

# AGENDA

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

### REGULAR BOARD MEETING

*Tuesday, January 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.



**CALL TO ORDER**

**1.0 PUBLIC COMMENT**

**2.0 PRESIDENT'S REPORT**

**3.0 CONSENT CALENDAR**

- 3.1 Minutes of the December 17, 2013, Regular Board Meeting.
- 3.2 November 2013 Financials & December 2013 List of Checks and Warrants.
- 3.3 2013 Annual Law Library Statistics.
- 3.4 Quarterly Strategic Planning Update.
- 3.5 Update of Law Library Position Descriptions

**4.0 DISCUSSION ITEMS**

- 4.1 Approval of OPEB Prepayment as Recommended by Board Subcommittee.
- 4.2 FY14 Mid-Year Budget Review and Forecast.
- 4.3 Approval of Law Library Organizational Restructure.
- 4.4 E-Branch Demonstration.

**5.0 CLOSED SESSION**

- 5.1 Conference with Labor Negotiator (G.C. 54957.6).  
*Library Negotiators:* Sandra J. Levin and Jaye Steinbrick;  
*Employee Organization:* SEIU Local 721.

**6.0 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.

**7.0 EXECUTIVE DIRECTOR REPORT**

**8.0 ADJOURNMENT**

The next Regular Meeting of the Board of Law Library Trustees is scheduled for Tuesday, February 25, 2014.

POSTED FRIDAY, JANUARY 24, 2014 @ 12:00 P.M.

POSTED BY EUSTORGIO BARAJAS



# AGENDA ITEM 3

## CONSENT CALENDAR

- 3.1 Minutes of the December 17, 2013, Regular Board Meeting.
- 3.2 November 2013 Financials & December 2013 List of Checks and Warrants.
- 3.3 2013 Annual Law Library Statistics.
- 3.4 Quarterly Strategic Planning Update.
- 3.5 Update of Law Library Position Descriptions



**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.**

**December 17, 2013**

The Regular Board Meeting of the Board of Law Library Trustees of Los Angeles County was held on Tuesday, December 17, 2013 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 Reva Goetz  
Judge Ann Jones  
Judge Mark Juhas  
Kenneth Klein, Esquire  
Susan Steinhauser

**Trustees Absent:**

Judge Lee Smalley Edmon

**Senior Staff Present:**

Sandra J. Levin, Executive Director  
Patrick O'Leary, Senior Director, Administrative Services  
Jaye Steinbrick, Senior Director, Information Services

**Also Present:**

Malinda Muller, Director, Programs & Partnerships  
Ryan Metheny, Librarian, Programs & Partnerships

President Steinhauser determined a quorum to be present, convened the meeting at 12:19 p.m. and thereafter presided. Executive Director, Sandra Levin recorded the Minutes.

**1.0 PUBLIC COMMENT**

During the three (3) minutes allocated, Mr. Wasserman commented on the Members Program and how his firm benefits, he questioned what the cost would be and expressed concern that it might be prohibitive.. Mr. Wasserman asked for the Board to consider all

impacts prior to approving the recommendation to revise the Members Program; re Agenda Item 4.2.

During the five (5) minutes allocated, Mr. Lee Paradise commented on the Law Library's accounting and hiring practices. Mr. Paradise also commented on his complaint to the grand jury for investigation of the LA Law Library. Mr. Paradise concluded his comment with a suggestion for the Board to open Agenda Building to the Public.

## **2.0 PRESIDENT'S REPORT**

There was no President's Report.

## **3.0 CONSENT CALENDAR**

- 3.1 Minutes of the November 19, 2013, Regular Board Meeting.
- 3.2 October 2013 Financials & November 2013 List of Checks and Warrants.
- 3.3 Approval of Revised Charge for Delivery of Materials.  
Staff recommended that the Board adopt the revised charge for overnight delivery of Law Library materials.

President Steinhauser requested a motion to approve the Consent Calendar. So moved by Trustee Jones and seconded by Trustee Juhas, the Consent Calendar was unanimously approved, 6-0.

## **4.0 DISCUSSION ITEMS**

*Per the President's prerogative, Steinhauser took up Agenda Item 4.2 prior to Agenda Item 4.1 in order to address comments made during Public Comment.*

- 4.2 Approval of Revised Members Program Borrowing Rules.

*At this time, Malinda Muller and Ryan Metheny joined the table.*

Staff recommended the Board approve the revised Members Program Borrowing Rules and Borrowing Fees and Deposits.

Following discussion, President Steinhauser requested a motion to approve the revised Members Program Borrowing Rules and Borrowing Fees and Deposits. So moved by Trustee Jones and seconded by Trustee Goetz, the motion was so unanimously approved, 6-0.

- 4.1 Approval of Establishment of a California Employers' Retirement Benefit Trust Program and Investment in State and Federal Bonds.

*At this time, Patrick O'Leary joined the table.*

Staff made two recommendations to the Board regarding Agenda Item 4.1:

CERBT: Staff recommended the Board enter into an agreement with the CalPERS Board CERBT with an initial contribution of \$2 million. A sample of the CERBT agreement was enclosed for the Board to review.

Bonds: Staff recommended the Board authorize the Executive Director to acquire a AA or better rated bond portfolio up to 70% of the Law Library's remaining cash surplus (about \$4.9 million).

Following discussion, President Steinhauser asked that last year's Budget Committee review Agenda Item 4.1, further examine all opportunities and bring report back with a recommendation no later than three (3) months. There was no further action taken.

## **6.0 EXECUTIVE DIRECTOR REPORT**

ED Levin reported back to the Board on a previous Agenda Building effort. LA Law Library has begun to collaborate on a state-wide level via a trial project with the CCCLL on a number of workshops and events that will occur during Law Week. Additionally, ED Levin updated the Board on the draft Bill regarding Law Library revenues now circulating for comment in the Legislature.

*At this time, President Steinhauser announced the Board would move in to Closed Session, Agenda Item 5.0. All members of the public and staff vacated the room.*

## **5.0 CLOSED SESSION**

5.1 Personnel (G.C. 54957). Public Employment. Title(s): Head of Cataloging; and Library Technician, Serials and Acquisitions.

5.2 Conference with Labor Negotiator (G.C. 54957.6). *Library Negotiator: Patrick O'Leary and Sandra J. Levin; Employee Organization: SEIU Local 721.*

The Board reconvened Open Session at 1:28 p.m. There was no reportable action.

## **5.0 AGENDA BUILDING**

There were no items for Agenda Building.

## **7.0 ADJOURNMENT**

There being no further business to come before the Board, the meeting was at 1:28 p.m. The next Regular Meeting of the Board of Law Library Trustees is scheduled for Tuesday, January 28, 2014.

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



# Los Angeles Law Library

## Balance Sheet

As of November 30, 2013

(Provisional and subject to year-end audit adjustments)

	6/30/2013	11/30/2013	Change
<b>Assets</b>			
Current Assets			
Cash and cash equivalents	8,626,122	9,537,277	911,155
Accounts receivable	1,497,101	1,524,884	27,783
Prepaid expenses	399,474	260,210	(139,264)
Total current assets	10,522,697	11,322,370	799,673
Restricted cash and cash equivalents	261,139	293,663	32,524
Capital assets, not being depreciated	580,333	580,333	-
Capital assets, being depreciated - net	23,462,542	22,641,906	(820,636)
Total assets	<b>34,826,711</b>	<b>34,838,272</b>	<b>11,561</b>
<b>Liabilities and Net Assets</b>			
Current Liabilities			
Accounts payable	233,134	233,151	16
Other liabilities	11,218	712	(10,506)
Payroll liabilities	28,627	27,033	(1,594)
Total current liabilities	272,980	260,896	(12,084)
Accrued sick and vacation liability	420,789	420,789	-
Borrowers' deposit	290,942	302,980	12,037
OPEB obligation	1,740,966	1,876,383	135,417
Total liabilities	<b>2,725,677</b>	<b>2,861,047</b>	<b>135,370</b>
Net assets			
Invested in capital assets, net of related debt	24,042,875	23,222,239	(820,636)
Unrestricted	8,058,158	8,754,986	696,828
Total net assets	<b>32,101,034</b>	<b>31,977,225</b>	<b>(123,809)</b>

**Los Angeles Law Library**  
Income Statement for the Period Ended November 30, 2013  
(Provisional and subject to year-end audit adjustments)

Nov 12 Actual	Nov 2013				FY 2012-13 YTD	FY 2013-14 YTD					Comments
	Budget	Actual	\$ Fav (Unf)	% Fav (Unf)		Budget	Actual	\$ Fav (Unf)	% Fav (Unf)		
<b>Income</b>											
707,108	690,137	629,648	-60,489	-8.8%	L.A. Superior Court Fees	3,379,315	3,298,210	3,126,204	-172,006	-5.2%	
5,043	4,842	4,015	-827	-17.1%	Interest	31,348	24,810	20,497	-4,313	-17.4%	
49,774	46,252	43,750	-2,502	-5.4%	Parking	235,593	235,064	288,665	53,601	22.8%	
139,447	205,212	158,519	-51,693	-25.2%	Library Services	240,932	320,804	330,371	9,567	3.0%	
901,372	946,443	835,932	-115,511	-12.2%	Total Income	3,887,188	3,878,889	3,765,738	-113,151	-2.9%	
<b>Expense</b>											
448,813	459,767	438,905	20,862	4.5%	Staff	1,796,914	1,766,624	1,763,002	3,622	0.2%	
324,981	623,170	188,286	434,884	69.8%	Library Materials	1,061,365	1,536,287	744,369	791,917	51.5%	
-324,981	-623,170	-188,286	-434,884	69.8%	Lib Materials Transferred to Assets	-1,061,365	-1,536,287	-744,369	-791,917	51.5%	
63,419	73,330	62,150	11,180	15.2%	Facilities	338,247	358,311	312,898	45,413	12.7%	
10,361	7,753	8,614	-861	-11.1%	Technology & Data	51,411	69,650	42,855	26,794	38.5%	
8,744	8,692	11,956	-3,264	-37.5%	General	41,667	45,579	41,262	4,317	9.5%	
1,371	800	444	356	44.5%	Professional Development	19,827	7,955	5,802	2,153	27.1%	
2,122	2,792	500	2,292	82.1%	Communications & Marketing	16,552	22,458	2,725	19,733	87.9%	
176	300	191	109	36.4%	Travel & Entertainment	2,045	1,700	603	1,097	64.5%	
10,958	2,917	0	2,917	100.0%	Professional Services	49,894	22,458	19,978	2,481	11.0%	
313,961	266,105	275,384	-9,279	-3.5%	Depreciation	1,551,349	1,330,663	1,378,599	-47,936	-3.6%	
859,924	822,456	798,144	24,312	3.0%	Total Expenses	3,867,904	3,625,398	3,567,723	57,675	1.6%	
41,448	123,988	37,788	-86,199	-69.5%	<b>Net Income</b>	19,284	253,491	198,015	-55,476	-21.9%	
0	0	0	0	0.0%	Extraordinary Income	0	0	0	0	0.0%	
9,514	0	0	0	0.0%	Extraordinary Expense	38,874	220,651	186,407	34,244	15.5%	
0	24,332	27,083	-2,752	-11.3%	OPEB Expense	97,326	132,664	135,417	-2,752	-2.1%	
31,934	99,656	10,705	-88,951	-89.3%	<b>Net Income (Loss) Including Extraordinary Items</b>	-116,916	-99,825	-123,809	23,984	24.0%	
9,451	99,500	0	99,500	100.0%	<b>Capitalized Expenditures</b>	41,134	304,400	0	304,400	100.0%	
NA	54.62	48.69	5.93	10.9%	<b>Full-Time Equivalent Employees</b>	NA	54.02	50.74	3.27	6.1%	

