

AGENDA

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

REGULAR BOARD MEETING

Tuesday, October 28, 2014

12:15 PM

M. 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 September 23, 2014, Regular Board Meeting.
- 3.2 Review of August 2014 Financials & September 2014 List of Checks and Warrants.
- 3.3 FY 2014-15 Quarter 1 Statistics Update.
- 3.4 Quarterly Strategic Plan Update.
- 3.5 Approval of Amended Conflict of Interest and Disclosure Code for The Los Angeles County Law Library.
- 3.6 Approval of UBS Certification and Agreement of Government/ Government-Related Entity.

4.0 DISCUSSION ITEMS

- 4.1 Discussion of Prohibition on Providing Legal Advice and Related Risk Management Procedures.
- 4.2 Presentation Re Alternative Legal Research Models and Products.

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 Tuesday, November 18, 2014.

POSTED THURSDAY, OCTOBER 23, 2014 @ 1:00 P.M.

POSTED BY EUSTORGIO BARAJAS



AGENDA ITEM 3

CONSENT CALENDAR

- 3.1 Approval of Minutes of the September 23, 2014, Regular Board Meeting
- 3.2 Review of August 2014 Financials & September 2014 List of Checks and Warrants.
- 3.3 FY 2014-15 Quarter 1 Statistics Update.
- 3.4 Quarterly Strategic Plan Update.
- 3.5 Approval of Amended Conflict of Interest and Disclosure Code for The Los Angeles County Law Library.
- 3.6 Approval of UBS Certification and Agreement of Government/ Government-Related Entity.

**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.**

September 23, 2014

The Regular Board Meeting of the Board of Law Library Trustees of Los Angeles County was held on Tuesday, September 23, 2014 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
Kenneth Klein, Esquire
Judge Dennis Landin
Susan Steinhauser, Esquire

Trustees Absent:

Judge Reva Goetz
Judge Mark Juhas

Senior Staff Present:

Sandra J. Levin, Executive Director
Jaye Steinbrick, Senior Director

Also Present:

John Kohl, Finance Director
Meiling Li, Director, Collection Management Services
Neel Agrawal, Librarian, Global Law

President Jones determined a quorum to be present, convened the meeting at 12:20 p.m. and thereafter presided. Executive Director, Sandra Levin recorded the Minutes.

1.0 PUBLIC COMMENT

During the five (5) minutes allocated, Ms. Joan Lavine circulated a copy of minutes that were drafted by her regarding the previous Board meeting and asked that the Board adopt

the minutes as their own. Lavine continued and commented on the public computers located in the Library's Members' Study in addition to the cost of the Members Program.

During five (5) minutes allocated, Mr. Lee Paradise announced to the Board that a press release regarding the Board actions was accepted nationwide. Paradise continued and commented on his opposition to the recent hire of the Library's Facilities Manager. Paradise also commented on the Library's Employee Handbook and Personnel Policies Manual, also requesting a copy. Paradise commenced with reading a letter that alleged staff concerns.

At this time, ED Levin responded to Lavine with some clarification regarding the acceptance of donations. ED Levin thanked Lavine for all her efforts in attempting to raise money for the Members Program. With regard to the request from Paradise, ED Levin would provide Paradise with a copy of the Library's Employee Handbook and Personnel Policies Manual. ED Levin clarified for Paradise that the Board of Supervisors Report was a requirement that is filed annual.

2.0 PRESIDENT'S REPORT

President Jones highlighted the Lawyers in the Library Program and thanked staff for all their efforts in coordinating the program and for the outreach that is done to make the program available to all members of the public.

3.0 CONSENT CALENDAR

- 3.1 Approval of Minutes of the August 26, 2014, Regular Board Meeting
- 3.2 Review of July 2014 Financials & August 2014 List of Checks and Warrants.
- 3.3 Approval of Amendment to Section 13.3, Health Insurance, of the Employee Handbook and Personnel Policies Manual.
Staff recommended the Board approve the amended Section 13.3, Health Insurance, Employee Handbook and Personnel Policies Manual, incorporating prior decisions regarding the cap on healthcare premium reimbursement.
- 3.4 Approval of FY14 Audit Engagement of Bazillo, Cobb & Associates.
Staff recommended that the Board approve the engagement letter.

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

4.0 DISCUSSION ITEMS

- 4.1 Annual Report to the Board of Supervisors, Fiscal Year 2013-14.

President Jones announced that some changes were made to the report since its publication. The changes were delineated in attachments and circulated to the

Board and members of the public. Trustee Steinhauser thanked the Staff for completing a thorough report, Jones agreed. There were no additional comments.

President Jones requested a motion to approve the Annual Report to the Board of Supervisors, Fiscal Year 2013-14. So moved by Trustee Landin and seconded by Trustee Steinhauser, the motion was unanimously approved, 5-0.

At this time, Neel Agrawal and Meiling Li joined the table.

4.2 Status Report Regarding Global Collection in Reading Room.

Agrawal commenced with an introduction to the global law collection by providing a brief show and tell with some significant global law research materials. Agrawal explained the reasons for the creation of the Global Reading Room (GRR). Li followed with a presentation on the process that would occur in order to complete the GRR project.

5.0 **AGENDA BUILDING**

There were no items for Agenda Building.

6.0 **EXECUTIVE DIRECTOR REPORT**

ED Levin highlighted some of the Library's busier program activity that included room rentals by local bar associations. ED Levin also announced that the month prior reflected a significant increase in parking revenue.

7.0 **ADJOURNMENT**

There being no further business to come before the Board, the meeting was adjourned at 1:07 p.m. The next Regular Meeting of the Board of Law Library Trustees is scheduled for Tuesday, November 18, 2014.

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

Los Angeles Law Library

Balance Sheet

As of August 31, 2014

(Provisional and subject to year-end audit adjustments)

	6/30/2014	8/31/2014	Change
Assets			
Current Assets			
Cash and cash equivalents	3,533,474	3,486,899	(46,575)
Accounts receivable	1,498,973	1,488,681	(10,293)
Prepaid expenses	164,660	356,510	191,850
Total current assets	5,197,107	5,332,089	134,982
Investments			
CalPERS CERBT Trust Fund	40,647	57,421	16,775
UBS Zero Coupon Treasury Fund	3,997,438	4,000,284	2,845
Total Investments	4,038,085	4,057,705	19,620
Restricted cash and cash equivalents			
Capital assets, not being depreciated	302,980	302,980	-
Capital assets, being depreciated - net	583,433	583,433	-
	23,100,529	22,930,494	(170,035)
Total assets	33,222,134	33,206,701	(15,433)
Liabilities and Net Assets			
Current Liabilities			
Accounts payable	268,931	152,376	(116,555)
Other liabilities	-	(965)	(965)
Payroll liabilities	12,894	13,793	899
Total current liabilities	281,825	165,204	(116,621)
Accrued sick and vacation liability			
Borrowers' deposit	381,734	360,586	(21,149)
OPEB obligation	302,006	304,567	2,561
	(200,378)	(154,078)	46,300
Total liabilities	765,187	676,279	(88,909)
Net assets			
Invested in capital assets, net of related debt	23,683,962	23,513,927	(170,035)
Unrestricted	8,772,985	9,016,495	243,510
Total net assets	32,456,947	32,530,422	73,476
Total liabilities and net assets	33,222,134	33,206,701	(15,433)

Los Angeles Law Library

Income Statement for the Period Ended August 31, 2014

(Provisional and subject to year-end audit adjustments)

Aug 13 Actual	August 2014				FY 2013-14 YTD	FY 2014-15 YTD					Comments
	Budget	Actual	\$ Fav (Unf)	% Fav (Unf)		Budget	Actual	\$ Fav (Unf)	% Fav (Unf)		
Summary:											
Income											
641,151	625,763	586,108	(39,655)	-6.3%	1,248,823	1,218,851	1,160,882	(57,969)	-4.8%		
3,718	1,175	35,918	34,743	2955.8%	7,525	2,351	19,488	17,137	729.0%		
0	0	11,038	11,038	0.0%	0	0	2,769	2,769	0.0%		
51,789	44,167	57,448	13,282	30.1%	101,793	88,333	111,564	23,231	26.3%		
45,734	28,417	31,417	17,724	62.4%	71,184	56,835	157,021	112,522	198.0%		
<u>742,391</u>	<u>699,523</u>	<u>721,929</u>	<u>37,130</u>	<u>5.3%</u>	<u>1,429,325</u>	<u>1,366,370</u>	<u>1,451,723</u>	<u>97,689</u>	<u>7.1%</u>		
Expense											
369,235	336,585	325,654	10,932	3.2%	713,620	672,301	658,304	13,998	2.1%		
175,280	189,461	177,435	12,026	6.3%	252,377	386,752	379,149	7,602	2.0%		
(175,280)	(189,461)	(177,435)	(12,026)	6.3%	(252,377)	(386,752)	(379,149)	(7,602)	2.0%		
65,034	70,778	58,654	12,124	17.1%	130,983	141,569	131,512	10,057	7.1%		
7,510	12,169	8,285	3,883	31.9%	16,211	21,697	16,643	5,054	23.3%		
3,292	4,488	5,524	(1,036)	-23.1%	8,553	12,568	9,615	2,953	23.5%		
739	800	474	326	40.8%	4,654	3,874	4,932	(1,058)	-27.3%		
0	1,235	0	1,235	100.0%	600	2,320	104	2,216	95.5%		
54	340	120	220	64.7%	107	645	322	323	50.1%		
60	4,166	2,675	1,491	35.8%	240	8,333	4,013	4,320	51.8%		
276,097	276,944	277,059	(114)	0.0%	551,178	552,565	552,803	(239)	0.0%		
<u>722,019</u>	<u>707,506</u>	<u>678,445</u>	<u>29,061</u>	<u>4.1%</u>	<u>1,426,147</u>	<u>1,415,871</u>	<u>1,378,247</u>	<u>37,625</u>	<u>2.7%</u>		
<u>20,372</u>	<u>15,166</u>	<u>43,484</u>	<u>28,318</u>	<u>186.7%</u>	<u>3,179</u>	<u>(26,352)</u>	<u>73,476</u>	<u>99,828</u>	<u>378.8%</u>		
Net Income											
0	0	0	0	0.0%	0	0	0	0	0.0%		
0	0	0	0	0.0%	0	0	0	0	0.0%		
<u>20,372</u>	<u>15,166</u>	<u>43,484</u>	<u>28,318</u>	<u>186.7%</u>	<u>3,179</u>	<u>(26,352)</u>	<u>73,476</u>	<u>99,828</u>	<u>-378.8%</u>		
Capitalized Expenditures											
0	0	0	0	0.0%	0	0	3,619	(3,619)	0.0%		

Los Angeles Law Library
 Income Statement for the Period Ended August 31, 2014
 (Provisional and subject to year-end audit adjustments)

Aug 13 Actual	August 2014				FY 2013-14 YTD	FY 2014-15 YTD				Comments		
	Budget	Actual	\$ Fav (Unf)	% Fav (Unf)		Budget	Actual	\$ Fav (Unf)	% Fav (Unf)			
Detailed Budget:												
Income:												
641,151	625,763	586,108	(39,655)	-6.3%	15 FIN 303300	L.A. Superior Court Fees	1,248,823	1,218,851	1,160,882	(57,969)	-4.8%	Even though the FY 2015 Budget reflects a decrease in revenue as compared to FY 2014, August's YTD revenue has decreased 4.8% compared to the FY 2015 Budget.
Interest:												
0	0	0	0	0.0%	15 FIN 311000	Interest - LAIF	0	0	0	0	0.0%	
3,589	1,029	1,183	154	15.0%	15 FIN 312000	Interest - General Fund	7,265	2,058	2,278	219	10.7%	
129	146	179	33	22.7%	15 FIN 313000	Interest - Deposit Fund	261	293	359	67	22.8%	
0	0	34,520	34,520	0.0%	15 FIN 313100	Interest - CalPERS CERBT	0	0	16,775	16,775	0.0%	August income gain of \$34,520. Inception to date gain of \$57,421.
0	0	36	36	0.0%	15 FIN 313200	Interest - Bonds	0	0	76	76	0.0%	
3,718	1,175	35,918	34,743	2955.8%		Subtotal	7,525	2,351	19,488	17,137	729.0%	
0	0	11,038	11,038	0.0%	15 FIN 321000	Unrealized Invest. Gain/Loss UBS (Zero Coupon Treasury)	0	0	2,769	2,769	0.0%	Unrealized gain from bond investment. Value at maturity is fixed.
Parking:												
51,789	43,750	57,448	13,698	31.3%	39 FAC 330100	Parking	101,793	87,500	111,564	24,064	27.5%	Parking utilization has increased due to better signage and events.
0	417	0	(417)	-100.0%	39 FAC 330105	Valet Parking	0	833	0	(833)	-100.0%	Event parking included in general parking revenue.
51,789	44,167	57,448	13,282	30.1%		Subtotal	101,793	88,333	111,564	23,231	26.3%	
Library Services:												
2,373	0	98	98	0.0%	27 CIRC 330150	Annual Borrowing Fee	2,714	0	1,284	1,284	0.0%	
9,605	8,500	9,680	1,180	13.9%	25 P&P 330140	Annual Members Fee	19,345	17,000	18,665	1,665	9.8%	Members program continues to be attractive to non attorneys which has brought in additional Members. Example: CCCLL library. Also, number of Members who went inactive was less than renewals and new Members added this quarter. Staff taught at local law schools and participated in a local conference as vendor.
1,072	2,350	1,663	(687)	-29.3%	23 R&R 330340	Course Registration	1,379	4,700	4,283	(417)	-8.9%	Timing.
6,625	5,000	5,028	28	0.6%	27 CIRC 330129	Copy Center	12,630	10,000	10,896	896	9.0%	Greater usage than anticipated.
2,672	2,100	2,366	266	12.7%	27 CIRC 330205	Document Delivery	4,837	4,200	4,308	108	2.6%	
7,409	3,750	3,409	(341)	-9.1%	27 CIRC 330210	Fines	11,997	7,500	6,877	(623)	-8.3%	Timing.
13,729	300	15,317	15,017	5005.5%	15 FIN 330310	Miscellaneous	13,799	600	17,661	17,061	2843.5%	\$14,398 from CalPERS in Medicare Retirees Subsidy Funds for Medicare Part D.
240	2,750	(2,503)	(5,253)	-191.0%	39 FAC 330330	Room Rental	365	5,500	6,758	1,258	22.9%	More activity than anticipated.
0	250	258	8	3.3%	27 CIRC 330350	Book Replacement	1,660	500	364	(136)	-27.2%	
0	0	0	0	0.0%	15 FIN 330360	Forfeited Deposits	0	0	0	0	0.0%	
0	0	0	0	0.0%	17 EXEC 330400	Friends of Law Library	0	0	85,000	85,000	0.0%	Timing. Annual budget is 120,000.
0	0	0	0	0.0%	25 P&P 330420	Grants	0	0	0	0	0.0%	
509	333	380	47	14.1%	39 FAC 330450	Vending	959	667	925	258	38.7%	Greater usage than anticipated.
1,500	3,084	(4,278)	7,362	238.7%	39 FAC 330465	Special Events Income	1,500	6,168	0	6,168	100.0%	Timing
45,734	28,417	31,417	17,724	62.4%		Subtotal	71,184	56,835	157,021	112,522	198.0%	
742,391	699,523	721,929	26,093	3.7%		Total Income	1,429,325	1,366,370	1,451,723	94,920	6.9%	
Expenses:												
Staff:												
215,791	195,458	185,492	9,966	5.1%	ALL 501000	Salaries (benefits eligible)	405,061	390,917	380,366	10,551	2.7%	Variance is actually \$1,454 after accounting for Staff Vacancy Offset, and Temporary Employment.
0	(3,909)	0	(3,909)	100.0%	15 FIN 501025	Staff Vacancy Offset (Ben. Eligible)	0	(7,818)	0	(7,818)	100.0%	Reductions due to vacancies included in Salaries (Benefit Eligible).
24,847	24,299	19,739	4,559	18.8%	ALL 501050	Salaries (benefits ineligible)	47,107	48,598	42,605	5,993	12.3%	
0	(321)	0	(321)	100.0%	15 FIN 501075	Staff Vacancy Offset (Ben. Ineligible)	0	(641)	0	(641)	100.0%	Reduction due to vacancies included in Salaries (Benefit Ineligible).
13,137	13,625	13,084	541	4.0%	15 FIN 502000	Social Security	26,567	27,250	26,016	1,234	4.5%	
3,072	3,186	3,060	127	4.0%	15 FIN 503000	Medicare	6,213	6,373	6,084	289	4.5%	
34,161	21,713	21,754	(41)	-0.2%	15 FIN 511000	Retirement	45,921	43,426	43,051	375	0.9%	
46,188	42,249	40,626	1,623	3.8%	15 FIN 512000	Health Insurance	93,708	84,498	77,668	6,830	8.1%	
426	381	434	(53)	-13.8%	15 FIN 513000	Disability Insurance	732	688	843	(155)	-22.5%	
5,185	6,173	5,717	456	7.4%	15 FIN 514000	Dental Insurance	10,401	11,573	10,713	860	7.4%	
743	860	632	228	26.5%	15 FIN 514500	Vision Insurance	1,481	1,599	1,279	320	20.0%	
51	54	110	(56)	-104.7%	15 FIN 515000	Life Insurance	186	188	211	(23)	-12.5%	
0	(1,765)	0	(1,765)	100.0%	15 FIN 515500	Vacancy Benefits Offset	0	(3,512)	0	(3,512)	100.0%	Reduction due to vacancies is reflected in benefits.
8,779	6,982	6,982	0	0.0%	15 FIN 516000	Workers Compensation Insurance	17,559	13,964	13,963	1	0.0%	

Los Angeles Law Library
Income Statement for the Period Ended August 31, 2014
(Provisional and subject to year-end audit adjustments)

