny Lew	Evaluate existing solutions and make final recommendation, proceed with purchasing.	11/15/2014		6/30/2016	
S1(D)	Provide self-serve scanning equipment in the Library	Sonny Lew	Install public scanner with signage and print materials	2/1/2015		8/1/2016	
S1(D)	Provide self-serve scanning equipment in the Library	Sonny Lew	Assess effectiveness of implementation and make adjustments as needed.	5/31/2015		11/15/2016	
S1(D)	Provide self-serve scanning equipment in the Library	Sonny Lew	Completion	5/31/2015		1/1/2017	
S2(A)	Development of online self-help and lay-friendly substantive materials (similar to eBranch)						
S2(A)	Development of online self-help and lay-friendly substantive materials (similar to eBranch)	Janine Liebert	Identify and assess virtual self-help center models	8/30/2013	Y	11/30/2013	
S2(A)	Development of online self-help and lay-friendly substantive materials (similar to eBranch)	Janine Liebert	Generate report of findings and make recommendations	11/30/2013	Y		New A2J volunteer interns will review existing resources and develop recommendations for updating LALL's self-help section

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S2(A)	Development of online self-help and lay-friendly substantive materials (similar to eBranch)	Janine Liebert	Identify and seek funding sources	6/30/2014		12/31/2015	Intent is to scale back to offerings that can be provided without additional funding
S2(A)	Development of online self-help and lay-friendly substantive materials (similar to eBranch)	Janine Liebert	Garner input (technology, staff, funding)	6/30/2014		9/30/2015	Partially complete
S2(A)	Development of online self-help and lay-friendly substantive materials (similar to eBranch)	Janine Liebert	Develop content	6/30/2014		12/31/2015	this will take place in conjunction with reconvening of website committee with assistance of A2J interns.
S2(A)	Development of online self-help and lay-friendly substantive materials (similar to eBranch)	Janine Liebert	Design look and feel for target audience	9/30/2014		12/31/2015	Intent is to mimic eBranch for consistency and efficiency
S2(A)	Development of online self-help and lay-friendly substantive materials (similar to eBranch)	Janine Liebert	Upload and implement	12/31/2014		2/28/2016	
S2(A)	Development of online self-help and lay-friendly substantive materials (similar to eBranch)	Janine Liebert	Completion	3/31/2015		6/30/2016	
S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)						
S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Assess feasibility	9/30/2013	Y	11/30/2013	
S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Identify and assess model videos	9/30/2013	Y	11/30/2013	
S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Identify and establish cooperative legal aid partner	12/30/13	y	6/30/2014	Bet Tzedek and the California Coalition on Consumer Justice are interested in partnering with us if we are able to secure funding and the equipment to create the videos
S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Identify and seek funding sources	3/30/2014	Y	3/31/2015	Conversations underway with PLI who has hired an attorney to manage their pro bono programming. Topic under consideration is how to talk to a lawyer and tie-in to Lawyers in the Library. A2J interns will be doing competitive intelligence to see what video content has already been created that is relevant to this topic.
S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Develop script and vet with stakeholder advisors	3/30/2014		10/1/2015	Subject to partnering with PLI who has all of the video recording equipment. Outline complete. Script in development with ED
S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Produce video	9/30/2014		12/31/2015	Date of production currently set at 11/2015
S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Publish and create distribution plan	9/30/2014		2/28/2016	Deferred until after production
S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Duplicate in Spanish and other languages	3/30/2015		6/30/2016	
S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Completion	4/30/2015		9/30/2016	
S2(C)	Develop transportation resource handouts for litigants						
S2(C)	Develop transportation resource handouts for litigants	Adam Rosenblum	Collect and evaluate available information	8/1/2013		5/15/2015	Information collected, but needs updating. Will reevaluate scope of project in light of LASC web update
S2(C)	Develop transportation resource handouts for litigants	Adam Rosenblum	Assemble information into usable print and online resources / present draft	10/1/2013		9/15/2015	Online information is available on LALL website. Print handout is in process.
S2(C)	Develop transportation resource handouts for litigants	Adam Rosenblum	Make information available to the public.	10/15/2013		10/15/2015	
S2(C)	Develop transportation resource handouts for litigants	Adam Rosenblum	Completion	10/15/2013		11/15/2015	
S2(D)	Develop translation resource handouts						
S2(D)	Develop translation resource handouts	Linda Heichman	Establish committee to assess needs	1/31/2014	Y		Committee: Austin, Pedro, Linda
S2(D)	Develop translation resource handouts	Linda Heichman	Identify existing resources	6/30/2014		12/31/2015	Need guidance and direction. Is this a translation services resource list or handout? If yes, Austin has as a similar goal C1(E)? Type of referral sheet needs to be defined. Create a list of referral services and/or workshops and include languages that are offered or translating sheets from the courts? Is this something intended for the branches & differs from what Austin is doing? Staff soft costs and time to translate? Costs to outsource? Defer?

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S2(D)	Develop translation resource handouts	Linda Heichman	Evaluate effectiveness of existing process	9/30/2014		12/31/2015	
S2(D)	Develop translation resource handouts	Linda Heichman	Develop handout	12/31/2014		3/31/2016	
S2(D)	Develop translation resource handouts	Linda Heichman	Recommend plan for future improvements	3/31/2015		7/1/2016	
S2(D)	Develop translation resource handouts	Linda Heichman	Completion	3/31/2015		6/30/2017	
S2(G)	Develop and implement model for library-based clinics and self-help workshops for delivery of civil self-help services.						
S2(G)	Develop and implement model for library-based clinics and self-help workshops for delivery of civil self-help services.	Janine Liebert	Conduct Needs Assessment	12/30/2013	Y		
S2(G)	Develop and implement model for library-based clinics and self-help workshops for delivery of civil self-help services.	Janine Liebert	Assess feasibility	12/30/2013	Y	3/31/2014	Expungement Clinic ongoing on monthly basis. Discussions and test projects ongoing with trial readiness clinic, Public Counsel's appellate law project and immigration legal aid partners.
S2(G)	Develop and implement model for library-based clinics and self-help workshops for delivery of civil self-help services.	Janine Liebert	Identify and seek funding sources	3/30/2014	Y		Firm sponsorship obtained for expungment clinic; application for TIG funding underway to expand name change workshop; trial readiness converted to fee-based model
S2(G)	Develop and implement model for library-based clinics and self-help workshops for delivery of civil self-help services.	Janine Liebert	Launch pilot program(s)	9/30/2014	Y		adult name change workshop, family law trial prep and expungement clinic all regularized
S2(G)	Develop and implement model for library-based clinics and self-help workshops for delivery of civil self-help services.	Janine Liebert	Assess outcomes	3/30/2015	Y		
S2(G)	Develop and implement model for library-based clinics and self-help workshops for delivery of civil self-help services.	Janine Liebert	Expand programs	9/30/2015		12/31/2015	Adding conservatorship clinic, immigration clinics and regularizing TRC
S2(G)	Develop and implement model for library-based clinics and self-help workshops for delivery of civil self-help services.	Janine Liebert	Completion	12/30/2015		1/31/2016	
S3(C)	Expand access to form templates and precedent beyond court-provided forms (e.g., commonly requested motions).						
S3(C)	Expand access to form templates and precedent beyond court-provided forms (e.g., commonly requested motions).	Janine Liebert	Assess needs and models of delivery	3/30/2015		12/31/2015	After final information gathering at PBW
S3(C)	Expand access to form templates and precedent beyond court-provided forms (e.g., commonly requested motions).	Janine Liebert	Identify potential partners	3/30/2015		12/31/2015	Ongoing
S3(C)	Expand access to form templates and precedent beyond court-provided forms (e.g., commonly requested motions).	Janine Liebert	Identify technology requirements and distribution framework	9/30/2015		3/31/2016	
S3(C)	Expand access to form templates and precedent beyond court-provided forms (e.g., commonly requested motions).	Janine Liebert	Identify and seek funding sources	9/30/2015		3/31/2016	
S3(C)	Expand access to form templates and precedent beyond court-provided forms (e.g., commonly requested motions).	Janine Liebert	Implement soft launch / Test usability	3/30/2016		6/30/2016	
S3(C)	Expand access to form templates and precedent beyond court-provided forms (e.g., commonly requested motions).	Janine Liebert	Implement full launch	6/30/2016		12/31/2016	
S3(C)	Expand access to form templates and precedent beyond court-provided forms (e.g., commonly requested motions).	Janine Liebert	Assess	12/31/2016		3/31/2016	
S3(C)	Expand access to form templates and precedent beyond court-provided forms (e.g., commonly requested motions).	Janine Liebert	Completion	12/31/2016		3/31/2016	
S3(D)	Establish a program for legal document assistants in the library						
S3(D)	Establish a program for legal document assistants in the library	Malinda Muller	Identify and assess viability with organization leaders	12/30/2014		9/30/2015	Internal discussions ongoing; evaluating models to minimize exposure
S3(D)	Establish a program for legal document assistants in the library	Malinda Muller	Assess components and recommend policies and procedures	3/30/2015		12/31/2015	
S3(D)	Establish a program for legal document assistants in the library	Malinda Muller	Determine liability, write contracts / MOU	3/30/2015		12/31/2015	
S3(D)	Establish a program for legal document assistants in the library	Malinda Muller	Soft launch program	6/30/2015		12/31/2015	
S3(D)	Establish a program for legal document assistants in the library	Malinda Muller	Create feedback mechanism and metrics	6/30/2015		12/31/2015	
S3(D)	Establish a program for legal document assistants in the library	Malinda Muller	Assess success of program	9/30/2015		3/31/2016	
S3(D)	Establish a program for legal document assistants in the library	Malinda Muller	Completion	12/30/2015		6/30/2016	
S4(A)	Establish eBranches throughout the County						
S4(A)	Establish eBranches throughout the County - see also T1(A)	Linda Heichman & Jaye Steinbrick	SWOT assessment based upon pilot program	3/31/2014		6/30/2015	Pilot program established and preliminary usage data collected. Project will continue until budget allows for augmentation
S4(A)	Establish eBranches throughout the County - see also T1(A)	Linda Heichman & Jaye Steinbrick	Develop additional technology and tools	6/30/2014		10/1/2016	Per ED, reevaluate FY17 depending on budget. No new eBranches in FY17 per ED.