**Los Angeles Law Library**  
Income Statement for the Period Ended November 30, 2013  
(Provisional and subject to year-end audit adjustments)

Nov 12 Actual	Nov 2013				FY 2012-13 YTD	FY 2013-14 YTD					Comments		
	Budget	Actual	\$ Fav (Unf)	% Fav (Unf)		Budget	Actual	\$ Fav (Unf)	% Fav (Unf)				
<b>Detailed Budget:</b>													
<b>Income:</b>													
707,108	690,137	629,648	-60,489	-8.8%	15 ACC	303300	L.A. Superior Court Fees	3,379,315	3,298,210	3,126,204	-172,006	-5.2%	Based on the most recent revenue information from the Superior Court, Staff expects fee revenue will fall about 5% below budget or about \$400k.
Interest:													
0	0	0	0	0.0%	15 ACC	311000	LAIF	1,190	600	865	265	44.1%	
4,898	4,680	3,866	-814	-17.4%	15 ACC	312000	General Fund	29,373	23,400	18,916	-4,484	-19.2%	The budget assumed an annual investment return of .7%. Actual return thus far has been about .61%. The rate should increase during the year as U.S. interest rates rise or as other investment options are selected.
145	162	149	-13	-7.9%	15 ACC	313000	Deposit Fund	785	810	716	-94	-11.6%	
5,043	4,842	4,015	-827	-17.1%			Subtotal	31,348	24,810	20,497	-4,313	-17.4%	
Parking:													
49,774	45,002	43,750	-1,252	-2.8%	39 FAC	330100	Parking	235,593	228,814	288,665	59,851	26.2%	The favorable variance resulted from a) a restructured vendor agreement that now requires payment in advance, b) a conservative budget that understated the demand for hourly and daily parking and c) the implementation of valet parking for events.
0	1,250	0	-1,250	-100.0%	39 FAC	330200	Valet Parking	0	6,250	0	-6,250	-100.0%	
49,774	46,252	43,750	-2,502	-5.4%			Subtotal	235,593	235,064	288,665	53,601	22.8%	
Library Services:													
200	500	16	-484	-96.8%	27 CIRC	330150	Annual Borrowing Fee	5,200	2,500	2,844	344	13.8%	This account tracks the fee to delegate borrowing privileges to a messenger company. The decision earlier this year to drop the fee from \$50 to \$16.25 per transaction stimulated an increase in demand producing a favorable variance.
6,230	6,230	7,065	835	13.4%	25 P&P	330140	Annual Members Fee	34,627	34,627	39,795	5,168	14.9%	The favorable variance was likely caused by new borrowers from the LACBA campaign which started in October.
703	1,200	3,090	1,890	157.5%	23 R&R	330340	Course Registration	3,444	8,604	6,260	-2,344	-27.2%	It appears the budget was unrealistically optimistic; nevertheless, income remains significantly above the prior year to date, and should continue to improve.
5,198	4,750	5,565	815	17.2%	27 CIRC	330129	Copy Center	31,098	23,750	28,176	4,426	18.6%	Actual copy center charges have not declined as much as the budget assumed.
2,147	2,300	2,134	-166	-7.2%	27 CIRC	330205	Document Delivery	11,114	11,500	12,818	1,318	11.5%	Document delivery growth has exceeded plan.
3,969	4,200	261	-3,939	-93.8%	27 CIRC	330210	Fines	22,706	21,000	20,725	-275	-1.3%	An erroneous \$3.8k fine incurred by a large downtown law firm was corrected this month.
82	50,300	813	-49,487	-98.4%	13 ACC	330310	Miscellaneous	737	51,500	68,018	16,518	32.1%	The \$50k contractual payment by the Law Library Microform Consortium budgeted for this month was received and posted in Oct 2013. YTD, we are over budget primarily due to a \$12.7k CalPERS refund related to Medicare Part D prescription subsidies.
275	10,000	13,163	3,163	31.6%	27 COM	330330	Room Rental	7,325	30,000	15,757	-14,243	-47.5%	Although revenue has increased over prior year, the campaign to rent rooms is taking longer than expected to reach target.
246	246	1,057	811	329.7%	27 CIRC	330350	Book Replacement	2,095	2,095	4,315	2,220	106.0%	
0	0	0	0	0.0%	15 ACC	330360	Forfeited Deposits	0	2,800	0	-2,800	-100.0%	The harvesting of forfeited deposits will occur later this year.
120,000	120,000	120,000	0	0.0%	15 ACC	330400	Friends of Law Library	120,000	120,000	120,000	0	0.0%	
0	5,000	0	-5,000	-100.0%	37 COM	330420	Grants	0	10,000	0	-10,000	-100.0%	Grant applications are in process, but grant revenues are difficult to predict.
396	486	356	-129	-26.7%	15 ACC	330450	Vending	2,587	2,428	1,316	-1,113	-45.8%	
	0	5,000	5,000	0.0%	27 COM	330465	Special Events Income	0	0	10,348	10,348	0.0%	The favorable variance results from Pro Bono Week donations which were used to pay the event expenses.
139,447	205,212	158,519	-51,693	-25.2%			Subtotal	240,932	320,804	330,371	9,567	3.0%	
901,372	946,443	835,932	(115,511)	-12.2%			Total Income	3,887,188	3,878,889	3,765,738	-113,151	-2.9%	
<b>Expenses:</b>													
Staff													
352,641	308,776	301,326	7,451	2.4%	15 ALL	501000	Salaries (benefits eligible)	1,325,081	1,124,142	1,113,054	11,088	1.0%	
	36,287	34,403	1,885	5.2%	15 ALL	501050	Salaries (benefits ineligible)	0	134,576	126,467	8,110	6.0%	
18,849	21,394	17,295	4,098	19.2%	15 ACC	502000	Social Security	75,372	78,041	68,866	9,174	11.8%	
4,905	5,003	4,625	379	7.6%	15 ACC	503000	Medicare	18,452	18,251	17,043	1,209	6.6%	

**Los Angeles Law Library**  
Income Statement for the Period Ended November 30, 2013  
(Provisional and subject to year-end audit adjustments)

Nov 12 Actual	Nov 2013				FY 2012-13 YTD	FY 2013-14 YTD					Comments	
	Budget	Actual	\$ Fav (Unf)	% Fav (Unf)		Budget	Actual	\$ Fav (Unf)	% Fav (Unf)			
9,688	20,539	22,565	-2,026	-9.9%	15 ACC 511000	Retirement	48,440	76,009	114,604	-38,594	-50.8%	Unknown to the Law Library when the budget was approved, CalPERS recalculated the Library's retirement cost at 11.682% of qualified compensation compared with its original calculation of 7.26%. This will result in a \$131k adverse variance by EOY.
43,068	47,423	41,138	6,285	13.3%	15 ACC 512000	Health Insurance	223,607	241,344	229,500	11,843	4.9%	
284	360	444	-83	-23.2%	15 ACC 513000	Disability Insurance	578	1,818	2,027	-209	-11.5%	
4,089	5,400	4,445	955	17.7%	15 ACC 514000	Dental Insurance	25,102	27,000	25,100	1,900	7.0%	
700	852	579	274	32.1%	15 ACC 514500	Vision Insurance	3,753	4,274	3,545	729	17.1%	
86	136	73	63	46.1%	15 ACC 515000	Life Insurance	708	688	498	190	27.6%	
9,353	8,779	8,779	0	0.0%	15 ACC 516000	Workers Comp. Insurance	46,767	43,897	43,897	0	0.0%	
0	0	2,889	-2,889	0.0%	15 ACC 517000	Unemployment Insurance	8,400	0	6,725	-6,725	0.0%	
3,213	2,500	0	2,500	100.0%	25 P&P 514010	Temporary Employment	9,023	5,000	0	5,000	100.0%	
225	150	0	150	100.0%	13 HR 514015	Recruitment	742	750	2,198	-1,448	-193.1%	
0	0	0	0	0.0%	15 ACC 517500	Accrued Sick Expense	0	0	0	0	0.0%	
0	0	0	0	0.0%	15 ACC 518000	Accrued Vacation Expense	0	0	0	0	0.0%	
653	667	-904	1,571	235.6%	15 ACC 518550	TMP	2,960	3,333	1,909	1,425	42.7%	
1,057	1,500	1,249	251	16.7%	15 ACC 518560	Payroll & Benefit Admin.	7,928	7,500	7,569	-69	-0.9%	
448,813	459,767	438,905	20,862	4.5%		Total - Staff	1,796,914	1,766,624	1,763,002	3,622	0.2%	
						Library Materials:						
225,321	549,872	94,501	455,371	82.8%	23 R&R 601999	American Continuations	700,251	1,165,728	461,585	704,143	60.4%	The favorable variance is mostly a matter of timing The budget spread Library Materials costs evenly throughout the year whereas actual costs will likely be concentrated in certain months, particularly in November, February, and March.
3,355	8,248	10,342	-2,094	-25.4%	23 R&R 602999	American New Orders	28,157	41,240	37,651	3,590	8.7%	
8,624	4,674	880	3,794	81.2%	23 R&R 609199	Branch Continuations	34,530	23,370	5,495	17,875	76.5%	
0	110	0	110	100.0%	23 R&R 609299	Branch New Orders	0	550	172	378	68.7%	
36,739	29,143	16,244	12,899	44.3%	23 R&R 603999	Commonwealth Continuations	167,614	145,716	94,525	51,191	35.1%	
0	110	0	110	100.0%	23 R&R 604999	Commonwealth New Orders	492	1,870	0	1,870	100.0%	
19,527	16,496	42,504	-26,008	-157.7%	23 R&R 605999	Foreign Continuations	58,153	82,481	76,253	6,228	7.6%	
195	1,650	737	913	55.3%	23 R&R 606999	Foreign New Orders	2,339	9,898	4,498	5,400	54.6%	
20,645	9,348	11,136	-1,788	-19.1%	23 R&R 607999	International Continuations	50,620	46,739	44,656	2,083	4.5%	
877	550	754	-204	-37.2%	23 R&R 608999	International New Orders	3,051	3,849	3,217	632	16.4%	
9,698	2,749	11,165	-8,416	-306.1%	23 R&R 609399	General/Librarianship	15,514	13,747	15,529	-1,783	-13.0%	
0	220	22	197	89.8%	23 R&R 609499	General/Librarianship New Orders	644	1,100	789	310	28.2%	
324,981	623,170	188,286	434,884	69.8%		Subtotal	1,061,365	1,536,287	744,369	791,917	51.5%	
-324,981	(623,170)	-188,286	-434,884	69.8%	15 ACC 690000	Lib Materials Transferred to Assets	-1,061,365	-1,536,287	-744,369	-791,917	51.5%	
0	0	0	0	0.0%		Facilities:						
1,782	1,454	2,417	-963	-66.2%	39 FAC 801005	Repair & Maintenance	16,328	11,543	12,951	-1,408	-12.2%	Unexpected repair/replacement of HVAC pulleys @ \$2,100.00.
747	1,527	596	931	61.0%	39 FAC 801010	Building Services	4,362	7,794	6,755	1,039	13.3%	
2,366	1,700	1,683	17	1.0%	39 FAC 801015	Cleaning Supplies	8,253	8,900	5,339	3,561	40.0%	
0	9,263	9,580	-317	-3.4%	39 FAC 801020	Electricity & Water	45,755	55,018	43,338	11,680	21.2%	Timing variance; bill processing was delayed by vendor.
1,226	1,200	1,247	-47	-3.9%	39 FAC 801025	Elevator Maintenance	6,129	6,000	6,234	-234	-3.9%	
3,511	3,500	2,485	1,015	29.0%	39 FAC 801030	Heating & Cooling	18,109	21,000	13,838	7,162	34.1%	Timing variance; bill processing was delayed.
22,777	22,550	20,621	1,929	8.6%	15 ACC 801035	Insurance	113,883	112,748	103,756	8,992	8.0%	
7,921	8,421	8,421	0	0.0%	39 FAC 801040	Janitorial Services	31,057	42,105	42,107	-2	0.0%	
0	1,200	1,050	150	12.5%	39 FAC 801045	Landscaping	0	6,000	5,250	750	12.5%	
16,132	21,131	14,049	7,081	33.5%	39 FAC 801050	Security	82,326	77,479	69,402	8,077	10.4%	
0	417	0	417	100.0%	39 FAC 801100	Furniture & Appliances (<3K)	0	2,083	19	2,065	99.1%	Few furniture requirements in first half of fiscal year.