Aug 13 Actual	August 2014				FY 2013-14 YTD	FY 2014-15 YTD					Comments
	Budget	Actual	\$ Fav (Unf)	% Fav (Unf)		Budget	Actual	\$ Fav (Unf)	% Fav (Unf)		
0	0	0	0	0.0%	15 FIN 517000	0	0	0	0	0.0%	
0	1,950	2,854	(904)	-46.4%	ALL 514010	0	3,900	5,179	(1,279)	-32.8%	Temp. assistance due to long-term disability. Offset in Salaries (benefit eligible).
146	0	0	0	0.0%	13 HR 514015	146	0	89	(89)	0.0%	
0	0	0	0	0.0%	15 FIN 517500	0	0	0	0	0.0%	
(12,706)	0	0	0	0.0%	15 FIN 518000	0	0	0	0	0.0%	
27,083	23,150	23,150	0	0.0%	15 FIN 518500	54,167	46,300	46,300	0	0.0%	
703	1,250	730	520	41.6%	15 FIN 518550	1,406	2,500	1,659	841	33.6%	Budgeted for anticipated increase in train usage.
1,629	1,250	1,291	(41)	-3.2%	15 FIN 518560	2,965	2,500	2,276	224	9.0%	
369,235	336,585	325,654	10,932	3.2%		713,620	672,301	658,304	13,998	2.1%	
Library Materials:											
113,793	138,089	136,322	1,767	1.3%	29 R&R 601999	156,328	276,177	299,733	(23,556)	-8.5%	Timing.
4,607	5,371	4,976	395	7.4%	29 R&R 602999	10,072	11,557	8,595	2,962	25.6%	Careful selection of new materials.
915	3,902	4,270	(368)	-9.4%	29 R&R 609199	3,066	7,803	5,104	2,699	34.6%	Timing.
108	83	0	83	100.0%	29 R&R 609299	143	169	0	169	100.0%	Active expansion of print collection is not planned.
24,741	19,486	9,544	9,942	51.0%	29 R&R 603999	40,777	42,471	25,848	16,623	39.1%	Timing.
0	144	0	144	100.0%	29 R&R 604999	0	292	30	262	89.9%	Careful selection of new materials.
14,424	10,408	11,062	(654)	-6.3%	29 R&R 605999	19,737	24,317	15,698	8,619	35.4%	Timing.
834	1,237	350	887	71.7%	29 R&R 606999	1,918	2,476	588	1,888	76.2%	Careful selection of new materials.
12,800	7,849	8,541	(692)	-8.8%	29 R&R 607999	17,118	15,698	19,673	(3,975)	-25.3%	Timing.
1,123	412	619	(207)	-50.3%	29 R&R 608999	1,221	829	619	210	25.3%	Careful selection of new materials.
1,650	2,316	1,671	644	27.8%	29 R&R 609399	1,713	4,632	3,180	1,452	31.4%	Timing.
284	165	81	84	51.1%	29 R&R 609499	284	330	81	249	75.6%	Careful selection of new materials.
175,280	189,461	177,435	12,026	6.3%		252,377	386,752	379,149	7,602	2.0%	
(175,280)	(189,461)	(177,435)	(12,026)	6.3%	15 FIN 690000	(252,377)	(386,752)	(379,149)	(7,602)	2.0%	
0	0	0	0	0.0%		0	0	0	0	0.0%	
Balance											
Facilities:											
2,624	2,889	6,956	(4,067)	-140.8%	39 FAC 801005	5,475	5,778	10,116	(4,338)	-75.1%	7th Fl. roof drains \$3,000/public women's stall repair \$850.00.
2,535	2,000	2,560	(560)	-28.0%	39 FAC 801010	3,357	4,000	2,972	1,028	25.7%	Indoor air quality assessment.
1,492	1,292	1,900	(608)	-47.1%	39 FAC 801015	1,492	2,584	3,827	(1,243)	-48.1%	New toilet paper dispensers/graffiti remover.
10,793	11,000	11,083	(83)	-0.8%	39 FAC 801020	21,942	22,000	23,153	(1,153)	-5.2%	Hot weather higher chilled water usage.
1,247	1,250	777	473	37.9%	39 FAC 801025	2,494	2,500	777	1,723	68.9%	Timing, canceled contract awaiting revised invoice.
277	2,375	3,618	(1,243)	-52.3%	39 FAC 801030	4,303	4,750	7,424	(2,674)	-56.3%	Several days with triple digit temperatures.
20,784	22,862	21,071	1,791	7.8%	15 FIN 801035	41,568	45,725	42,142	3,583	7.8%	Projected 10% increase over FY 2014 forecast per broker. Actual cost is 1.7% below FY 2014 forecast.
8,421	8,755	8,674	81	0.9%	39 FAC 801040	16,843	17,510	17,748	(238)	-1.4%	
1,050	1,200	1,050	150	12.5%	39 FAC 801045	2,100	2,400	2,100	300	12.5%	Timing.
13,434	13,500	3,320	10,180	75.4%	39 FAC 801050	27,634	27,000	7,240	19,760	73.2%	Timing.
0	1,300	682	618	47.5%	39 FAC 801060	815	2,600	11,147	(8,547)	-328.7%	Timing, awaiting payment \$10,000.
0	953	(4,408)	5,361	562.6%	39 FAC 801065	112	1,906	270	1,636	85.8%	Timing.
0	160	419	(259)	-161.6%	39 FAC 801100	0	320	419	(99)	-30.8%	Tool chest purchase.
1,600	300	0	300	100.0%	39 FAC 801110	1,600	600	0	600	100.0%	Timing.
0	375	0	375	100.0%	39 FAC 801115	0	750	0	750	100.0%	Timing.
533	325	(53)	378	116.2%	39 FAC 801120	753	650	557	93	14.2%	Timing.
242	242	1,006	(764)	-315.6%	39 FAC 801125	496	496	1,621	(1,125)	-226.7%	Timing.
65,034	70,778	58,654	12,124	17.1%		130,983	141,569	131,512	10,057	7.1%	
Technology:											
498	1,093	1,089	4	0.3%	33 TECH 801210	4,695	2,186	2,146	40	1.8%	
0	1,191	825	365	30.7%	33 TECH 801212	0	2,381	1,651	730	30.7%	Timing.
218	2,500	0	2,500	100.0%	33 TECH 801215	218	4,050	0	4,050	100.0%	Timing.
0	0	548	(548)	0.0%	33 TECH 801220	0	1,000	548	452	45.2%	Timing.
0	400	0	400	100.0%	33 TECH 801225	0	400	0	400	100.0%	Timing.
3,560	3,750	3,702	48	1.3%	33 TECH 801230	7,119	7,500	7,404	96	1.3%	
3,235	3,235	2,120	1,115	34.5%	33 TECH 801235	4,180	4,180	4,838	(658)	-15.7%	Timing.
0	0	0	0	0.0%	33 TECH 801245	0	0	0	0	0.0%	
0	0	0	0	0.0%	33 TECH 801250	0	0	56	(56)	0.0%	
7,510	12,169	8,285	3,883	31.9%		16,211	21,697	16,643	5,054	23.3%	
General:											
477	477	578	(101)	-21.2%	15 FIN 801310	989	989	1,168	(179)	-18.1%	Timing.
33	725	657	68	9.4%	35 CMS 801315	668	1,450	1,314	136	9.4%	Due to OCLC's new policy in FY2014-15 of applying monthly flat-rate-cataloging-credit based on member library's contribution to the consortium in prior year.

Los Angeles Law Library
Income Statement for the Period Ended August 31, 2014
(Provisional and subject to year-end audit adjustments)

Aug 13 Actual	August 2014				FY 2013-14 YTD	FY 2014-15 YTD					Comments	
	Budget	Actual	\$ Fav (Unf)	% Fav (Unf)		Budget	Actual	\$ Fav (Unf)	% Fav (Unf)			
0	0	0	0	0.0%	35 CMS 801320	Binding	0	0	0	0	0.0%	
0	108	1,570	(1,462)	-1349.3%	17 EXEC 801325	Board Expense	122	3,217	1,570	1,647	51.2%	Timing.
392	575	136	439	76.4%	37 COM 801330	Staff meals & events	392	625	235	390	62.4%	
1,751	1,839	1,254	584	31.8%	15 FIN 801335	Supplies - Office	2,445	2,568	1,751	818	31.8%	Timing.
0	0	0	0	0.0%	35 CMS 801337	Supplies - Library materials	1,776	1,309	559	750	57.3%	Timing variance. Supplies will be replenished as needed in later months.
0	125	175	(50)	-39.8%	37 COM 801340	Stationery, business cards, etc.	0	250	175	75	30.1%	
0	0	0	0	0.0%	25 P&P 801365	Grant Application Expenses	0	0	0	0	0.0%	
554	554	960	(406)	-73.3%	27 CIRC 801370	Copy Center Expense	2,075	2,075	1,339	736	35.5%	
85	85	92	(7)	-8.5%	15 FIN 801375	General - Misc	85	85	96	(11)	-12.8%	Timing.
0	0	102	(102)	0.0%	15 FIN 801390	Course Registration	0	0	1,409	(1,409)	0.0%	Timing.
0	0	0	0	0.0%	15 FIN 801395	Friends of Law Library	0	0	0	0	0.0%	
3,292	4,488	5,524	(1,036)	-23.1%		Subtotal	8,553	12,568	9,615	2,953	23.5%	
						Professional Development:						
739	800	0	800	100.0%	ALL 803105	Travel	1,849	2,600	2,471	129	5.0%	
0	0	0	0	0.0%	ALL 803110	Meals	0	0	0	0	0.0%	
0	0	0	0	0.0%	ALL 803113	Incidental and miscellaneous	0	0	0	0	0.0%	
0	0	474	(474)	0.0%	ALL 803115	Membership dues	10	175	814	(639)	-365.0%	Timing.
0	0	0	0	0.0%	ALL 803120	Registration fees	2,795	1,099	1,647	(548)	-49.9%	Timing.
0	0	0	0	0.0%	ALL 803125	Educational materials	0	0	0	0	0.0%	
739	800	474	326	40.8%		Subtotal	4,654	3,874	4,932	(1,058)	-27.3%	
						Communications & Marketing:						
0	250	0	250	100.0%	37 COM 803205	Services	0	450	0	450	100.0%	No outside services required at this time
0	100	0	100	100.0%	37 COM 803210	Collateral materials	0	200	0	200	100.0%	Positive variance due to in-house printing
0	600	0	600	100.0%	37 COM 803215	Advertising	600	1,100	104	996	90.6%	No paid advertising outreach during this time period needed
0	285	0	285	100.0%	37 COM 803220	Trade shows & Outreach	0	570	0	570	100.0%	No additional outreach is required at this time.
0	1,235	0	1,235	100.0%		Subtotal	600	2,320	104	2,216	95.5%	
						Travel & Entertainment						
0	0	0	0	0.0%	ALL 803305	Travel	0	0	12	(12)	0.0%	
0	0	0	0	0.0%	ALL 803310	Meals	0	0	0	0	0.0%	
0	0	0	0	0.0%	ALL 803315	Entertainment	0	0	0	0	0.0%	
54	340	120	220	64.7%	ALL 803320	Ground transportation & mileage reimb.	107	645	310	335	52.0%	Timing.
0	0	0	0	0.0%	ALL 803325	Incidental travel expenses	0	0	0	0	0.0%	
54	340	120	220	64.7%		Subtotal	107	645	322	323	50.1%	
						Professional Services						
0	0	0	0	0.0%	15 FIN 804005	Accounting	0	0	0	0	0.0%	
0	3,333	2,675	658	19.7%	17 EXEC 804008	Consulting Services	0	6,666	4,013	2,654	39.8%	Timing.
60	833	0	833	100.0%	17 EXEC 804010	Legal	240	1,667	0	1,667	100.0%	Timing. Future needs may be handled in-house.
0	0	0	0	0.0%	15 FIN 804015	Other	0	0	0	0	0.0%	
60	4,166	2,675	1,491	35.8%		Subtotal	240	8,333	4,013	4,320	51.8%	
						Depreciation:						
244,157	247,473	246,630	843	0.3%	15 FIN 806105	Depreciation - Library Materials	487,263	493,335	491,681	1,654	0.3%	
31,939	29,471	30,428	(957)	-3.2%	15 FIN 806110	Depreciation Exp - FF&E	63,915	59,230	61,122	(1,892)	-3.2%	
276,097	276,944	277,059	(114)	0.0%		Subtotal	551,178	552,565	552,803	(239)	0.0%	
722,019	707,505	678,445	29,060	4.1%		Total Expense	1,426,147	1,415,871	1,378,247	37,623	2.7%	
20,372	15,166	43,484	28,318	0.0%		Net Income Before Extraordinary Items	3,179	(26,352)	73,476	99,828	378.8%	
0	0	0	0	0.0%	17 EXEC 401000	Extraordinary Income	0	0	0	0	0.0%	
0	0	0	0	0.0%	17 EXEC 901000	Extraordinary Expense	0	0	0	0	0.0%	
20,372	15,166	43,484	28,318	186.7%		999500 Net Income Including Extraordinary Items	3,179	(26,352)	73,476	99,828	378.8%	
						Capital Expenditures:						
0	0	0	0	0.0%	39 FAC 161100	Furniture / Appliances (>3k)	0	0	3,619	(3,619)	0.0%	
0	0	0	0	0.0%	33 TECH 161300	Electronics / Computer Hardware (>3k)	0	0	0	0	0.0%	
0	0	0	0	0.0%	39 FAC 164500	Exterior Building Repairs/ Improvements (>3k)	0	0	0	0	0.0%	
0	0	0	0	0.0%	39 FAC 164000	Interior Improvements / Alterations (>3k)	0	0	0	0	0.0%	
0	0	0	0	0.0%	33 TECH 168000	Computer Software	0	0	0	0	0.0%	
0	0	0	0	0.0%		Total - Capitalized Expenditures	0	0	3,619	(3,619)	0.0%	

Los Angeles Law Library
Statement of Cash Flows
As of August 31, 2014
(Provisional and subject to year-end audit adjustments)

	8/31/2014	YTD
Cash flows from operating activities		
LA Superior court fees	586,108	1,160,882
Parking fees	57,448	111,564
Library services	31,417	72,021
(Increase) decrease in accounts receivable	108,287	10,293
Increase (decrease) in borrowers' deposit	1,752	2,561
Cash received from filing fees and services	785,012	1,357,320
Facilities	(58,654)	(131,512)
Technology	(8,285)	(16,643)
General	(5,524)	(9,615)
Professional development	(474)	(4,932)
Communications & marketing	-	(104)
Travel & entertainment	(120)	(322)
Professional services	(2,675)	(4,013)
(Increase) decrease in prepaid expenses	39,749	(191,850)
Increase (decrease) in accounts payable	(308,377)	(116,555)
Increase (decrease) in other liabilities	(625)	(965)
Cash payments to suppliers for goods and services	(344,985)	(476,510)
Staff	(325,654)	(658,304)
Increase (decrease) in payroll liabilities	(78)	899
Increase (decrease) in accrued sick and vacation liability	(17,817)	(21,149)
Increase (decrease) in OPEB liability	23,150	46,300
Cash payments to employees for services	(320,399)	(632,253)
Contributions received	-	85,000
Net cash from operating activities	119,628	333,557
Cash flow from capital and related financing activities		
Library materials	(177,435)	(379,149)
Fixed assets	-	(3,619)
Capital - Work in Progress (WIP)	-	-
Cash flows from investing activities		
Investment earnings	1,362	2,637
Net cash increase (decrease) in cash and cash equivalents	(56,445)	(46,575)
Cash and cash equivalents, at beginning of period	3,846,324	3,836,454
Cash and cash equivalents, at end of period	3,789,879	3,789,879
Reconciliation of Operating Income to Net Cash from Operating Activities		
Operating income	(3,472)	51,219
Adjustments for noncash effects:		
Depreciation	277,059	552,803
Extraordinary expense: book write-off		
Changes in operating assets and liabilities:		
(Increase) decrease in accounts receivable	108,287	10,293
(Increase) decrease in prepaid expenses	39,749	(191,850)
Increase (decrease) in accounts payable	(308,377)	(116,555)
Increase (decrease) in other liabilities	(625)	(965)
Increase (decrease) in payroll liabilities	(78)	899
Increase (decrease) in accrued sick and vacation liability	(17,817)	(21,149)
Increase (decrease) in borrowers' deposit	1,752	2,561
Increase (decrease) in OPEB liability	23,150	46,300
Net cash from operating activities	119,628	333,557

LOS ANGELES COUNTY LAW LIBRARY
September 1, 2014 - September 30, 2014 (CHECKS)
Account No.: 108000

DATE	PAYEE	FOR	AMOUNT	CHECK NO.
September 4	AMERICAN BAR ASSOCIATION	BOOKS	3,349.91	027594
	ALEXANDERS LEGAL SEMINARS AND PUBLI	BOOKS	92.88	027595
	SYNCB AMAZON	BOOKS	444.23	027596
	WOLTERS KLUWER LAW & BUSINESS	BOOKS	567.21	027597
	BERNAN ASSOCIATES	BOOKS	482.20	027598
	CONTINUING EDUCATION OF THE BAR CAL	BOOKS	471.50	027599
	COIMBRA EDITORA SA	BOOKS	249.57	027600
	COUTTS LIBRARY SERVICES	BOOKS	2,109.35	027601
	DATA TRACE PUBLISHING COMPANY	BOOKS	179.95	027602
	OTTO HARRASSOWITZ	BOOKS	7,705.86	027603
	JAMES PUBLISHING INC	BOOKS	95.68	027604
	ALM MEDIA LAW JOURNAL PRESS	BOOKS	188.21	027605
	LAWPRESS CORPORATION	BOOKS	270.40	027606
	LRP PUBLICATIONS	BOOKS	398.50	027607
	NATIONAL DIRECTORY OF EXPERT WITNES	BOOKS	52.00	027608
	PRACTISING LAW INSTITUTE	BOOKS	330.41	027609
	THOMSON REUTERS TAX & ACCOUNTING	BOOKS	256.97	027610
	WILLIAM S HEIN & CO	BOOKS	580.79	027611
	AMERICAN LEGAL PUBLISHING CORPORATI	BOOKS	287.00	027612
	WOLTERS KLUWER LAW & BUSINESS	BOOKS	2,243.14	027613
	CAL OSHA REPORTER	BOOKS	395.00	027614
	CONTINUING EDUCATION OF THE BAR CAL	BOOKS	1,919.21	027615
	CODE PUBLISHING COMPANY	BOOKS	7.00	027616
	CONTINUING LEGAL EDUCATION SOCIETY	BOOKS	308.58	027617
	DATA TRACE PUBLISHING COMPANY	BOOKS	179.95	027618
	EBSCO PUBLISHING	BOOKS	3,411.00	027619
	GAUNT	BOOKS	344.30	027620
	INGRAM LIBRARY SERVICES	BOOKS	196.66	027621
	INTERNATIONAL SPECIALIZED BOOK SERV	BOOKS	153.55	027622
	JURIS PUBLISHING INC	BOOKS	121.50	027623
	ALM MEDIA LAW JOURNAL PRESS	BOOKS	412.75	027624
	CITY OF LIVERMORE	BOOKS	3.60	027625
	REPUBLIC OF PALAU NATIONAL TREASURY	BOOKS	704.90	027626
	CITY OF THOUSAND OAKS	BOOKS	33.20	027627
	THOMSON REUTERS TAX & ACCOUNTING	BOOKS	1,481.75	027628
	YBP LIBRARY SERVICES	BOOKS	80.68	027629
	AT&T	TELECOM	839.41	027630
	AT&T MOBILITY	TELECOM	166.29	027631
	BANDWIDTH.COM, INC.	TELECOM	325.67	027632
	BRIDGES FILTER SERVICE, INC	REPAIR & MAINTENA	614.49	027633
CITY OF LA - BUILDING AND SAFETY	ELEVATOR MAINT	776.52	027634	
CCCLL	REGISTRATION	100.00	027635	
CONSOLIDATED DISPOSAL SVC	BLDG SVCS	233.89	027636	
CUMMINS PACIFIC LLC	BLDG MAINT	768.81	027637	

37,553.70

LOS ANGELES COUNTY LAW LIBRARY
September 1, 2014 - September 30, 2014 (CHECKS)
Account No.: 108000

DATE	PAYEE	FOR	AMOUNT	CHECK NO.
September 10	DEMCO	FURNITURE	3,619.23	027638
	LORENZO GALLARDO	REPAIR & MAINTENA	3,003.00	027639
	GOURMET COFFEE SERVICE	KITCHEN SUPPL	1,005.70	027640
	LINDA J HEICHMAN	MEMBERSHIP	75.00	027641
	COUNTY OF LOS ANGELES	HEAT/COOL	3,806.16	027642
	MEGAPATH	TELECOM	71.47	027643
	PAN AMERICAN PEST CONTROL CO	BUILDING SERVICE	454.00	027644
	ROMERO MAINTENANCE CO.	REPAIR & MAINTENA	450.00	027645
	SEPCO EARTHSCAPE, INC	LANDSCAPING	1,050.00	027646
	STATE COMPENSATION INSURANCE FUND	WORKERS COMP	6,981.58	027647
	UNITED PARCEL SERVICE	DELIVERY/POSTAGE	131.79	027648
	VALLEY WIDE AIR	REPAIR & MAINTENA	2,389.40	027649
	VELASQUEZ DRYWALL INC.	REPAIR & MAINTENA	850.00	027650
	WOLTERS KLUWER LAW & BUSINESS	BOOKS	192.48	027651
	MATTHEW BENDER LEXISNEXIS MATTHEW B	BOOKS	1,881.21	027652
	BLOOMBERG BNA	BOOKS	766.05	027653
	BOOK HOUSE INC	BOOKS	38.03	027654
	LEXISNEXIS CANADA BUTTERWORTHS CANA	BOOKS	1,063.68	027655
	CALIFORNIA HOSPITAL ASSOCIATION CAH	BOOKS	531.75	027656
	CARSWELL COMPANY LTD	BOOKS	195.75	027657
CONTINUING EDUCATION OF THE BAR CAL	BOOKS	699.93	027658	
CO INFO PTY LTD	BOOKS	878.94	027659	
JURIS PUBLISHING INC	BOOKS	184.50	027660	
JURISNET LLC	BOOKS	86.50	027661	
RETTA LIBROS LIDERLAF S A	BOOKS	510.97	027662	
ALM MEDIA LAW JOURNAL PRESS	BOOKS	169.40	027663	
LIBRERIA LINARDI Y RISSO A LINARDI	BOOKS	283.72	027664	
NATIONAL HOUSING LAW PROJECT	BOOKS	436.00	027665	
OXFORD UNIVERSITY PRESS	BOOKS	142.87	027666	
PAN PACIFICA	BOOKS	552.00	027667	
PRACTISING LAW INSTITUTE	BOOKS	1,034.87	027668	
QUALITY CODE PUBLISHING	BOOKS	42.16	027669	
WEST ACADEMIC	BOOKS	349.84	027670	
September 12	AMERICAN JUDICATURE SOCIETY	BOOKS	32.50	027671
	WOLTERS KLUWER LAW & BUSINESS	BOOKS	1,224.39	027672
	ATLANTIC LAW BOOK COMPANY	BOOKS	141.00	027673
	AUX AMATEUR DE LIVRES	BOOKS	117.62	027674
	MATTHEW BENDER LEXISNEXIS MATTHEW B	BOOKS	293.66	027675
	BLOOMBERG BNA	BOOKS	114.58	027676
	LEXISNEXIS CANADA BUTTERWORTHS CANA	BOOKS	1,941.05	027677
	CCH INCORPORATED	BOOKS	199.46	027678
	CONTINUING EDUCATION OF THE BAR CAL	BOOKS	739.17	027679
	COUTTS LIBRARY SERVICES	BOOKS	1,574.14	027680

75,907.74

LOS ANGELES COUNTY LAW LIBRARY
September 1, 2014 - September 30, 2014 (CHECKS)
Account No.: 108000