Los Angeles County Law Library Strategic Plan
Accountability Report

GOAL	PROJECT	COORDINATOR(S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
S4(A)	Establish eBranches throughout the County - see also T1(A)	Linda Heichman & Jaye Steinbrick	Identify strategic locations and develop partnerships	7/31/2014		11/30/2016	
S4(A)	Establish eBranches throughout the County - see also T1(A)	Linda Heichman & Jaye Steinbrick	Pilot new tools	9/30/2014		1/1/2017	
S4(A)	Establish eBranches throughout the County - see also T1(A)	Linda Heichman & Jaye Steinbrick	Launch "next phase" eBranch	12/31/2014		6/30/2017	
S4(A)	Establish eBranches throughout the County - see also T1(A)	Linda Heichman & Jaye Steinbrick	Completion			12/31/2017	

#	GOAL	PROJECT	COORDINATOR(S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
24	C1(D)	Showcase rare books, historical materials and memorabilia						
25	C1(D)	Showcase rare books, historical materials and memorabilia	Ralph Stahlberg & Betsy Warner	Evaluate our collection	9/30/2013	Y		
26	C1(D)	Showcase rare books, historical materials and memorabilia	Ralph Stahlberg & Betsy Warner	Select materials	10/31/2013	Y		
27	C1(D)	Showcase rare books, historical materials and memorabilia	Ralph Stahlberg & Betsy Warner	Prepare exhibit	12/31/2013	Y		
28	C1(D)	Showcase rare books, historical materials and memorabilia	Ralph Stahlberg & Betsy Warner	Completion	3/31/2014	Y		
130	Comm1(A)	Expand awareness of transportation and parking alternatives						
131	Comm1(A)	Expand awareness of transportation and parking alternatives	Adam Rosenblum	Collect and evaluate available information	9/1/2013	Y		Have Metro & parking information.
132	Comm1(A)	Expand awareness of transportation and parking alternatives	Adam Rosenblum	Assemble information into usable print and online resources / present draft	10/31/2013	Y	3/21/2014	
133	Comm1(A)	Expand awareness of transportation and parking alternatives	Adam Rosenblum	Make information available to the public.	11/15/2013	Y	4/15/2014	
134	Comm1(A)	Expand awareness of transportation and parking alternatives	Adam Rosenblum	Completion	11/15/2013	Y	4/15/2014	
143	Comm1(C)	Provide vending machines to sell office supplies and sundries						
144	Comm1(C)	Provide vending machines to sell office supplies and sundries	Marcelino Juarez	Establish product specifications and identify vendors	7/31/2013	Y		
145	Comm1(C)	Provide vending machines to sell office supplies and sundries	Marcelino Juarez	Develop and write procedures (stocking, cash-handling, ordering)	7/31/2013	Y		
146	Comm1(C)	Provide vending machines to sell office supplies and sundries	Marcelino Juarez	Purchase and install office supplies vending machine	8/31/2013	Y		
147	Comm1(C)	Provide vending machines to sell office supplies and sundries	Marcelino Juarez	Monitor and revise procedures as required	9/30/2013	Y		
148	Comm1(C)	Provide vending machines to sell office supplies and sundries	Marcelino Juarez	Assess utilization	6/30/2014	Y		
149	Comm1(C)	Provide vending machines to sell office supplies and sundries	Marcelino Juarez	Completion	9/30/2013	Y	Vending machine was stocked and available for use on 9/27/13	
163	Comm1(E)	Continue and refine Members Program	Ryan Metheny	Revise parking and pricing	9/30/2013	Y	11/1/2013	Extended to allow time to analyze options by new staff member (Ryan). Implementation of parking/pricing revisions will be dependent on IT issues (installation of parking self-reservation software, etc.)
164	Comm1(E)	Continue and refine Members Program	Ryan Metheny	Research / assess existing program models	3/31/2014	Y		
165	Comm1(E)	Continue and refine Members Program	Ryan Metheny	Devise and document options / SWOT	4/30/2014	Y		
166	Comm1(E)	Continue and refine Members Program	Ryan Metheny	Finalize and coordinate resources for implementation	6/30/2014	Y		
167	Comm1(E)	Continue and refine Members Program	Ryan Metheny	Implement	7/31/2014	Y	12/31/2014	Ongoing due to parking program implementation phase
168	Comm1(E)	Continue and refine Members Program	Ryan Metheny	Monitor and assess	9/30/2014	Y	1/31/2015	Program will continue to be refined once parking and database management system is implemented
169	Comm1(E)	Continue and refine Members Program	Ryan Metheny	Completion	10/31/2014	Y	1/31/2015	
187	Comm2(A)	Publish articles on our own website and in journals, newsletters and the press						
188	Comm2(A)	Publish articles on our own website and in journals, newsletters and the press	Leigh Garcia	Identify possible articles/promotion topics	9/1/2013	Y	11/15/2013	
189	Comm2(A)	Publish articles on our own website and in journals, newsletters and the press	Leigh Garcia	Identify key publications to pitch for articles	11/1/2013	Y	11/15/2013	
190	Comm2(A)	Publish articles on our own website and in journals, newsletters and the press	Leigh Garcia	Work with staff to complete articles (min 3 per quarter)	12/31/2013	Y		
191	Comm2(A)	Publish articles on our own website and in journals, newsletters and the press	Leigh Garcia	Create a repository of articles to facilitate reuse and retrieval	12/31/2013	Y		
192	Comm2(A)	Publish articles on our own website and in journals, newsletters and the press	Leigh Garcia	Pitch articles / place on our website	3/31/2014	Y		
193	Comm2(A)	Publish articles on our own website and in journals, newsletters and the press	Leigh Garcia	Completion	6/30/2014	Y		On-going

209	Comm2(D)	Co-market with LACBA and other bar associations to promote events and programs						
210	Comm2(D)	Co-market with LACBA and other bar associations to promote events and programs	Sandi Levin & Leigh Garcia	Evaluate opportunities and document partnership with LACBA	9/30/2013	Y	4/30/2014	
211	Comm2(D)	Co-market with LACBA and other bar associations to promote events and programs	Sandi Levin & Leigh Garcia	Identify top 10 opportunities for other bar associations / create prospects list	9/1/2013	Y	4/30/2014	
212	Comm2(D)	Co-market with LACBA and other bar associations to promote events and programs	Sandi Levin & Leigh Garcia	Reach out to 10 key contacts / meet to compare calendars & identify opportunities	11/1/2013	Y	2/28/2014	Working with: BHBA, SBBA, SFVBA, WBA, WLALA, BWL, AABA, CAALAC, KABA, GBA, PBA
213	Comm2(D)	Co-market with LACBA and other bar associations to promote events and programs	Sandi Levin & Leigh Garcia	Create proposed shared marketing calendar for 2014	12/1/2013	Y	4/30/2014	Using WLALA format
214	Comm2(D)	Co-market with LACBA and other bar associations to promote events and programs	Sandi Levin & Leigh Garcia	Completion	12/1/2013	Y	5/31/2015	Process in place, but needs review for effectiveness and potential revision
216	Comm2(E)	Establish schedule for regular meetings of outside organizations						
217	Comm2(E)	Establish schedule for regular meetings of outside organizations	Leigh Garcia	Establish committee to identify potential target organizations	1/30/2014	Y	2/14/2014	Along with P&P and Exec office we have several organizations with whom we meet with and with whom we are continuing to grow the partnership. LSALA, LAPA, City Attorneys, CLA, CAALAC
218	Comm2(E)	Establish schedule for regular meetings of outside organizations	Leigh Garcia	Develop sales/marketing materials -	3/15/2014	Y	4/15/2014	Room rental flyer complete; developing additional materials on-going
219	Comm2(E)	Establish schedule for regular meetings of outside organizations	Leigh Garcia	Conduct community reach-out program	5/1/2014	Y		On-going
220	Comm2(E)	Establish schedule for regular meetings of outside organizations	Leigh Garcia	Completion	6/30/2014	Y		on-going
222	Comm2(F)	Outreach to courts, SHCs and local bar associations re events and services at branches						
223	Comm2(F)	Outreach to courts, SHCs and local bar associations re events and services at branches	Linda Heichman	Develop expanded events and services at branches, including deepening relationships with courts, SHCs, local bar associations. (see also Transition of Torrance Branch)	12/31/2013	Y	6/30/2014	
224	Comm2(F)	Outreach to courts, SHCs and local bar associations re events and services at branches	Linda Heichman	Slate events/services at branches (no cost)	4/31/14	Y	9/30/2014	
225	Comm2(F)	Outreach to courts, SHCs and local bar associations re events and services at branches	Linda Heichman	Evaluate success of events/services at branches, budget FY2015	6/30/2014	Y	6/30/2015	
226	Comm2(F)	Outreach to courts, SHCs and local bar associations re events and services at branches	Linda Heichman	Schedule ongoing regular events/services at branches	6/30/2014	Y	9/30/2015	
227	Comm2(F)	Outreach to courts, SHCs and local bar associations re events and services at branches	Linda Heichman	Completion	7/31/2015	Y	9/30/2015	
235	Comm3(A)	Expand CLE classes						
236	Comm3(A)	Expand CLE classes	Ryan Metheny	Research other public law library offerings	9/30/2013	Y		
237	Comm3(A)	Expand CLE classes	Ryan Metheny	Develop methodology for identification of speakers and topics of interest	9/30/2013	Y		
238	Comm3(A)	Expand CLE classes	Ryan Metheny	Build ongoing list of potential speakers	12/30/2013	Y		
239	Comm3(A)	Expand CLE classes	Ryan Metheny	Calendar bi-monthly classes	9/30/2013	Y		
240	Comm3(A)	Expand CLE classes	Ryan Metheny	Implement regularized programs	1/30/2014	Y		
241	Comm3(A)	Expand CLE classes	Ryan Metheny	Completion	1/31/2014	Y		
243	Comm3(B)	Expand classes for self-represented persons						
244	Comm3(B)	Expand classes for self-represented persons	Janine Liebert	Develop relationships with potential presenters	3/31/2014	Y		
245	Comm3(B)	Expand classes for self-represented persons	Janine Liebert	Outline structure of program delivery	6/30/2014	Y		
246	Comm3(B)	Expand classes for self-represented persons	Janine Liebert	Implement classes	6/30/2014	Y		
247	Comm3(B)	Expand classes for self-represented persons	Janine Liebert	Assess and evaluate	12/31/2014	Y		
248	Comm3(B)	Expand classes for self-represented persons	Janine Liebert	Completion	1/31/2015	Y		
256	Comm3(D)	Develop a high school student workshop series in the Library						
257	Comm3(D)	Develop a high school student workshop series in the Library	Ryan Metheny	Identify outreach coordinators and stakeholders in LAUSD	9/30/2013	Y		
258	Comm3(D)	Develop a high school student workshop series in the Library	Ryan Metheny	Identify prospective pilot series with applicable schools	9/30/2013	Y		
259	Comm3(D)	Develop a high school student workshop series in the Library	Ryan Metheny	Build program structures in conjunction with school partners	12/30/2013	Y		