**Los Angeles Law Library**  
 Income Statement for the Period Ended November 30, 2013  
 (Provisional and subject to year-end audit adjustments)

Nov 12 Actual	Nov 2013				FY 2012-13 YTD	FY 2013-14 YTD					Comments	
	Budget	Actual	\$ Fav (Unf)	% Fav (Unf)		Budget	Actual	\$ Fav (Unf)	% Fav (Unf)			
0	0	0	0	0.0%	39 FAC 801110	Equipment (<3K)	0	2,800	3,910	-1,110	-39.6%	Office supplies vending machine and replacement urinals in the public men's room.
6,958	968	0	968	100.0%	39 FAC 801115	Building Alterations (<3K)	12,044	4,840	0	4,840	100.0%	
63,419	73,330	62,150	11,180	15.2%		Subtotal	338,247	358,311	312,898	45,413	12.7%	
						Technology & Data:						
3,229	253	1,972	-1,719	-678.6%	33 IT 801210	Services	10,835	16,740	12,793	3,947	23.6%	The favorable variance is the result of timing and will be spent in December and January.
0	1,000	0	1,000	100.0%	33 IT 801215	Software (<\$3k)	0	13,450	693	12,757	94.8%	Planned upgrades were delayed due to staffing issues and competing projects. The upgrades will proceed in the next several months.
1,448	0	69	-69	0.0%	33 IT 801220	Hardware (<\$3k)	6,524	5,000	69	4,931	98.6%	Planned upgrades were delayed due to staffing issues and competing projects.
0	500	78	422	84.3%	33 IT 801225	Computer Supplies	0	1,000	147	853	85.3%	
3,456	3,500	3,560	-60	-1.7%	33 IT 801230	Integrated Library System	17,279	18,460	17,798	662	3.6%	
2,228	2,500	2,935	-435	-17.4%	33 IT 801235	Telecommunications	16,772	14,500	11,321	3,179	21.9%	
0	0	0	0	0.0%	33 IT 801245	Tech & Data - Misc	0	500	35	466	93.1%	
10,361	7,753	8,614	-861	-11.1%		Subtotal	51,411	69,650	42,855	26,794	38.5%	
						General:						
539	495	583	-88	-17.8%	15 ACC 801310	Bank Charges	2,742	2,475	2,581	-106	-4.3%	
636	710	1,282	-572	-80.6%	35 CMS 801315	Bibliographical Services	3,265	4,500	1,950	2,550	56.7%	The favorable variance is in part the result of timing which will be resolved by EOY and in part from OCLC credits earned from the Library's contribution of original cataloging data to the consortium, and interest earned from deposit account.
0	0	0	0	0.0%	35 CMS 801320	Binding	0	0	0	0	0.0%	
167	83	106	-23	-27.0%	15 ACC 801325	Board Expense	578	417	411	6	1.4%	
30	0	170	-170	0.0%	15 ACC 801330	Staff Meals & Events	267	1,200	880	320	26.7%	
2,403	833	761	73	8.7%	15 ACC 801335	Supplies - Office	11,590	4,167	6,074	-1,907	-45.8%	Increased toner purchase is pushing this account over budget year-to-date.
0	959	865	94	9.8%	35 CMS 801337	Supplies - Library materials	2,786	3,465	3,607	-142	-4.1%	
79	500	0	500	100.0%	37 COM 801340	Stationery & business cards	2,119	2,500	227	2,273	90.9%	The Law Library is printing stationery in-house thereby reducing outside printing costs.
2,241	833	338	496	59.5%	15 ACC 801345	Delivery & Postage	6,732	4,167	1,714	2,453	58.9%	Favorable variance reflects a decrease in shipments of briefs from the Cal. Ct. of App. and price discounts negotiated with UPS and GSO.
544	486	627	-141	-28.9%	15 ACC 801350	Kitchen supplies	3,181	2,730	1,863	867	31.7%	The favorable variance results from a decrease in ordering to draw down kitchen supplies.
0	0	1,219	-1,219	0.0%	37 COM 801355	Room Rental Expenses	0	0	2,775	-2,775	0.0%	
0	1,542	3,471	-1,929	-125.2%	37 COM 801360	Special Events Expenses	0	7,708	10,388	-2,679	-34.8%	Charges related to ProBono Week and the Legal Secretaries Lunch.
0	0	0	0	0.0%	37 COM 801365	Grant Application Expenses	0	1,000	0	1,000	100.0%	Possible grant opportunities for 2014 under review.
1,713	2,250	2,528	-278	-12.3%	39 IT 801370	Copy Center Expense	7,235	11,250	8,362	2,888	25.7%	Timing variance resulted from Konica Minolta's monthly billing being delayed.
393	0	7	-7	0.0%	15 ACC 801375	Miscellaneous	1,172	0	430	-430	0.0%	
8,744	8,692	11,956	-3,264	-37.5%		Subtotal	41,667	45,579	41,262	4,317	9.5%	
						Professional Development:						
675	0	15	-15	0.0%	ALL 803105	Travel	13,220	3,600	2,053	1,547	43.0%	Staff has been frugal with travel expenses
321	0	74	-74	0.0%	ALL 803110	Meals	554	0	74	-74	0.0%	
	0	0	0	0.0%	ALL 803113	Incidental and Misc.	0	255	0	255	100.0%	
365	0	200	-200	0.0%	ALL 803115	Membership dues	1,115	0	535	-535	0.0%	
	0	155	-155	0.0%	ALL 803120	Registration fees	4,908	2,500	3,140	-640	-25.6%	
10	800	0	800	100.0%	ALL 803125	Educational materials	30	1,600	0	1,600	100.0%	
1,371	800	444	356	44.5%		Subtotal	19,827	7,955	5,802	2,153	27.1%	
						Communications & Marketing:						
	1,000	0	1,000	100.0%	37 COM 803205	Services	0	7,000	0	7,000	100.0%	No outside servcies required at this time.
	500	0	500	100.0%	37 COM 803210	Collateral materials	0	7,000	0	7,000	100.0%	No collateral matierial printing required at this time.
	500	500	0	0.0%	37 COM 803215	Advertising	500	4,500	2,475	2,025	45.0%	Six program ads placed in publications for the library.

**Los Angeles Law Library**  
Income Statement for the Period Ended November 30, 2013  
(Provisional and subject to year-end audit adjustments)