DATE	PAYEE	FOR	AMOUNT	CHECK NO.
September 18	DAILY JOURNAL CORPORATION	BOOKS	1,667.72	027681
	LAW PUBLISHERS	BOOKS	55.00	027682
	LEXISNEXIS BUTTERWORTHS	BOOKS	5,482.08	027683
	PAN PACIFICA	BOOKS	98.00	027684
	PRACTISING LAW INSTITUTE	BOOKS	957.22	027685
	USCIB INTERNATIONAL BOOKSTORE	BOOKS	286.40	027686
	YBP LIBRARY SERVICES	BOOKS	450.15	027687
	AMERICAN RELOCATION & LOGISTIC	REPAIR & MAINTENA	350.78	027688
	ANTHEM BLUE CROSS ** VOIDED *****	COBRA	0.00	027689
	ARCADIS US INC	BUILDING SERVICES	1,850.00	027690
BULBS.COM	REPAIR & MAINTENA	588.90	027691	
CHANNA CAJERO	MILEAGE	25.76	027692	
COUNTY OF LOS ANGELES	BANK CHARGE	58.32	027693	
CLEAN SOURCE, INC.	CLEANING SUPPLIES	1,900.11	027694	
CONSOLIDATED DISPOSAL SVC	BLDG SVCS	233.75	027695	
ESTHER EASTMAN	MILEAGE	27.97	027696	
LORENZO GALLARDO	REPAIR & MAINTENA	285.00	027697	
GOURMET COFFEE SERVICE	KITCHEN SUPPL	45.94	027698	
GOLDEN STATE OVERNIGHT	DELIVERY/POSTAGE	99.40	027699	
COUNTY OF LOS ANGELES	HEATING/COOLING	3,617.57	027700	
L A DEPT WATER & POWER	WATER/SEWER	280.61	027701	
CHRISTINE R LANGTEAU	MILEAGE	49.73	027702	
MANAGE EASE INCORPORATED	CONSULTING	1,337.50	027703	
METROLINK	TMP	1,350.00	027704	
OCLC INC	BIBLIOGRAPHICAL S	657.01	027705	
OFFICE DEPOT	SUPPLIES - OFFICE	1,130.56	027706	
SEPCO EARTHSCAPE, INC	LANDSCAPING	1,050.00	027707	
UNITED PARCEL SERVICE	DELIVERY/POSTAGE	55.27	027708	
VALLEY WIDE AIR	BLDG SERVICE	200.00	027709	
LINDA J HEICHMAN	MILEAGE	16.63	027710	
September 23	AMERICAN BAR ASSOCIATION	BOOKS	1,463.06	027711
	WOLTERS KLUWER LAW & BUSINESS	BOOKS	881.00	027712
	CARSWELL COMPANY LTD	BOOKS	153.07	027713
	CONTINUING EDUCATION OF THE BAR CAL	BOOKS	2,109.54	027714
	COUTTS LIBRARY SERVICES	BOOKS	1,766.14	027715
	IMMIGRANT LEGAL RESOURCE CENTER	BOOKS	299.05	027716
	INTERNATIONAL SPECIALIZED BOOK SERV	BOOKS	157.19	027717
	JURIS PUBLISHING INC	BOOKS	106.50	027718
	KUBON & SAGNER	BOOKS	56.07	027719
	MEXICO SUR	BOOKS	3,427.24	027720
	SASKATCHEWAN QUEENS PRINTER	BOOKS	126.69	027721
	WEST ACADEMIC	BOOKS	119.90	027722
	ANTHEM BLUE CROSS	COBRA	637.08	027723

110,696.93

LOS ANGELES COUNTY LAW LIBRARY
September 1, 2014 - September 30, 2014 (CHECKS)
Account No.: 108000

DATE	PAYEE	FOR	AMOUNT	CHECK NO.
September 24	STATE BOARD OF EQUALIZATION	USE TAX	947.00	027724
	KONICA MINOLTA BUSINESS	COPY CENTER	581.49	027725
	ROMERO MAINTENANCE CO.	REPAIR MAINTENAN	395.00	027726
September 26	GUARDIAN	PREPAID EXP	8,174.63	027727
September 26	PETTY CASH FUND	PETTY CASH	347.87	027728
	AMERICAN BAR ASSOCIATION	BOOKS	2,520.36	027729
	WOLTERS KLUWER LAW & BUSINESS	BOOKS	753.65	027730
	LEXISNEXIS CANADA BUTTERWORTHS CANA	BOOKS	195.44	027731
	CONTINUING EDUCATION OF THE BAR CAL	BOOKS	1,467.44	027732
	DATA TRACE PUBLISHING COMPANY	BOOKS	179.95	027733
	GAUNT	BOOKS	208.25	027734
	HOGARTH REPRESENTATION	BOOKS	202.12	027735
	INFORMATION TODAY INC	BOOKS	96.95	027736
	ESPINOSA MARTIN DE JESUS SANCHEZ ME	BOOKS	1,080.00	027737
	MUNICIPAL CODE CORPORATION	BOOKS	1,103.50	027738
	PUBLIC UTILITIES REPORTS INC	BOOKS	1,695.00	027739
	SASKATCHEWAN QUEENS PRINTER	BOOKS	90.84	027740
	THOMSON REUTERS	BOOKS	164.05	027741
	WILLIAM S HEIN & CO	BOOKS	2,238.97	027742

132,192.44

LOS ANGELES COUNTY LAW LIBRARY
September 1, 2014 - September 30, 2014 (WARRANTS)
Account No.: 102000

DATE	PAYEE	FOR	AMOUNT	CHECK NO.
September 12	THOMSON REUTERS	BOOKS	69,737.10	TS00207832
September 23	L A DEPT WATER & POWER	ELECTRIC/FIRE	10,802.45	TS00208259
	ROMERO MAINTENANCE CO.	JANITORIAL SVCS	10,869.17	TS00208259
September 30	MARY MARTIN BOOKSELLERS	BOOKS	11,500.00	TS00208601
	CALPERS	PREPAID EXP	52,805.81	TS00208601
	THOMSON REUTERS	BOOKS	15,732.20	TS00208601
			171,446.73	

CONSENT ITEM 3.3 | FY2014-15 QUARTER 1 STATISTICS

This item will be sent separately.

MEMORANDUM

DATE: October 28, 2014

TO: Board of Law Library Trustees

FROM: Sandra J. Levin, Executive Director

RE: Strategic Plan Accountability Report – Quarterly Update

In July of 2013, at its Regular Meeting, the Board of Law Library Trustees adopted a new strategic plan. As a result, the Strategic Plan Accountability Report was created to help staff track and update the status of their milestones and objectives. At the close of each quarter, staff presents an update of the report to the Board for their review.

Attached, you will find the FY2014-15 quarter 1 update.

Note: The blue highlights mark all milestones whose original or extended date fell within this quarter.

RECOMMENDATION

Staff recommends that the Board receive and file the attached report.



Los Angeles County Law Library Strategic Plan
Accountability Report

#	GOAL	PROJECT	COORDINATOR(S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
2	C1(A)	Track usage, visitors and performance metrics						
3	C1(A)	Track usage, visitors and performance metrics	Ralph Stahlberg & Channa Cajero	Identify technology needed	9/30/2013	Y		
4	C1(A)	Track usage, visitors and performance metrics	Ralph Stahlberg & Channa Cajero	Research methods available	10/31/2013	Y		
5	C1(A)	Track usage, visitors and performance metrics	Ralph Stahlberg & Channa Cajero	Formally implement programs	11/30/2013		12/31/2014	Project coordinators still working with Circulation and Technology Services staff on planning and implementing programs. The Voyager reports are being developed for this project .
6	C1(A)	Track usage, visitors and performance metrics	Ralph Stahlberg & Channa Cajero	Evaluate results	12/31/2013		12/31/2014	
7	C1(A)	Track usage, visitors and performance metrics	Ralph Stahlberg & Channa Cajero	Completion	1/31/2014		12/31/2014	
9	C1(B)	Conduct patron surveys and focus groups regarding legal resource materials needs						
10	C1(B)	Conduct patron surveys and focus groups regarding legal resource materials needs	Channa Cajero	Identify users	12/31/2013	Y		
11	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	
12	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		12/31/2014	Date extended pending revision of survey content.
13	C1(B)	Conduct patron surveys and focus groups regarding legal resource materials needs	Channa Cajero	Evaluate results	3/31/2014		3/31/2015	Extended date reflects new deadline to draft and distribute survey to user groups.
14	C1(B)	Conduct patron surveys and focus groups regarding legal resource materials needs	Channa Cajero	Completion	3/31/2014		3/31/2015	Extended date reflects new deadline to draft and distribute survey to user groups.
16	C1(C)	Develop a comprehensive strategy for collection assessment and evaluation						
17	C1(C)	Develop a comprehensive strategy for collection assessment and evaluation	Channa Cajero	Evaluate methods available	12/31/2013	Y		
18	C1(C)	Develop a comprehensive strategy for collection assessment and evaluation	Channa Cajero	Select useful tools and technology	12/31/2013	Y		
19	C1(C)	Develop a comprehensive strategy for collection assessment and evaluation	Channa Cajero	Collect data	3/31/2014		12/31/2014	Date extended pending revision of Voyager reports for this project.
20	C1(C)	Develop a comprehensive strategy for collection assessment and evaluation	Channa Cajero	Review results and make assessments	3/31/2014		12/31/2014	Date extended pending revision of Voyager reports for this project.
21	C1(C)	Develop a comprehensive strategy for collection assessment and evaluation	Channa Cajero	Present recommendations	6/30/2014		1/31/2015	Extended date reflects new deadline for data collection and assessment.
22	C1(C)	Develop a comprehensive strategy for collection assessment and evaluation	Channa Cajero	Completion	6/30/2014		1/31/2015	Extended date reflects new deadline for data collection and assessment.
30	C1(E)	Develop resource materials and referrals for patrons needing translation						
31	C1(E)	Develop resource materials and referrals for patrons needing translation	Austin Stoub	Research available resources	8/30/2013	Y		
32	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		
33	C1(E)	Develop resource materials and referrals for patrons needing translation	Austin Stoub	Prepare resource sheet for patrons	10/31/2013	Y		
34	C1(E)	Develop resource materials and referrals for patrons needing translation	Austin Stoub	Translate resource sheet	11/30/2013		12/31/2014	Dates extended pending response to requests for assistance in translating materials
35	C1(E)	Develop resource materials and referrals for patrons needing translation	Austin Stoub	Completion	12/31/2013		12/31/2014	
37	C1(F)	Include tools on our website to help patrons find materials (e.g., a "Treatise Finder")						
38	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		
39	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		
40	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		I have identified legal topical areas to begin and, as completed, will add additional legal topics to our treatise finder list.

Los Angeles County Law Library Strategic Plan
Accountability Report

#	GOAL	PROJECT	COORDINATOR(S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
41	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		
42	C1(F)	Include tools on our website to help patrons find materials (e.g., a "Treatise Finder")	Austin Stoub	Completion	12/31/2013		12/31/2014	have made progress on treatise finders, and anticipate launching in the near future.
43	C1(G)	Develop, increase and advertise depository status and availability of local government agency legal material						
45	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
46	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 projects arise; i.e. Constitution Day exhibit in September.
47	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		Limited interest externally. Will continue to explore options, especially in-house.
48	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		12/31/2014	I have conceptualized but not been able to finalize.
49	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	9/30/2014		6/30/2015	This is ongoing, and off to a tremendous start. Date was extended to allow for extensive data entry which may possibly become an intern project (P:\GovDocs\CaliforniaDocProject
51	C1(G)	Develop, increase and advertise depository status and availability of local government agency legal material	Esther Eastman	Completion	12/31/2014			
53	C1(H)	Establish material loan program between Main and branch locations						
54	C1(H)	Establish material loan program between Main and branch locations	Linda Heichman	Needs assessment	3/31/2014		12/31/2014	Committee established to brainstorm possibilities and assess needs.
55	C1(H)	Establish material loan program between Main and branch locations	Linda Heichman	Pilot loan program	6/30/2014		6/30/2015	
56	C1(H)	Establish material loan program between Main and branch locations	Linda Heichman	Launch formal material loan program	9/30/2014		7/1/2015	
57	C1(H)	Establish material loan program between Main and branch locations	Linda Heichman	Evaluate loan program	3/31/2015		1/1/2016	6 month Pilot; 1 month evaluation
58	C1(H)	Establish material loan program between Main and branch locations	Linda Heichman	Completion			3/31/2016	Adjust & retool as necessary.
60	C2(A)	Encourage donations of FCIL materials from other libraries and formalize LLMC collaboration						
61	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		
62	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		3/31/2015	Delayed due to other priorities
63	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			
64	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			
65	C2(A)	Encourage donations of FCIL materials from other libraries and formalize LLMC collaboration	Neel Agrawal	Completion	3/31/2015			
67	C2(B)	Conduct user needs survey and research to develop and expand FCIL programming						
68	C2(B)	Conduct user needs survey and research to develop and expand FCIL programming	Neel Agrawal	Identify patron groups	3/31/2014	Y		
69	C2(B)	Conduct user needs survey and research to develop and expand FCIL programming	Neel Agrawal	Create survey	5/31/2014		1/1/2015	Commenced informally; formal survey deferred in light of other projects/priorities and pending evaluation of ongoing programming
70	C2(B)	Conduct user needs survey and research to develop and expand FCIL programming	Neel Agrawal	Send survey	6/30/2014		3/1/2015	
71	C2(B)	Conduct user needs survey and research to develop and expand FCIL programming	Neel Agrawal	Hold focus groups	7/31/2014		5/1/2015	
72	C2(B)	Conduct user needs survey and research to develop and expand FCIL programming	Neel Agrawal	Assessment	12/31/2014		7/31/2015	
73	C2(B)	Conduct user needs survey and research to develop and expand FCIL programming	Neel Agrawal	Completion	3/31/2015		9/30/2015	
75	C2(C)	Purchase FCIL materials that supplement FCIL programming						
76	C2(C)	Purchase FCIL materials that supplement FCIL programming	Neel Agrawal	Identify programs	12/31/2013	Y		

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#	GOAL	PROJECT	COORDINATOR(S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
77	C2(C)	Purchase FCIL materials that supplement FCIL programming	Neel Agrawal	Identify appropriate materials	3/31/2014	Y		
78	C2(C)	Purchase FCIL materials that supplement FCIL programming	Neel Agrawal	Revise collection development policy for FCIL (see C2(D))	6/30/2014		1/1/2015	Deferred in light of budget and other projects/priorities
79	C2(C)	Purchase FCIL materials that supplement FCIL programming	Neel Agrawal	Purchase after evaluating current library holdings	9/30/2014		7/1/2015	
80	C2(C)	Purchase FCIL materials that supplement FCIL programming	Neel Agrawal	Completion	9/30/2014		6/30/2015	
82	C2(D)	Undertake a collection assessment, developing country profiles and working with expert practitioners and academics to identify the most significant materials						
83	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		
84	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		
85	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		3/31/2015	Still need to complete country surveys.
86	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		3/31/2015	
87	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		6/31/2015	
89	C2(E)	Build strong relationships with vendors around the world						
90	C2(E)	Build strong relationships with vendors around the world	Shohreh Saljooghi	Create a map/locator connecting regions with vendors	3/31/2014		8/30/2015	Due to vast changes to FCIL vendors' information and structure during last few years e.g. bankruptcies, going out of business, etc. need more time re research
91	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	Y		ongoing
92	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		10/31/2015	Coordinating with e-payables system and vendor negotiations
93	C2(E)	Build strong relationships with vendors around the world	Shohreh Saljooghi	Present recommendation	11/30/2015			
94	C2(E)	Build strong relationships with vendors around the world	Shohreh Saljooghi	Completion	11/30/2015			
96	C3(A)	Develop digitization and archiving plan for the next 20 years						
97	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	Delayed - Prioritized Accounting and ILS software upgrades before starting this project.
98	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		6/1/2015	
99	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	
100	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		11/1/2015	
101	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	
102	C3(A)	Develop digitization and archiving plan for the next 20 years	Jaye Steinbrick	Completion	3/1/2015		4/1/2016	
104	C3(B)	Develop a rare book storage and access plan						
105	C3(B)	Develop a rare book storage and access plan	Betsy Warner	Review LALL's former rare book access plan	9/30/2013	Y		
106	C3(B)	Develop a rare book storage and access plan	Betsy Warner	Review rare book access plans from other institutions	1/30/2014	Y		
107	C3(B)	Develop a rare book storage and access plan	Betsy Warner	Confer with affected staff	3/31/2014		1/30/2015	Deadlines extended due to other priorities and pending return of rare books from Bonhams.
108	C3(B)	Develop a rare book storage and access plan	Betsy Warner	Recommend a new rare book storage and access plan	6/30/2014		4/30/2015	
109	C3(B)	Develop a rare book storage and access plan	Betsy Warner	Completion	6/30/2014		4/30/2015	
111	C3(C)	Conduct a space needs assessment for the collection						
112	C3(C)	Conduct a space needs assessment for the collection	Betsy Warner	Evaluate current space needs	12/31/2014			
113	C3(C)	Conduct a space needs assessment for the collection	Betsy Warner	Project space needs for next 5-10 years	6/30/2015			

Los Angeles County Law Library Strategic Plan
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#	GOAL	PROJECT	COORDINATOR(S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
114	C3(C)	Conduct a space needs assessment for the collection	Betsy Warner	Present draft of space needs assessment & recommendations	8/30/2015			
115	C3(C)	Conduct a space needs assessment for the collection	Betsy Warner	Completion	8/30/2015			
117	C3(D)	Establish a schedule and conduct a regular, periodic inventory of collection materials						
118	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			
119	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			
120	C3(D)	Establish a schedule and conduct a regular, periodic inventory of collection materials	Marcelino Juarez	Complete and document inventory	5/31/2015			
121	C3(D)	Establish a schedule and conduct a regular, periodic inventory of collection materials	Marcelino Juarez	Report to auditor	9/30/2015			
122	C3(D)	Establish a schedule and conduct a regular, periodic inventory of collection materials	Marcelino Juarez	Completion	10/31/2015			
124	C3(E)	Develop a plan for the preservation of gazettes and other loose periodicals						
125	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		11/30/2014	Deadline extended due to other priorities.
126	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			
127	C3(E)	Develop a plan for the preservation of gazettes and other loose periodicals	Betsy Warner	Initiate preservation plan.	6/30/2015			
128	C3(E)	Develop a plan for the preservation of gazettes and other loose periodicals	Betsy Warner	Completion	6/30/2015			
136	Comm1(B)	Maintain security levels in a respectful and non-threatening manner						
137	Comm1(B)	Maintain security levels in a respectful and non-threatening manner	Richard Ortega	Gather input from staff via survey on possible improvements.	7/15/2013		9/15/2014	Re-assigned to new facilities Manager; new schedule established.
138	Comm1(B)	Maintain security levels in a respectful and non-threatening manner	Richard Ortega	Amend current post orders	9/30/2013		11/30/2014	Dates aligned with dates for Goal W1B since they will happen using the same survey process.
139	Comm1(B)	Maintain security levels in a respectful and non-threatening manner	Richard Ortega	Implement improvements	10/31/2013		12/18/2014	
140	Comm1(B)	Maintain security levels in a respectful and non-threatening manner	Richard Ortega	Complete regular training sessions with security staff	12/31/2013		2/19/2015	
141	Comm1(B)	Maintain security levels in a respectful and non-threatening manner	Richard Ortega	Completion	12/31/2013		2/19/2015	
152	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
153	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.
154	Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Conduct needs assessments	9/30/2014	Y		
155	Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Establish interest level and engagement	10/31/2014			
156	Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Devise mutually beneficial options with participants	10/31/2014			
157	Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Create and formalize agreements	11/30/2014			
158	Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Implement program	12/31/2014			
159	Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Assess results	1/31/2015			
160	Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Completion	2/28/2015			
162	Comm1(E)	Continue and refine Members Program						
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		

Los Angeles County Law Library Strategic Plan
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#	GOAL	PROJECT	COORDINATOR(S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
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		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		1/31/2015	
169	Comm1(E)	Continue and refine Members Program	Ryan Metheny	Completion	10/31/2014		1/31/2015	
171	Comm1(F)	Automate parking reservations						
172	Comm1(F)	Automate parking reservations	Jaye Steinbrick	Assess parking requirements with staff	9/1/2013	Y		
173	Comm1(F)	Automate parking reservations	Jaye Steinbrick	Acquire online reservation software	10/1/2013	Y		
174	Comm1(F)	Automate parking reservations	Jaye Steinbrick	Installation and customization of software	11/29/2013		10/31/2014	Delayed due to new security access software.
175	Comm1(F)	Automate parking reservations	Jaye Steinbrick	Begin parallel testing of new system	12/2/2013		11/15/2014	
176	Comm1(F)	Automate parking reservations	Jaye Steinbrick	Begin using new self-reservation system	1/1/2014		12/31/2014	
177	Comm1(F)	Automate parking reservations	Jaye Steinbrick	Completion	12/31/2013		1/31/2015	
179	Comm1(G)	Resume used book sales						
180	Comm1(G)	Resume used book sales	Shohreh Saljooghi	Evaluate prior process for book sales, document possible efficiencies	7/15/2013	Y		
181	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
182	Comm1(G)	Resume used book sales	Shohreh Saljooghi	Identify channels for announcing to various layers of the community	8/15/2013		3/31/2015	extending the time line due to other priorities
183	Comm1(G)	Resume used book sales	Shohreh Saljooghi	Establish parameters for online sale and identify available venues	3/31/2014		3/31/2015	need more time to research the possibilities
184	Comm1(G)	Resume used book sales	Shohreh Saljooghi	Assess	6/30/2014		3/31/2015	dependant upon line 141
185	Comm1(G)	Resume used book sales	Shohreh Saljooghi	Completion	8/30/14		3/31/2015	dependant upon line 141
195	Comm2(B)	Make presentations to potential users off-site						
196	Comm2(B)	Make presentations to potential users off-site	Austin Stoub	Identify potential users	9/30/2013		12/30/2014	Deferred until after other strategic plan priorities. Potentially usable data may be collected during focus groups.
197	Comm2(B)	Make presentations to potential users off-site	Austin Stoub	Identify presenters	9/30/2013		12/30/2014	
198	Comm2(B)	Make presentations to potential users off-site	Austin Stoub	Present to test sites	10/31/2013		3/31/2015	
199	Comm2(B)	Make presentations to potential users off-site	Austin Stoub	Evaluate effectiveness	11/30/2013		3/31/2015	
200	Comm2(B)	Make presentations to potential users off-site	Austin Stoub	Recommend program parameters	12/31/2013		6/30/2015	
201	Comm2(B)	Make presentations to potential users off-site	Austin Stoub	Completion	12/31/2013		6/30/2015	
203	Comm2(C)	Collaborate with Grand Park on programming and shared outreach						
204	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		There has been limited opportunity, but we attend as invited.
205	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		
206	Comm2(C)	Collaborate with Grand Park on programming and shared outreach	Sandi Levin	Participate in at least one joint event	6/30/2014		6/30/2015	Established collaboration (and reimbursement) for GP events; joint events delayed due to transitional issues at GP
207	Comm2(C)	Collaborate with Grand Park on programming and shared outreach	Sandi Levin	Completion	6/30/2014		6/30/2015	
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		5/31/2014	

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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	Law Week - TOR; Divorce Options - TOR, LB; SHC Default Clinic - TOR (during Pro Bono Week)
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		12/31/2014	
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	6/30/2015	
227	Comm2(F)	Outreach to courts, SHCs and local bar associations re events and services at branches	Linda Heichman	Completion	7/31/2015		6/30/2015	
229	Comm2(G)	Coordinate programs with downtown arts community (e.g., Artwalk)						
230	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		
231	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		
232	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
233	Comm2(G)	Coordinate programs with downtown arts community (e.g., Artwalk)	Jaye Steinbrick	Completion	2/1/2014		10/16/2014	
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			
248	Comm3(B)	Expand classes for self-represented persons	Janine Liebert	Completion	1/31/2015			
250	Comm3(C)	Expand librarian training workshops						
251	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.
252	Comm3(C)	Expand librarian training workshops	Linda Heichman	Develop web-based public librarian training	8/31/2014		1/1/2015	In Progress but not completed.
253	Comm3(C)	Expand librarian training workshops	Linda Heichman	Launch web-based public librarian training	6/30/2016			
254	Comm3(C)	Expand librarian training workshops	Linda Heichman	Completion	7/31/2016			
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		3/30/2015	Deferred to further develop program and coordinate with grant writer on staff
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.