260	Comm3(D)	Develop a high school student workshop series in the Library	Ryan Metheny	Implement programs	1/31/2014–3/30/2014	Y		
261	Comm3(D)	Develop a high school student workshop series in the Library	Ryan Metheny	Assess programs	3/30/2014	Y		
262	Comm3(D)	Develop a high school student workshop series in the Library	Ryan Metheny	Expand to one or two additional workshop pilots	6/30/2014	Y		
263	Comm3(D)	Develop a high school student workshop series in the Library	Ryan Metheny	Identify funders for at risk career education / school success programs	6/30/2014	Y		Partial: Mannatt Phelps funded school program; occasional teen law workshops and workplace tours
264	Comm3(D)	Develop a high school student workshop series in the Library	Ryan Metheny	Write grant for funding to expand programs	6/30/2014		12/31/2015	Looking for assistance from Friends of the Law Library for this
265	Comm3(D)	Develop a high school student workshop series in the Library	Ryan Metheny	Expand programs to additional schools	9/30/2014	Y		Developing additional on-site program for target local schools & incorporating mentorship program participation for students interested in becoming lawyers. Washington Prep, Wilson, San Fernando, Esteban E. Torres, Cesar Chavez; Diversity Pipeline Coalition (in development)
266	Comm3(D)	Develop a high school student workshop series in the Library	Ryan Metheny	Completion	12/31/2014	Y		Three programs, 2 which are in the implementation phase for fall, 2015; Guest lecturer in criminal law, mediation activity/civil procedure; support teen court potential
278	Comm3(G)	Develop law-related Film Series						
279	Comm3(G)	Develop law-related Film Series	Leigh Garcia	Acquire films and inventory	11/31/13	Y	2/12/2014	
280	Comm3(G)	Develop law-related Film Series	Leigh Garcia	Complete marketing tools	1/15/2014	y	5/1/2014	flyers, posters, in-house marketing tools in development
281	Comm3(G)	Develop law-related Film Series	Leigh Garcia	Develop calendar	2/15/2014	y	5/15/2014	
282	Comm3(G)	Develop law-related Film Series	Leigh Garcia	Develop cost structure	3/1/2014	Y	6/1/2014	
283	Comm3(G)	Develop law-related Film Series	Leigh Garcia	Launch	4/20/2014	Y	8/1/2014	Launched August 2014; 2 screenings to date
284	Comm3(G)	Develop law-related Film Series	Leigh Garcia	Completion	6/30/2014	Y	8/31/2014	
286	Comm3(H)	Conduct a book discussion group						
287	Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Define goals of Book Group	6/19/2013	Y		
288	Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Create overview of different Book Group Models	7/10/2013	Y		
289	Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Meet and discuss/choose model for initial Book Group	7/24/2013	Y		
290	Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Identify potential participants in Book Group & targeted publicity				
291	Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Create format for initial Book Group	8/7/2013	Y		
292	Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Formulate publicity	8/28/2013	y		first meeting scheduled for 11/18/2014
293	Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Launch publicity	9/11/2013	y		flyer created; presentation made to staff; presentation made to Veterans Collaborative and contact made with other resources to help spread the word.
294	Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	First Book Group Discussion	10/2/2013	y	11/18/2014	
295	Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Evaluate and modify	11/20/2013	y	12/1/2014	
296	Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Create plan for ongoing discussion group	11/25/2013	y	12/1/2014	Attendance steadily increasing
297	Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Completion	12/31/2013	y	6/30/2015	Successful, ongoing discussion group
327	W1(A)	Draft and implement Safety and Emergency Preparedness Plans						
328	W1(A)	Draft and implement Safety and Emergency Preparedness Plans	Richard Ortega	Review and edit existing plan as needed.	8/1/2013	Y		
329	W1(A)	Draft and implement Safety and Emergency Preparedness Plans	Richard Ortega	Present plan to BOT for adoption	8/20/2013	Y		
330	W1(A)	Draft and implement Safety and Emergency Preparedness Plans	Richard Ortega	Conduct quarterly safety committee meetings	9/30/2013	Y		Ongoing
331	W1(A)	Draft and implement Safety and Emergency Preparedness Plans	Richard Ortega	Completion	9/30/2013	Y		
361	W2(A)	Annual employee picnic						
362	W2(A)	Annual employee picnic	Leigh Garcia	Survey employees about venue, date, and activities	6/15/2013	Y		
363	W2(A)	Annual employee picnic	Leigh Garcia	Confirm venue	6/30/2013	Y		
364	W2(A)	Annual employee picnic	Leigh Garcia	Coordinate potluck, arrange paper products, enlist volunteers, communicate event	7/15/2013	Y		
365	W2(A)	Annual employee picnic	Leigh Garcia	Conduct event and debrief	8/31/2013	Y		
366	W2(A)	Annual employee picnic	Leigh Garcia	Completion	8/31/2013	Y		
368	W2(B)	Hold occasional events open to family and friends						

369	W2(B)	Hold occasional events open to family and friends	Leigh Garcia	Survey employees about frequency and suggested activities	10/31/2013	Y		
370	W2(B)	Hold occasional events open to family and friends	Leigh Garcia	Develop and propose events schedule to ED	11/30/2013	Y	1/30/2014	
371	W2(B)	Hold occasional events open to family and friends	Leigh Garcia	Calendar and plan events	12/31/2013	Y		
372	W2(B)	Hold occasional events open to family and friends	Leigh Garcia	Assess success and propose ongoing program	3/31/2014	Y		
373	W2(B)	Hold occasional events open to family and friends	Leigh Garcia	Completion	6/30/2014	Y		Ongoing. Annual holiday party, family picnic and public events
388	W2(E)	Establish an employee of the month/year program						
389	W2(E)	Establish an employee of the month/year program	Terri Daniels/Lisa Curtin	Enlist participation from managers and staff to develop nomination and selection criteria and procedures	6/30/2014	Y	10/1/2014	Alternative employee recognition programs implemented
390	W2(E)	Establish an employee of the month/year program	Terri Daniels/Lisa Curtin	Write EOM/Y program for review by focus group and ED	9/30/2014	Y	12/31/2014	Alternative employee recognition programs implemented
391	W2(E)	Establish an employee of the month/year program	Terri Daniels/Lisa Curtin	Announce program, develop schedule and implement	11/30/2014	Y	3/31/2015	Alternative employee recognition programs implemented
392	W2(E)	Establish an employee of the month/year program	Terri Daniels/Lisa Curtin	Review success of program, revise as necessary	3/31/2015	N	10/1/2015	
393	W2(E)	Establish an employee of the month/year program	Terri Daniels/Lisa Curtin	Completion	4/30/2015	N		Alternative employee recognition programs implemented
419	W3(D)	Establish a law student intern / extern program						
420	W3(D)	Establish a law student intern / extern program	Malinda Muller	Identify partner schools	6/30/2013	Y		
421	W3(D)	Establish a law student intern / extern program	Malinda Muller	Build program components	6/30/2013	Y		
422	W3(D)	Establish a law student intern / extern program	Malinda Muller	Implement pilot program	6/30/2013	Y		
423	W3(D)	Establish a law student intern / extern program	Malinda Muller	Assess	9/30/2013	Y		
424	W3(D)	Establish a law student intern / extern program	Malinda Muller	Create handbook and guidelines	12/31/2013	Y		
425	W3(D)	Establish a law student intern / extern program	Malinda Muller	Recruit and expand program to new institutions if applicable	3/31/2014	Y		Complete. Recruited to University of Illinois and USC (new) programs. Future to consider Pasadena City and other library tech programs if CMS is interested.
426	W3(D)	Establish a law student intern / extern program	Malinda Muller	Completion	3/31/2014	Y		
429	W3(E)	Establish a library student/recent graduate unpaid Internship program	Malinda Muller	Identify current practices and assess strengths and weaknesses	12/30/2013	Y		
430	W3(E)	Establish a library student/recent graduate unpaid Internship program	Malinda Muller	Redesign, incorporate and expand on current practices	3/30/2014	Y	9/30/2014	Took place over the summer program period
431	W3(E)	Establish a library student/recent graduate unpaid Internship program	Malinda Muller	Research, evaluate and implement best practices	9/30/2014	Y		
432	W3(E)	Establish a library student/recent graduate unpaid Internship program	Malinda Muller	Design and implement staff and participant feedback mechanism	12/31/2014	Y		
433	W3(E)	Establish a library student/recent graduate unpaid Internship program	Malinda Muller	Create handbook and guidelines	12/31/2014	Y		
434	W3(E)	Establish a library student/recent graduate unpaid Internship program	Malinda Muller	Completion	12/31/2014	Y		
436	W3(F)	Establish an "on-call list" of contract employees available to cover occasional absences						
437	W3(F)	Establish an "on-call list" of contract employees available to cover occasional absences	Executive Assistant	Working with supervisors, identify critical needs and timing	2/28/2015	Y		Implemented informally. Formal project not necessary.
438	W3(F)	Establish an "on-call list" of contract employees available to cover occasional absences	Executive Assistant	Document on-call agreements and compensation schedules	4/30/2015	Y		
439	W3(F)	Establish an "on-call list" of contract employees available to cover occasional absences	Executive Assistant	Recruit on-call staff	6/30/2015	N		
440	W3(F)	Establish an "on-call list" of contract employees available to cover occasional absences	Executive Assistant	Review program's success and revise as necessary	9/30/2015	N		
441	W3(F)	Establish an "on-call list" of contract employees available to cover occasional absences	Executive Assistant	Completion	10/31/2015	N		
443	W4(A)	Provide continuing education and training opportunities	Executive Assistant					
444	W4(A)	Provide continuing education and training opportunities	Executive Assistant	Working with staff, identify training needs and desires	2/28/2014	Y	6/30/2015	Ongoing by request. All Staff trainings, web trainings and conference attendance underway. Support for advance degree students also in process.
445	W4(A)	Provide continuing education and training opportunities	Executive Assistant	Develop schedule of training events and nominate trainers (in-house or from the outside)	4/30/2014	Y	9/30/2015	

446	W4(A)	Provide continuing education and training opportunities	Executive Assistant	Working with trainers, develop curricula and training materials	6/30/2014	Y	12/31/2015	
447	W4(A)	Provide continuing education and training opportunities	Executive Assistant	Schedule and promote training events	7/31/2014	Y	1/31/2016	
448	W4(A)	Provide continuing education and training opportunities	Executive Assistant	Completion	8/31/2014	Y	3/31/2016	
450	W4(B)	Establish a volunteer program to provide additional support and outreach						
451	W4(B)	Establish a volunteer program to provide additional support and outreach	Sandi Levin	Research existing public/nonprofit/govt programs	7/31/2013	Y		
452	W4(B)	Establish a volunteer program to provide additional support and outreach	Sandi Levin	Participate in available trainings and workshops	8/30/2013	Y		
453	W4(B)	Establish a volunteer program to provide additional support and outreach	Sandi Levin	Build program components and Develop handbook	9/1/2013	Y		
454	W4(B)	Establish a volunteer program to provide additional support and outreach	Sandi Levin	Develop recruitment procedures	10/31/2013	Y	2/28/2014	
455	W4(B)	Establish a volunteer program to provide additional support and outreach	Sandi Levin	Recruit and Implement	12/31/2013	Y	12/31/2014	Partially implemented; still under revision
456	W4(B)	Establish a volunteer program to provide additional support and outreach	Sandi Levin	Assess effectiveness, SWOT	3/31/2014	Y	6/30/2015	
457	W4(B)	Establish a volunteer program to provide additional support and outreach	Sandi Levin	Completion	3/31/2014	Y	9/30/2015	
506	T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks						
507	T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks	Sonny Lew	Determine available, relevant content	3/1/2014	Y		
508	T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks	Sonny Lew	Review technology, create budget estimates & recommendation	5/1/2014	N	12/31/2015	Project deferred indefinitely due to budget constraints, discouraging assessment of available ebook platforms and content and other priorities.
509	T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks	Sonny Lew	Create 90 day pilot implementation plan / Order equipment	7/15/2014	N	1/30/2016	
510	T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks	Sonny Lew	Test pilot configurations	9/15/2014	N	4/30/2016	
511	T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks	Sonny Lew	Make available to patrons	10/15/2014	N	6/15/2016	
512	T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks	Sonny Lew	Develop ongoing program to review and expand	12/31/2014	N	10/31/2016	
513	T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks	Sonny Lew	Completion	12/31/2014	N	4/15/2017	
539	T2(D)	Improve and maintain user-friendly website with expanded audio-visual and interactive tools						
540	T2(D)	Improve and maintain user-friendly website with expanded audio-visual and interactive tools	Jaye Steinbrick & Adam Rosenblum	Go Live with newly expanded website	8/15/2013	Y		Online payment obstacles delayed project.
541	T2(D)	Improve and maintain user-friendly website with expanded audio-visual and interactive tools	Jaye Steinbrick & Adam Rosenblum	Assess effectiveness and accessibility	9/30/2013	Y		
542	T2(D)	Improve and maintain user-friendly website with expanded audio-visual and interactive tools	Jaye Steinbrick & Adam Rosenblum	Develop ongoing program to review and expand content	10/30/2013	Y	1/30/2014	Staff web committee now meets quarterly to assess content and recommend additions/changes/deletions to web content as well as discuss emerging technologies.
543	T2(D)	Improve and maintain user-friendly website with expanded audio-visual and interactive tools	Jaye Steinbrick & Adam Rosenblum	Completion	10/30/2013	Y	1/30/2014	Ongoing
552	F1(A)	Promote awareness at local and state government levels through CCCLL and lobbying efforts						
553	F1(A)	Promote awareness at local and state government levels through CCCLL and lobbying efforts	Sandi Levin	Develop talking points	9/30/2013	Y		
554	F1(A)	Promote awareness at local and state government levels through CCCLL and lobbying efforts	Sandi Levin	Identify contacts, key legislators	10/31/2013	Y		
555	F1(A)	Promote awareness at local and state government levels through CCCLL and lobbying efforts	Sandi Levin	Meet with each at least once	2/15/2014	Y		
556	F1(A)	Promote awareness at local and state government levels through CCCLL and lobbying efforts	Sandi Levin	Develop program for follow up in FY 15	3/15/2014	Y		
557	F1(A)	Promote awareness at local and state government levels through CCCLL and lobbying efforts	Sandi Levin	Completion/report to BOT	4/30/2014	Y		Ongoing.
559	F1(B)	Assist in development of statewide strategy to protect or enhance revenue stream						