Nov 12 Actual	Nov 2013				FY 2012-13 YTD	FY 2013-14 YTD					Comments	
	Budget	Actual	\$ Fav (Unf)	% Fav (Unf)		Budget	Actual	\$ Fav (Unf)	% Fav (Unf)			
2,122	792	0	792	100.0%	37 COM 803220	Trade shows & Outreach	16,052	3,958	250	3,708	93.7%	
2,122	2,792	500	2,292	82.1%		Subtotal	16,552	22,458	2,725	19,733	87.9%	
						Travel & Entertainment:						
0	0	6	-6	0.0%	ALL 803305	Travel	631	0	46	-46	0.0%	
0	0	0	0	0.0%	ALL 803310	Meals	348	0	0	0	0.0%	
0	0	0	0	0.0%	ALL 803315	Entertainment	0	0	0	0	0.0%	
176	300	185	115	38.4%	ALL 803320	Ground Transport.	1,066	1,500	557	943	62.9%	
0	0	0	0	0.0%	ALL 803325	Incidentals	0	200	0	200	100.0%	
176	300	191	109	36.4%		Subtotal	2,045	1,700	603	1,097	64.5%	
						Professional Services:						
0	0	0	0	0.0%	15 ACC 804005	Accounting	7,500	7,875	15,560	-7,685	-97.6%	Timing variance; Bazilio Cobb was scheduled to be paid its second installment in December.
0	417	0	417	100.0%	15 ACC 804008	Consulting Services	18,998	2,083	0	2,083	100.0%	
10,958	2,500	0	2,500	100.0%	17 EXEC 804010	Legal	23,396	12,500	4,418	8,082	64.7%	Staff has cut back on outside legal services using internal resources.
0	0	0	0	0.0%	17 EXEC 804015	Other	0	0	0	0	0.0%	
10,958	2,917	0	2,917	100.0%		Subtotal	49,894	22,458	19,978	2,481	11.0%	
						Depreciation:						
261,164	230,916	243,773	-12,857	-5.6%	15 ACC 806105	Library Materials	1,287,743	1,162,664	1,219,611	-56,947	-4.9%	Actual depreciation is higher than budget because of the delay in the write off of the Van Nuys and Compton donated titles and because the write off will be lower than we expected. We expect this variance to grow to about \$60K at EOY.
52,797	35,189	31,611	3,578	10.2%	15 ACC 806110	Fixed Assets	263,606	167,999	158,987	9,012	5.4%	
313,961	266,105	275,384	-9,279	-3.5%		Subtotal	1,551,349	1,330,663	1,378,599	-47,936	-3.6%	
859,924	822,456	798,144	24,312	3.0%		Total Expense	3,867,904	3,625,398	3,567,723	57,675	1.6%	
41,448	123,988	37,788	-86,199	-69.5%		<b>Net Income</b>	<b>19,284</b>	<b>253,491</b>	<b>198,015</b>	<b>-55,476</b>	<b>-21.9%</b>	
0	0	0	0	0.0%	17 EXEC	Extraordinary Income	0	0	0	0	0.0%	
9,514	0	0	0	0.0%	15 ACC	Extraordinary Expense	38,874	220,651	186,407	34,244	15.5%	The write-off of Van Nuys' and Compton's donated titles was delayed one month resulting in an unfavorable variance in October. The total write-off was slightly lower than budget.
	24,332	27,083	-2,752	-11.3%	15 ACC 518500	OPEB Expense	97,326	132,664	135,417	-2,752	-2.1%	
31,934	99,656	10,705	-88,951	-89.3%		<b>Net Income (Loss) Including Extraordinary Items</b>	<b>-116,916</b>	<b>-99,825</b>	<b>-123,809</b>	<b>23,984</b>	<b>24.0%</b>	
						<b>Capital Expenditures:</b>						
0	15,000	0	15,000	100.0%	39 FAC 161100	Furniture / Appliances (>3k)	0	97,500	0	97,500	100.0%	Scanner, book truck, security camera, and copier purchases were deferred to later in the year.
0	12,500	0	12,500	100.0%	33 IT 161300	Electronics / Comp. Hardware (>3k)	7,539	12,500	0	12,500	100.0%	Planned upgrades were delayed due to staffing issues and competing projects. The upgrades will proceed in the next several months.
0	0	0	0	0.0%	39 FAC 164500	Ext. Bldg. Repairs/Improvements (>3k)	0	12,400	0	12,400	100.0%	Floor repair was deferred to later in the year.
5,800	72,000	0	72,000	100.0%	39 FAC 164000	Interior Improvements / Alterations (>3k)	14,285	107,000	0	107,000	100.0%	
3,651	0	0	0	0.0%	33 IT 168000	Computer Software	19,311	75,000	0	75,000	100.0%	Planned upgrades were delayed due to staffing issues and competing projects. The upgrades will proceed in the next several months.
9,451	99,500	0	99,500	100.0%		Total - Capitalized Expenditures	41,134	304,400	0	304,400	100.0%	
NA	54.6	48.7	5.9	10.9%		<b>Full-Time Equivalent Employees</b>	<b>NA</b>	<b>54.0</b>	<b>50.7</b>	<b>3.3</b>	<b>6.1%</b>	

**Los Angeles Law Library**  
Statement of Cash Flows  
As of November 30, 2013  
(Provisional and subject to year-end audit adjustments)

	11/30/2013	YTD
<b>Cash flows from operating activities</b>		
LA Superior court fees	629,648	3,126,204
Parking fees	43,750	288,665
Library services	158,519	330,371
(Increase) decrease in accounts receivable	(10,973)	(27,783)
Increase (decrease) in borrowers' deposit	792	12,037
<b>Cash received from filing fees and services</b>	<b>821,736</b>	<b>3,729,496</b>
Facilities	(62,150)	(312,898)
Technology & data	(8,614)	(42,855)
General	(11,956)	(41,262)
Professional development	(444)	(5,802)
Communications & marketing	(500)	(2,725)
Travel & entertainment	(191)	(603)
Professional services	-	(19,978)
(Increase) decrease in prepaid expenses	47,932	139,264
Increase (decrease) in accounts payable	50,981	16
Increase (decrease) in other liabilities	-	(10,506)
<b>Cash payments to suppliers for goods and services</b>	<b>15,059</b>	<b>(297,348)</b>
Staff	(465,989)	(1,898,419)
Increase (decrease) in payroll liabilities	12,371	(1,594)
Increase decrease in accrued sick and vacation liability	-	-
Increase decrease in OPEB liability	27,083	135,417
<b>Cash payments to employees for services</b>	<b>(426,535)</b>	<b>(1,764,596)</b>
Contributions received	-	-
Net cash from operating activities	410,260	1,667,551
<b>Cash flow from capital and related financing activities</b>		
Library materials	(188,286)	(744,369)
Other capital acquisitions	-	-
<b>Cash flows from investing activities</b>		
Investment earnings	4,015	20,497
<b>Net cash increase (decrease) in cash and cash equivalents</b>	<b>225,989</b>	<b>943,679</b>
Cash and cash equivalents, at beginning of period	9,604,951	8,887,261
Cash and cash equivalents, at end of period	9,830,940	9,830,940
<b>Reconciliation of Operating Income to Net Cash from Operating Activities</b>		
Operating income	6,690	(144,306)
Adjustments for noncash effects:		
Depreciation	275,384	1,378,599
Extraordinary expense: book write-off	-	186,407
Changes in operating assets and liabilities:		
(Increase) decrease in accounts receivable	(10,973)	(27,783)
(Increase) decrease in prepaid expenses	47,932	139,264
Increase (decrease) in accounts payable	50,981	16
Increase (decrease) in other liabilities	-	(10,506)
Increase (decrease) in payroll liabilities	12,371	(1,594)
Increase (decrease) in accrued sick and vacation liability	-	-
Increase (decrease) in borrowers' deposit	792	12,037
Increase (decrease) in OPEB liability	27,083	135,417
Net cash from operating activities	<b>410,260</b>	<b>1,667,551</b>

**LOS ANGELES COUNTY LAW LIBRARY**  
**December 1, 2013 - December 31, 2013 (CHECKS)**  
**Account No.: 108000**

DATE	PAYEE	FOR	AMOUNT	CHECK NO.
December 2	AMERICAN BAR ASSOCIATION	BOOKS	1,754.80	026261
	AMERICAN MARITIME CASES INC	BOOKS	1,000.00	026262
	AMERICAN LAWYER MEDIA L P RECORDER	BOOKS	424.01	026263
	WOLTERS KLUWER LAW & BUSINESS	BOOKS	1,132.30	026264
	MATTHEW BENDER LEXISNEXIS MATTHEW B	BOOKS	132.37	026265
	BLOOMBERG BNA	BOOKS	199.58	026266
	CONTINUING EDUCATION OF THE BAR CAL	BOOKS	1,401.42	026267
	J NOE HERRERA	BOOKS	401.00	026268
	DAILY JOURNAL CORPORATION	BOOKS	337.90	026269
	EQUITAS MEDIA	BOOKS	1,000.00	026270
	OTTO HARRASSOWITZ	BOOKS	62.33	026271
	IMMIGRANT LEGAL RESOURCE CENTER	BOOKS	104.72	026272
	JAMES PUBLISHING INC	BOOKS	114.66	026273
	JURIS PUBLISHING INC	BOOKS	138.50	026274
	LEXISNEXIS BUTTERWORTHS	BOOKS	1,341.11	026275
	LIBROS DE HONDURAS	BOOKS	1,200.00	026276
	INSTITUTE OF CONTINUING LEGAL EDUCA	BOOKS	132.50	026277
	NATIONAL BOOK NETWORK	BOOKS	84.82	026278
	NEW YORK LAW JOURNAL	BOOKS	835.00	026279
	OREGON SECRETARY OF STATE ARCHIVES	BOOKS	640.00	026280
PRACTISING LAW INSTITUTE	BOOKS	285.46	026281	
PUBLIC UTILITIES REPORTS INC	BOOKS	1,695.00	026282	
THOMSON REUTERS TAX & ACCOUNTING	BOOKS	9,699.22	026283	
THOMSON REUTERS	BOOKS	5,642.75	026284	
YBP LIBRARY SERVICES	BOOKS	137.25	026285	
December 6	GE MONEY BANK AMAZON	BOOKS	529.58	026286
	AMERICAN EXPRESS	BUSINESS CARD	8,031.95	026287
	AT&T MOBILITY	TELECOM	183.26	026288
	BANDWIDTH.COM, INC.	TELECOM	986.30	026289
	BLUE SHIELD OF CALIFORNIA	HEALTH INS	541.37	026290
	CLEAN SOURCE, INC.	CLEAN SUPPL	1,682.61	026291
	CONSOLIDATED DISPOSAL SVC	BLDG SVCS	184.16	026292
	EMPLOYMENT DEVELOPMENT DEPT	UI	2,889.00	026293
	EX LIBRIS USERS OF NORTH AMERICA	MEMBERSHIP	200.00	026294
	GOURMET COFFEE SERVICE	KITCHEN SUPPLIES	626.56	026295
	GOLDEN STATE OVERNIGHT	DELIVERY/ POSTAGE	145.29	026296
	GUARDIAN	DENTAL/VIS/LIFE/DIS	7,645.18	026297
	INDEPENDENT STATIONERS	SUPPL-OFFICE	465.70	026298
	INFINISOURCE INC	PAYROLL/HR BENEFI	77.00	026299
	COUNTY OF LOS ANGELES	HEATING/COOLING	2,485.49	026300
	KONICA MINOLTA BUSINESS	COPY CENTER	1,106.34	026301
	SONNY LEW	MILEAGE	23.11	026302
	MEGAPATH	TELECOM	426.09	026303