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266	Comm3(D)	Develop a high school student workshop series in the Library	Ryan Metheny	Completion	12/31/2014			
268	Comm3(F)	Develop a continuing education series on legal topics for non-lawyers						
269	Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Identify potential stakeholders	3/30/2015			
270	Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Build rapport with prospective participants	3/30/2015			
271	Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Conduct needs assessment	3/30/2015			
272	Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Develop methodology for identification of speakers	6/30/2015			
273	Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Build list of potential speakers	6/30/2015			
274	Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Calendar classes	9/30/2015			
275	Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Implement programs	9/30/2015			
276	Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Completion	10/31/2015			
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
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 is in process of being created; presentation made to staff re:group; 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		11/18/2014	
295	Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Evaluate and modify	11/20/2013		12/1/2014	
296	Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Create plan for ongoing discussion groups	11/25/2013		12/1/2014	
297	Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Completion	12/31/2013		12/1/2014	
299	Comm4(A)	Create a mobile eBranch to deploy at events						
300	Comm4(A)	Create a mobile eBranch to deploy at events	Linda Heichman	Analyze fixed eBranch locations and develop mobile eBranch model	3/31/2015			
301	Comm4(A)	Create a mobile eBranch to deploy at events	Linda Heichman	Secure funding/partners/landing spaces for mobile eBranch	6/30/2015			
302	Comm4(A)	Create a mobile eBranch to deploy at events	Linda Heichman	Launch mobile eBranch	6/30/2016			
303	Comm4(A)	Create a mobile eBranch to deploy at events	Linda Heichman	Completion	7/31/2016			
305	Comm4(B)	Broadcast professional development and general public webinars						
306	Comm4(B)	Broadcast professional development and general public webinars	Jaye Steinbrick	Work with staff to determine pilot content	2/1/2014		1/1/2015	Delayed due to other projects.
307	Comm4(B)	Broadcast professional development and general public webinars	Jaye Steinbrick	Create pilot class on video	4/1/2014		2/28/2015	
308	Comm4(B)	Broadcast professional development and general public webinars	Jaye Steinbrick	Review pilot with staff for final edits	4/29/2014		3/31/2015	
309	Comm4(B)	Broadcast professional development and general public webinars	Jaye Steinbrick	Make pilot class available online	6/1/2014		4/30/2015	

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310	Comm4(B)	Broadcast professional development and general public webinars	Jaye Steinbrick	Develop program to review and expand content	6/30/2014		6/30/2015	
311	Comm4(B)	Broadcast professional development and general public webinars	Jaye Steinbrick	Completion	12/31/2014		8/30/2015	Ongoing
313	Comm4(C)	Provide public computer classes for basic skill development						
314	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.
315	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		1/1/2015	
316	Comm4(C)	Provide public computer classes for basic skill development	Sonny Lew	Assess effectiveness and recommend ongoing program parameters	2/28/2014		4/1/2015	
317	Comm4(C)	Provide public computer classes for basic skill development	Sonny Lew	Completion	3/31/2014		9/30/2015	
319	Comm4(D)	Outreach to prison inmates and other homebound people						
320	Comm4(D)	Outreach to prison inmates and other homebound people	Ralph Stahlberg	Identify user groups	1/1/2015			
321	Comm4(D)	Outreach to prison inmates and other homebound people	Ralph Stahlberg	Determine information needs	3/3/2015			
322	Comm4(D)	Outreach to prison inmates and other homebound people	Ralph Stahlberg	Research methods to fulfill identified needs	6/30/2015			
323	Comm4(D)	Outreach to prison inmates and other homebound people	Ralph Stahlberg	Create program to disseminate information to user groups	9/1/2015			
324	Comm4(D)	Outreach to prison inmates and other homebound people	Ralph Stahlberg	Evaluate and assess	1/1/2016			
325	Comm4(D)	Outreach to prison inmates and other homebound people	Ralph Stahlberg	Completion	3/31/2016			
333	W1(B)	Maintain high-quality, comfortable physical facilities and working conditions						
334	W1(B)	Maintain high-quality, comfortable physical facilities and working conditions	Richard Ortega	Survey staff / conduct needs assessment	9/1/2013		9/15/2014	Delayed due to staffing changes. Aligned dates with security survey.
335	W1(B)	Maintain high-quality, comfortable physical facilities and working conditions	Richard Ortega	Create needs list, and implement low or no-cost items	10/15/2013		10/30/2014	
336	W1(B)	Maintain high-quality, comfortable physical facilities and working conditions	Richard Ortega	Identify funding and timeframe for additional items	12/1/2013		12/31/2014	
337	W1(B)	Maintain high-quality, comfortable physical facilities and working conditions	Richard Ortega	Completion	6/30/2014		7/15/2015	
339	W1(C)	Improve accessibility						
340	W1(C)	Improve accessibility	Technology Manager	Gather input from staff/patrons/experts - complete needs assessment	2/1/2014	Y		
341	W1(C)	Improve accessibility	Technology Manager	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.
342	W1(C)	Improve accessibility	Technology Manager	Review accessibility software & hardware needs	3/31/2014		3/31/2015	Delayed until after new IT manager hire
343	W1(C)	Improve accessibility	Technology Manager	Complete software & hardware installations	4/15/2014		12/31/2014	
344	W1(C)	Improve accessibility	Technology Manager	Review facility accessibility needs – make budget recommendations	5/1/2014		3/31/2015	
345	W1(C)	Improve accessibility	Technology Manager	Completion	6/30/2015		6/30/2015	
347	W1(D)	Automate elevator functions						
348	W1(D)	Automate elevator functions	Richard Ortega	Create RFP	8/1/2013	Y	1/29/2014	Preliminary bid request yielded no response. Exploring other options with updated bid package.
349	W1(D)	Automate elevator functions	Richard Ortega	Send approved RFP out to public bid	8/5/2013		10/31/2014	Sending out revised RFP second time, no responses recieved from first RFP due to timing.
350	W1(D)	Automate elevator functions	Richard Ortega	Award Bid, begin elevator updates	8/20/2013		11/18/2014	Board Meeting Date - November
351	W1(D)	Automate elevator functions	Richard Ortega	Completion	4/1/2014		6/15/2015	
353	W1(E)	Draft HR Procedures Manual						
354	W1(E)	Draft HR Procedures Manual	Terri Daniels	Outline Procedures Manual organization and content; develop a table of contents.	9/30/2013	Y		
355	W1(E)	Draft HR Procedures Manual	Terri Daniels	Outline each chapter	11/30/2013	Y	5/31/2014	
356	W1(E)	Draft HR Procedures Manual	Terri Daniels	Write draft	1/31/2014		10/31/2014	Delayed due to staffing changes. New HR consultant has commenced.
357	W1(E)	Draft HR Procedures Manual	Terri Daniels	Solicit feedback from ED, Sr. Director, and other directors	2/28/2014		11/30/2014	

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358	W1(E)	Draft HR Procedures Manual	Terri Daniels	Incorporate suggestions into final draft	3/31/2014		12/30/2014	
359	W1(E)	Draft HR Procedures Manual	Terri Daniels	Completion	4/30/2014		1/31/2014	
375	W2(C)	Evaluate feasibility and cost of alternative scheduling options (e.g., flexible scheduling, adjusted shift lengths, shortened work weeks)						
376	W2(C)	Evaluate feasibility and cost of alternative scheduling options (e.g., flexible scheduling, adjusted shift lengths, shortened work weeks)	John Kohl	Poll directors and employees about desirable alternative work arrangements	12/31/2013		9/1/2014	
377	W2(C)	Evaluate feasibility and cost of alternative scheduling options (e.g., flexible scheduling, adjusted shift lengths, shortened work weeks)	John Kohl	Analyze costs and feasibility and write proposal	2/28/2014		10/1/2014	
378	W2(C)	Evaluate feasibility and cost of alternative scheduling options (e.g., flexible scheduling, adjusted shift lengths, shortened work weeks)	John Kohl	Discuss proposal with union	3/31/2014		12/1/2014	
379	W2(C)	Evaluate feasibility and cost of alternative scheduling options (e.g., flexible scheduling, adjusted shift lengths, shortened work weeks)	John Kohl	Implement program	6/30/2014		2/1/2015	
380	W2(C)	Evaluate feasibility and cost of alternative scheduling options (e.g., flexible scheduling, adjusted shift lengths, shortened work weeks)	John Kohl	Completion	7/31/2014		3/1/2015	
382	W2(D)	Provide stretch classes or other physical activities at break times						
383	W2(D)	Provide stretch classes or other physical activities at break times	Eustorgio Barajas	Research and propose a stretch program to ED	3/31/2014		11/28/2014	Pushed back due to other HR and Administrative tasks
384	W2(D)	Provide stretch classes or other physical activities at break times	Eustorgio Barajas	Enlist employee leaders or acquire video classes	5/31/2014		12/31/2014	
385	W2(D)	Provide stretch classes or other physical activities at break times	Eustorgio Barajas	Develop a schedule	6/30/2014		1/30/2015	
386	W2(D)	Provide stretch classes or other physical activities at break times	Eustorgio Barajas	Completion	7/31/2014		1/30/2015	
388	W2(E)	Establish an employee of the month/year program						
389	W2(E)	Establish an employee of the month/year program	Terri Daniels	Enlist participation from managers and staff to develop nomination and selection criteria and procedures	6/30/2014		10/1/2014	Outsourced HR onsite 4 hours per week. Working to incorporate this task in weekly workload. Prepared Staff Input Survey
390	W2(E)	Establish an employee of the month/year program	Terri Daniels	Write EOM/Y program for review by focus group and ED	9/30/2014		12/31/2014	Draft Program Document Started;Waiting for Survey Results to Complete.
391	W2(E)	Establish an employee of the month/year program	Terri Daniels	Announce program, develop schedule and implement	11/30/2014			
392	W2(E)	Establish an employee of the month/year program	Terri Daniels	Review success of program, revise as necessary	3/31/2015			
393	W2(E)	Establish an employee of the month/year program	Terri Daniels	Completion	4/30/2015			
395	W3(A)	Cross-train employees in related positions						
396	W3(A)	Cross-train employees in related positions	Terri Daniels	Work with directors to identify opportunities for cross-training	2/28/2015			
397	W3(A)	Cross-train employees in related positions	Terri Daniels	Develop and document a plan and timeline for each area	4/30/2015			
398	W3(A)	Cross-train employees in related positions	Terri Daniels	Ensure plans are implemented	7/31/2015			
399	W3(A)	Cross-train employees in related positions	Terri Daniels	Assess success of cross-training and revise as necessary	9/30/2015			
400	W3(A)	Cross-train employees in related positions	Terri Daniels	Completion	10/31/2015			
402	W3(B)	Evaluate and improve process efficiency in all library functions						
403	W3(B)	Evaluate and improve process efficiency in all library functions	John Kohl	Work with directors to map function processes	12/31/2013		11/1/2014	Delayed due to staffing changes. Now underway.
404	W3(B)	Evaluate and improve process efficiency in all library functions	John Kohl	Analyze process maps within and between departments and identify opportunities for streamlining, simplification, automation, or elimination	3/31/2014		12/1/2014	
405	W3(B)	Evaluate and improve process efficiency in all library functions	John Kohl	Benchmark other libraries/organizations and document best practices and appropriate metrics	3/31/2014		2/1/2015	
406	W3(B)	Evaluate and improve process efficiency in all library functions	John Kohl	Implement no-cost improvements.	5/31/2014		5/1/2015	

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407	W3(B)	Evaluate and improve process efficiency in all library functions	John Kohl	Propose and budget for other improvements including costs and impacts on other departments	5/31/2014		5/31/2015	
408	W3(B)	Evaluate and improve process efficiency in all library functions	John Kohl	Plan, document, and implement process changes and success metrics	9/30/2014		9/30/2015	
409	W3(B)	Evaluate and improve process efficiency in all library functions	John Kohl	Review changes and revise as necessary. Document revisions.	12/31/2014		12/31/2015	
410	W3(B)	Evaluate and improve process efficiency in all library functions	John Kohl	Completion	1/15/2015		1/15/2016	
412	W3(C)	Merge Programs & Partnerships and Reference functions						
413	W3(C)	Merge Programs & Partnerships and Reference functions	Sandi Levin	Reconfigure desk/office locations	9/1/2013	Y		
414	W3(C)	Merge Programs & Partnerships and Reference functions	Sandi Levin	Adjust reference desk schedule	9/1/2013	Y		
415	W3(C)	Merge Programs & Partnerships and Reference functions	Sandi Levin	Develop project teams comprised of both groups	12/31/2013	Y		
416	W3(C)	Merge Programs & Partnerships and Reference functions	Sandi Levin	Conduct cross-training	12/31/2013		12/31/2014	Partially complete.
417	W3(C)	Merge Programs & Partnerships and Reference functions	Sandi Levin	Completion	2/28/2014		12/31/2014	
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	The process will take place over the summer program period and reportable at the end of Sept. when there is information to assess and the program in it's implementation test can be evaluated.
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			
433	W3(E)	Establish a library student/recent graduate unpaid Internship program	Malinda Muller	Create handbook and guidelines	12/31/2014			
434	W3(E)	Establish a library student/recent graduate unpaid Internship program	Malinda Muller	Completion	12/31/2014			
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	Eustorgio Barajas	Working with supervisors, identify critical needs and timing	2/28/2015			
438	W3(F)	Establish an "on-call list" of contract employees available to cover occasional absences	Eustorgio Barajas	Document on-call agreements and compensation schedules	4/30/2015			
439	W3(F)	Establish an "on-call list" of contract employees available to cover occasional absences	Eustorgio Barajas	Recruit on-call staff	6/30/2015			
440	W3(F)	Establish an "on-call list" of contract employees available to cover occasional absences	Eustorgio Barajas	Review program's success and revise as necessary	9/30/2015			
441	W3(F)	Establish an "on-call list" of contract employees available to cover occasional absences	Eustorgio Barajas	Completion	10/31/2015			
443	W4(A)	Provide continuing education and training opportunities						
444	W4(A)	Provide continuing education and training opportunities	Eustorgio Barajas	Working with staff, identify training needs and desires	2/28/2014		1/31/2015	Ongoing by request. Formal survey delayed due to staffing changes and HR responsibilities
445	W4(A)	Provide continuing education and training opportunities	Eustorgio Barajas	Develop schedule of training events and nominate trainers (in-house or from the outside)	4/30/2014		3/31/2015	
446	W4(A)	Provide continuing education and training opportunities	Eustorgio Barajas	Working with trainers, develop curricula and training materials	6/30/2014		4/30/2015	
447	W4(A)	Provide continuing education and training opportunities	Eustorgio Barajas	Schedule and promote training events	7/31/2014		6/30/2015	
448	W4(A)	Provide continuing education and training opportunities	Eustorgio Barajas	Completion	8/31/2014		7/31/2015	
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	

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#	GOAL	PROJECT	COORDINATOR(S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
455	W4(B)	Establish a volunteer program to provide additional support and outreach	Sandi Levin	Recruit and Implement	12/31/2013		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		11/30/2014	
457	W4(B)	Establish a volunteer program to provide additional support and outreach	Sandi Levin	Completion	3/31/2014		3/31/2015	
459	W4(C)	Expand the high school intern program						
460	W4(C)	Expand the high school intern program	Shohreh Saljooghi	Coordinate and complete current pilot project (4 interns)	8/2/2013	Y		ongoing
461	W4(C)	Expand the high school intern program	Shohreh Saljooghi	Identify partner organizations to maximize recruitment opportunities	3/31/2014		4/15/2015	<i>need more time to research the possibilities with LAEP and outside LAEP</i>
462	W4(C)	Expand the high school intern program	Shohreh Saljooghi	Build and refine program components	4/30/2014	Y	4/15/2015	Research and compilation
463	W4(C)	Expand the high school intern program	Shohreh Saljooghi	Document procedures for expanded program	5/31/2014		4/15/2014	depedent on line 337
464	W4(C)	Expand the high school intern program	Shohreh Saljooghi	Completion	6/30/2014		4/15/2015	depedent on line 337
466	W4(E)	Conduct a space needs assessment for employee workspaces						
467	W4(E)	Conduct a space needs assessment for employee workspaces	Sandi Levin & Jaye Steinbrick	Interview directors	9/30/2013	Y		
468	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.
469	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	
470	W4(E)	Conduct a space needs assessment for employee workspaces	Sandi Levin & Jaye Steinbrick	Draft report with recommendations	1/31/2014		12/31/2014	Partially complete; undergoing refinement due to staffing changes
471	W4(E)	Conduct a space needs assessment for employee workspaces	Sandi Levin & Jaye Steinbrick	Completion	2/28/2014		12/31/2014	
473	W4(F)	Install document management and/or collaboration software						
474	W4(F)	Install document management and/or collaboration software	Technology Manager	Acquire licensing	7/31/2013	Y		
475	W4(F)	Install document management and/or collaboration software	Technology Manager	Meet with staff and vendor to create implementation plan	11/15/2013		2/30/2015	Initial component complete; additional components in development. Transition of external vendor support for the project and internal re-alignment of IT support managerial responsibilities have taken longer than anticipated. Project assigned to new IT Manager, dates updated.
476	W4(F)	Install document management and/or collaboration software	Technology Manager	Install software including required workflow definitions	12/1/2013		3/31/2015	
477	W4(F)	Install document management and/or collaboration software	Technology Manager	Completion	2/1/2014		5/31/2015	
479	T1(A)	Develop eBranches for distribution throughout the County						
480	T1(A)	Develop eBranches for distribution throughout the County	Linda Heichman & Jaye Steinbrick	SWOT assessment based upon pilot program	3/31/2014		12/31/2015	Pilot ongoing; eBranch metrics continue to be recorded.
481	T1(A)	Develop eBranches for distribution throughout the County	Linda Heichman & Jaye Steinbrick	Develop additional technology and tools	6/30/2014		6/30/2015	Longer lead time for technology development
482	T1(A)	Develop eBranches for distribution throughout the County	Linda Heichman & Jaye Steinbrick	Pilot new tools	9/30/2014		9/30/2015	
483	T1(A)	Develop eBranches for distribution throughout the County	Linda Heichman & Jaye Steinbrick	Launch "next phase" eBranch	12/31/2014		12/31/2015	
484	T1(A)	Develop eBranches for distribution throughout the County	Linda Heichman & Jaye Steinbrick	Recommend program for ongoing implementation	3/31/2015		6/30/2016	5 month launch, 1 month compiling recommendation
485	T1(A)	Develop eBranches for distribution throughout the County	Linda Heichman & Jaye Steinbrick	Completion	6/30/2015		6/30/2016	
487	T1(B)	Develop next-generation collection management practices, including replacement of Voyager (Integrated Library Systems software)						
488	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		11/30/2014	Date extended due to key staff change and re-alignment of IT support managerial responsibilities. Proposed project timeline is under 2nd review to take into consideration and to coordinate with timing of accounting system upgrade.
489	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 completed in Aug 2013.