560	F1(B)	Assist in development of statewide strategy to protect or enhance revenue stream	Sandi Levin	Confer with CCCLL directors	10/31/2013	Y	
561	F1(B)	Assist in development of statewide strategy to protect or enhance revenue stream	Sandi Levin	Meet with CCCLL lobbyist	11/30/2013	Y	
562	F1(B)	Assist in development of statewide strategy to protect or enhance revenue stream	Sandi Levin	Present proposal for BOT review	12/31/2013	y	
563	F1(B)	Assist in development of statewide strategy to protect or enhance revenue stream	Sandi Levin	Present proposal to CCCLL executive board for consideration	1/31/2014	Y	
564	F1(B)	Assist in development of statewide strategy to protect or enhance revenue stream	Sandi Levin	Present proposal to CCCLL at annual conference	3/30/2014	Y	
565	F1(B)	Assist in development of statewide strategy to protect or enhance revenue stream	Sandi Levin	Completion		Y	Similar efforts will be required annually.
567	F1(C)	Reevaluate, re-bid and expand parking services					
568	F1(C)	Reevaluate, re-bid and expand parking services	Finance Director	Update and issue RFP to current provider and other qualified parking management companies	6/30/2013	Y	
569	F1(C)	Reevaluate, re-bid and expand parking services	Finance Director	Summarize proposals, reconcile inconsistencies, and recommend vendor	8/31/2013	Y	
570	F1(C)	Reevaluate, re-bid and expand parking services	Finance Director	Execute contract (Board Approval)	9/30/2013	Y	
571	F1(C)	Reevaluate, re-bid and expand parking services	Finance Director	Commence with new vendor and implement service and hours changes, if necessary	11/1/2013	Y	
572	F1(C)	Reevaluate, re-bid and expand parking services	Finance Director	Completion	12/31/2013	Y	New vendor commenced service on 10/1/13. Revenues have increased. Signage and service have improved.
580	F1(E)	Consider annual merit increases					
581	F1(E)	Consider annual merit increases	Marcelino Juarez	Document salary adjustment history for staff and benchmark comparable institutions	2/28/2014	Y	6/30/2015 Merit bonuses under discussion in conjunction with budget and MOU negotiations. Objective revised due to budget and staffing constraints
582	F1(E)	Consider annual merit increases	Marcelino Juarez	Make recommendation to ED subject to budget constraints	4/30/2014	Y	6/30/2015
583	F1(E)	Consider annual merit increases	Marcelino Juarez	Completion	6/30/2014	Y	3/1/2016 Implementation by end of FY16
585	F2(A)	Apply for grants					
586	F2(A)	Apply for grants	Linda Heichman	Identify areas/ projects for desired grant funding	10/31/2013	Y	12/31/2013
587	F2(A)	Apply for grants	Linda Heichman	Determine slate of potential grants and grant cycles through FY2015	12/31/2013	Y	3/31/2014
588	F2(A)	Apply for grants	Linda Heichman	Develop schedule of grant opportunities and assign responsibilities	1/31/2014	Y	6/30/2014
589	F2(A)	Apply for grants	Linda Heichman	Apply for minimum of 3 grants	6/30/2014	Y	12/31/2014
590	F2(A)	Apply for grants	Linda Heichman	Target budget line item, forecast for grants.	6/30/2015	Y	
591	F2(A)	Apply for grants	Linda Heichman	Completion	Ongoing	Y	6/30/2015
603	F2(C)	Promote conference room rentals and develop informational outreach					
604	F2(C)	Promote conference room rentals and develop informational outreach	Leigh Garcia	Finalize marketing material, content	8/1/2013	Y	
605	F2(C)	Promote conference room rentals and develop informational outreach	Leigh Garcia	Identify key marketing opportunities	8/15/2013	Y	
606	F2(C)	Promote conference room rentals and develop informational outreach	Leigh Garcia	Create marketing campaign/timeline / kick-off campaign	9/1/2013	Y	4/1/2014
607	F2(C)	Promote conference room rentals and develop informational outreach	Leigh Garcia	Evaluate/ measure success	12/31/2013	Y	6/1/2014
608	F2(C)	Promote conference room rentals and develop informational outreach	Leigh Garcia	Recommend budget line item for FY2015	3/31/2014	y	
609	F2(C)	Promote conference room rentals and develop informational outreach	Leigh Garcia	Completion	Ongoing	Y	
671	S1(A)	Preserve service levels by maintaining adequate staffing					
672	S1(A)	Preserve service levels by maintaining adequate staffing	Sandra Levin	Working with supervisors and employee groups, establish baseline productivity metrics	9/30/2014	Y	Commenced but not completed. Deferred indefinitely due to staff vacancies.
673	S1(A)	Preserve service levels by maintaining adequate staffing	Sandra Levin	Benchmark productivity at comparable institutions	11/30/2014	N/A	Revenue decline forced personnel reductions and efficiency measures before project completion

674	S1(A)	Preserve service levels by maintaining adequate staffing	Sandra Levin	Establish target metrics	1/31/2015	N/A		
675	S1(A)	Preserve service levels by maintaining adequate staffing	Sandra Levin	Recommend changes in staffing to achieve targets	3/31/2015	N/A		
676	S1(A)	Preserve service levels by maintaining adequate staffing	Sandra Levin	Completion	6/30/2015	N/A		Ongoing depending on funding levels
702	S1(E)	Establish and implement a policy for how to handle patrons with greater needs and time demands						
703	S1(E)	Establish and implement a policy for how to handle patrons with greater needs and time demands	Ralph Stahlberg	Survey other libraries and internal staff for best practices	10/31/2013	Y		Little feedback from other public law libraries, but good info from library publications
704	S1(E)	Establish and implement a policy for how to handle patrons with greater needs and time demands	Ralph Stahlberg	Identify successful alternatives	10/31/2013	Y		
705	S1(E)	Establish and implement a policy for how to handle patrons with greater needs and time demands	Ralph Stahlberg	Recommend policies and conduct training	12/31/2013	Y	1/30/2015	Discussed strategies with staff. Determined formal policy is difficult to implement but an ongoing discussion and pointers on handling situations is vital, as is commitment to reference service
706	S1(E)	Establish and implement a policy for how to handle patrons with greater needs and time demands	Ralph Stahlberg	Assess effectiveness and revise as needed	9/30/2014	Y	3/31/2015	Ongoing, should not have an ending date
707	S1(E)	Establish and implement a policy for how to handle patrons with greater needs and time demands	Ralph Stahlberg	Completion	10/30/2014	Y	10/30/2015	
709	S1(F)	Establish regular office hours at partnership libraries						
710	S1(F)	Establish regular office hours at partnership libraries	Linda Heichman	Develop possibilities for office hours at partnership libraries	9/30/2013	Y		
711	S1(F)	Establish regular office hours at partnership libraries	Linda Heichman	Evaluate options and select viable model(s)	1/31/2014	Y		
712	S1(F)	Establish regular office hours at partnership libraries	Linda Heichman	Formalize Branch Assistant-office hours/professional training	3/30/2014	Y	6/30/2014	Need full six month pilot to evaluate, report to Board, determine next steps for overall project.
713	S1(F)	Establish regular office hours at partnership libraries	Linda Heichman	Completion	7/30/2014	Y		
715	S1(G)	Present intermittent but regular, free classes						
716	S1(G)	Present intermittent but regular, free classes	Janine Liebert	Assess success of existing free classes and information sessions	11/30/2013	Y		
717	S1(G)	Present intermittent but regular, free classes	Janine Liebert	Identify and prioritize new class/information session offerings	1/31/2014	Y		
718	S1(G)	Present intermittent but regular, free classes	Janine Liebert	Determine frequency and assess impact on existing fee-based classes	1/31/2014		5/31/2014	Commenced but extended due to scheduling of classes in Feb-Mar and during Law Week
719	S1(G)	Present intermittent but regular, free classes	Janine Liebert	Identify and confirm partner organizations and presenters	2/28/2014	Y		
720	S1(G)	Present intermittent but regular, free classes	Janine Liebert	Implement	3/28/2014	Y		
721	S1(G)	Present intermittent but regular, free classes	Janine Liebert	Assess	6/28/2014	Y		
722	S1(G)	Present intermittent but regular, free classes	Janine Liebert	Completion	6/28/2014	Y		Free during Law Week and Pro Bono Week and SoCal Pro Bono Mngrs' summer series for law clerks and fellows - other classes fee-based
724	S1(H)	Create a plan to provide ebooks in the Library, beginning with research to determine patron needs and preferences						
725	S1(H)	Create a plan to provide ebooks in the Library, beginning with research to determine patron needs and preferences	Channa Cajero	Identify patron groups	12/31/2013	Y		
726	S1(H)	Create a plan to provide ebooks in the Library, beginning with research to determine patron needs and preferences	Channa Cajero	Set up and hold focus groups	12/31/2013	Y	2/15/2014	This project is being coordinated with objective C1(B). Extended dates for focus groups and survey reflect extended dates for objective C1(B).
727	S1(H)	Create a plan to provide ebooks in the Library, beginning with research to determine patron needs and preferences	Channa Cajero	Draft and distribute survey to user groups	3/31/2014	Y	2/28/2015	This project is being coordinated with objective C1(B).
728	S1(H)	Create a plan to provide ebooks in the Library, beginning with research to determine patron needs and preferences	Channa Cajero	Review results and make assessments	12/31/2014	Y	5/31/2015	Options are limited because ebooks only available at significant additional cost and lending platforms not yet suitable for public law libraries
729	S1(H)	Create a plan to provide ebooks in the Library, beginning with research to determine patron needs and preferences	Channa Cajero	Present recommendations	12/31/2014	Y	8/31/2015	Recommendation not to proceed due to pricing plans and budget constraints
730	S1(H)	Create a plan to provide ebooks in the Library, beginning with research to determine patron needs and preferences	Channa Cajero	Completion	1/31/2015	Y	8/31/2015	
732	S1(I)	Provide quality, comprehensive, face-to-face reference services by trained librarians						
733	S1(I)	Provide quality, comprehensive, face-to-face reference services by trained librarians	Ralph Stahlberg	Identify a set of effective reference standards/techniques	9/30/2013	Y		
734	S1(I)	Provide quality, comprehensive, face-to-face reference services by trained librarians	Ralph Stahlberg	Evaluate current staff performance	12/31/2013	Y		Ongoing as part of regular duties