59,431.69

**LOS ANGELES COUNTY LAW LIBRARY**  
**December 1, 2013 - December 31, 2013 (CHECKS)**  
**Account No.: 108000**

DATE	PAYEE	FOR	AMOUNT	CHECK NO.
December 11	METROLINK	TMP	1,306.00	026304
	OCLC, INC.	BIBLIO SVCS	582.70	026305
	THE OFFICE DEALER	SUPPLIES-OFFICE	224.98	026306
	OFFICE DEPOT	SUPPLIES-OFFICE	275.47	026307
	QUILL CORPORATION	SUPPLIES-OFFICE	283.94	026308
	JEREMY SAMLER	REIMBURSEMENT	23.80	026309
	SECURITAS SECURITY	SECURITY	5,342.64	026310
	STATE COMPENSATION INSURANCE FUND	WORKERS COMP	8,779.42	026311
	UNITED PARCEL SERVICE	DELIVERY/ POSTAGE	11.60	026312
	WOLTERS KLUWER LAW & BUSINESS	BOOKS	1,283.32	026313
	MATTHEW BENDER LEXISNEXIS MATTHEW B	BOOKS	116.01	026314
	BERNAN ASSOCIATES	BOOKS	189.00	026315
	BOOK HOUSE INC	BOOKS	250.88	026316
	LEXISNEXIS CANADA BUTTERWORTHS CANA	BOOKS	1,708.67	026317
	CCH INCORPORATED	BOOKS	233.65	026318
	CONTINUING EDUCATION OF THE BAR CAL	BOOKS	1,299.95	026319
	OTTO HARRASSOWITZ	BOOKS	3,486.02	026320
	HAWAII STATE BAR ASSOCIATION	BOOKS	210.00	026321
	INDEXMASTER	BOOKS	395.00	026322
	JAMES PUBLISHING INC	BOOKS	177.63	026323
	JURIS PUBLISHING INC	BOOKS	196.00	026324
	JURISNET LLC	BOOKS	86.50	026325
	LAW JOURNAL PRESS	BOOKS	3,799.13	026326
	LIBROS CENTROAMERICANOS	BOOKS	29.30	026327
	MARY MARTIN BOOKSELLERS	BOOKS	758.00	026328
	INSTITUTE OF CONTINUING LEGAL EDUCA	BOOKS	185.00	026329
	MUNICIPAL CODE CORPORATION	BOOKS	948.80	026330
	OXFORD UNIVERSITY PRESS	BOOKS	258.88	026331
	PRACTISING LAW INSTITUTE	BOOKS	481.94	026332
	THOMSON REUTERS TAX & ACCOUNTING	BOOKS	791.35	026333
	THOMSON REUTERS	BOOKS	538.67	026334
	YBP LIBRARY SERVICES	BOOKS	95.01	026335
	STATE BOARD OF EQUALIZATION	USE TAX	456.00	026336
PETTY CASH FUND	PETTY CASH	318.71	026337	
PROQUEST INFORMATION AND LEARNING	BOOKS	3,178.25	026338	
MINON MILLER	REFUND	20.00	026339	
OLGA N NAZAROVA	REFUND	140.00	026340	
CARMEN PENA-LORA	REFUND	140.00	026341	
ROBERT F PEREZ II	REFUND	140.00	026342	
ARACELI PEREZ-BRIZO	REFUND	140.00	026343	
RODERICK & ARNOLD	REFUND	387.00	026344	
MICHAEL WILLIAM WEBSTER	REFUND	120.00	026345	
December 13	ABOUT THYME	ROOM RENTAL	5,000.00	026346

103,014.91

**LOS ANGELES COUNTY LAW LIBRARY**  
**December 1, 2013 - December 31, 2013 (CHECKS)**  
**Account No.: 108000**

DATE	PAYEE	FOR	AMOUNT	CHECK NO.	
December 17	LA NIGHT CASINO ENTERTAINMENT INC	ROOM RENTAL	500.00	026347	
	WOLTERS KLUWER LAW & BUSINESS	BOOKS	956.00	026348	
	BLOOMBERG BNA	BOOKS	711.78	026349	
	LEXISNEXIS CANADA BUTTERWORTHS CANA	BOOKS	195.00	026350	
	CONTINUING EDUCATION OF THE BAR CAL	BOOKS	397.38	026351	
	COUTTS LIBRARY SERVICES	BOOKS	3,696.81	026352	
	EDITIONS YVON BLAIS	BOOKS	121.25	026353	
	GAUNT	BOOKS	51.28	026354	
	INGRAM LIBRARY SERVICES	BOOKS	554.44	026355	
	LAW JOURNAL PRESS	BOOKS	2,873.74	026356	
	LEXISNEXIS BUTTERWORTHS	BOOKS	1,323.64	026357	
	LIBRERIA LINARDI Y RISSO A LINARDI	BOOKS	274.49	026358	
	MEXICO SUR	BOOKS	140.40	026359	
	NATIONAL BOOK NETWORK	BOOKS	43.85	026360	
	NORTHERN NEW ENGLAND LAW PUBLISHERS	BOOKS	95.68	026361	
	PRACTISING LAW INSTITUTE	BOOKS	1,254.77	026362	
	THOMSON REUTERS	BOOKS	125.90	026363	
	AT&T	TELECOM	419.90	026364	
	BRIDGES FILTER SERVICE, INC	REPAIR & MAINT	269.34	026365	
	CDW GOVERNMENT, INC.	SERVICE	298.50	026366	
	CONSOLIDATED DISPOSAL SVC	BLDG SVCS	233.49	026367	
	GAYLORD BROS.	SUPPLIES- LIB MATE	865.00	026368	
	LINDA J HEICHMAN TAYLOR	MILEAGE	25.43	026369	
	HEWLETT-PACKARD COMPANY	SUPPLIES - OFFICE	269.90	026370	
	KONICA MINOLTA BUSINESS	COPY CENTER	1,251.99	026371	
	L A DEPT WATER & POWER	ELECTRIC/FIRE	9,201.42	026372	
	MING LU	TMP	247.50	026373	
	MEGAPATH	TELECOM	357.52	026374	
	MALINDA MULLER	REIMBURSEMENT	358.32	026375	
	NATIONAL CONSUMER LAW CENTER	BOOKS	663.00	026376	
	OCLC, INC.	BIBLIO SVCS	699.63	026377	
	OFFICE DEPOT	SUPPLIES - OFFICE	67.26	026378	
	PAN AMERICAN PEST CONTROL CO.	BLDG SVCS	178.00	026379	
	ROMERO MAINTENANCE CO.	JANITORIAL SVCS	8,421.43	026380	
	JEREMY SAMLER	REIMBURSEMENT	39.49	026381	
	SCHINDLER ELEVATOR CORP.	REPAIR & MAINT	698.75	026382	
	SEPCO EARTHSCAPE, INC	LANDSCAPING	1,050.00	026383	
	STATE COMPENSATION INSURANCE FUND	WORKERS COMP	7,282.00	026384	
	JAYE B STEINBRICK	REIMBURSEMENT	148.60	026385	
	TIME WARNER CABLE	TELECOM	1,200.00	026386	
	UNITED PARCEL SERVICE	DELIVERY/ POSTAGE	12.33	026387	
	VALLEY WIDE AIR	REPAIR/MAINT	200.00	026388	
	L A DEPT WATER & POWER	WATER/SEWER	378.88	026389	
	December 18				

150,912.00

**LOS ANGELES COUNTY LAW LIBRARY**  
**December 1, 2013 - December 31, 2013 (CHECKS)**  
**Account No.: 108000**

DATE	PAYEE	FOR	AMOUNT	CHECK NO.
	3M	SERVICE	243.00	026390
	KONICA MINOLTA BUSINESS	COPY CENTER	20.00	026391
December 19	FORERUNNER FIRE PREVENTION INC.	BLDG MAINT	1,000.00	026392
December 20	IDAHO STATE BAR	BOOKS	62.50	026393
December 23	WOLTERS KLUWER LAW & BUSINESS	BOOKS	1,464.87	026394
	MATTHEW BENDER LEXISNEXIS MATTHEW B	BOOKS	79.12	026395
	GEORGE T BISEL COMPANY	BOOKS	178.62	026396
	BLOOMBERG BNA	BOOKS	524.74	026397
	BLOOMBERG BNA INTERNATIONAL INC	BOOKS	2,271.00	026398
	CONTINUING EDUCATION OF THE BAR CAL	BOOKS	1,728.43	026399
	COUTTS LIBRARY SERVICES	BOOKS	2,226.28	026400
	THOMSON GALE	BOOKS	315.22	026401
	E ITURRIAGA Y CIA S A C	BOOKS	334.00	026402
	JAMES PUBLISHING INC	BOOKS	261.22	026403
	JURIS PUBLISHING INC	BOOKS	84.50	026404
	LEXISNEXIS BUTTERWORTHS	BOOKS	1,985.64	026405
	CHIEF LOC CDS	BOOKS	525.00	026406
	NEW JERSEY LAW JOURNAL	BOOKS	201.11	026407
	PRACTISING LAW INSTITUTE	BOOKS	305.89	026408
	THOMSON REUTERS TAX & ACCOUNTING	BOOKS	1,290.56	026409
	THOMSON REUTERS	BOOKS	267.06	026410
	JOHN WILEY & SONS INC	BOOKS	280.28	026411

166,318.04

**LOS ANGELES COUNTY LAW LIBRARY**  
**December 1, 2013 - December 31, 2013 (WARRANTS)**  
**Account No.: 102000**

DATE	PAYEE	FOR	AMOUNT	CHECK NO.
December 2	CALPERS	HEALTH INS	52,254.70	TS00193011
December 17	GAUNT	BOOKS	14,326.76	TS00193903
	LEXISNEXIS ONLINE SERVICES	BOOKS	15,300.00	TS00193904
	WILLIAM S HEIN & CO	BOOKS	65,545.24	TS00193904
December 20	TYCO INTEGRATED SECURITY LLC	PREPAID EXP	11,213.32	TS00194189
	LEXISNEXIS ONLINE SERVICES	BOOKS	15,300.00	TS00194189
	CALPERS	HEALTH INS	48,299.10	TS00194189
	SECURITAS SECURITY	SECURITY	10,268.16	TS00194189
December 23	THE MESRIANI LAW FIRM TRUST ACCOUNT	MISC	60,000.00	TS00194290

292,507.28

LA Law Library Statistics

			2010 Year	2011 Year	2012 Year	2013 Year	Notes
<b>Reference and Research</b>							
	<i>Reference and Research responds to user requests for Library materials in-person, mail and electronic inquiries.</i>						
	Desk Inquiries		27,920	32,380	30,473	28,293	
	Phone		10,272	9,435	10,403	9,233	
	Email/ Live Chat		7,989	5,097	1,702	1,732	
	By Mail		167	277	246	201	
	Foreign/International		204	842	640	597	
	Foreign/International Web		29	119	133	429	
		<b>Total</b>	<b>46,581</b>	<b>48,150</b>	<b>43,597</b>	<b>40,485</b>	
<b>Circulation Services</b>							
	<i>The Circulation Desk responds to requests for computer sign-up, books on reserve, placing books on hold, questions about overdue fines and lost items, paging materials needed from closed stacks as well as checking books in and out.</i>						
	Desk Inquiries		36,152	41,731	23,044	18,904	
	Phone Inquiries		5,039	6,703	9,681	9,013	
		<b>Total</b>	<b>41,191</b>	<b>48,434</b>	<b>32,725</b>	<b>27,917</b>	
	Books Circulated		16,616	13,723	13,520	13,889	
<b>Document Delivery / E-Delivery Services</b>							
	<i>Document Delivery responds to requests for materials from the LA Law Library collection.</i>						
	Phone Inquiries		765	731	764	287	
	Email		216	252	249	605	
	In-Person		340	377	264	234	
	By Mail		46	89	28	0	
		<b>Total</b>	<b>1,367</b>	<b>1,449</b>	<b>1,305</b>	<b>1,126</b>	
	Pages Delivered		21,461	44,832	48,812	55,570	