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490	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		3/1/2015	
491	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		4/30/2015	
492	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		8/30/2015	
493	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		11/31/2015	
494	T1(B)	Develop next-generation collection management practices, including replacement of Voyager (Integrated Library Systems software)	Meiling Li	Conduct staff training	8/31/2015		12/20/2015	
495	T1(B)	Develop next-generation collection management practices, including replacement of Voyager (Integrated Library Systems software)	Meiling Li	Go live	9/30/2015		2/1/2016	
496	T1(B)	Develop next-generation collection management practices, including replacement of Voyager (Integrated Library Systems software)	Meiling Li	Completion	10/31/2015		3/1/2016	
498	T1(C)	Develop a Law Library mobile application						
499	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.
500	T1(C)	Develop a Law Library mobile application	Adam Rosenblum	Create beta web-app for testing	9/15/2014		4/15/2015	
501	T1(C)	Develop a Law Library mobile application	Adam Rosenblum	Staff review of content & functionality	9/30/2014		4/30/2015	
502	T1(C)	Develop a Law Library mobile application	Adam Rosenblum	Go live - Make web-application available online	11/1/2014		6/1/2015	
503	T1(C)	Develop a Law Library mobile application	Adam Rosenblum	Develop ongoing program to review and expand content	12/31/2014		8/1/2015	Ongoing
504	T1(C)	Develop a Law Library mobile application	Adam Rosenblum	Completion	12/31/2014		8/1/2015	Ongoing
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	Technology Manager	Determine available, relevant content	3/1/2014	Y		In the process of working with staff to determine content.
508	T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks	Technology Manager	Review technology, create budget estimates & recommendation	5/1/2014		12/31/2014	Will reassign to new IT Manager - Dates revised.
509	T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks	Technology Manager	Create 90 day pilot implementation plan / Order equipment	7/15/2014		1/30/2015	
510	T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks	Technology Manager	Test pilot configurations	9/15/2014		4/30/2015	
511	T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks	Technology Manager	Make available to patrons	10/15/2014		6/15/2015	
512	T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks	Technology Manager	Develop ongoing program to review and expand	12/31/2014			
513	T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks	Technology Manager	Completion	12/31/2014		4/15/2015	
514	T2(A)	Upgrade Navision	John Kohl	Needs assessment	10/30/2013		11/30/2014	Delayed due to staffing changes. Currently underway.
515	T2(A)	Upgrade Navision	Jaye Steinbrick	Hire IT Manager	New	Y	6/30/2014	
516	T2(A)	Upgrade Navision	John Kohl	Focus Group	New		12/1/2014	
517	T2(A)	Upgrade Navision	John Kohl	Confirm whether Navision/Voyager are the right solutions	11/30/2013		4/1/2015	
518	T2(A)	Upgrade Navision	John Kohl	Conduct RFP	10/30/2013		6/1/2015	
519	T2(A)	Upgrade Navision	John Kohl	Plan and implement data migration including software customization	1/31/2014		9/1/2015	
520	T2(A)	Upgrade Navision	John Kohl	Plan for rollout and training	3/31/2014		11/1/2015	
521	T2(A)	Upgrade Navision	John Kohl	Go live and document changes	4/30/2014		12/15/2015	
521	T2(A)	Upgrade Navision	John Kohl	Completion	5/31/2014		1/15/2016	
523	T2(B)	Provide the option to pay fees, fines and charges online						

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524	T2(B)	Provide the option to pay fees, fines and charges online	Technology Manager	Finalize PayPal account banking requirements	6/30/2013	Y		Project assigned to new IT Manager, dates updated.
525	T2(B)	Provide the option to pay fees, fines and charges online	Technology Manager	Determine system capabilities	7/31/2013	Y		
526	T2(B)	Provide the option to pay fees, fines and charges online	Technology Manager	Create workflow processing chart(s)	9/15/2013	Y		
527	T2(B)	Provide the option to pay fees, fines and charges online	Technology Manager	Begin programming/Implementation	10/1/2013	Y		The new website has integrated Paypal as payment option for class registration.
528	T2(B)	Provide the option to pay fees, fines and charges online	Technology Manager	Test and assure functionality	9/30/2013		12/30/2014	Software issues with ILS system have delayed integration with Voyager. Project assigned to new IT Manager, dates updated.
529	T2(B)	Provide the option to pay fees, fines and charges online	Technology Manager	Go live and document changes	2/1/2014		11/30/2014	
530	T2(B)	Provide the option to pay fees, fines and charges online	Technology Manager	Completion	2/28/2014		12/15/2014	
532	T2(C)	Provide the option to renew materials and manage Library user account online						
533	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		
534	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.
535	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		12/31/2014	Software issues with ILS system continue to delay this project.
536	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		1/31/2015	
537	T2(C)	Provide the option to renew materials and manage Library user account online	Jaye Steinbrick & Angelica Buenrostro	Completion	2/15/2014		2/28/2015	
545	T2(E)	Provide catalog searching capabilities in closed stacks						
546	T2(E)	Provide catalog searching capabilities in closed stacks	Jeremy Samler	Identify locations in the stacks for deployment	7/1/2013	Y		
547	T2(E)	Provide catalog searching capabilities in closed stacks	Jeremy Samler	Verify and/or expand Wi-Fi coverage	9/1/2013	Y		
548	T2(E)	Provide catalog searching capabilities in closed stacks	Jeremy Samler	Repurpose existing, available hardware as search stations	10/1/2013	Y		
549	T2(E)	Provide catalog searching capabilities in closed stacks	Jeremy Samler	Installation and training	3/31/2014		10/31/2014	Cascade plan for equipment and WiFi configuration issues have caused delays
550	T2(E)	Provide catalog searching capabilities in closed stacks	Jeremy Samler	Completion	4/30/2014		12/31/2014	
574	F1(D)	Evaluate and renegotiate relationships with vendors to maximize value/resources						
575	F1(D)	Evaluate and renegotiate relationships with vendors to maximize value/resources	John Kohl	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		1/31/2015	Delayed due to staffing changes. Currently underway.
576	F1(D)	Evaluate and renegotiate relationships with vendors to maximize value/resources	John Kohl	Develop a negotiation protocol for each vendor including expected outcomes	11/30/2013		2/28/2015	
577	F1(D)	Evaluate and renegotiate relationships with vendors to maximize value/resources	John Kohl	Evaluate interim success with vendor negotiations and revise as necessary	3/31/2014		3/31/2015	
578	F1(D)	Evaluate and renegotiate relationships with vendors to maximize value/resources	John Kohl	Completion	4/30/2014		4/15/2015	
580	F1(E)	Consider annual merit increases						
581	F1(E)	Consider annual merit increases	John Kohl	Document salary adjustment history for staff and benchmark comparable institutions	2/28/2014		1/1/2015	
582	F1(E)	Consider annual merit increases	John Kohl	Make recommendation to ED subject to budget constraints	4/30/2014		2/1/2015	
583	F1(E)	Consider annual merit increases	John Kohl	Completion	6/30/2014		4/1/2015	
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	List of grants compiled.
588	F2(A)	Apply for grants	Linda Heichman	Develop schedule of grant opportunities and assign responsibilities	1/31/2014	Y	6/30/2014	

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589	F2(A)	Apply for grants	Linda Heichman	Apply for minimum of 3 grants	6/30/2014	Y	12/31/2014	IMLS Sparks!, Community Stories, project partner on TIG (LAFLA lead).
590	F2(A)	Apply for grants	Linda Heichman	Target budget line item, forecast for grants.	6/30/2015			
591	F2(A)	Apply for grants	Linda Heichman	Completion	Ongoing		6/30/2015	
593	F2(B)	Consider legislative proposal to authorize revenue-generating activities						
594	F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Confer with CCCLL directors	10/31/2013	Y		
595	F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Meet with CCCLL lobbyist	11/30/2013	Y		
596	F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Present proposal for BOT review	1/31/2014	Y		
597	F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Present proposal to CCCLL executive board for consideration	3/31/2014	Y		
598	F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Identify sponsors	4/30/2014	Y		
599	F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Present proposal to CCCLL at annual conference	9/30/2014	Y		
600	F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Lobby legislators	12/31/2014			Partially complete. A portion was signed into law. Balance is slated for next session.
601	F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Completion	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		
611	F2(D)	Develop conceptual plan for café						
612	F2(D)	Develop conceptual plan for café	Jaye Steinbrick	Identify footprint / services	5/14/2014		12/15/2014	Delayed due to other projects and pending legislation.
613	F2(D)	Develop conceptual plan for café	Jaye Steinbrick	Identify potential vendors			2/29/2015	
614	F2(D)	Develop conceptual plan for café	Jaye Steinbrick	Identify funding resources and partner agencies	6/14/2014		2/29/2015	
615	F2(D)	Develop conceptual plan for café	Jaye Steinbrick	Present a conceptual plan to the Board of Trustees	9/1/2014		4/28/2015	
616	F2(D)	Develop conceptual plan for café	Jaye Steinbrick	Completion			4/28/2015	
618	F2(E)	Provide a notary service for a fee						
619	F2(E)	Provide a notary service for a fee	Eustorgio Barajas	Identify options (in-house; contract; etc.)	3/31/2014		10/31/2014	Pushed back due to other HR and Administrative tasks
620	F2(E)	Provide a notary service for a fee	Eustorgio Barajas	Write proposal to coordinate notary services and training	4/30/2014		12/31/2014	
621	F2(E)	Provide a notary service for a fee	Eustorgio Barajas	Work with notary candidates and coordinate training	8/30/2014		2/28/2015	
622	F2(E)	Provide a notary service for a fee	Eustorgio Barajas	Write policies and procedures	9/30/2014		4/30/2015	
623	F2(E)	Provide a notary service for a fee	Eustorgio Barajas	Announce and roll-out	11/30/2014		6/30/2015	
624	F2(E)	Provide a notary service for a fee	Eustorgio Barajas	Evaluate effectiveness and usage	2/28/2015		10/31/2015	
625	F2(E)	Provide a notary service for a fee	Eustorgio Barajas	Completion	3/31/2015		12/31/2015	
627	F2(F)	Provide e-filing for a fee						
628	F2(F)	Provide e-filing for a fee	Ryan Metheny	Research court requirements, existing needs and solutions	6/30/2014		10/31/2014	Deferred due to other priorities
629	F2(F)	Provide e-filing for a fee	Ryan Metheny	Identify potential services and prospective user groups	8/30/2014		11/30/2014	
630	F2(F)	Provide e-filing for a fee	Ryan Metheny	Draft procedures and policy	11/30/2014			

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631	F2(F)	Provide e-filing for a fee	Ryan Metheny	Present recommendation to Board of Trustees	1/31/2015			
632	F2(F)	Provide e-filing for a fee	Ryan Metheny	Implement	3/31/2015			
633	F2(F)	Provide e-filing for a fee	Ryan Metheny	Assess and revise as needed	5/31/2015			
634	F2(F)	Provide e-filing for a fee	Ryan Metheny	Completion	6/30/2015			
636	F2(G)	Offer fee-based collection acquisition and management services to other libraries						
637	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		
638	F2(G)	Offer fee-based collection acquisition and management services to other libraries	Sandi Levin	Identify costs and constraints	12/31/2013		12/31/2014	Preliminary inquiries have not yielded favorable results. Exploring other options/avenues.
639	F2(G)	Offer fee-based collection acquisition and management services to other libraries	Sandi Levin	Identify potential 'customers'	1/31/2014		12/31/2014	
640	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		12/31/2014	
641	F2(G)	Offer fee-based collection acquisition and management services to other libraries	Sandi Levin	Evaluate success and performance metrics	2/28/2015			
642	F2(G)	Offer fee-based collection acquisition and management services to other libraries	Sandi Levin	Recommend program for future contracts	4/30/2015			
643	F2(G)	Offer fee-based collection acquisition and management services to other libraries	Sandi Levin	Completion	5/31/2015			
645	F3(A)	Outreach to law firms & bar associations						
646	F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Establish rapport with bar association leaders	1/31/2014	Y		
647	F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Select target organizations to work with	3/30/2014	Y		
648	F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Conduct needs assessments	3/30/2014	Y		
649	F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Assess and document options	6/30/2014		12/31/2014	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
650	F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Devise mutually agreed upon programs	6/30/2014		12/31/2014	Commenced but not completed. Lawyers in the Library, meetings bar association execs, law firm reps commenced. Establishing outreach to law firms through publications.
651	F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Implement programs	9/30/2014		12/31/2014	
652	F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Assess results & recommend ongoing programs	10/31/2014		2/28/2015	
653	F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Completion	11/30/2014		3/31/2015	
655	F3(B)	Build relationships with relevant corporate entities						
656	F3(B)	Build relationships with relevant corporate entities	Sandi Levin	Identify candidate organizations	3/30/2014		10/31/2014	Deferred while establishing stronger foundation for project and focussing on relationships with government and legal service organizations.
657	F3(B)	Build relationships with relevant corporate entities	Sandi Levin	Contact organizations and discuss opportunities (min 4)	6/30/2014		12/31/2014	
658	F3(B)	Build relationships with relevant corporate entities	Sandi Levin	Implement test programs	9/30/2014		2/28/2015	
659	F3(B)	Build relationships with relevant corporate entities	Sandi Levin	Assess results & recommend ongoing programs	10/31/2014		4/30/2015	
660	F3(B)	Build relationships with relevant corporate entities	Sandi Levin	Completion	11/30/2014		6/30/2015	
662	F3(C)	Establish a speakers' bureau						
663	F3(C)	Establish a speakers' bureau	Sandi Levin	Research and review existing models	9/30/2013	Y		
664	F3(C)	Establish a speakers' bureau	Sandi Levin	Develop parameters, incentives and program	12/31/2013		3/31/2015	Awaiting further development of in-house MCLE programs; delayed due to other priorities
665	F3(C)	Establish a speakers' bureau	Sandi Levin	Announce program	1/31/2014		4/30/2015	
666	F3(C)	Establish a speakers' bureau	Sandi Levin	Conduct outreach	3/31/2014		5/31/2015	
667	F3(C)	Establish a speakers' bureau	Sandi Levin	Launch	4/30/2014		6/30/2015	
668	F3(C)	Establish a speakers' bureau	Sandi Levin	Assess and revise, as needed	6/30/2014		8/31/2015	
669	F3(C)	Establish a speakers' bureau	Sandi Levin	Completion	9/30/2014		9/30/2015	
671	S1(A)	Preserve service levels by maintaining adequate staffing						
672	S1(A)	Preserve service levels by maintaining adequate staffing	John Kohl	Working with supervisors and employee groups, establish baseline productivity metrics	9/30/2014		10/30/2014	Delayed due to staff transition. Commenced but not completed.

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673	S1(A)	Preserve service levels by maintaining adequate staffing	John Kohl	Benchmark productivity at comparable institutions	11/30/2014		12/30/2014	
674	S1(A)	Preserve service levels by maintaining adequate staffing	John Kohl	Establish target metrics	1/31/2015		2/28/2015	
675	S1(A)	Preserve service levels by maintaining adequate staffing	John Kohl	Recommend changes in staffing to achieve targets	3/31/2015		4/1/2015	
676	S1(A)	Preserve service levels by maintaining adequate staffing	John Kohl	Completion	6/30/2015		7/1/2015	
678	S1(B)	Expand legal resources available & visible on the internet						
679	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		
680	S1(B)	Expand legal resources available & visible on the internet	Austin Stoub	Identify potential resources that can be added to collection	3/31/2014		12/31/2014	Web committee has made progress; expect to launch resources in the next quarter
681	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		13/31/14	
682	S1(B)	Expand legal resources available & visible on the internet	Austin Stoub	Implement new resources on test site	9/30/2014		12/31/2014	
683	S1(B)	Expand legal resources available & visible on the internet	Austin Stoub	Develop metrics to evaluate user satisfaction and assess	10/31/2014		12/31/2014	
684	S1(B)	Expand legal resources available & visible on the internet	Austin Stoub	Launch resources on website	12/31/2014			
685	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			
686	S1(B)	Expand legal resources available & visible on the internet	Austin Stoub	Completion	6/31/15			
688	S1(C)	Create an advance reservation system for Library computers						
689	S1(C)	Create an advance reservation system for Library computers	Adam Rosenblum	Add option into public website	9/1/2013		11/14/2014	Implemented the basic framework, need to insert scripts into public website. Website Location not yet identified.
690	S1(C)	Create an advance reservation system for Library computers	Adam Rosenblum	Work with IT staff to test implementation	9/15/2013		11/26/2014	IT has implemented the basic framework. Waiting for approval before implementation and moving on to the next step.
691	S1(C)	Create an advance reservation system for Library computers	Adam Rosenblum	Training and testing with reference staff	9/30/2013		12/15/2014	Need to schedule training sessions with reference staff.
692	S1(C)	Create an advance reservation system for Library computers	Adam Rosenblum	Create promotional materials	10/1/2013		12/20/2014	Above steps need to be completed before promotional materials can be created.
693	S1(C)	Create an advance reservation system for Library computers	Adam Rosenblum	Completion	11/15/2013		12/24/2014	All of the above steps need to be completed.
695	S1(D)	Provide self-serve scanning equipment in the Library						
696	S1(D)	Provide self-serve scanning equipment in the Library	Jaye Steinbrick & Technology Manager	Work with staff and patrons to evaluate technology requirements.	10/15/2014		11/15/2015	Deffered to fiscal year 2015-16 budget to combine with copier replacements for cost-savings and efficiency.
697	S1(D)	Provide self-serve scanning equipment in the Library	Jaye Steinbrick & Technology Manager	Evaluate existing solutions and make final recommendation, proceed with purchasing.	11/15/2014		12/15/2015	
698	S1(D)	Provide self-serve scanning equipment in the Library	Jaye Steinbrick & Technology Manager	Install public scanner with signage and print materials	2/1/2015		3/1/2016	
699	S1(D)	Provide self-serve scanning equipment in the Library	Jaye Steinbrick & Technology Manager	Assess effectiveness of implementation and make adjustments as needed.	5/31/2015		5/1/2016	
700	S1(D)	Provide self-serve scanning equipment in the Library	Jaye Steinbrick & Technology Manager	Completion	5/31/2015		5/1/2016	
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		1/30/2015	Informally discussed strategies with staff. Formal policy delayed due to other assignments
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		3/31/2015	
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		10/30/2015	
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		

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#	GOAL	PROJECT	COORDINATOR(S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
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		12/31/2014	This project is being coordinated with objective C1(B). Extended dates for focus groups and survey reflect extended dates for 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		3/31/2015	This project is being coordinated with objective C1(B). Extended date reflects new deadline to draft and distribute survey to user groups for objective C1(B).
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		3/31/2015	This project is being coordinated with objective C1(B). Extended date reflects new deadline to draft and distribute survey to user groups for objective C1(B).
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		4/30/2015	This project is being coordinated with objective C1(B). Extended date reflects new completion date for objective C1(B).
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		10/31/2015	Review other surveys in S. Plan before preparing
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		12/31/2015	
738	S1(I)	Provide quality, comprehensive, face-to-face reference services by trained librarians	Ralph Stahlberg	Completion			1/2/2016	
740	S2(A)	Development of online self-help and lay-friendly substantive materials (similar to eBranch)						
741	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	Delayed due to other priorities.
742	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		12/30/2014	Phase 1 was part of the launch of the new website in the Fall of 2013. Phase 2, revision of existing content, new content including expanded FAQ topic areas, links to videos, blog, downloadable referral sheets, et cetera. Commenced but not completed.
743	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		12/30/2014	delayed due to other priorities
744	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		12/30/2014	delayed due to other priorities
745	S2(A)	Development of online self-help and lay-friendly substantive materials (similar to eBranch)	Janine Liebert	Develop content	6/30/2014		12/30/2014	delayed due to other priorities
746	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		12/30/2014	delayed due to other priorities and reconvening of website committee meetings.
747	S2(A)	Development of online self-help and lay-friendly substantive materials (similar to eBranch)	Janine Liebert	Upload and implement	12/31/2014			
748	S2(A)	Development of online self-help and lay-friendly substantive materials (similar to eBranch)	Janine Liebert	Completion	3/31/2015			
750	S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)						
751	S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Assess feasibility	9/30/2013	Y	11/30/2013	
752	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	
753	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