735	S1(I)	Provide quality, comprehensive, face-to-face reference services by trained librarians	Ralph Stahlberg	Develop training regimen for current librarians and new hires	1/31/2014	Y		Integrated with intern/extern/volunteer initiatives. Major components implemented as part of regular reference work, e.g., trainings from vendors and attendance at workshops, conferences, webinars.
736	S1(I)	Provide quality, comprehensive, face-to-face reference services by trained librarians	Ralph Stahlberg	Evaluate effectiveness of new standards/techniques by surveying users	10/31/2014	Y	10/31/2015	Based on favorable response to reference service in initial Strategic Plan survey, additional surveying not recommended, although future periodic surveying will be explored.
737	S1(I)	Provide quality, comprehensive, face-to-face reference services by trained librarians	Ralph Stahlberg	Amend training regime as needed based upon survey results.	11/30/2014	Y	12/31/2015	Current formal and informal training for librarians that includes vendor programs, conference attendance, webinars, and professional reading keeps them prepared to deal with daily reference work. Additional training is always explored and encouraged.
738	S1(I)	Provide quality, comprehensive, face-to-face reference services by trained librarians	Ralph Stahlberg	Completion		Y	4/1/2015	Ongoing
775	S2(E)	Establish regular "Lawyer in the Library" programs (mediators, collaborative divorce, small claims advisor, etc.)						
776	S2(E)	Establish regular "Lawyer in the Library" programs (mediators, collaborative divorce, small claims advisor, etc.)	Janine Liebert	Identify models and scope of services	8/30/2013	Y		
777	S2(E)	Establish regular "Lawyer in the Library" programs (mediators, collaborative divorce, small claims advisor, etc.)	Janine Liebert	Identify prospective partners and gauge interest	9/30/2013	Y	11/30/2013	Commenced but not completed. Pilot programs in progress.
778	S2(E)	Establish regular "Lawyer in the Library" programs (mediators, collaborative divorce, small claims advisor, etc.)	Janine Liebert	Identify potential host locations (including the Law Library)	9/30/2013	Y	11/30/2013	
779	S2(E)	Establish regular "Lawyer in the Library" programs (mediators, collaborative divorce, small claims advisor, etc.)	Janine Liebert	Design, structure and plan program	12/30/2013	Y		
780	S2(E)	Establish regular "Lawyer in the Library" programs (mediators, collaborative divorce, small claims advisor, etc.)	Janine Liebert	Implement soft launch	3/30/2014	Y		
781	S2(E)	Establish regular "Lawyer in the Library" programs (mediators, collaborative divorce, small claims advisor, etc.)	Janine Liebert	Assess	3/30/2014	Y		
782	S2(E)	Establish regular "Lawyer in the Library" programs (mediators, collaborative divorce, small claims advisor, etc.)	Janine Liebert	Expand	6/30/2014	Y		
783	S2(E)	Establish regular "Lawyer in the Library" programs (mediators, collaborative divorce, small claims advisor, etc.)	Janine Liebert	Completion	12/30/2014	Y		
785	S2(F)	Coordinate with lawyer referral services, judiciary and local bar associations on unbundling of legal services and development of delivery model at library						
786	S2(F)	Coordinate with lawyer referral services, judiciary and local bar associations on unbundling of legal services and development of delivery model at library	Janine Liebert	Further investigate working models	6/30/2014	Y		
787	S2(F)	Coordinate with lawyer referral services, judiciary and local bar associations on unbundling of legal services and development of delivery model at library	Janine Liebert	Identify prospective partners and gauge interest with applicable bar associations	9/30/2014	Y	10/31/2014	Commenced vis a vis Los Angeles Collaborative Consortium discussions (modest means training and referral service) and meetings and regularized Lawyers in the Library.
788	S2(F)	Coordinate with lawyer referral services, judiciary and local bar associations on unbundling of legal services and development of delivery model at library	Janine Liebert	Design structure and plan program	12/30/2014	Y		Lawyers in the Library is now regularized and no longer legal aid-based. Library has also agreed to support the County-wide incubator consortium, which has the potential to create referrals for unbundled or modest means fee-based services.
789	S2(F)	Coordinate with lawyer referral services, judiciary and local bar associations on unbundling of legal services and development of delivery model at library	Janine Liebert	Establish MOU	12/30/2014	Y		Not necessary under model as implemented
790	S2(F)	Coordinate with lawyer referral services, judiciary and local bar associations on unbundling of legal services and development of delivery model at library	Janine Liebert	Implement soft launch	1/30/2015	Y		Dates to be adjusted to coordinate with incubator
791	S2(F)	Coordinate with lawyer referral services, judiciary and local bar associations on unbundling of legal services and development of delivery model at library	Janine Liebert	Assess	3/30/2015	Y		Programs run smoothly; incubator new solos assimilated; Customer satisfaction surveys indicate program useful; majority of volunteers return on a regular basis and compliment the program
792	S2(F)	Coordinate with lawyer referral services, judiciary and local bar associations on unbundling of legal services and development of delivery model at library	Janine Liebert	Expand program	6/30/2015	Y		New areas of coverage expanded.

793	S2(F)	Coordinate with lawyer referral services, judiciary and local bar associations on unbundling of legal services and development of delivery model at library	Janine Liebert	Completion	6/31/15	Y		
804	S2(H)	Offer more training from vendors and publishers						
805	S2(H)	Offer more training from vendors and publishers	Katie O'Laughlin	Identify training needs	7/22/2013	Y		
806	S2(H)	Offer more training from vendors and publishers	Katie O'Laughlin	Develop contact list of vendors and	8/26/2013	Y		
807	S2(H)	Offer more training from vendors and publishers	Katie O'Laughlin	Create schedule of training events and intended audience	9/23/2013	y	6/1/2014	Regular Lexis and Westlaw classes now scheduled - need more time to develop other classes
808	S2(H)	Offer more training from vendors and publishers	Katie O'Laughlin	Develop and distribute summary of training opportunities	10/21/2013	y	12/1/2014	Continuing to contact vendors other than Lexis & Westlaw and investigate possibility of public training classes
809	S2(H)	Offer more training from vendors and publishers	Katie O'Laughlin	Administer training events	12/31/2013	y	12/1/2014	MCLE's offered by various vendors as well
810	S2(H)	Offer more training from vendors and publishers	Katie O'Laughlin	Completion	2/28/2014	Y	12/1/2014	ongoing trainings
812	S3(A)	Conversion of Torrance space to training and education facility						
813	S3(A)	Conversion of Torrance space to training and education facility	Linda Heichman	Assess needs and resources, develop plan for conversion	12/31/2013	Y		
814	S3(A)	Conversion of Torrance space to training and education facility	Linda Heichman	Establish relationships with local bar associations, legal service agencies, other groups and identify programing	3/31/2014	Y		
815	S3(A)	Conversion of Torrance space to training and education facility	Linda Heichman	Secure funding for conversion	6/30/2014	Y		LALL used own labor and funds, donated furniture.
816	S3(A)	Conversion of Torrance space to training and education facility	Linda Heichman	Conduct programming	6/30/2015	Y		Commenced: Monthly workshops: Divorce Options (A Better Divorce); Divorce Default (Paternity and Dissolution) (SHC).
817	S3(A)	Conversion of Torrance space to training and education facility	Linda Heichman	Completion	7/30/2015	Y		
819	S3(B)	Confirm plan for new Long Beach Branch						
820	S3(B)	Confirm plan for new Long Beach Branch	Linda Heichman	Discuss options for Long Beach presence	7/31/2013	Y		
821	S3(B)	Confirm plan for new Long Beach Branch	Linda Heichman	Pilot eBranch and/or mini-branch (LBPL)	9/30/2013	Y	12/31/2013	
822	S3(B)	Confirm plan for new Long Beach Branch	Linda Heichman	Evaluate and assess LB presence	12/31/2013	Y	12/31/2014	
823	S3(B)	Confirm plan for new Long Beach Branch	Linda Heichman	Completion	3/31/2014	Y	12/31/2014	
844	S3(E)	Offer training and materials to the courts, including library resources, FAQ's and referral sheets						
845	S3(E)	Offer training and materials to the courts, including library resources, FAQ's and referral sheets	Ralph Stahlberg	Research court needs and FAQ's	12/31/2013	Y	4/1/2014	
846	S3(E)	Offer training and materials to the courts, including library resources, FAQ's and referral sheets	Ralph Stahlberg	Develop resource/referral sheets for distribution by court personnel	3/31/2014	Y	4/30/2014	P&P and Communications and roving members of the Reference staff distribute flyers at courthouse
847	S3(E)	Offer training and materials to the courts, including library resources, FAQ's and referral sheets	Ralph Stahlberg	Develop curriculum for judicial education seminars	3/31/2014	Y		Info from Court administrator was that their needs are currently met; annual judicial webinar ongoing
848	S3(E)	Offer training and materials to the courts, including library resources, FAQ's and referral sheets	Ralph Stahlberg	Assess efficacy and seek feedback from courts	6/30/2014	Y		Ref working with Communications and P&P actively posting and delivering library flyers, positive comments from court staff
849	S3(E)	Offer training and materials to the courts, including library resources, FAQ's and referral sheets	Ralph Stahlberg	Completion	9/30/2014	y		Ongoing
859	S4(B)	Expand training at partnership locations						
860	S4(B)	Expand training at partnership locations	Linda Heichman	Develop slate of public and staff training	9/30/2013	Y	12/31/2013	
861	S4(B)	Expand training at partnership locations	Linda Heichman	Launch public and staff training	1/31/2014	Y	3/31/2014	
862	S4(B)	Expand training at partnership locations	Linda Heichman	Assess and revise as needed	4/30/2014	Y	12/31/2014	
863	S4(B)	Expand training at partnership locations	Linda Heichman	Recommend program for ongoing, regular, public and staff training	6/30/2014	Y	3/31/2015	Monthly trainings at partnership locations; expanded programming at all branches
864	S4(B)	Expand training at partnership locations	Linda Heichman	Completion	7/31/2014	Y	3/31/2015	

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BOARD OF TRUSTEES

September 10, 2015

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Sandra J. Levin
Executive Director

Patrick Ogawa, Executive Officer
Board of Supervisors of the County of Los Angeles
383 Kenneth Hahn Hall of Administration
500 West Temple Street
Los Angeles, California 90012

Dear Mr. Ogawa:

Enclosed, please find the Annual Report of the Board of Law Library Trustees to the Board of Supervisors of the County of Los Angeles for the July 1, 2014 – June 30, 2015 Fiscal Year. The Board of Trustees wishes to assure the Board of Supervisors that the Los Angeles County Law Library stands ready to satisfy the Board's legal information needs and those of its staff and constituents, as well as the needs of County departments.

The Board of Trustees also wishes to thank the County of Los Angeles for its assistance during the reported Fiscal Year.