LA Law Library Statistics

			2010 Year	2011 Year	2012 Year	2013 Year	Notes	
<b>Copy Center</b>								
	<i>Copy Center responds to requests for photocopies, printouts from our computers as well as from the microfiche reader-printer.</i>							
	Phone		175	862	908	1,009		
	In-Person		15,279	15,368	10,647	11,239		
		<b>Total</b>	<b>15,454</b>	<b>16,230</b>	<b>11,555</b>	<b>12,248</b>		
	Copies Made (Main Library)		261,918	378,684	357,999	295,837		
<b>Collection Management Services</b>								
	<i>Collection Management handles all new acquisitions, continuation and updates, as well as any volumes that are withdrawn from the collection.</i>							
	New Titles		912	1,276	791	504		
	New Continuations		242	331	202	325		
	Book Volumes Added		7,678	7,652	7,289	6,908		
	Microfiche / Media Added		32,417	12,927	7,598	16,821		
	Books Cataloged/Reclassed		20,492	39,374	14,322	11,563		
	Volumes / Media Withdrawn		4,087	3,682	5,391	4,444		
<b>Scan Project</b>								
	Briefs Scanned		35,669	56,467	34,208	61,747		
<b>Web Statistics</b>								
	Visitors		82,291	73,586	71,754	83,259		
	Visits		151,300	147,785	181,682	190,036		
	Average Daily Visits		397	404	496	380		
	Average Duration		9:10	32:29	13:47	Unavailable		
	Visitors: US		68.64%	71.75%	75.70%	Unavailable		
	Visitors: International / Unspecified		31.36%	28.25%	24.30%	Unavailable		

Los Angeles County Law Library Strategic Plan  
Accountability Report

GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
C1(A)	Track usage, visitors and performance metrics	Ralph Stahlberg & Channa Cajero	Formally implement programs	11/30/2013		5/1/2014	Project coordinators still working with Circulation and Technology Services staff on planning and implementing programs.
C1(A)	Track usage, visitors and performance metrics	Ralph Stahlberg & Channa Cajero	Evaluate results	12/31/2013		5/1/2014	Project coordinators still working with Circulation and Technology Services staff on planning and implementing programs.
C1(A)	Track usage, visitors and performance metrics	Ralph Stahlberg & Channa Cajero	Identify technology needed	9/30/2013	Y		
C1(A)	Track usage, visitors and performance metrics	Ralph Stahlberg & Channa Cajero	Research methods available	10/31/2013	Y		
C1(A)	Track usage, visitors and performance metrics	Ralph Stahlberg & Channa Cajero	Completion	1/31/2014			
C1(A)	Track usage, visitors and performance metrics						
C1(B)	Conduct patron surveys and focus groups regarding legal resource materials needs	Channa Cajero	Identify users	12/31/2013	Y		
C1(B)	Conduct patron surveys and focus groups regarding legal resource materials needs						
C1(B)	Conduct patron surveys and focus groups regarding legal resource materials needs	Channa Cajero	Set up and hold focus groups	12/31/2013		2/15/2014	Focus groups originally scheduled for Oct. 2013 to be pushed back. Focus groups rescheduled for Feb 2014.
C1(B)	Conduct patron surveys and focus groups regarding legal resource materials needs	Channa Cajero	Draft and distribute surveys to user groups	2/28/2014		4/15/2014	Survey content is based on focus group results. All target dates for this project extended to reflect new deadline for focus groups.
C1(B)	Conduct patron surveys and focus groups regarding legal resource materials needs	Channa Cajero	Evaluate results	3/31/2014		6/15/2014	All target dates for this project extended to reflect new deadline for focus groups.
C1(B)	Conduct patron surveys and focus groups regarding legal resource materials needs	Channa Cajero	Completion	3/31/2014		6/15/2014	All target dates for this project extended to reflect new deadline for focus groups.
C1(C)	Develop a comprehensive strategy for collection assessment and evaluation	Channa Cajero	Evaluate methods available	12/31/2013	Y		
C1(C)	Develop a comprehensive strategy for collection assessment and evaluation	Channa Cajero	Select useful tools and technology	12/31/2013	Y		
C1(C)	Develop a comprehensive strategy for collection assessment and evaluation						
C1(C)	Develop a comprehensive strategy for collection assessment and evaluation	Channa Cajero	Collect data	3/31/2014			
C1(C)	Develop a comprehensive strategy for collection assessment and evaluation	Channa Cajero	Review results and make assessments	3/31/2014			
C1(C)	Develop a comprehensive strategy for collection assessment and evaluation	Channa Cajero	Present recommendations	6/30/2014			
C1(C)	Develop a comprehensive strategy for collection assessment and evaluation	Channa Cajero	Completion	6/30/2014			
C1(D)	Showcase rare books, historical materials and memorabilia	Ralph Stahlberg & Betsy Warner	Evaluate our collection	9/30/2013	Y		

Los Angeles County Law Library Strategic Plan  
Accountability Report

GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
C1(D)	Showcase rare books, historical materials and memorabilia	Ralph Stahlberg & Betsy Warner	Select materials	10/31/2013	Y		
C1(D)	Showcase rare books, historical materials and memorabilia	Ralph Stahlberg & Betsy Warner	Prepare exhibit	12/31/2013	Y		
C1(D)	Showcase rare books, historical materials and memorabilia						
C1(D)	Showcase rare books, historical materials and memorabilia	Ralph Stahlberg & Betsy Warner	Completion	3/31/2014			
C1(E)	Develop resource materials and referrals for patrons needing translation	Austin Stoub	Research available resources	8/30/2013	Y		
C1(E)	Develop resource materials and referrals for patrons needing translation	Austin Stoub	Contact translators, interpreters, other resources regarding potential partnerships (min 10 contacts)	9/30/2013	Y		
C1(E)	Develop resource materials and referrals for patrons needing translation						
C1(E)	Develop resource materials and referrals for patrons needing translation	Austin Stoub	Prepare resource sheet for patrons	10/31/2013		3/1/2014	I have moved these dates back; I have not had time to make much progress on this goal.
C1(E)	Develop resource materials and referrals for patrons needing translation	Austin Stoub	Translate resource sheet	11/30/2013		3/1/2014	I have moved these dates back; I have not had time to make much progress on this goal.
C1(E)	Develop resource materials and referrals for patrons needing translation	Austin Stoub	Completion	12/31/2013		3/1/2014	I have moved these dates back; I have not had time to make much progress on this goal.
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		
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.
C1(F)	Include tools on our website to help patrons find materials (e.g., a "Treatise Finder")						
C1(F)	Include tools on our website to help patrons find materials (e.g., a "Treatise Finder")	Austin Stoub	Test system	10/31/2013		4/1/2014	Working with IT to implement
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		4/1/2014	Working to implement
C1(F)	Include tools on our website to help patrons find materials (e.g., a "Treatise Finder")	Austin Stoub	Completion	12/31/2013		4/1/2014	While i have made progress on the develop ment of these treatise finders, they are not quite ready to launch; i anticipate launching these in the near future.
C1(G)	Develop, increase and advertise depository status and availability of local government agency legal material	Esther Eastman	Research other library methods	9/30/2013	Y		s:\ADMINISTRATIVE_SERVICES\MANAGEMENT TEAM\Strategic Planning\docslibsurvey.xlsx

Los Angeles County Law Library Strategic Plan  
Accountability Report

GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
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		Meeting with Communications in Nov. 2013 it was decided that the library was all ready doing quite a bit to promote government documents through exhibits, handouts, and classes, and that in the future, we should look to promote the documents by use of a libguide to documents on the website and additional classes. Work is proceeding on multiple fronts.
C1(G)	Develop, increase and advertise depository status and availability of local government agency legal material						
C1(G)	Develop, increase and advertise depository status and availability of local government agency legal material	Esther Eastman	Explore digitizing unique local government publications	3/31/2014			Proposed digitizing unique California government documents to team members (Ralph and Meiling)
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			
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			
C1(G)	Develop, increase and advertise depository status and availability of local government agency legal material	Esther Eastman	Implement in library	12/31/2014			
C1(G)	Develop, increase and advertise depository status and availability of local government agency legal material	Esther Eastman	Completion	12/31/2014			
C1(H)	Establish material loan program between Main and branch locations						
C1(H)	Establish material loan program between Main and branch locations	Linda Taylor	Needs assessment	3/31/2014		6/30/2014	Delay in LB launch; conversion of TOR as education/training space. Have these projects more under development/potentially completed before begin needs assessment.
C1(H)	Establish material loan program between Main and branch locations	Linda Taylor	Pilot loan program	6/30/2014		9/30/2014	
C1(H)	Establish material loan program between Main and branch locations	Linda Taylor	Launch formal material loan program	9/30/2014		12/31/2014	
C1(H)	Establish material loan program between Main and branch locations	Linda Taylor	Evaluate loan program	3/31/2015		6/30/2015	6 month Pilot; 1 month evaluation
C1(H)	Establish material loan program between Main and branch locations	Linda Taylor	Completion			9/30/2015	Adjust & retool as necessary.
C2(A)	Encourage donations of FCIL materials from other libraries and formalize LLMC collaboration	Neel Agrawal	Finalize LLMC agreement re donation, storage and scanning of materials	6/30/2013	Y		

Los Angeles County Law Library Strategic Plan  
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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
C2(A)	Encourage donations of FCIL materials from other libraries and formalize LLMC collaboration						
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			
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			
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			
C2(A)	Encourage donations of FCIL materials from other libraries and formalize LLMC collaboration	Neel Agrawal	Completion	3/31/2015			
C2(B)	Conduct user needs survey and research to develop and expand FCIL programming						
C2(B)	Conduct user needs survey and research to develop and expand FCIL programming	Neel Agrawal	Identify patron groups	3/31/2014			
C2(B)	Conduct user needs survey and research to develop and expand FCIL programming	Neel Agrawal	Create survey	5/31/2014			
C2(B)	Conduct user needs survey and research to develop and expand FCIL programming	Neel Agrawal	Send survey	6/30/2014			
C2(B)	Conduct user needs survey and research to develop and expand FCIL programming	Neel Agrawal	Hold focus groups	7/31/2014			
C2(B)	Conduct user needs survey and research to develop and expand FCIL programming	Neel Agrawal	Assessment	12/31/2014			
C2(B)	Conduct user needs survey and research to develop and expand FCIL programming	Neel Agrawal	Completion	3/31/2015			
C2(C)	Purchase FCIL materials that supplement FCIL programming	Neel Agrawal	Identify programs	12/31/2013	Y		
C2(C)	Purchase FCIL materials that supplement FCIL programming						
C2(C)	Purchase FCIL materials that supplement FCIL programming	Neel Agrawal	Identify appropriate materials	3/31/2014			
C2(C)	Purchase FCIL materials that supplement FCIL programming	Neel Agrawal	Revise collection development policy for FCIL (see C2(D))	6/30/2014			
C2(C)	Purchase FCIL materials that supplement FCIL programming	Neel Agrawal	Purchase after evaluating current library holdings	9/30/2014			
C2(C)	Purchase FCIL materials that supplement FCIL programming	Neel Agrawal	Completion	9/30/2014			