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#	GOAL	PROJECT	COORDINATOR(S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
754	S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Identify and seek funding sources	3/30/2014		12/30/2014	Commenced but not completed. Delayed due to other priorities.
755	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		11/30/2014	Deferred because source of funding and equipment needs still need to be identified and confirmed.
756	S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Produce video	9/30/2014		12/30/2014	Deferred because source of funding and equipment needs still need to be identified and confirmed.
757	S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Publish and create distribution plan	9/30/2014		12/30/2014	Deferred because source of funding and equipment needs still need to be identified and confirmed.
758	S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Duplicate in Spanish and other languages	3/30/2015			
759	S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Completion	4/30/2015			
761	S2(C)	Develop transportation resource handouts for litigants						
762	S2(C)	Develop transportation resource handouts for litigants	Adam Rosenblum	Collect and evaluate available information	8/1/2013	Y		
763	S2(C)	Develop transportation resource handouts for litigants	Adam Rosenblum	Assemble information into usable print and online resources / present draft	10/1/2013		11/14/2014	Delay due to complex layout and other priorities.
764	S2(C)	Develop transportation resource handouts for litigants	Adam Rosenblum	Make information available to the public.	10/15/2013		12/16/2014	
765	S2(C)	Develop transportation resource handouts for litigants	Adam Rosenblum	Completion	10/15/2013		12/16/2014	
767	S2(D)	Develop translation resource handouts						
768	S2(D)	Develop translation resource handouts	Linda Heichman	Establish committee to assess needs	1/31/2014	Y		
769	S2(D)	Develop translation resource handouts	Linda Heichman	Identify existing resources	6/30/2014		3/31/2015	Delayed due to other priorities
770	S2(D)	Develop translation resource handouts	Linda Heichman	Evaluate effectiveness of existing process	9/30/2014		6/30/2015	
771	S2(D)	Develop translation resource handouts	Linda Heichman	Develop handout	12/31/2014		9/30/2015	
772	S2(D)	Develop translation resource handouts	Linda Heichman	Recommend plan for future improvements	3/31/2015		12/31/2015	Recommendation to follow 3 months after initial development of handout.
773	S2(D)	Develop translation resource handouts	Linda Heichman	Completion	3/31/2015		12/31/2015	
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		10/31/2014	Commenced via 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			
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			
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			
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			
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			
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			
795	S2(G)	Develop and implement model for library-based clinics and self-help workshops for delivery of civil self-help services.						
796	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		

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#	GOAL	PROJECT	COORDINATOR(S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
797	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	Commenced but not completed. Expungement Clinic ongoing on monthly basis. Discussions underway with trial readiness clinic, Public Counsel's appellate law project and immigration legal aid partners.
798	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 expungement clinic; application for TIG funding underway to expand name change workshop; trial readiness converted to fee-based model
799	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
800	S2(G)	Develop and implement model for library-based clinics and self-help workshops for delivery of civil self-help services.	Janine Liebert	Assess and document outcomes	3/30/2015			
801	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			
802	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			
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 publishers	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		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		12/1/2014	
810	S2(H)	Offer more training from vendors and publishers	Katie O'Laughlin	Completion	2/28/2014		12/1/2014	
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	Delayed due to 90-day moratorium on room alteration; delay in installing data lines.
822	S3(B)	Confirm plan for new Long Beach Branch	Linda Heichman	Evaluate and assess LB presence	12/31/2013		10/31/2014	Assessment/evaluation criteria are being determined.
823	S3(B)	Confirm plan for new Long Beach Branch	Linda Heichman	Completion	3/31/2014		12/31/2014	Additional time needed for evaluation/assessment.
825	S3(C)	Expand access to form templates and precedent beyond court-provided forms (e.g., commonly requested motions).						
826	S3(C)	Expand access to form templates and precedent beyond court-provided forms (e.g., commonly requested motions).	Janine Liebert	Asses needs and models of delivery	3/30/2015			
827	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			
828	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			
829	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			
830	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			
831	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			
832	S3(C)	Expand access to form templates and precedent beyond court-provided forms (e.g., commonly requested motions).	Janine Liebert	Assess	12/31/2016			
833	S3(C)	Expand access to form templates and precedent beyond court-provided forms (e.g., commonly requested motions).	Janine Liebert	Completion	12/31/2016			
835	S3(D)	Establish a program for legal document assistants in the library						
836	S3(D)	Establish a program for legal document assistants in the library	Malinda Muller	Identify and assess viability with organization leaders	12/30/2014			
837	S3(D)	Establish a program for legal document assistants in the library	Malinda Muller	Assess components and recommend policies and procedures	3/30/2015			
838	S3(D)	Establish a program for legal document assistants in the library	Malinda Muller	Determine liability, write contracts / MOU	3/30/2015			
839	S3(D)	Establish a program for legal document assistants in the library	Malinda Muller	Soft launch program	6/30/2015			
840	S3(D)	Establish a program for legal document assistants in the library	Malinda Muller	Create feedback mechanism and metrics	6/30/2015			
841	S3(D)	Establish a program for legal document assistants in the library	Malinda Muller	Assess success of program	9/30/2015			
842	S3(D)	Establish a program for legal document assistants in the library	Malinda Muller	Completion	12/30/2015			

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#	GOAL	PROJECT	COORDINATOR(S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
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	Working to refine current referral sheet, P&P and Communications 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		
851	S4(A)	Establish eBranches throughout the County						
852	S4(A)	Establish eBranches throughout the County	Linda Heichman & Jaye Steinbrick	SWOT assessment based upon pilot program	3/31/2014		12/31/2015	5 locations in place as pilot.
853	S4(A)	Establish eBranches throughout the County	Linda Heichman & Jaye Steinbrick	Develop additional technology and tools	6/30/2014		6/30/2015	Longer lead time for technology development
854	S4(A)	Establish eBranches throughout the County	Linda Heichman & Jaye Steinbrick	Identify strategic locations and develop partnerships	7/31/2014		9/30/2015	
855	S4(A)	Establish eBranches throughout the County	Linda Heichman & Jaye Steinbrick	Pilot new tools	9/30/2014		12/31/2015	
856	S4(A)	Establish eBranches throughout the County	Linda Heichman & Jaye Steinbrick	Launch "next phase" eBranch	12/31/2014		6/30/2016	5 month launch, 1 month compiling recommendation
857	S4(A)	Establish eBranches throughout the County	Linda Heichman & Jaye Steinbrick	Completion	Ongoing?		6/30/2016	Completion to correspond with recommendation for ongoing implementation
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	Delayed due to staff changes/lack of engaged interest among some partnership libraries.
861	S4(B)	Expand training at partnership locations	Linda Heichman	Launch public and staff training	1/31/2014	Y	3/31/2014	Classes underway
862	S4(B)	Expand training at partnership locations	Linda Heichman	Assess and revise as needed	4/30/2014		12/31/2014	Discussion forthcoming among Public Services Librarians.
863	S4(B)	Expand training at partnership locations	Linda Heichman	Recommend program for ongoing, regular, public and staff training	6/30/2014		3/31/2015	
864	S4(B)	Expand training at partnership locations	Linda Heichman	Completion	7/31/2014		3/31/2015	

MEMORANDUM

DATE: October 28, 2014

TO: Board of Law Library Trustees

FROM: Sandra Levin, Executive Director

RE: Conflict of Interest and Disclosure Code for The Los Angeles County Law Library

As you know, the Political Reform Act (Government Code Section 81000, *et seq.*) requires state and local government agencies to adopt and promulgate conflict of interest codes. The Fair Political Practices Commission has adopted a regulation (2 Cal. Code of Regs. 18730), which contains the terms of a standard conflict of interest code and the Law Library has adopted the terms of that code as its conflict of interest code, with amendments necessary to designate the persons and categories subject to the requirements of the code.

Attached for your review is a resolution approving the current proposed amendments to the Conflict of Interest and Disclosure Code for the Law Library.

Specifically, the Conflict of Interest Code is modified to:

1. Reflect the deletion of one position that was eliminated since the last update: *Senior Director, Administrative Services – Category 1;*
2. Reflect the addition of two positions: *Director, Reference & Research – Category 1; and Director, Finance – Category 1.*

Once approved, the Law Library’s Conflict of Interest Code will be submitted to the County of Los Angeles as applicable responsible agency under the Government Code. The proposed code will be reviewed by the County’s Code Review Panel and it is anticipated that it will be approved by the panel prior to the Board’s next meeting.

In addition to adopting a Conflict of Interest Code, each of the individuals listed in the Code or otherwise covered under state law must file Form 700 disclosure statements upon assuming office, departing office and annually. This includes Board Members. Law Library staff sends reminders and instructions as filing deadlines approach and is available to answer any questions regarding the completion and filing of the forms.

RECOMMENDATION

Staff recommends the resolution and proposed amendments be approved.



Conflict of Interest Code
of the

LAW LIBRARY, LOS ANGELES COUNTY

Incorporation of FPPC Regulation 18730 (2 California Code of Regulations, Section 18730) by Reference

The Political Reform Act (Government Code Section 81000, *et seq.*) requires state and local government agencies to adopt and promulgate conflict of interest codes. The Fair Political Practices Commission has adopted a regulation (2 Cal. Code of Regs. 18730), which contains the terms of a standard conflict of interest code. After public notice and hearing, it may be amended by the Fair Political Practices Commission to conform to amendments in the Political Reform Act. Therefore, the terms of 2 California Code of Regulations Section 18730, and any amendments to it duly adopted by the Fair Political Practices Commission, are hereby incorporated into the conflict of interest code of this agency by reference. This regulation and the attached Appendices (or Exhibits) designating officials and employees and establishing economic disclosure categories shall constitute the conflict of interest code of this agency.

Place of Filing of Statements of Economic Interests

All officials and employees required to submit a statement of economic interests shall file their statements with the agency head; or his or her designee. The agency shall make and retain a copy of all statements filed by its Board of Trustees and Executive Director, and forward the originals of such statements to the Executive Office of the Board of Supervisors of Los Angeles County.

The agency shall retain the originals of statements for all other Designated Positions named in the agency's conflict of interest code. All retained statements, original or copied, shall be available for public inspection and reproduction (Gov. Code Section 81008).

LAW LIBRARY, LOS ANGELES COUNTY

EXHIBIT “A”

CATEGORY 1

Persons in this category shall disclose all business positions and investments in and all income **(including gifts, loans and travel payments)** received from businesses that manufacture or sell supplies or services of the type utilized by the Law Library, including but not limited to, publications, office equipment and supplies, library supplies and landscape maintenance, insurance and utilities.

CATEGORY 2

Individuals who perform under contract the duties of any designated position shall be required to file Statements of Economic Interests disclosing reportable interest in the categories assigned to that designated position.

In addition, individuals who, under contract, participate in decisions which affect financial interests by providing information advice, recommendation or counsel to the agency which could affect financial interest shall be required to file Statements of Economic Interests, unless they fall within the Political Reform Act's exceptions to the definition of consultant. The level of disclosure shall be as determined by the executive officer (or head) of the agency. **(See footnote for clarification.)**

LAW LIBRARY, LOS ANGELES COUNTY

EXHIBIT "B"

<u>Designated Positions</u>	<u>Disclosure Categories</u>
Board of Trustees	1
Executive Director	1
Senior Director, Administrative Services	1
Senior Director, Information Services & CTO	1
<u>Finance Director</u>	<u>1</u>
<u>Director, Reference & Research</u>	<u>1</u>
Consultant/ New Positions*	2

*Consultants/New Positions are included in the list of designated positions and shall disclose pursuant to the broadest disclosure category in the code, subject to the following limitations:

The Executive Director or his or her designee may determine in writing that a particular consultant or new position, although a “designated position,” is hired to perform a range of duties that is limited in scope and thus is not required to fully comply with disclosure requirements in this section. Such written determination shall include a description of the consultant’s or new position’s duties and, based upon that description, a statement of the extent of disclosure requirements. The Executive Director or his or her designee’s determination is a public record and shall be retained for public inspection in the same manner and location as this conflict-of-interest code. (Gov. Code Section 81008.)

EFFECTIVE: ~~10/09/2013~~ 10/28/2014

MEMORANDUM

DATE: October 28, 2014

TO: Board of Law Library Trustees

FROM: John F. Kohl, Finance Director

RE: UBS Certification and Agreement of Government/
Government-Related Entity

The Board of Trustees is requested to authorize the Finance Director to sign, execute and deliver the attached Certification and Agreement of Government/Government-Related Entity for and on behalf of the LA County Law Library to UBS Financial Services Inc.

UBS Financial Services Inc. Certification and Agreement of Government/Government-Related Entity pertains to custody of the Library's securities and related assets, investment policy and compliance with applicable laws, UBS relationship and the Municipal Advisor Rule, liability, and knowledge as to the source of funds. The appropriate box has been marked by an "x" indicating that none of the funds currently invested in or through the account constitute proceeds of municipal securities or municipal escrow investments nor will the Library invest any funds in or through UBS from these sources without first notifying UBS in writing. This document also refers to the client's (LA County Law Library) investment policy which is not necessary in the Library's case since the California & Professional Code Section 6348.5 (attached) governs our investment options and is very restrictive.

RECOMMENDATION

Staff recommends that the Board authorize the Finance Director to sign, execute and deliver the attached Certification and Agreement of Government/Government-Related Entity for and on behalf of the LA County Law Library to UBS Financial Services Inc.



Certification and Agreement of Government/ Government-Related Entity

GOVEntity Name LA Cnty Law Library

This certification and agreement (Agreement) of the entity identified above (Client), based on the authorized action of its governing body, amends and supplements the provisions contained in the Client Relationship Agreement and any Investment Advisory Agreement or Consulting Services Agreement executed between Client and UBS Financial Services Inc. or UBS Financial Services Inc. of Puerto Rico as applicable (UBS) (all documents including the Agreement collectively referred to as the "UBS Agreements"). Defined terms used in this Agreement have the same meaning as in the other UBS Agreements unless otherwise defined in this Agreement.

Please review this Agreement, include the appropriate signature(s) where indicated on page 2 and return it to your Financial Advisor.

In connection with UBS's agreement to provide services to the Client according to the UBS Agreements, and after review of all federal, state and local laws and regulations applicable to the Client and its investments, and consultation with its counsel, the Client hereby represents to UBS and agrees to the following with respect to all of its UBS accounts and relationships:

Custody (Applicable only if UBS holds or will hold Client assets)

UBS is eligible to accept, deposit and custody the Client's securities and related assets, and there are no further steps that UBS must take to assure this eligibility.

Investment policy and compliance with applicable laws

The Client represents that, in the event it has provided a written investment policy statement (Investment Policy) to UBS, it reflects investments that are permissible according to applicable federal, state and local laws and regulations, and it has been approved by the Client's governing body. The Client also represents, warrants and agrees that, unless otherwise agreed to in a written agreement under UBS Institutional Consulting or UBS DC Advisory (Consulting Services Agreement) or other document signed by UBS:

- The Client is the sole party responsible for directing its investments;
- The Client is the sole party responsible for monitoring Client's account(s) with UBS to conform with the Client's Investment Policy;
- The Client is the sole party responsible for ensuring that Client's account(s) with UBS and any authorized trade for the Client's account(s) with UBS complies with the Client's Investment Policy;
- UBS shall have no obligation to monitor the Client's account(s) with UBS or to monitor any trade or trades for the Client's account with UBS, for conformance with the Client's Investment Policy or to inform the Client if UBS believes a trade or position in the Client's account does not, or may not, conform with the Client's Investment Policy; and
- The Client has reasonable procedures and controls in place to prevent the Client from directing investments outside the scope of the Client's Investment Policy or applicable law, and to monitor the Client's account with UBS for ongoing conformance with the Client's Investment Policy.

The Client acknowledges that, by accepting an Investment Policy from the Client (if applicable), UBS does not take on any additional duties or obligations over and above those set forth in the UBS Agreements.

UBS relationship and the Municipal Advisor Rule

The Client understands and agrees that UBS will not act as an investment advisor or a fiduciary either to the Client or for the Client's account(s) with UBS, except and to the extent agreed in a UBS investment advisory contract.

The Client also understands and agrees that UBS will not act as a municipal advisor as defined under Section 15B of the Securities Exchange Act of 1934, Rule 15Ba1 et seq. (the "Municipal Advisor Rule") to the Client and will not provide advice on investment strategies, including investing municipal bond proceeds, or advice with respect to municipal financial products, including municipal derivatives and guaranteed investment contracts. To ensure the firm does not inadvertently become a municipal advisor to you, please make one of the two representations by checking the relevant box.



I certify:

- (a) I am an official representative of the Client listed below, and am authorized to sign this certification;
- (b) I have access to the appropriate information or have direct knowledge of the source of the funds in the account(s) or arrangement that the Client has with UBS that enable me to make these representations and for the purposes of the Municipal Advisor Rule relating to the registration of municipal advisors;

- No bond proceeds or escrow investments*
None of the funds currently invested in or through the account(s) or arrangement that Client has with UBS, or that the Client seeks to invest in these accounts, constitute (i) proceeds of municipal securities or (ii) municipal escrow investments. I further certify that the Client will not invest any funds in or through the Firm that constitute proceeds of municipal securities or municipal escrow investments without first notifying the Firm in writing;
- Have bond proceeds or escrow investments and represented by Municipal Advisor*
Some or all of the funds currently invested in or through the account(s) or arrangement that Client has with the Firm, or that the Client seeks to invest in these accounts, constitute (i) proceeds of municipal securities or (ii) municipal escrow investments, and we are represented or will be represented by an independent registered Municipal Advisor;
- Have bond proceeds or escrow investments and NOT represented by Municipal Advisor*
Some or all of the funds currently invested in or through the account(s) or arrangement that Client has with the Firm, or that the Client seeks to invest in these accounts, constitute (i) proceeds of municipal securities or (ii) municipal escrow investments, and we are NOT represented and will NOT be represented by an independent registered Municipal Advisor;

This Agreement shall continue to be effective until written notice of amendment or revocation is received by UBS.

This Agreement shall continue to benefit the Client's successors and assigns, by merger, consolidation or otherwise.

Liability

The Client understands that UBS, its affiliates, and their respective directors, officer, agents and employees will rely on the accuracy of the representations made in this Certification and Agreement and will not be responsible to the Client for any losses or other damages that may arise out of any false or inaccurate representations.

Authorized persons

The individuals signing below represent and certify that the Client's governing body has:

- Approved this Agreement;
- Authorized the individuals signing below to execute and deliver this Agreement for and on behalf of the Client; and
- Authorized and directed each individual signing below to act on the Client's behalf in connection with opening the Client's account(s) with UBS, obtaining services from UBS, and in directing investments for the Client's account(s) with UBS.

Conflicts

In the event of any conflict between the terms of this Agreement and the terms of a Consulting Services Agreement, the terms of the Consulting Agreement will control. In the event of any conflict between the terms of this Agreement and any other UBS agreement, this Agreement will control.

		
	<i>Signature</i>	<i>Print Name and Title</i>
		
	<i>Signature</i>	<i>Print Name and Title</i>
		
	<i>Signature</i>	<i>Print Name and Title</i>
		
	<i>Signature</i>	<i>Print Name and Title</i>

California Business & Professional Code Section 6348.5

A board of law library trustees may invest surplus funds in excess of one hundred thousand dollars (\$100,000) or of the average annual expenditures of the library for the four fiscal years immediately preceding the investment, whichever is lesser, in the Local Agency Investment Fund pursuant to Article 11 (commencing with Section 16429.1) of Chapter 2 of Part 2 of Division 4 of Title 2 of the Government Code or bonds of the government of the United States or of this state. Bonds so purchased may be sold at any time in the discretion of the board. In computing average annual expenditures for the purposes of this section, capital expenditures for the purchase of real property and construction of a library building shall not be included.

AGENDA ITEM 4

DISCUSSION ITEMS

- 4.1 Discussion of Prohibition on Providing Legal Advice and Related Risk Management Procedures.
- 4.2 Presentation Re Alternative Legal Research Models and Products.

MEMORANDUM

DATE: October 28, 2014

TO: Board of Law Library Trustees

FROM: Sandra Levin, Executive Director

RE: Discussion of Prohibition on Providing Legal Advice and Related Risk Management Procedures

INTRODUCTION

LA Law Library does not provide – and is prohibited from providing – legal advice. Given the expansion in educational and informational services provided at the Library, we have also expanded the procedures in place to protect against any misunderstanding as to the scope of services provided. In particular, the Library goes to great lengths to ensure that patrons understand that we do not provide legal advice. This agenda item is intended to familiarize the Board with the procedures currently in place and seek any input or direction regarding the adequacy and appropriateness of the procedures.

DISCUSSION

Reference Desk: Of course, the Law Library’s greatest exposure is at the Reference Desk and the most important component of risk management is therefore the skill and training of the reference librarians who provide public assistance. Fortunately, our reference librarians are extremely knowledgeable, experienced and well-trained. They are well aware of the prohibition on providing legal advice, the restrictions on providing opinions or direction to patrons and the difference between legal information and legal advice. Nonetheless, the Law Library continually provides training for librarians, including at our quarterly reference librarians meetings, to share information, scholarly articles, tips and experience in how to assist patrons without venturing into legal advice.

Similarly, all of the participants in our intern program who will have contact with patrons are trained how to provide information about legal resources without providing legal advice. In addition to oral instructions, we provide each intern with handouts and articles on how to provide legal information versus legal advice.

Classes and Workshops: Regardless of how diligent our librarians are, there still remains the possibility of misunderstandings, especially given the expanded scope of services the Law Library now provides – ranging from in-house research classes to workshops and clinics hosted by third parties. Accordingly, the Law Library now utilizes all of the following procedures:



- A sign in the lobby of the Law Library;
- A disclosure on all written promotional materials relating to classes and workshop;
- A disclosure on our online registration page for classes and workshops;
- A verbal disclosure in classes and workshops presented by LA Law Library;
- Agreements signed by patrons in workshops, clinics and one-on-one consultation settings (where the risk of misunderstanding is greatest)

The details and wording of each of these items is in the attached forms.

RECOMMENDATION

Staff recommends that the Board ask questions, discuss the current procedures and provide any suggestions or direction it deems appropriate.