Sincerely,

Sandra J. Levin
Executive Director and Secretary to the Board
of Law Library Trustees of Los Angeles County

Enclosure: (1) Annual Report to the Board of Supervisors (Fiscal year 2014-15)

Cc: John Naimo, Auditor-Controller

LALAWLIBRARY



TO THE HONORABLE BOARD OF SUPERVISORS
OF LOS ANGELES COUNTY, CALIFORNIA

The Board of Law Library Trustees of Los Angeles County presents to you its Annual Report for the Fiscal Year ending June 30, 2015.

The Board is composed of the following members:

Hon. Ann I. Jones President	- Judge of the Superior Court
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Hon. Mark A. Juhas Vice-President	- Judge of the Superior Court
--------------------------------------	-------------------------------

Hon. Michelle W. Court	- Judge of the Superior Court
Hon. Dennis J. Landin	- Judge of the Superior Court
Kenneth D. Klein	- Attorney at Law
Susan Steinhauser	- Attorney at Law

The Board is staffed by:

Sandra J. Levin	- Executive Director & Secretary to the Board
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ANNUAL FINANCIAL STATEMENT
of the
Secretary of the Board of Law Library Trustees
of
Los Angeles County

Sandra J. Levin, Secretary to the Board of Law Library Trustees of Los Angeles County, pursuant to Section 6350 of the Business and Professions Code, presents to the Honorable Board, an Annual Financial Statement, as Secretary of said Law Library Board, for the Fiscal Year ending on the 30th day of June, 2015.



LOS ANGELES COUNTY LAW LIBRARY
 Balance Sheet as of June 30, 2015
 (Provisional and subject to year-end adjustments)

	2015	2014
Assets		
Current Assets		
Cash and cash equivalents	3,305,891	3,533,474
Accounts receivable	1,560,518	1,495,768
Prepaid expenses	108,887	164,660
Total current assets	4,975,296	5,193,902
Investments		
CalPERS CERBT Trust Fund	2,031,964	2,040,647
UBS Zero Coupon Treasury Fund	4,037,519	3,997,438
Total Investments	6,069,483	6,038,085
Restricted cash and cash equivalents	302,980	302,980
Capital assets, not being depreciated	583,433	583,433
Capital assets, being depreciated - net	22,654,077	23,100,529
Total assets	34,585,269	35,218,929
Liabilities and net assets		
Current Liabilities		
Accounts payable	112,142	311,176
Other liabilities	8,260	0
Payroll liabilities	14,015	12,894
Total current liabilities	134,418	324,070
Accrued sick and vacation liability	369,252	381,734
Borrowers' deposit	326,794	302,006
OPEB obligation	-69,450	1,799,622
Total liabilities	761,013	2,807,432
Net assets		
Invested in capital assets, net of related debt	23,237,510	23,683,962
Unrestricted	10,586,746	8,727,535
Total net assets	33,824,256	32,411,497
Total liabilities and net assets	34,585,269	35,218,929



LOS ANGELES COUNTY LAW LIBRARY

Income Statement for the Period Ending June 30, 2015
(Provisional and subject to year-end audit adjustments)

	2015	2014
Income		
L.A. Superior Court Fees	6,560,373	7,112,614
Interest	20,628	51,601
UBS (Zero Coupon Treasury)	39,291	-2,617
Parking	668,472	618,386
Library Services	518,932	563,148
Total Income	7,807,696	8,343,133
Expense		
Staff	1,995,108	4,115,472
Library Materials	2,809,418	3,035,273
Library Materials Transferred to Assets	-2,809,418	-3,035,273
Facilities	839,275	800,083
Technology	111,770	113,847
General	73,295	138,720
Professional Development	20,775	16,759
Communications & Marketing	2,561	9,587
Travel & Entertainment	1,859	1,827
Professional Services	50,345	49,454
Depreciation	3,304,608	3,266,848
Total Expenses	6,399,597	8,512,599
Net Income	1,408,099	-169,466
Extraordinary Income	12,664	711,775
Extraordinary Expense	7,823	186,407
Net Income Including Extraordinary Items	1,412,940	355,903
Capitalized Expenditures	48,739	65,523



LOS ANGELES COUNTY LAW LIBRARY
Statement of Cash Flows as of June 30, 2015
(Provisional and subject to year-end audit adjustments)

	2015
Cash flows from operating activities	
LA Superior court fees	6,560,373
Parking fees	668,472
Library services	420,098
(Increase) decrease in accounts receivable	-64,749
Increase (decrease) in borrowers' deposit	24,787
Cash received from filing fees and services	7,608,981
Facilities	-839,275
Technology	-111,770
General	-81,118
Professional development	-20,775
Communications & marketing	-2,561
Travel & entertainment	-1,859
Professional services	-50,345
(Increase) decrease in prepaid expenses	55,773
Increase (decrease) in accounts payable	-199,034
Increase (decrease) in other liabilities	8,260
Cash payments to suppliers for goods and services	-1,242,704
Staff	-1,995,108
Increase (decrease) in payroll liabilities	1,122
Increase (decrease) in accrued sick and vacation liability	-12,482
Increase (decrease) in OPEB liability	-1,869,072
Cash payments to employees for services	-3,875,541
Contributions received	120,000
Net cash from operating activities	2,610,736
Cash flow from capital and related financing activities	
Library materials	-2,809,418
Fixed assets	-48,739
Capital - Work in Progress (WIP)	0
Cash flows from investing activities	
Investment earnings	19,838
Net cash increase (decrease) in cash and cash equivalents	-227,583
Cash and cash equivalents, at beginning of period	3,836,454
Cash and cash equivalents, at end of period	3,608,871



LOS ANGELES COUNTY LAW LIBRARY
Statement of Cash Flows as of June 30, 2015 (Continued)
(Provisional and subject to year-end audit adjustments)

	2015
Reconciliation of Operating Income to Net Cash from Operating Activities	
Operating income	1,361,524
Adjustments for noncash effects:	
Depreciation	3,304,608
Extraordinary expense: book write-off	
Changes in operating assets and liabilities:	
(Increase) decrease in accounts receivable	-64,749
(Increase) decrease in prepaid expenses	55,773
Increase (decrease) in accounts payable	-199,034
Increase (decrease) in other liabilities	8,260
Increase (decrease) in payroll liabilities	1,122
Increase (decrease) in accrued sick and vacation liability	-12,482
Increase (decrease) in borrowers' deposit	24,787
Increase (decrease) in OPEB liability	-1,869,072
Net cash from operating activities	2,610,736



INTRODUCTORY INFORMATION

For over 120 years the Los Angeles County Law Library (“LA Law Library”) has served the Los Angeles County government, legal and business communities and the general public, including self-represented litigants.

Today, LA Law Library has become:

- The largest public Law Library in the United States other than the Law Library of Congress;
- A vibrant community education center, offering classes for attorneys, paralegals, librarians and the public;
- The curator and cultivator of nearly one million volume equivalents -- including one of the nation’s most comprehensive global law collections covering more than 200 countries;
- A navigator facilitating access to the legal system for those who do not have or cannot afford legal representation; and
- A leader in providing public access to legal knowledge.

LA Law Library is a global leader in providing state-of-the-art legal research combined with nearly one million volume equivalents of primary and practice materials, including Federal and State resources, a comprehensive California law collection and one of the nation’s largest Global Law collections with nearly 300,000 volumes of foreign, international and comparative law.

LA Law Library serves more than 50 thousand patrons annually, locally, nationally and globally, and the number continues to grow daily as new programs and workshops are developed with the assistance of the Library’s many partners and donors.



LOCATIONS AND HOURS

The Main Law Library is located in the Mildred L. Lillie Building at First & Hill, 301 West First Street, Los Angeles, California, across the street from the Stanley Mosk Courthouse of the Los Angeles Superior Court. The Main Library includes approximately 175,000 square feet and 35 miles of shelving. The Main Library's regular hours are from 8:30 a.m. until 6:00 p.m., Monday through Friday; and from 9:00 a.m. to 5:00 p.m. on Saturday.

The Law Library also has nine other locations throughout the County. A few of these locations have a solely electronic presence, called an eBranch, which is a walk-up computer-based, interactive research experience. eBranch users can contact LA Law Reference Librarians remotely via chat service, or during on-site office hours. The branch and partnership locations can be found in:

Four courthouse branch locations:

- Long Beach and Torrance (eBranch and staff)
- Norwalk and Pomona (eBranch only)

Five partnership locations:

- Los Angeles Public Library in Van Nuys
- Los Angeles County Public Libraries in Compton and Lancaster
- Pasadena Public Library
- The attorney lounge at the Los Angeles County Bar Association

At most branch and partnership locations, office hours and law librarian assistance are provided for four hours each week and classes are taught monthly.



PROGRAMS AND SERVICES

Reference Assistance: The Law Library provides reference and research assistance at the reference desk, by phone, mail, email and live web-chat. These services are available at no charge to any and all users of the library including attorneys, legal professionals, students and the general public.

Support Services: The Law Library makes available free public computers and Wi-Fi, as well as copiers, printers, typewriters, office supplies, faxing service, document delivery and e-delivery for a small fee.

Classes and Programs: The reference staff teaches regular legal research classes to the public including classes on searching Lexis and WestlawNext, research using print sources, utilizing free legal internet sites, locating forms, and many more. The Law Library, supported by many partners within the legal community, also provides law-related informational and clinical classes and workshops for its diverse patron groups:

For Attorneys and Paralegals: Continuing Legal Education classes, including:

- Basic Research; Advanced Research; Ethics; Substance Abuse; Elimination of Bias; Specialty Courses

For Self-Represented Individuals: workshops and clinics, including:

- Bi-weekly: Civil Lawsuit Basics
- Monthly: legal research online; name change workshop; expungement clinic; divorce options workshop; family law trial preparation; Lawyers in the Library (free consultations with volunteer lawyers)
- Occasional Series: ; Landlord & Tenant Series: Rights, Responsibilities, Fair Housing and Section 8; Representing Yourself in Federal Court; Representing Yourself in the Court of Appeal



For Business People and Entrepreneurs: classes and workshops, including:

- Starting & Growing a Business: Legal & Financial Knowledge You Need to Succeed (12-part biannual series)
- Export University (regulations, laws and strategies for export businesses) sponsored by the L.A. Ports
- How to Form a Corporation/Non-Profit
- Landlord-Tenant Rights and Responsibilities

For Members of the Public and Legal Community: free community events, aimed at promoting legal research and equal access to justice throughout Los Angeles County:

- Law Week in May
- Pro Bono Week in October

Fiscal Year 2014-15 saw the greatest number of MCLE classes ever held at LA Law Library, the most diverse and well-attended events and many new, successful partnerships with service providers throughout the County.

Members Program: The Law Library also provides a Members Program, which is an affordable fee-for-service program that provides a quiet work and meeting space adjacent to the downtown courthouses, unlimited access to the law collection and legal databases on-site, off-site access to certain databases, discounts on services, parking and priority reference service. The Members Program was successfully revamped to give members greater flexibility in choosing benefits, and improve the cost efficiency of the program. A more affordable option was created—and is the most popular to date—providing new lawyers with many of the basic services one needs when “hanging out a new law office shingle.” The program provides affordable support to attorneys, especially newer members of the bar, who are engaged in offering new and innovative representation models for litigants who might otherwise be unable to afford legal help.



Room Rentals: The Law Library rents private office space, conference rooms, classroom or Training Center and larger Reading Room for meetings and special events.

Tours: Library staff also gives library orientations and stack tours to outside groups including bar associations, paralegal and law-related student groups and academic institutions. The Law Library also hosted field trips from several local high schools, leading students on explorations of the library's resources, holding panel discussions on legal issues relevant to teens, and hosting career talks where students got the chance to learn about different career paths available to them in the legal field.