Los Angeles County Law Library Strategic Plan  
Accountability Report

GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMP L E T E D (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
C2(D)	Undertake a collection assessment, developing country profiles and working with expert practitioners and academics to identify the most significant materials	Neel Agrawal	Create template for priority materials for systematic review	12/31/2013	Y		
C2(D)	Undertake a collection assessment, developing country profiles and working with expert practitioners and academics to identify the most significant materials						
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			
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			
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			
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			
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	N/A	ONGOING	Continues on an ongoing bases so far have had 3 visits by our FCIL jobbers
C2(E)	Build strong relationships with vendors around the world						
C2(E)	Build strong relationships with vendors around the world	Shohreh Saljooghi	Create a map/locator connecting regions with vendors	3/31/2014			
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			
C2(E)	Build strong relationships with vendors around the world	Shohreh Saljooghi	Present recommendation	11/30/2015			
C2(E)	Build strong relationships with vendors around the world	Shohreh Saljooghi	Completion	11/30/2015			
C3(A)	Develop digitization and archiving plan for the next 20 years						
C3(A)	Develop digitization and archiving plan for the next 20 years	Jaye Nelson	Assemble committee of stakeholders / departments	2/1/2014			

Los Angeles County Law Library Strategic Plan  
Accountability Report

GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
C3(A)	Develop digitization and archiving plan for the next 20 years	Jaye Nelson	Identify what is currently being digitized and by whom	5/1/2014			
C3(A)	Develop digitization and archiving plan for the next 20 years	Jaye Nelson	Determine collection & priorities to be scanned	9/1/2014			
C3(A)	Develop digitization and archiving plan for the next 20 years	Jaye Nelson	Present draft of plan to staff for evaluation	10/31/2014			
C3(A)	Develop digitization and archiving plan for the next 20 years	Jaye Nelson	Create scan program for image storage and accessibility.	2/1/2015			
C3(A)	Develop digitization and archiving plan for the next 20 years	Jaye Nelson	Completion	3/1/2015			
C3(B)	Develop a rare book storage and access plan	Betsy Warner	Review LALL's former rare book access plan	9/30/2013	Y		
C3(B)	Develop a rare book storage and access plan						
C3(B)	Develop a rare book storage and access plan	Betsy Warner	Review rare book access plans from other institutions	1/30/2014			
C3(B)	Develop a rare book storage and access plan	Betsy Warner	Confer with affected staff	3/31/2014			
C3(B)	Develop a rare book storage and access plan	Betsy Warner	Recommend a new rare book storage and access plan	6/30/2014			
C3(B)	Develop a rare book storage and access plan	Betsy Warner	Completion	6/30/2014			
C3(C)	Conduct a space needs assessment for the collection						
C3(C)	Conduct a space needs assessment for the collection	Betsy Warner	Evaluate current space needs	12/31/2014			
C3(C)	Conduct a space needs assessment for the collection	Betsy Warner	Project space needs for next 5-10 years	6/30/2015			
C3(C)	Conduct a space needs assessment for the collection	Betsy Warner	Present draft of space needs assessment & recommendations	8/30/2015			
C3(C)	Conduct a space needs assessment for the collection	Betsy Warner	Completion	8/30/2015			
C3(D)	Establish a schedule and conduct a regular, periodic inventory of collection materials						
C3(D)	Establish a schedule and conduct a regular, periodic inventory of collection materials	Marcelino Juarez	Assemble project team and develop detailed scope, methodology, and schedule	10/31/2014			
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			
C3(D)	Establish a schedule and conduct a regular, periodic inventory of collection materials	Marcelino Juarez	Complete and document inventory	5/31/2015			
C3(D)	Establish a schedule and conduct a regular, periodic inventory of collection materials	Marcelino Juarez	Report to auditor	9/30/2015			

Los Angeles County Law Library Strategic Plan  
Accountability Report

GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMP LETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
C3(D)	Establish a schedule and conduct a regular, periodic inventory of collection materials	Marcelino Juarez	Completion	10/31/2015			
C3(E)	Develop a plan for the preservation of gazettes and other loose periodicals						
C3(E)	Develop a plan for the preservation of gazettes and other loose periodicals	Betsy Warner	Survey other libraries to find out if they are binding or preserving with some other method.	6/30/2014			
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			
C3(E)	Develop a plan for the preservation of gazettes and other loose periodicals	Betsy Warner	Initiate preservation plan.	6/30/2015			
C3(E)	Develop a plan for the preservation of gazettes and other loose periodicals	Betsy Warner	Completion	6/30/2015			
Comm1(A)	Expand awareness of transportation and parking alternatives	Adam Rosenblum	Collect and evaluate available Information	9/1/2013	Y		Have Metro & parking information.
Comm1(A)	Expand awareness of transportation and parking alternatives						
Comm1(A)	Expand awareness of transportation and parking alternatives	Adam Rosenblum	Assemble information into usable print and online resources / present draft	10/31/2013		3/21/2014	Due to complex layout and other information needed additional time is required for the best possible look.
Comm1(A)	Expand awareness of transportation and parking alternatives	Adam Rosenblum	Make information available to the public.	11/15/2013		4/15/2014	Previous step is required before completion.
Comm1(A)	Expand awareness of transportation and parking alternatives	Adam Rosenblum	Completion	11/15/2013		4/15/2014	
Comm1(B)	Maintain security levels in a respectful and non-threatening manner						
Comm1(B)	Maintain security levels in a respectful and non-threatening manner	Jaye Nelson & Facility	Gather input from staff via survey on possible improvements.	7/15/2013		2/10/2014	Other security staffing changes & priorities have been made; waiting for services to stabilize before conducting survey
Comm1(B)	Maintain security levels in a respectful and non-threatening manner	Jaye Nelson & Facility	Amend current post orders	9/30/2013		3/14/2014	
Comm1(B)	Maintain security levels in a respectful and non-threatening manner	Jaye Nelson & Facility	Implement improvements	10/31/2013		4/1/2014	
Comm1(B)	Maintain security levels in a respectful and non-threatening manner	Jaye Nelson & Facility	Complete regular training sessions with security staff	12/31/2013		4/1/2014	
Comm1(B)	Maintain security levels in a respectful and non-threatening manner	Jaye Nelson & Facility	Completion	12/31/2013		4/1/2014	
Comm1(C)	Provide vending machines to sell office supplies and sundries	Marcelino Juarez	Establish product specifications and identify vendors	7/31/2013	Y		
Comm1(C)	Provide vending machines to sell office supplies and sundries	Marcelino Juarez	Develop and write procedures (stocking, cash-handling, ordering)	7/31/2013	Y		
Comm1(C)	Provide vending machines to sell office supplies and sundries	Marcelino Juarez	Purchase and install office supplies vending machine	8/31/2013	Y		

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Comm1(C)	Provide vending machines to sell office supplies and sundries	Marcelino Juarez	Monitor and revise procedures as required	9/30/2013	Y		
Comm1(C)	Provide vending machines to sell office supplies and sundries	Marcelino Juarez	Assess utilization	6/30/2014	Y		
Comm1(C)	Provide vending machines to sell office supplies and sundries	Marcelino Juarez	Completion	9/30/2013	Y		Vending machine was stocked and available for use on 9/27/13
Comm1(C)	Provide vending machines to sell office supplies and sundries						
Comm1(D)	Develop member incentive programs with bar associations						
Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Establish rapport with bar association leaders	6/31/14			
Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Select target organizations	6/31/14			
Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Conduct needs assessments	9/30/2014			
Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Establish interest level and engagement	10/31/2014			
Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Devise mutually beneficial options with participants	10/31/2014			
Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Create and formalize agreements	11/30/2014			
Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Implement program	12/31/2014			
Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Assess results	1/31/2015			
Comm1(D)	Develop member incentive programs with bar associations	Ryan Metheny	Completion	2/28/2015			
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.)
Comm1(E)	Continue and refine Members Program						
Comm1(E)	Continue and refine Members Program	Ryan Metheny	Research / assess existing program models	3/31/2014			
Comm1(E)	Continue and refine Members Program	Ryan Metheny	Devise and document options / SWOT	4/30/2014			
Comm1(E)	Continue and refine Members Program	Ryan Metheny	Finalize and coordinate resources for implementation	6/30/2014			
Comm1(E)	Continue and refine Members Program	Ryan Metheny	Implement	7/31/2014			
Comm1(E)	Continue and refine Members Program	Ryan Metheny	Monitor and assess	9/30/2014			
Comm1(E)	Continue and refine Members Program	Ryan Metheny	Completion	10/31/2014			

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Comm1(F)	Automate parking reservations	Jaye Nelson	Assess parking requirements with staff	9/1/2013	Y		
Comm1(F)	Automate parking reservations	Jaye Nelson	Acquire online reservation software	10/1/2013	Y		
Comm1(F)	Automate parking reservations						
Comm1(F)	Automate parking reservations	Jaye Nelson	Installation and customization of software	11/29/2013		4/14/2014	Delayed due to security vendor requirements.
Comm1(F)	Automate parking reservations	Jaye Nelson	Begin parallel testing of new system	12/2/2013		4/21/2014	
Comm1(F)	Automate parking reservations	Jaye Nelson	Begin using new self-reservation system	1/1/2014		6/1/2014	
Comm1(F)	Automate parking reservations	Jaye Nelson	Completion	12/31/2013		7/1/2014	
Comm1(G)	Resume used book sales	Shohreh Saljooghi	Evaluate prior process for book sales, document possible efficiencies	7/15/2013	Y		
Comm1(G)	Resume used book sales	Shohreh Saljooghi	List and price current materials available for sale, place on sale shelves.	8/15/2013	Y		we are preparing for 4th book sale
Comm1(G)	Resume used book sales						
Comm1(G)	Resume used book sales	Shohreh Saljooghi	Identify channels for announcing to various layers of the community	8/15/2013		3/31/2015	
Comm1(G)	Resume used book sales	Shohreh Saljooghi	Establish parameters for online sale and identify available venues	3/31/2014		3/31/2015	
Comm1(G)	Resume used book sales	Shohreh Saljooghi	Assess	6/30/2014			
Comm1(G)	Resume used book sales	Shohreh Saljooghi	Completion	8/30/14			
Comm2(A)	Publish articles on our own website and in journals, newsletters and the press	Leigh Garcia	Identify possible articles/promotion topics	9/1/2013	Y	11/15/2013	
Comm2(A)	Publish articles on our own website and in journals, newsletters and the press	Leigh Garcia	Identify key publications to pitch for articles	11/1/2013	Y	11/15/2013	
Comm2(A)	Publish articles on our own website and in journals, newsletters and the press	Leigh Garcia	Work with staff to complete articles (min 3 per quarter)	12/31/2013	Y		on-going
Comm2(A)	Publish articles on our own website and in journals, newsletters and the press	Leigh Garcia	Create a repository of articles to facilitate reuse and retrieval	12/31/2013	Y		P:\Communications\Articles Archive, however project is on-going
Comm2(A)	Publish articles on our own website and in journals, newsletters and the press						
Comm2(A)	Publish articles on our own website and in journals, newsletters and the press	Leigh Garcia	Pitch articles / place on our website	3/31/2014			
Comm2(A)	Publish articles on our own website and in journals, newsletters and the press	Leigh Garcia	Completion	6/30/2014			
Comm2(B)	Make presentations to potential users off-site						
Comm2(B)	Make presentations to potential users off-site	Austin Stoub	Identify potential users	9/30/2013		3/31/2014	Deferred until after other strategic plan priorities. Potentially usable data may be collected during focus groups.
Comm2(B)	Make presentations to potential users off-site	Austin Stoub	Identify presenters	9/30/2013		5/30/2014	
Comm2(B)	Make presentations to potential users off-site	Austin Stoub	Present to test sites	10/31/2013		7/31/2014	