Disclosures for Use with Public Programs

ON FLYERS AND COLLATERAL MATERIALS

FOR USE WITH: events presented by third parties who either provide legal advice or provide individualized consultations:

LA Law Library does not provide legal advice. LA Law Library provides legal resources and assistance with legal research as an educational service. The Law Library is pleased to offer our patrons the opportunity to obtain assistance from third party legal service providers at this and other events within the Library. However, the Library does not control and is not responsible for the content or scope of any assistance given by those providers.

FOR USE WITH: Public classes presented by the Law Library

LA Law Library provides access to legal resources and assistance with legal research. LA Law Library does not provide legal advice. For legal advice, you should consult an attorney.

FOR USE WITH: Workshops and clinics presented by the Law Library

LA Law Library does not provide legal advice. LA Law Library provides legal resources and assistance with legal research as an educational service. The information presented in this program is not legal advice and is provided solely as an educational service to our patrons. For legal advice, you should consult an attorney.

FOR USE WITH: written materials, such as resource sheets

The information in this research guide is intended to assist patrons with their legal research and is in no way intended to replace the counsel of an attorney. LA Law Library does not provide legal advice. LA Law Library provides legal resources and assistance with legal research as an educational service.

ON THE WEBSITE REGISTRATION PAGE

LA Law Library does not provide legal advice: LA Law Library provides legal resources and assistance with legal research as an educational service. The Law Library is pleased to offer our patrons the opportunity to obtain assistance from third party legal service providers at this and other events within the Library. However, the Library does not control and is not responsible for the content or scope of any assistance given by those providers.

ON A SIGN IN THE LOBBY

LA Law Library does not provide legal advice. LA Law Library provides legal resources and assistance with legal research as an informational and educational service. The Library does not control and is not responsible for the content or scope of any assistance given by third parties within the Law Library.

SAMPLE DISCLOSURE BY SPEAKER DURING CLASS

Please remember that LA Law Library does not provide legal advice and this presentation is not a substitute for obtaining legal counsel. If you want personalized advice or to be represented in court, you should consult with your own attorney.

AGREEMENTS

FOR USE WITH: events presented by third parties who either provide legal advice or provide individualized consultations:

LA LAW LIBRARY DISCLOSURE AND AGREEMENT
[LAWYERS IN THE LIBRARY]

Welcome to the [Lawyer in the Library] Program at LA Law Library! This program is designed to provide you a brief consultation with an attorney to provide general legal information, referrals to public agencies or legal service providers or a referral to a Lawyer Referral Service. If you already have an attorney, we will not be able to help you. This service is for self-represented individuals only.

The volunteer attorney assigned to you is not “your attorney” and does not represent you. Rather, the attorney will provide brief legal information during today’s clinic. Similarly, LA Law Library Staff do not provide legal advice and there is no attorney-client relationship between you and any person at the LA Law Library. LA Law Library and its volunteer lawyers will not go to court, appear at any legal proceedings, file documents or take any action other than giving information and advice at the time of your Law Library visit. You should consult with your own attorney if you want personalized advice or strategy or to be represented by an attorney in court.

Communications between you and the attorney(s) with whom you speak will be treated as confidential. However, LA Law Library or the attorney(s) with whom you consult may provide information and assistance to other litigants or individuals whose interests are not aligned with yours.

You must be present in the reading area when your name is called or you will lose your slot. While you wait, please keep your conversations quiet and turn off your cell phone. If you disturb other people in the library, you will be asked to leave and you will forfeit your appointment. No recording of your meeting with the attorneys of the Lawyers in the Library Program is permitted. By signing below, you consent to being photographed during the Lawyers in the Library program and consent to copies of your photograph being used anonymously in LA Law Library promotional materials including, but not limited to, in its website, and/or Facebook page. You further consent to your story and the services provided to you being used anonymously by LA Law Library to conduct outreach about the Library and promote the Lawyers in the Library program.

LA Law Library is not responsible for the content or accuracy of any legal information or advice you may receive during the program or the outcome of your case or matter.

I have read this Disclosure or have had it read to me. I understand this document and hereby release the LA Law Library and any attorneys present from any claim, liability or damages arising out of or in connection with receiving information or assistance under this program.

TYPE OR PRINT NAME

SIGNATURE

DATE

FOR USE WITH: Workshops and clinics presented by the Law Library:

LA LAW LIBRARY DISCLOSURE AND AGREEMENT

LA Law Library is available to help patrons have questions about legal research and legal issues. The Law Library can help you in preparing your own forms and can give you general information. The Law Library staff cannot go with you to court.

Attorneys at the Law Library who may assist you are NOT YOUR LAWYERS. They are neutral educational resources who do not represent any person or party in your matter. There is no attorney-client relationship between you and any person at LA Law Library. LA Law Library may also provide information and assistance to other litigants or individuals whose interests are not aligned with yours.

Communications between you and the Law Library staff are not confidential. You should consult with your own attorney if you want personalized advice or strategy, to have a confidential conversation, or to be represented by an attorney in court.

LA Law Library is not responsible for the outcome of your case or matter.

I have read this Disclosure or have had it read to me. I understand this document.

TYPE OR PRINT NAME

SIGNATURE

DATE

MEMORANDUM

DATE: October 28, 2014

TO: Board of Law Library Trustees

FROM: Sandra Levin, Executive Director

RE: Alternative Legal Research Models and Products

INTRODUCTION

With ever-increasing interest from Silicon Valley and other venture capital funding sources, many new technologies and products for legal research are being introduced into the legal market or are in development. Understanding the future of these alternative products and research methods is important to long-term planning at the Law Library. Participating in – and influencing – the development of these products may help assure their compatibility with library and patron access business models.

BACKGROUND

Even as many libraries still struggle with the fundamental shift created by digital access to legal resources, the next wave of innovation is occurring. Legal databases such as WestLaw and Lexis offer are no longer considered the forefront. New and start-up companies are offering different models for conducting legal research. Larger stalwarts of the legal research industry (like Westlaw) are developing new ways of accessing legal information. Attached are several recent articles discussing recent trends.

Although the features of the next generation models are still in flux, common features include more visual tools and interactive methods for users to augment the information provided. For example, FastCase and Ravel both offer a visual representation of search results. Thus, rather than a list of results, users see a map that provides visual cues to the relative importance of the various results. As another example, Casetext allows users to add annotations and external links to the primary legal documents, continually augmenting the available resources by adding the collective knowledge of the community of users. Westlaw’s new Practical Law product includes similar types of annotations and links to complementary resources as well, but in their case provided by a team of experts specifically retained by West for the task.

At the meeting, Staff will provide a short demonstration of some of the tools already available. Over time, Law Library staff (including Senior Director of Information Services, Jaye Steinbrick and Senior Librarian, Austin Stoub) will explore the tools and products currently being developed and seek new ways to participate in shaping these new models (e.g., serving as a test site, sitting on review committees, etc.).

RECOMMENDATION

Review the information presented by Staff and provide input as to future trends in legal research and the role of LA Law Library.



ABA (http://www.americanbar.org/) Join (http://www.americanbar.org/membership/join_the_aba.html) ABA Calendar (http://apps.americanbar.org/abanet/oc/) Web Store (http://apps.americanbar.org/abastore/) About ABA (http://www.americanbar.org/utility/about_the_aba.html) Contact ABA (http://www.americanbar.org/utility/about_the_aba/contact.html)



(http://www.abajournal.com/)

(http://oasc10.247realmedia.com/RealMedia/ads/click_ix.ads/www.abajournal.com/magazine/article/visual_law_services_are_worth_a

Home (/) / In-Depth Reporting (/magazine/) Visual law services are worth a thousand words--and big money/L35/134591813/Top/ABA/Airwatch_COM_10_01_2014/airwatch_aba_journal_sci_728x90_20140129.gif/726354495x)

COVER STORY

Visual law services are worth a thousand words--and big money

POSTED MAY 01, 2014 10:40 AM CDT

BY ROBERT AMBROGI



Daniel Lewis: "What we're trying to do is make the process easier, more intuitive, more thorough." Photo of Daniel Lewis by Tony Avelar, illustration by Stephen Webster.

Daniel Lewis was midway through his second year at Stanford Law School when he became convinced there was a better way to do legal research.

The thought came to him while doing work for a nonprofit in 2011. He was trying to understand where his issue fit within a broad group of cases his research had found. In his mind he pictured a view of his issue triangulated against the most important cases at the center and all the other, less important cases circled around them.

"It took shape in my mind as sort of a visual process of trying to figure out where on this map I needed to locate myself and what the other cases were that I needed to be aware of," he recalls. As he discussed

that idea with other students, he discovered many of them shared his approach of trying to contextualize their research visually.

With the rough contours forming in his mind of a better legal research mousetrap, Lewis took the idea to various people at Stanford, most influentially Jeffrey Heer, a computer science professor then at Stanford (and now at the University of Washington) and an expert in data visualization. Heer introduced Lewis to computer science research on understanding social connections and visualizing data sets that helped him begin to crystallize his idea.

By the beginning of his third year, Lewis had teamed up with friend and classmate Nicholas Reed. That fall the pair took a course in venture capital, and in the spring they enrolled in an intensive LaunchPad course in product design at Stanford's Hasso Plattner Institute of Design, known as the D.school. Before year's end they had a business plan, and just two weeks before graduation their plan placed second in a universitywide business plan competition.

By their June 16, 2012, graduation day, Lewis and Reed had investors knocking at their doors. A week after graduation they went full bore into raising funds; and a month later, just a few days before they were to take the bar exam, they closed an initial round of financing of \$1.1 million.

Ravel (https://www.ravellaw.com/), their legal research alternative, was born.

Like 199

37

246

(http://adclick.g.doubleclick.net/pcs/click?xai=AKAOjsvrALnWX2byH5LrAwCPCDLazPb4-gw442RORR0ARUx5W7jvM5p739QX0EGs7-UiKSwcHE1sLCOcD4jQLhPWmwBOM_#d714A&sig=Cg0ArKJSzA

1. Michael Flately Awarded \$11M for False Rape Accusation
(/news/article/michael_flately_awarded_and_big_money/L35/11729994/Middle/ABA/West_11888_COM_utm_source=internal&utm_medium=na)
2. Why I Love Being a Lawyer
(/magazine/article/why_i_love_being_a_utm_source=internal&utm_medium=na)
3. Jack Daniel's Cease-and-Desist Letter Goes Viral for Being Exceedingly Polite
(/news/article/jack_daniels_cease-and-desist_letter_goes_viral_for_being_exc_utm_source=internal&utm_medium=na)
4. Former Holland Knight partner sues over alleged \$1.5M underpayment
(/news/article/former_holland_knight_p_utm_source=internal&utm_medium=na)
5. Law allowing cops to inspect hotel guest registries without judge's OK gets Supreme Court review
(/news/article/law_allowing_cops_to_in_utm_source=internal&utm_medium=na)
6. Woman's condo is sold at auction because of \$95 overdue tax bill; she says she never received notice
(/news/article/womans_condo_is_sold_utm_source=internal&utm_medium=na)
7. Privatized probation becomes a spiral of added fees and jail time

Ravel does not look like traditional legal research platforms. The difference is its visual presentation of search results. Rather than display a stack of text entries, Ravel draws a visual map of the results, showing the relationships among cases and their relative importance to each other—much like the triangulation Lewis originally imagined.

Daniel Lewis was midway through his second year at Stanford Law School when he became convinced there was a better way to do legal research.

The thought came to him while doing work for a nonprofit in 2011. He was trying to understand where his issue fit within a broad group of cases his research had found. In his mind he pictured a view of his issue triangulated against the most important cases at the center and all the other, less important cases circled around them.

Enter a search query and you get the standard list of matching cases displayed along the right side of your screen. But across the left three-quarters you see a cluster map showing the cases as circles of various sizes. The larger the circle, the more important the case; the most relevant cases appear in the center.

Lines radiate out of the circles, connecting each case to others it cites and that cite it. The thickness of the line indicates the depth of treatment. Hover your pointer over a case and its information shows in the right pane. Click it to get a list of every case cited within it. Double-click it to get the full text.

Below the cluster map is a timeline, with the cases arrayed across the map by date. To see only cases from a specific period, drag bars along the timeline to limit the view.

The visualizations, Lewis says, help researchers quickly understand the lay of the landscape for an issue—which cases are the major ones—and then better filter results to fit the research.

“What we’re trying to do is make the process easier, more intuitive, more thorough and give people greater confidence that they’re finding the cases that are best suited to their need.”

To date, Ravel remains in a beta-testing stage and is free to use. Fifteen large law firms are helping test the platform, with a particular focus on its role in sophisticated, complex litigation. Their feedback has been positive, Lewis says.

“Either we’re crazy,” he says, “or we’re on to something.”

THE DISRUPTOR

Disruptive innovation is a concept popularized by Harvard Business School professor Clayton M. Christensen in his 1997 book, *The Innovator’s Dilemma: When New Technologies Cause Great Firms to Fail*. Citing the personal computer as the classic example, he described the phenomenon by which an innovation transforms a market by introducing simplicity and convenience where complexity was the rule.

Whether Ravel will prove to be a disruptive technology remains to be seen. It seems safe to say, however, that Lewis and his colleagues are almost certainly on to something. In fact they represent a trend, rapidly gaining momentum, in which visualization tools and design concepts are used to help lawyers, students, consumers and scholars make sense of the law.

As if through some scheme of cosmic synchronicity, the last year has seen visual law take a place at the leading edge of legal technology across a range of applications. It has been embraced by product vendors, app developers, legal academics and legal services organizations—all sharing in the belief that a picture is worth a thousand words when it comes to making the law more understandable and accessible.

“We are having a visual moment,” says Margaret Hagan, who in November launched the Program for Legal Technology & Design (<http://www.legaltechdesign.com/>) at Stanford’s D.school, together with Ron Dolin, a fellow at Stanford Law’s Center on the Legal Profession. The



Margaret Hagan: “I would love to see legal product designers embedded in law firms and in court systems.” Photo by Tony Avelar.

(/magazine/article/probationers_prison_utm_source=internal&utm_medium=na

- 8. 7th Annual Blawg 100 (/magazine/article/7th_annual_blawg_1_utm_source=internal&utm_medium=na
- 9. FIFA’s culture of secrecy criticized by former US Atty who investigated World Cup bidding process (/news/article/former_us_attorney_who_utm_source=internal&utm_medium=na
- 10. Pennsylvania Supreme Court suspends its own Justice McCaffery, asks for ethics investigation (/news/article/pennsylvania_supreme_utm_source=internal&utm_medium=na

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program will focus on using design to build better tools for bringing law to consumers and on promoting and documenting research in legal design.

Hagan also founded a personal project called the Open Law Lab (<http://www.openlawlab.com/>), where she focuses on four law-and-design topics that sum up the current range of initiatives: legal design process, visual law, access to justice, and legal education and practice.

Her interest in visual law started in law school when she would sketch comiclike flowcharts to help make sense of legal concepts. As she shared them with classmates and heard them clamor for more, she realized she was on to something useful. After her Stanford Law graduation last year, Hagan went straight into a yearlong fellowship at the D.school.

Unlike Ravel, which uses visualization to make sense of data, Hagan's focus is on design. Her strongest interest is in how elements of design can be employed to enhance access to justice and legal education.

"Design is the 'how' of the equation," Hagan explains. "Law is very good at figuring out the what—what is the goal. But in terms of how to get at that goal, that is design. It is the art and science of how to make things usable."

Among her projects, Hagan has created Law Dojo (<http://www.lawschooldojo.com/>), a set of games for lawyers, law students and nonlawyers that combine comics and quizzes to teach lessons about law. The games are included in an app that works on Apple and Android tablets and mobile phones.

So passionate is she about legal design, Hagan envisions it becoming an entirely new career track within the profession. "I would love to see legal product designers embedded in law firms and in court systems—someone trained in design and engineering who knows best practices and can be an advocate for clients and users."

THE EVOLUTION

The genesis of visual law is difficult to trace. For use in U.S. legal research, Fastcase introduced one of the first such tools in 2008. Its Interactive Timeline displays search results as various-size bubbles along a visual timeline.

The inspiration for the timeline, Fastcase CEO Ed Walters says, was the work of two data-visualization pioneers: statistician and Yale professor emeritus Edward R. Tufte and Dr. Hans Rosling, a Swedish physician and statistician. Rosling's 2006 presentation "The Best Stats You've Ever Seen" (http://www.ted.com/talks/hans_rosling_shows_the_best_stats_you_ve_ever_seen.html), "visualizing global health data, consistently ranks among the most popular TED talks of all time.

A UK legal research company, Justis Publishing Ltd., first used data-visualization tools in the late 1980s or early 1990s for legal research products on CD-ROMs, according to Jonathan Daymond, its sales and marketing director. In February 2011, Justis launched a Web visualization tool, the JustCite Precedent Map (<http://www.justcite.com/Help/PrecedentMap>), which uses nodes to illustrate the relationships between cases and to help users see which cases most closely relate to their queries.

"Our early tools were very one-dimensional in a three-dimensional way," Daymond explains. "But they were the starting point; from there the concept emerged of exploring what we can do to allow you to see how your case connects with other cases across different jurisdictions."

While these legal research applications have their foundation in data visualization, other forms of visual law were inspired by principles of design and typography. Today, the concept of visual law embraces a diverse range of projects intended to make the law more accessible to consumers, more intuitive for lawyers, and more transparent for academics. Consider some of the varieties of visual law:

- To help New York City's 10,000 street vendors understand their legal rights and responsibilities, the Center for Urban Pedagogy created a pamphlet (http://welcometocup.org/Store?product_id=17) in 2009 that uses simple graphics and minimal text. CUP, whose focus is using design and art to improve civic engagement, has developed many similar projects that tackle issues like juvenile justice and zoning law.
- The Connecticut Network for Legal Aid adapted the *fotonovela* style of graphic storytelling popular in Spanish-speaking countries to develop a series of educational legal rights videos (<http://ctlawhelp.org/audio-video>) in 2013. Using photographs and dialog bubbles in a style similar to comic books, the videos teach about topics such as the Family and Medical Leave Act (<http://ctlawhelp.org/family-and-medical-leave-act-fmla>) and the Individuals with Disabilities Education Act (<http://ctlawhelp.org/applying-and-appealing-disability-social-security>).

A user can switch from this relevance view to a court-level view, which changes the Y-axis to a list of court names and then displays the cases along the timeline grouped by court. Hover over a circle to get the case name and citation and a preview of its text.

Last August, Fastcase added a feature to the timeline called Explore Case Relationships. With this feature, when a user clicks on a specific case within the timeline, it generates a new timeline showing only the cases cited within that case and the cases that cite back to it.

Walters believes lawyers will someday look back at today's text-based research platforms and realize how primitive they were. The problem, he says, is that text-based results lie. "The results all look the same; one result looks as good as another. The truth is there are some real winners there."

Visual search lets you instantly perceive the winners among cases, Walters says. "Sometimes the right result jumps out of the pack and hangs above the others like a colossus. That's the promise of visual search—that the best results jump out."

A further advantage is that visual search is better at telling you when to stop searching. With text search, there is always the fear of the hidden winner—the big case that your relevance search missed because the judge used a different term, Walters says. But if you can see all the cases arrayed on a map, you can be more confident that you have covered the terrain.

"Text-based search results are necessarily one-dimensional: You can only sort based on one value. If you rank cases by relevance score, you might sort the most-cited case to the bottom. If you sort the most-cited case to the top, you might be sorting the most recent to the bottom. "We saw people sorting by relevance, then by most cited, then by date, and trying to keep that all in their heads. But our brains don't work that way. One-dimensional search makes us do gymnastics in our head. Visual search is four-dimensional."

Fastcase is preparing to release a new version of its platform that will give visual search even greater prominence. In the new version, the Interactive Timeline will appear on the same page as the search results rather than on a separate page. The results page will also display a tag cloud, showing the words and concepts that are most prominent in the cases within the search results.

MAPPING PRECEDENT

Whereas Ravel and Fastcase both show a range of cases over a timeline, JustCite's Precedent Map charts the cartography of a single "focus" case. The Precedent Map display appears as an option in JustCite after a case is selected from the list of search results.

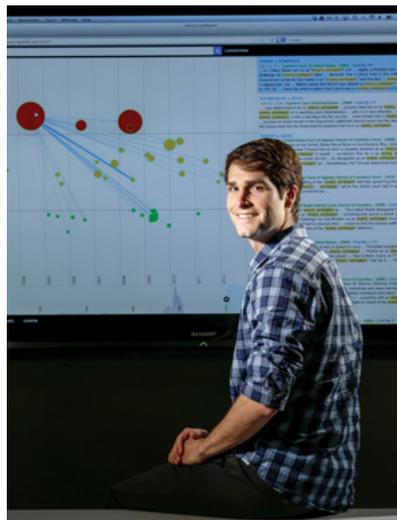
The map shows the focus case at the center of the screen, surrounded by nodes. Each node represents a case. Nodes to the left are previous cases cited by the focus case. Nodes to the right are subsequent cases that cite the focus case. The larger the node, the more connections it has to the focus case.

Between the nodes are color-coded connectors showing the type of citation: green for positive, amber for neutral and red for negative. Mouse over the arrow in the middle of a connector to see the details of the citation. Mouse over any node and the view changes to show the connectors between that node and the others.