Special Projects: LA Law Library has received a grant from Cal Humanities, a non-profit partner of the National Endowment for the Humanities to create a first-of-its-kind oral history project entitled "Opening the Door: Personal Stories of Groundbreaking Los Angeles Lawyers and Judges." Personal stories will be gathered through videotaped interviews, which will be professionally edited and compiled into a short educational film. LA Law Library is partnering in this project with LAEP (Los Angeles Education Partnership), a non-profit organization dedicated to providing career and college readiness for students living in low-income communities. The film and ancillary programs will become a public resource and be used in local, at-risk schools to inspire students to reach for their dreams despite the barriers they too may face.

LIBRARY USAGE

The Law Library is open to all members of the public, and use of the library materials including the computers and legal databases is free. A library card is needed to access the computers (2 hour limit per day) and to borrow books. Borrowing requires a refundable security deposit.



At the end of Fiscal Year 2014-15, there were 1,533 persons registered as individual borrowers, including 1197 attorneys. In addition, 207 law firm and business borrowers have identified 1,321 designated borrowers, including attorneys, librarians and messenger services. There are 352 judicial borrowers, and 375 government borrowers. At the end of Fiscal Year 2014-15 the Library also served 10,317 library cardholders without borrowing privileges.

During Fiscal Year 2014-15, the LA Law Library Reference staff fielded 40,563 requests for information, 25,739 of which were received at the Reference Desk. 8,020 requests were received by phone; 2,108 were email or live-chat; and 217 were letter requests, generally from the incarcerated. There were also 1,116 requests for Foreign & International information, 582 of which were web based. Main branch staff also fielded 208 requests for service from eBranches which were received by chat or email. The questions came from a diverse group of users that includes self-represented litigants, attorneys, paralegals, judges, students and the general public.

The circulation department is closely aligned with reference. The staff issues library cards, checks books in and out, responds to requests for computer sign-ups, places books on reserve and hold, handles questions about overdue fines and pages materials as needed from the library's closed stack areas. In Fiscal Year 2014-15, 26,917 in-person requests were handled by Circulation, 18,231 were at the desk and 8,686 of which were telephone requests. A total of 14,508 volumes were circulated.

In response to requests for materials and information, the LA Law Library provides document delivery and e-delivery services. 1,003 such requests were received in Fiscal Year 2014-15. The LA Law Library Copy Center responded to 11,697 requests and produced more than 338,000 photocopies.



The LA Law Library web site (www.lalawlibrary.org) was visited by more than 99,000 visitors in Fiscal Year 2014-15. The average number of daily visits was 271, with an average visit duration of 3:54 minutes. 97.76% of the visitors were from the United States; 2.24% of the visitors were from other countries.

LA Law Library subscribes to 21 online legal databases. These databases, including Lexis, Westlaw, and most recently Lexis Advance, are available free of charge at 22 public terminals located in the main library. One notable database is the Legal Information Reference Center. It contains the full text of many of the Nolo Press self-help legal publications and is freely available from the Library's website to all residents of the County. The Law Library is also a Wi-Fi ready facility with 20 multiplex table outlets throughout the reading room that enable library users to access the Law Library's website, as well as their own programs and documents through personal computers.

COLLECTION / ACQUISITIONS

Print Materials: During Fiscal Year 2014-15, the Main Library added 5,718 volumes; the Branch and Partnership locations added 187 110 volumes. During the same period, the library withdrew 3,712 volumes and media from the Main Library and 39 volumes from the Branch locations. At the end of Fiscal Year 2014-15, the total number of print volumes in the LA Law Library collection was 670,749. The Main Library held 668,238; the Branch locations held 2,511.

Non-print Materials: During Fiscal Year 2014-15, the main Library added 457 computer discs, 55 audio discs, and 5 video/DVDs. Additionally, the Law Library added 4 rolls of microfilm and 20,780 microfiche to the collection. At the end of the Fiscal Year 2014-15, the Library held 8,197 reels of microfilm, 1,381,104 microfiche, 1,309 computer discs, 1,235 audio discs, and 93 video/DVDs. The Branch locations do not maintain non-print collections.



Volume Equivalents: The volume equivalent of non-print materials is approximately 300,811.8 volumes. The grand total of volumes and volume equivalents in the LA Law Library collection is 971,560.8 volumes, representing 196,404 titles.

FUNDING

The majority of the Law Library's services are free of charge, including in-person access to the highly valuable collection, reference assistance and borrowing. Many other services, such as copying and book delivery are provided at cost.

County Law Libraries are funded by a formula established by the Legislature which allocates a small portion of the fees generated from initial civil filings in each county to that county's Law Library. Due to a significant decline in the number of filings statewide, these funds have decreased precipitously in the past 6 years. LA Law Library specifically has experienced a decline in civil filing fee revenue of approximately \$3.5 million per year (more than 35% of its overall revenue). LA Law Library continues to try to develop additional revenue sources including fees for extraordinary library services (such as electronic delivery, room rentals, etc.), programs (such as MCLE classes) and parking in the court-adjacent structure.

GIFTS

During Fiscal Year 2014-15, although many offers were given, due to duplication, the LA Law Library did not accept any gifts of legal materials, except for the following donations: 2 copies of "California Unemployment, Disability & Paid Family Leave" 12th edition (2014) gifted by Judge David W O'Brien. Edward Poll gifted the following five titles: "Ending the Gauntlet," "Healing Client Relationships," "How to Get Sued," "Oxford Book of Legal Anecdotes," "Quotable Lawyer." In addition, the Friends of the Los Angeles County Law



Library donated \$120,000 in Fiscal Year 2014-15.

Respectfully submitted,

Sandra J. Levin, Executive Director & Secretary
Board of Law Library Trustees

LALAWLIBRARY



ACKNOWLEDGEMENT

(SEAL)

By order of the Board of
Law Library Trustees of
Los Angeles County

Los Angeles, California

The Los Angeles County Law Library Board of Trustees desires to acknowledge the support and assistance given to the Law Library by the Los Angeles County Board of Supervisors during the past year.

Respectfully submitted,

President of the Board of Law Library Trustees

Secretary of the Board of Law Library Trustees

LALAWLIBRARY



MEMORANDUM

DATE: September 16, 2015
TO: Board of Law Library Trustees
FROM: Meiling Li, Director of Collection Management Services, and the ILS Upgrade Project Team (Alex Kern, Angelica Buenrostro, Austin Stoub, Channa Cajero, and Shohreh Saljooghi)
VIA: Sandra Levin, Executive Director
RE: ILS Upgrade Project Status Update

This agenda item is informational only, intended to update the Board the progress of the ILS Upgrade Project.

In December 2014, Staff presented a report intended to familiarize the Board with the goals and process for the planned upgrade to the Law Library's integrated library system (ILS). At that time, Staff explained that the ILS (a product from Ex Libris called Voyager) was initially implemented approximately 20 years ago and needed to be replaced because it had already exceeded its expected life, future vendor support would be difficult (if not impossible) to obtain and the upgrade would allow the Law Library to convert to newer, more efficient and effective systems that would provide better information in more timely fashion with less manual effort.

Since that report, however, circumstances have changed considerably in that legal publishers have been slow to conform to the next generation systems and Ex Libris has decided to continue to offer and support Voyager. The ILS Upgrade Project team has completed its findings and analysis and is preparing the RFP. The resulting recommendation is proceed with the RFP process to compare systems and costs but to include the possible outcome of *not* replacing Voyager.

Background

The project team was convened on January 7, 2015 to study, evaluate, and search for a replacement ILS system for Voyager and to migrate to a next-generation system that would provide the functionalities and features to better serve library users and to manage library resources more efficiently. After scrutinizing current workflow, gathering staff input, and conducting a literature review, the team completed a needs analysis and compiled the functionality checklist in March, with more than 440 items enumerated. Fourteen (14) libraries were contacted for peer review and feedback concerning the functionality checklist, including law schools, county law libraries, and public libraries. Based on comments received, the functionality checklist was further refined.



Patron Service Level

The Team also studied ILS industry trends and reports, products, and vendors. A feature of primary importance in the next generation systems is called the "Discovery Layer." The Discovery Layer distinguishes a next-generation system from a traditional ILS system by offering features such as faceted searches and full text indexing of licensed electronic databases to expand user functionality. The main benefits for our library would be the ability to offer an improved experience for users of our online public catalog, and to provide access to licensed electronic contents beyond the library's holdings of its print collection in one cohesive search interface.

Unfortunately, the benefit of having a Discovery tool would not be significant at this time. Compared to other subject areas, the level of participation and conformance in the legal publishing industry has been dismal. Major databases of interest, such as Westlaw and/or Lexis, are not included in the central indexes of these services; hence their content is not currently "discoverable" using the Discovery Layer tools.

Voyager Development

Meanwhile, Ex Libris has not moved forward with their initial predictions to terminate Voyager as a supported product. Although Ex Libris now offers a next-generation successor and Voyager will eventually be terminated, to date no official "end of life" has been announced. They predict that transitioning their current Voyager customers at over 1000+ sites will take years. With upgrade cycles scheduled on an annual basis, the latest general release of Voyager 9 includes 150 enhancements as requested by customers; among them many are what we have been requesting. In addition, Voyager 10, 11, 12 are now listed on the published product roadmap for the next 3 years, and support is maintained and provided for the latest two versions that are in general release.

Staff is proceeding with the RFP process to solicit proposals to ascertain cost and compare systems, with the option of retaining Voyager.



AGENDA ITEM 4

DISCUSSION ITEMS

- 4.1 Approval of Revised Borrower Rules
- 4.2 Authorization to Donate Surplus Books to the Friends of the Los Angeles County
Law Library

MEMORANDUM

DATE: September 16, 2015

TO: Board of Law Library Trustees

FROM: Sandra Levin, Executive Director

RE: Approval of Revised Borrower Rules

INTRODUCTION

On a periodic basis, staff brings recommended adjustments to Law Library policies to the Board for approval to ensure the policies are compliant with current law and Law Library practices. The Board is asked to approve the amended Law Library Borrowing Rules as presented

DISCUSSION AND BACKGROUND

The Borrowing Rules were last amended and approved in July 2013. Attached are amended Borrowing Rules incorporating the following recommended adjustments in the Rules:

1. Foreign Identification: Occasionally, a patron requests to become a borrower presenting only a foreign identification card. Although the rules did not expressly prohibit acceptance of a foreign identification card, the general practice was to refuse borrower status without a local, state or federal identification. The primary reason for this was the difficulty in corresponding with a patron with only a foreign address. The proposed change would allow a patron to become a borrower using a foreign identification card with proof of a United States address that can be used as the address of record for the account.
2. Waiting Period to Request a Refund: The current waiting period of 3 months before a refund may be requested imposes a hardship on some patrons. Moreover, triggering the waiting period from the date of registration as a borrower, rather than the date of return of borrowed materials, does not always allow sufficient time for staff to determine status of the account. Accordingly, the proposed change reduces the waiting period to



two weeks, but the two week period commences upon the return of all borrowed materials.

3. Deposit Forfeiture: The language regarding deposit forfeiture is proposed to be amended to better conform to the language of the applicable Government Code section.
4. No Legal Advice: The proposed language stating that LA Law Library does not provide legal advice is amended to conform to the language previously approved by the Board for disclosures regarding the prohibition on the practice of law.
5. Card Replacement Charge: Despite some patron complaints regarding the charge for a replacement charge, no change has been proposed to the policy of charging for replacement of library cards. (The replacement charge is currently \$12.) Although some patrons protest that their card was stolen or otherwise disappeared through no fault of their own, it is impossible for staff to determine why or how a library card disappeared. We do offer a grace period for the patron to attempt to find their card (during which time they can obtain services with an ID and their borrower card number). However, upon the expiration of the grace period, the patron must pay the fee and request a replacement card in order to continue with library privileges.

A number of grammatical and typographic changes were also made in the attached proposed amendment.

RECOMMENDATION

Staff recommends that the Board approve the attached amended Borrowing Rules, effective October 1, 2015.



LA Law Library Borrowing Rules

Per California Business and Professions Code § 6360, LA Law Library is open to the public and free for the examination of books and other publications at the library; this includes free use of the library's online legal research databases.

NON-BORROWER LIBRARY CARD

A Non-Borrower library card may be used to access the Public Terminal Computers and photocopiers. Non-borrower cards are subject to a replacement charge as stated in the current schedule of fees and charges approved by the Board of Trustees ("Schedule of Fees and Charges"). Users must agree to the Computer Usage Policy.

The following Borrowing Rules apply to individuals and entities wishing to check out materials from the library.

BORROWER LIBRARY CARD REGISTRATION

To borrow books and materials: (1) complete the Borrower Registration Application; (2) submit the appropriate Security Deposit; and (3) pay any additional established and approved charges.

Any subsequent changes to a Borrower's account must be made in writing. Library cards are solely for the use of the person for whom ~~it~~is/they are issued.

BORROWING RULES

Books and materials may be borrowed from LA Law Library in accordance with the following Borrowing Rules.

BORROWER CATEGORIES

- Individual – any individual 18 years of age or older. Photo identification with current name and current address is required.*
- Corporate – any law firm, corporate legal department, public interest law office, corporation or other business entity. A corporate borrower may identify, in writing, partners, associates or other employees as designated borrowers. Fines and charges accrued will be the responsibility of the corporate borrower.
- Judicial – any judge, commissioner, magistrate judge or referee of a State or Federal court located in Los Angeles County. A judicial borrower may identify, in writing, research attorneys, law clerks or other employees who do work of a legal nature in the performance of ~~his/her~~their duties.
- Government – any elected or appointed State, Federal, County, Municipal, special district official or government office who maintains an office in Los Angeles County. A government borrower may identify, in writing, associates or other employees who do work of a legal nature in the performance of his/her duties.



- Reduced Deposit – any individual who presents a ~~c~~Court-approved “Waiver of Court Fees and Costs” for a specific, currently pending legal action in any State or Federal court within Los Angeles County. Photo identification with current name and current address is required.* A reduced deposit account expires 90 days after resolution of the case.
- Special Promotion Borrower – any individual 18 years of age or older, who becomes a Borrower due to a special promotion offered by the LA Law Library. Photo identification with current name and current address is required.*

** Photo Identification: A California driver's license or an ID card issued by the DMV. If no driver's license or ID card has been issued by the DMV, a registrant may use a current Passport, a School ID card, or other government-issued ID together with proof of a current United States address.*

MESSENGERS

An Individual, Corporate, Judicial, or Government Borrower may, in writing, designate persons or services to function as messengers to retrieve and return books for the Borrower upon payment of any applicable fee as set forth in the Schedule of Fees and Charges. The messenger must present proper identification when borrowing materials. The Borrower will be responsible for all fines and charges. Messenger services must be renewed on an annual basis, July 1 – June 30, at the rate set forth in the Schedule of Fees and Charges.

SECURITY DEPOSIT

The appropriate security deposit for each borrower category will be collected and placed in a trust account with the treasurer of the county. (Cal. Bus. & Prof. Code § 6320.) Any interest earned on the trust account will be paid to the Law Library and used for its expenses.

~~Upon written request by a Borrower, and following a No sooner than two (2) weeks three (3) month period from the date of registration after the return of all borrowed materials, a Borrower may request in writing a refund of a security deposit, less any outstanding fines or charges, will be refunded, provided all borrowed materials have been returned.~~ Borrowing privileges will cease upon receipt of the written request for refund of the security deposit. Refund of the security deposit will be issued in the form of a check. The security deposit is non-transferrable.

~~If the Security Deposit is not claimed within~~ After three (3) years of inactivity on an account, any Security Deposit that remains unclaimed despite notice to the Borrower's address on file after the Borrower account has expired it will become the property of LA Law Library. (Gov. Code, § 50050)

REFERENCE SERVICES

Reference staff is available to suggest materials in print or electronic format on a particular topic and to arrange for those materials to be placed on hold, or sent to the Borrower via e-delivery, messenger service or UPS. However, LA Law Library does not provide legal advice. To avoid engaging in the unauthorized practice of law (Cal. Bus. &



Prof. Code § 6125) LA Law Library provides legal resources and assistance with legal research as an informational and educational service. ~~reference staff does not conduct legal research, but will provide assistance in locating and using materials.~~

CIRCULATION SERVICES

Circulation staff are available during Library open hours to help Borrowers as follows: (1) review a Borrower's record; (2) provide a list of items checked out; (3) identify due dates for items checked out; (4) provide a status report on items requested to be reserved; and (5) provide a status report on any fines or charges that are owed.

LOAN PERIODS

Library materials are loaned for five (5) days. Individual, Judicial, Government, and Reduced Deposit Borrowers may check out and have up to 7 items in their possession at any one time. Corporate borrowers may check out and have up to 20 items in their possession at any one time. A maximum of five (5) non-book items may be checked out at any given time.

Library materials may be returned in person or through a book drop at the Main Library. A freestanding book drop is located at the service entrance on Broadway.

A borrower may not borrow an item on the same day in which it was returned.

If a Borrower fails to return an item within 30 days after its due date, his/her borrowing privileges will be suspended.

RENEWING LIBRARY MATERIALS

Items may be renewed a maximum of two (2) times. However, items may not be renewed if there is a pending "hold" on the item. If the item is overdue at the time of renewal, the standard overdue fine will be assessed.

Materials may be renewed in person or over the phone by calling 213-785-2529.

CHARGES AND FINES

If materials are returned or renewed late, overdue fines will be assessed at the rate set forth in the Schedule of Fees and Charges. Failure to pay accrued fines may result in the Member's account being suspended and/or turned over to a collection agency.

Library materials are not due on Sundays or on holidays when the Library is closed, but such days will count as days of the circulation period and for calculation of overdue fines.

If Library material is overdue for more than 30 days, the item will be deemed lost and replacement steps initiated. Replacement costs as set forth in the Schedule of Fees and Charges will be assessed and added to the overdue fines.

A Borrower who reports an item as lost, and who confirms the loss in writing, will be charged the amount of the fines accrued at the time of the initial report, plus the replacement cost and the processing charge. If an item deemed lost is returned before a



replacement is ordered, the charges will be reduced to the overdue fines as stated in the Schedule of Fees and Charges.

Books and materials lost but later found remain property of LA Law Library and must be returned, even if they have been replaced. No credit adjustments will be made for a lost item returned after a replacement has been ordered.

| An item~~s~~ which, in the judgment of the Library Director or his/her designee, is significantly damaged or defaced will be deemed lost unless it may be suitably repaired, in which case a charge equal to the cost of making repairs will be made against the Borrower.

Judicial Borrowers will be responsible for all charges other than fines.

Under Federal law library fines are not eligible for dismissal in bankruptcy (11 USC 523(a)(7)).

| The Library will charge for replacement library cards ~~se~~at the rate established in the Schedule of Fees and Charges.

SUSPENSIONS / TERMINATIONS

Once an Individual, Reduced or Government Borrower reaches a fine equal to \$30, or a Corporate Borrower reaches a fine equal to \$60, no additional circulation privileges will be allowed until the fine is paid in full.

If a Borrower fails to return library materials or to pay the due amount of fines or charges within 30 days of a mailed invoice, all borrowing privileges will be suspended until the amount due is paid. If the outstanding amount is not paid within 30 days following the date of the suspension, the amount owed will be deducted from the Borrower's Security Deposit. Borrowing privileges will remain suspended until the outstanding amount is paid. If the outstanding amount is greater than the Security Deposit, the entire deposit will be taken and the Borrower's account will be closed.

For Special Promotion Borrowers who were not required to provide a Security Deposit, accrual of unpaid fines or charges in excess of the standard deposit for individuals will result in account closure.

A Borrower whose borrowing privileges have been suspended will not qualify for another borrowing category until the suspension has been removed, outstanding amounts have been paid in full and the Security Deposit has been made whole.

A Borrower whose borrowing privileges have been suspended may, in writing, request the return of their security deposit, less any fines or charges accrued, at any time within three (3) years after their borrowing privileges have ceased. Any balance of the Security Deposit remaining and not requested in writing at the end of the three (3) years will become the property of the LA Law Library.



MEMORANDUM

DATE: September 16, 2015

TO: Board of Law Library Trustees

FROM: Sandra Levin, Executive Director

RE: Authorization to Donate Surplus Books to the Friends of the Los Angeles County Law Library.

INTRODUCTION

The Board of Trustees in 2013 authorized Bonhams to sell at auction a large number of rare books from the Law Library's European collection. Some of those items sold and the proceeds were remitted to the Law Library. Other items were not placed for auction or did not sell and are now being returned to LA Law Library. This staff report recommends that the Board authorize the Executive Director to donate to the Friends of the Los Angeles County Law Library from time to time any of the books that were previously designated for auction to be used for the purpose of raising funds to support the Law Library.

BACKGROUND

Business & Professions Code § 6344 provides that the Board "may dispose of obsolete or duplicate books, and other unneeded or unusable property." After years of discussion, investigation and consideration of options, the Board of Trustees in 2013 approved the sale at auction of a portion of the foreign rare books collection by Bonhams in England. Although beautiful, antique and rare, the books identified for auction were fragile and no longer useful practice materials. Moreover, the Law Library has limited climate-controlled space in which to preserve older materials and needs that space for its more relevant and practical historical California and domestic materials.



Some, but not all, of the books were sold at auction and the proceeds remitted to the Library. The rest are currently en route to the Law Library to be returned to the shelves in the Rare Books Room. The option of selling the items in Europe has for now been exhausted, but the reasons for the Board's prior decision to remove the items from the collection and use them to generate revenue remain unchanged. Although the Law Library itself has little expertise or bandwidth to sell rare books, the Friends of the Los Angeles County Law Library may be able to use or sell some of the materials to raise funds for the Law Library (either as a separate event or in conjunction with other fundraising events). Moreover, the Friends have been advised that sales and use tax do not apply where a "Friends of the Library" or equivalent organization sells books under the following conditions:

- The organization performs auxiliary services to a library in California as authorized by the library's governing authority.
- The organization uses all profits from sales exclusively to advance its purpose.

Staff does not recommend donating all of the foreign rare books returned by Bonhams because it is anticipated that the Friends will only utilize a small portion of them. Any funds generated by the Friends from the sale or use of the books would benefit the Law Library. All of the foreign rare books returned by Bonhams will remain on site at the Law Library in the Rare Books Room unless placed on display or sold.

RECOMMENDATION

Staff recommends that the Board authorize the Executive Director to donate to the Friends of the Los Angeles County Law Library, for the purpose of raising funds to support the Law Library, any or all of the books that were previously designated for auction.