"One of our attorneys likes to say: 'Case law hunts in packs,'" Daymond jokes. "The nodes on the Precedent Map allow you to see whether there are other cases you should be aware of. This makes it easy to bring to the surface the two or three you need to see."

The map has proved popular not only among lawyers, Daymond says, but also in law schools. Several law schools use it as a teaching aid to help illustrate what precedent is and how it works.

The growing use of touch-screen computers and tablets is likely to accelerate the development of visualization tools like Precedent Map, Daymond believes. "Finding different ways to navigate legal concepts visually is something we will continue to develop. In particular, with the move to touch screens, this becomes very natural."



RAVEL VISUAL: Enter a search query and you get the standard list of matching cases on the right side of your screen. On the left side is a cluster map. Photo of Daniel Lewis by Tony Avelar.

With these smaller legal re-search companies developing data visualization tools, can the big three—Westlaw, LexisNexis and Bloomberg Law—be far behind?

Well, maybe. The goliaths of legal research may be limited in their ability to present their data in visual forms. The limits result from the sheer vastness of their data and the structures of the systems in which they house it all.

BEYOND THE BIGGIES

Summit, N.J., lawyer and computer programmer John M. Miano worked for LexisNexis as a research scientist from 2011 to 2013. After leaving LexisNexis, and frustrated with what he sees as a lack of innovation in legal research systems, he began producing a series of videos outlining his vision of the legal research system of the future. One of Miano's core criticisms of the established platforms is their collective failure to account for the visual aspect of communicating information.

"If you look at *Moore's Federal Practice* in print, it will discuss a point of law, and then below that discussion you'll see a formatted table displaying how each jurisdiction treats that point of law," Miano explains. "Look at the same point online and all the graphical stuff is obliterated. As long as [the developers of these platforms] get this information up as text, that's all they care about."

One of his videos argues that in the future, text will be displayed with typeset quality, appearing much as it would in print. "I have to believe that if someone were to build a legal research system today and had never seen Lexis and Westlaw, that such a new system wouldn't look like anything that's on the market now."

Westlaw and LexisNexis are hampered in developing visual tools by the structures and size of their databases and the constraints of their browser-based interfaces, Miano believes. While it is relatively simple for a small platform such as Ravel, with a limited library, to plot relationships among cases, it would be much more difficult to do for Westlaw or LexisNexis.

Marty Kilmer, vice president of product platforms at LexisNexis, says the challenge for a company such as his is to find a way to make visualizations practical and useful. It is an issue his company is actively researching, he says.

"Visualization is not an end point; it is a directional tool to help people get to where they need to be," Kilmer says. "We struggle with developing the ability to display visualizations of large amounts of information in a way that makes them usable."



Joseph Breda: "Data visualization is "baked into the DNA of" Bloomberg Law, though "we're also careful not to lean on it for pure aesthetics." Photo by Arnie Adler.

Although Lexis has not brought visualization tools to its case law research platform, it has developed several tools that are more focused. For example, its Shepard's Graphical product works with its Shepard's Citations Service to show a case's citation history in either a visual map or grid format. In map view, Shepard's Graphical displays the prior and subsequent appellate history of a case. In grid view, the product shows a breakdown of citation history either by jurisdiction or date.

Another LexisNexis product, the Verdict & Settlement Analyzer, uses dynamic charts and graphs to help lawyers navigate verdict and settlement data and zero in on the most relevant results. Search results are displayed using graphics that show a variety of information about cases, including types of case, verdict and settlement amounts, trends over time, and types of outcomes.

The Verdict & Settlement Analyzer and a similar product, the MedMal Navigator, are representative of how LexisNexis will use visualization tools at least for the near future. But at the same time, Kilmer says, visualization tools are not something customers are clamoring for.

"We have a very conservative market," he says. "Sometimes we have to put things out there and help them understand how it can be useful."

Thomson Reuters also has not incorporated visualization tools into case law research. However, in February it integrated its public records search tool, PeopleMap, into WestlawNext, and with that came new visualization features. PeopleMap draws out the connections about people,

businesses and public records, providing an at-a-glance overview of a search subject's networks and relationships.

People Map also brings address mapping to WestlawNext, using Google Maps. Once you find the person or business you are interested in, you can call up a map view without leaving WestlawNext. There you can see the address location and even use Google Streetview to get a picture of the address. This lets users see the kind of place someone lives in or the neighborhood in which a business is located, for example.

For the newest of the big three, Bloomberg Law, which launched in December 2009 out of the Bloomberg financial news network, data visualization is "baked into the DNA of the company," says Joseph Breda, executive vice president of products for Bloomberg BNA. The classic Bloomberg terminal used graphs to help financial decision-makers quickly assess large quantities of numerical data.

In Bloomberg Law, visualizations are used selectively when they can help present information to the user. "But we're also careful not to lean on it for pure aesthetics," Breda says.

One example is Bloomberg's Docket Analytics tool. Search for a company and you get a pie chart showing its litigation profile by types of cases. This lets you see at a glance that a company is engaged in a substantial percentage of asbestos litigation or securities matters. Another example is a tool that overlays news and events across a chart of a company's stock performance. Click on any point along the chart—where a stock drops in value, for instance—to see news and events from that date.

FUTURE VIEW

Three years after first imagining a better legal research platform, Ravel's Lewis believes lawyers need no help understanding the usefulness of his visual platform. Although visualization tools can walk a fine line between gimmick and glitter, he says Ravel has established itself firmly on the middle ground of useful and intuitive.

That is not to say that visuals will ever replace text-based research entirely. "The law is text-heavy, so there will always have to be an interplay between text and visuals," Lewis says. "We're trying to figure out the right balance for combining those elements."

But he believes increasingly sophisticated visualization technology will enable Ravel to evolve from an exploratory tool to an explanatory one. Rather than simply allow users to explore the connections among cases, he explains, Ravel would help reveal the story or theme that connects them.

"We're looking at how we can group cases in a way that tells the story. If you're interested in the rules about abortion, let's start with *Roe v. Wade* and then track the elements of that over time.

"We want to help build visualizations that function like dynamically created infographics to help people see the stories in their search results."

Crazy or on to something? The answer, at least for visual law broadly, seems clear as day.

This article originally appeared in the May 2014 issue of the ABA Journal with this headline: "Vision Quest: Visual law services are worth a thousand words--and big money."

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Taking on the Big Three Legal Research Providers

Ross Todd, The American Lawyer

August 11, 2014

Few segments of the legal industry are poised for disruption quite like research—a market long dominated by Thomson Reuters Corporation's Westlaw and Reed Elsevier Group plc's LexisNexis. Even though Lexis and Westlaw bills can run into the millions of dollars at large law firms, the big two have had few viable down-market challengers. The barriers to entry in the field are high. New companies serving the legal sector have to be prepared for a market that changes incrementally and expects comprehensiveness and quality, says David Perla, a venture capitalist at 1991 Ventures. "More than any other profession, lawyers can't be wrong," he says.

The challenges of developing a new research product haven't kept out all newcomers, though. One company that's anted up is Fastcase, a legal research service that since 1999 has built a web-based library of primary legal materials: state and federal statutes and cases. Founders Ed Walters and Phil Rosenthal came up with the idea when they were associates at Covington & Burling in the late 1990s. A Fortune 5 client asked them to find which cases were available for free on the Internet. "We don't pay to put the books on your shelves," Walters recalls the client saying. "That's your overhead. Why are we paying for Lexis and Westlaw?" (The sentiment is even stronger today: According to the The American Lawyer's most recent Law Librarian Survey, 72 percent of respondents said this year they're recouping fewer online research costs than they were a year earlier ["Beyond Recovery," July 2014].

Even at that time, the amount of material publicly and freely available surprised Walters and Rosenthal. The pair left the firm to create a new resource stripped of the secondary material—legal treatises, law review articles, and editorial content—that contribute to the cost of Lexis and Westlaw.

Since Fastcase's founding coincided with the dot-com crash, it took time to find funding. But since its product launched in 2003, Fastcase has expanded from serving fewer than 1,000 users to more than 800,000. The vast majority—nearly 500,000—have signed on since late 2007.

Although the service costs \$995 per year for an individual subscriber, most Fastcase users gain access via state bar associations. Twenty-eight state bars offer Fastcase access as part of membership. But with a quarter of Am Law 100 firms now using Fastcase, large law firms are the company's fastest growing market segment.

"The mortgage crisis was really a catalyst for the biggest firms in the country to change their approach to research," Walters says.

Scott Bailey, the director of research services at Squire Patton Boggs, says that legacy firm Squire Sanders has used Fastcase for about two years. The firm's research staff has access, as well as the pro bono practice headed up by of counsel George Kendall.

"If you're really just looking at case law, there's no reason not to use Fastcase primarily," Bailey says. "Having Fastcase as an alternative helps the firm's bottom line. More importantly it helps the bottom line of our clients."

Disrupters aren't immune from disruption, though. Fastcase has upstart competition of its own. Ravel Law, a legal research startup founded by Stanford Law School graduates Daniel Lewis and Nik Reed, raised \$8.1 million in venture capital funding in February.

Both Ravel Law founders spent a summer working as an associate in tech-focused law firms: Lewis at Cooley and Reed at Gunderson Dettmer Stough Villeneuve Franklin & Hachigian. But rather than practice law, the pair opted to found a startup focused on serving the legal market. They developed the first version of Ravel Law (pronounced RAV-ul, meant to suggest the detangling of law) as part of the Launchpad course at Stanford's Institute of Design, a multidisciplinary class meant to help students pursuing ideas for startup businesses. (Notable alumni include the founders of the Pulse newsreader app which was purchased by LinkedIn for about \$90 million in stock and cash in April 2013.)

Lewis was surprised during his summer at Cooley to see that the legal research tools he had at his disposal were similar to those he remembered seeing in his dad's law office decades earlier. What Ravel's 14-person team has built is essentially a visual version of a legal search engine.

After plugging in keywords, a user is presented with a visual representation of 75 cases that Ravel Law's algorithm finds most relevant. Those cases are represented by circles plotted along a timeline, with larger circles representing the cases cited most often. Citations are represented by lines connecting circles, with the thickness of the lines indicating the depth of each citation. Scrolling over the circles allows the user to bring up the text of an individual case. Once a case's page is open, a sidebar shows text from citing cases.

Individual Ravel Law subscriptions are priced around \$100 per month. Lewis estimates that lawyers at one-third of Am Law 100 firms are using Ravel.

Robert Taylor, an intellectual property consultant in San Francisco who was previously senior counsel at Arnold & Porter, vetted the service for New Enterprise Associates, one of its primary funders. Taylor says the service could be particularly attractive to the latest generation of associates, who have grown up with computers. "They're able to use a computer the same way that we used a pencil," Taylor says. "This is how they think of the world."

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Wave of start-ups tackle legal research

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Judicata isn't trying to knock out legal research giants Lexis and Westlaw—at least not yet. But the team of lawyers and engineers behind the San Francisco start-up certainly sees room to improve on their services.

Since early 2012, Judicata has been building technology to bring Google-like searchability and a user-friendly interface to the tedious—but essential—task of legal research.

The venture-backed company is part of a constellation of young businesses which are trying to modernize the practice of law with new ways of collecting, organizing, analyzing and displaying legal information.

The emerging crop of companies is driven in part by client demands for cost control and for data-based decisionmaking—and the hope of breaking into the \$20 billion legal research market dominated by Westlaw and Lexis Nexis.

The new wave of startups share a broad interest in making legal information more open and transparent. Beyond that, the companies tend to break down into two categories. Some, including Judicata, are primarily trying to bring smarter technology and intuitive interfaces to traditional legal research, while others, like Stanford University spin-off Lex Machina, are working to amass large collections of data on filings and dispositions that can be mined for patterns and actionable information.

"Conditions in the legal information and technology markets are perfect for start-up market disruptors that are not held back by old coding languages, expensive pricing structures and large overheads," said Hugh Logue, an analyst who covers legal research and publishing at research and advisory firm Outsell Inc.

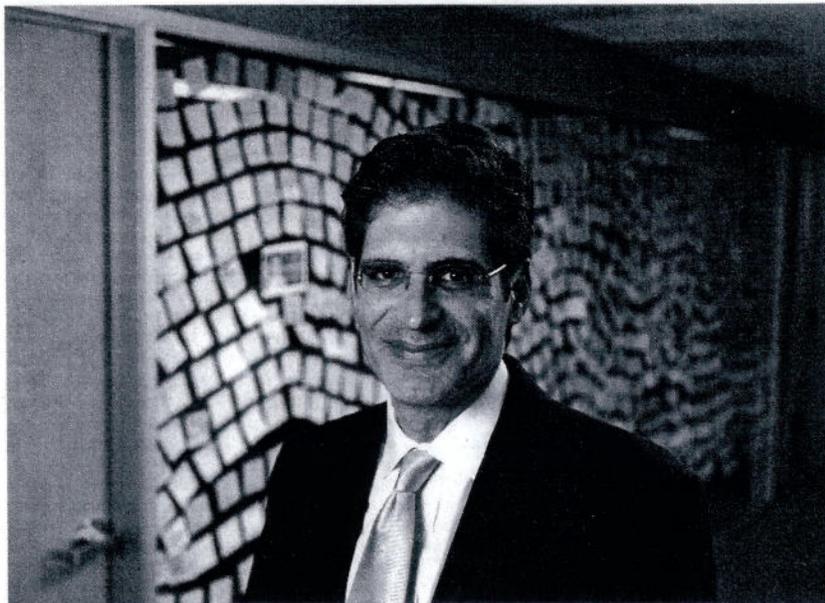
"At the same time," Logue added, "this is a complex market and success requires substantial investment, experience, and years of development."

Judicata's founders—including CEO Itai Gurari, a Jones Day lawyer turned software engineer—think they have the right formula.

For the last year, a team of engineers with experience at Google and AdaptTV have been working with lawyers to identify and map legal data. The approach mirrors what companies like Amazon or Zappos do with their inventory so that customers searching for a book or pair of boots are directed only to relevant products.

"If you're paying a lawyer, you want them to lawyer and not spend time fact gathering," said Judicata cofounder Blake Masters, who graduated last year from Stanford Law School. "And if you're the lawyer, you don't want to spend time fact gathering either."

The ultimate goal is to enable attorneys to "search in a really precise, targeted way," he said. "We



GOING DEEP: Josh Becker heads Lex Machina, the Stanford spin-off that mines patent filings so users can analyze outcomes and costs associated with specific issues.

basically prepopulate every search out there and give the lawyer the result for that." Judicata plans to roll out a beta-test product on California employment law to attorneys in the Bay Area in December.

The fledgling company has already attracted \$8 million in funding from some notable investors in the Valley. Among its backers are PayPal co-founder Peter Thiel; Box cofounders Aaron Levie and Dylan Smith; and Keith Rabois, known for his early-stage investments at PayPal, LinkedIn and Square.

Gurari, a former engineer for Google Scholar, said the company plans to expand its coverage to other areas of law and eventually hopes to build tools that offer actionable insights and help practitioners craft arguments. He calls Judicata a "supplement" to the offerings of Lexis and Westlaw—but also has a subtle dig for the market leaders.

"We're not going to replace them anytime soon, maybe never," he said. "But at the same time, we're recreating legal research in the 21st century rather than relying on something that was done 140 years ago."

ESTABLISHED PLAYERS

Westlaw can trace its roots in legal research back to the mid-1800s; Lexis Nexis has been around since the 1970s. Bloomberg Law made its play in 2010, of-

fering a web-based product that's modeled after the company's flagship data-and-research terminals relied on by finance professionals. These titans offer comprehensive content as well as a suite of research and productivity tools.

'The legal research space is stale. I was a lawyer about eight years ago and the tools in the space are basically the same.'

DAVID TISCH
Box Group

But while the established players continually update their offerings and come up with new ways to leverage vast collections of information, they hardly move at Internet speed. As David Tisch, founder of the seed-stage venture firm BoxGroup, puts it: "The legal research space is stale. I was a lawyer about eight years ago and the tools in the space are basically the

same."

Law firm librarians and researchers say lawyers are interested in exploring the new products, particularly if they seem to offer a competitive edge. However, for now it's unclear if the newcomers meet the need for a more efficient, less expensive research product—or merely fill a niche.

John DiGilio, national manager of research services at Reed Smith, said five years after the economic collapse, the legal industry is still feeling the pressure to economize and considering "how to get more done with less people or more efficiently." Clients remain reluctant to subsidize law firms' research budgets, and may balk at pursuing cases without evidence, in the form of hard data, that they're likely to win.

Camille Reynolds, director of risk management and information services at Fenwick & West, said, "Clients overall are pushing back on cost, not necessarily that they want lower cost, but that they want predictability and the way legal research is rolled out is often something that clients do push back on."

Miriam Rivera, cofounder of Ulu Ventures and former deputy general counsel at Google, agrees. She says the lack of understanding about "whether your expenses are going to have an impact on achieving particular goals is not a sustainable practice" for in-house at-

torneys.

Ulu Ventures and several other investors have poured \$10 million into Lex Machina, a platform that takes a Big Data approach to IP litigation. The company, which originated as a public interest project at Stanford University in 2006, has aggregated vast amounts of information publicly available through the federal court's PACER system into a mega-database. The product is pitched to in-house lawyers as a way to research outside counsel and analyze the cost and likelihood of success on particular issues. For law firms, the sell is information that can be used to pitch new clients and strategize about cases.

When Rivera joined the board of the Menlo Park-based company, she said, "If I was at Google today, I would be using the type of data Lex Machina can deliver to select and manage outside counsel, and I would want all my outside law firms to be using it."

Lex Machina's CEO, Josh Becker, said its services have spread "organically" and the company recently added a sales representative in New York. At the American Intellectual Property Law Association's annual meeting last month, the group's president elect announced a partnership with Lex Machina to a crowd of about 2,000 IP attorneys, according to Becker.

ON THE CUTTING EDGE

Marty Kilmer, vice president of product platforms at LexisNexis, said his company is not ignoring the push for more analytical tools and capabilities. Those services, he said, are "front and center of virtually all of our conversations with influential law firms and legal departments that are on the cutting edge of legal technology."

Westlaw representatives were not immediately available to comment.

Reed Smith's Digilio said his firm has enterprise agreements with both Lexis Nexis and Westlaw, is "dabbling" in Bloomberg Law and has a few licenses for Lex Machina. He said his attorneys have been asking about the specialized, analytical products offered by the younger vendors. "Established vendors are doing what they've done for so long, they provide all of this information and there's a place for that," he said. "But there's also time and place for something that's far more precise, far more contextual."

Nicholas Wagoner, an Austin employment lawyer and coauthor of "Lawyer in the Shadow of Data," said that for now, a more quantitative approach to lawyering is "very much at the fringe," but expects it will "creep up into the mainstream of the profession" as younger lawyers adopt the relevant tools.

Rivera of Ulu Ventures agreed that a generational shift is driving innovation. "There's a big wave of young people saying we don't want to practice law the way that it has been practiced," she said.

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COMPANY	FOUNDED	HQ	WHAT IS IT?
Ravel Law	2012	Palo Alto	Legal search and analytics with visualization
Judicata	2012	San Francisco	A Google-like search engine with an intuitive interface
Lex Machina	2009	Menlo Park	A data crunching tool for IP litigators
Casetext	2013	Sunnyvale	Case law annotated through crowdsourcing
AssistMyCase	2013	San Francisco	Applies predictive analysis to commercial litigation

RESEARCH

Continued from page 1

This shift is not only driving the demand for professional products that are user friendly and intuitive, like those attorneys use in the personal lives, but it may also be inspiring a push for greater accessibility.

"There's a feeling that access to the law shouldn't be behind a paywall," said Jacob Heller, a former litigation associate at Ropes & Gray and founder of Casetext, a platform that is crowdsourcing case annotation. Unlike the research giants that have hundreds of attorneys and legal experts on staff to provide editorial content on cases, Casetext offers a community-based approach, similar to Wikipedia. Since its launch from seed accelerator Y-Combinator in 2013, the company has raised \$1.5 million, including funding from Ashton Kutcher.

Nathaniel Cooper, a litigation associate at Cooley, said he starts his research with Ravel Law, a Cooley-backed search and visualization platform built on information that's publicly available. "If I'm trying to do it quickly or cheaply, I'll try to go to [free] services to get started," he said.

Ravel Law's CEO and cofounder, Daniel Lewis, a Stanford Law grad, said, "The cur-

rent research tools still require a lot of intelligence behind the wheel, a lot of thinking as you craft and refine your searches." Ravel Law's beta product offers a single search box and allows users to use natural language as they would in Google, he said.

Fenwick's Reynolds said that the proliferation of legal research tools has led to "a bit of tool fatigue in the market overall." Moreover, cost cutting isn't always achieved through the adoption of a cheaper research product, she added. "Sometimes," she said, "the soft cost of switching to a cheaper tool ends up costing more in the long run in terms of behavior change required and training."

Additionally, lawyers can't afford to miss key cases. "When you're in the midst of a very large deal, you need a service that has 100 percent of the content and provides 100 percent assurance that there aren't gaps in the search," said Anne Stemler, director of research and knowledge services at Goodwin Procter.

Ron Dolin, an investor in Ravel Law who teaches a course at Stanford on legal technology and informatics, predicts radical change is still to come. "I don't think it's going to be five years, but certainly less than 10," he said. "As soon as any of these new systems have a full database of full coverage behind them."