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
Comm2(B)	Make presentations to potential users off-site	Austin Stoub	Evaluate effectiveness	11/30/2013		8/31/2014	
Comm2(B)	Make presentations to potential users off-site	Austin Stoub	Recommend program parameters	12/31/2013		8/31/2014	
Comm2(B)	Make presentations to potential users off-site	Austin Stoub	Completion	12/31/2013		9/30/2014	
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.
Comm2(C)	Collaborate with Grand Park on programming and shared outreach						
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			
Comm2(C)	Collaborate with Grand Park on programming and shared outreach	Sandi Levin	Participate in at least one joint event	6/30/2014			
Comm2(C)	Collaborate with Grand Park on programming and shared outreach	Sandi Levin	Completion	6/30/2014			
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	Commenced but not completed due to PBW and other priorities
Comm2(D)	Co-market with LACBA and other bar associations to promote events and programs						
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		2/28/2014	Partially complete; LACBA Borrowers Promotion complete and ongoing - New eBranch opportunity with LACBA generated additional discussion
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		2/28/2014	Commenced but not completed due to PBW and other priorities
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		3/1/2014	
Comm2(D)	Co-market with LACBA and other bar associations to promote events and programs	Sandi Levin & Leigh Garcia	Completion	12/1/2013		3/1/2014	
Comm2(E)	Establish schedule for regular meetings of outside organizations						
Comm2(E)	Establish schedule for regular meetings of outside organizations	Leigh Garcia	Establish committee to identify potential target organizations	1/30/2014		2/14/2014	Committee identified and requested participation, confirmations still coming in.
Comm2(E)	Establish schedule for regular meetings of outside organizations	Leigh Garcia	Develop sales/marketing materials -	3/15/2014		4/15/2014	Room rental flyer complete; developing additional materials
Comm2(E)	Establish schedule for regular meetings of outside organizations	Leigh Garcia	Conduct community reach-out program	5/1/2014			
Comm2(E)	Establish schedule for regular meetings of outside organizations	Leigh Garcia	Completion	6/30/2014			
Comm2(F)	Outreach to courts, SHCs and local bar associations re events and services at branches						

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Comm2(F)	Outreach to courts, SHCs and local bar associations re events and services at branches	Linda Taylor	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		3/31/2014	Delay in LB launch; Torrance conversion in progress; need time to build relationships.
Comm2(F)	Outreach to courts, SHCs and local bar associations re events and services at branches	Linda Taylor	Slate events/services at branches (no cost)	4/31/14		6/30/2014	
Comm2(F)	Outreach to courts, SHCs and local bar associations re events and services at branches	Linda Taylor	Evaluate success of events/services at branches, budget FY2015	6/31/14		9/30/2014	
Comm2(F)	Outreach to courts, SHCs and local bar associations re events and services at branches	Linda Taylor	Schedule ongoing regular events/services at branches	6/31/15		12/31/2014	Not as much lead time needed for scheduling.
Comm2(F)	Outreach to courts, SHCs and local bar associations re events and services at branches	Linda Taylor	Completion	7/31/2015		6/30/2015	
Comm2(G)	Coordinate programs with downtown arts community (e.g., Artwalk)	Jaye Nelson	Develop a partnership recommendation	1/1/2014		3/14/2014	Delayed due to new DTLA Artwalk Executive Team
Comm2(G)	Coordinate programs with downtown arts community (e.g., Artwalk)	Jaye Nelson	Contact Art-Walk coordinators to identify 2014 opportunities	9/1/2013	Y		
Comm2(G)	Coordinate programs with downtown arts community (e.g., Artwalk)	Jaye Nelson	Attend regular Art-Walk & Community Meetings to promote 2014 library involvement.	11/1/2013	Y		
Comm2(G)	Coordinate programs with downtown arts community (e.g., Artwalk)	Jaye Nelson	Completion	2/1/2014		5/16/2014	
Comm3(A)	Expand CLE classes	Ryan Metheny	Research other public law library offerings	9/30/2013	Y		
Comm3(A)	Expand CLE classes	Ryan Metheny	Develop methodology for identification of speakers and topics of interest	9/30/2013	Y		
Comm3(A)	Expand CLE classes	Ryan Metheny	Build ongoing list of potential speakers	12/30/2013	Y		
Comm3(A)	Expand CLE classes	Ryan Metheny	Calendar bi-monthly classes	9/30/2013	Y		
Comm3(A)	Expand CLE classes	Ryan Metheny	Implement regularized programs	1/30/2014	Y		
Comm3(A)	Expand CLE classes	Ryan Metheny	Completion	1/31/2014	Y		
Comm3(B)	Expand classes for self-represented persons	Janine Liebert	Develop relationships with potential presenters	3/31/2014	Y		
Comm3(B)	Expand classes for self-represented persons	Janine Liebert	Outline structure of program delivery	6/30/2014			
Comm3(B)	Expand classes for self-represented persons	Janine Liebert	Implement classes	6/30/2014			
Comm3(B)	Expand classes for self-represented persons	Janine Liebert	Assess and evaluate	12/31/2014			

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
Comm3(B)	Expand classes for self-represented persons	Janine Liebert	Completion	1/31/2015			
Comm3(C)	Expand librarian training workshops						
Comm3(C)	Expand librarian training workshops	Linda Taylor	Develop slate of workshops.	12/31/2013		3/31/2014	Partially complete; additional measures anticipated due to transitions and staffing changes at partnerships
Comm3(C)	Expand librarian training workshops	Linda Taylor	Develop web-based public librarian training	8/31/2014			
Comm3(C)	Expand librarian training workshops	Linda Taylor	Launch web-based public librarian training	6/30/2016			
Comm3(C)	Expand librarian training workshops	Linda Taylor	Completion	7/31/2016			
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		
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		
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		
Comm3(D)	Develop a high school student workshop series in the Library						
Comm3(D)	Develop a high school student workshop series in the Library	Ryan Metheny	Implement programs	1/31/2014–3/30/2014			
Comm3(D)	Develop a high school student workshop series in the Library	Ryan Metheny	Assess programs				
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			
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			
Comm3(D)	Develop a high school student workshop series in the Library	Ryan Metheny	Write grant for funding to expand programs	6/30/2014			
Comm3(D)	Develop a high school student workshop series in the Library	Ryan Metheny	Expand programs to additional schools	9//30/14			
Comm3(D)	Develop a high school student workshop series in the Library	Ryan Metheny	Completion	12/31/2014			
Comm3(F)	Develop a continuing education series on legal topics for non-lawyers						
Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Identify potential stakeholders	3/30/2015			
Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Build rapport with prospective participants	3/30/2015			
Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Conduct needs assessment	3/30/2015			
Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Develop methodology for identification of speakers	6/30/2015			
Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Build list of potential speakers	6/30/2015			
Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Calendar classes	9/30/2015			
Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Implement programs	9/30/2015			

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
Comm3(F)	Develop a continuing education series on legal topics for non-lawyers	Ryan Metheny	Completion	10/31/2015			
Comm3(G)	Develop law-related Film Series						
Comm3(G)	Develop law-related Film Series	Leigh Garcia	Acquire films and inventory	11/31/13		2/12/2014	First requested film is out for approval (JS), marketing efforts have been discussed but follow-up is needed .
Comm3(G)	Develop law-related Film Series	Leigh Garcia	Complete marketing tools	1/15/2014		3/14/2014	Further research needed
Comm3(G)	Develop law-related Film Series	Leigh Garcia	Develop calendar	2/15/2014			
Comm3(G)	Develop law-related Film Series	Leigh Garcia	Develop cost structure	3/1/2014			
Comm3(G)	Develop law-related Film Series	Leigh Garcia	Launch	4/20/2014			
Comm3(G)	Develop law-related Film Series	Leigh Garcia	Completion	6/30/2014			
Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Define goals of Book Group	6/19/2013	Y		
Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Create overview of different Book Group Models	7/10/2013	Y		
Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Meet and discuss/choose model for initial Book Group	7/24/2013	Y		
Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Create format for initial Book Group	8/7/2013	Y		
Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Identify potential participants in Book Group & targeted publicity				
Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Formulate publicity	8/28/2013		3/1/2014	First meeting planned for after the Friends' speaker series in March
Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Launch publicity	9/11/2013		3/1/2014	working with Communications and publicity to confirm launch date, and then create publicity. Author of first book agreed to attend if possible
Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	First Book Group Discussion	10/2/2013		3/31/2014	
Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Evaluate and modify	11/20/2013		4/15/2014	
Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Create plan for ongoing discussion groups	11/25/2013		5/15/2014	
Comm3(H)	Conduct a book discussion group	Katie O'Laughlin	Completion	12/31/2013		6/30/2014	
Comm4(A)	Create a mobile eBranch to deploy at events						
Comm4(A)	Create a mobile eBranch to deploy at events	Linda Taylor	Analyze fixed eBranch locations and develop mobile eBranch model	3/31/2015			
Comm4(A)	Create a mobile eBranch to deploy at events	Linda Taylor	Secure funding/partners/landing spaces for mobile eBranch	6/30/2015			
Comm4(A)	Create a mobile eBranch to deploy at events	Linda Taylor	Launch mobile eBranch	6/30/2016			
Comm4(A)	Create a mobile eBranch to deploy at events	Linda Taylor	Completion	7/31/2016			
Comm4(B)	Broadcast professional development and general public webinars						
Comm4(B)	Broadcast professional development and general public webinars	Jaye Nelson	Work with staff to determine pilot content	2/1/2014		6/4/2014	Delayed due to other projects.
Comm4(B)	Broadcast professional development and general public webinars	Jaye Nelson	Create pilot class on video	4/1/2014		7/18/2014	
Comm4(B)	Broadcast professional development and general public webinars	Jaye Nelson	Review pilot with staff for final edits	4/29/2014		7/31/2014	

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
Comm4(B)	Broadcast professional development and general public webinars	Jaye Nelson	Make pilot class available online	6/1/2014		8/8/2014	
Comm4(B)	Broadcast professional development and general public webinars	Jaye Nelson	Develop program to review and expand content	6/30/2014		8/29/2014	
Comm4(B)	Broadcast professional development and general public webinars	Jaye Nelson	Completion	12/31/2014		8/29/2014	Ongoing
Comm4(C)	Provide public computer classes for basic skill development	Sonny Lew	Create three proposed 30 minute computer class outlines	10/1/2013	Y		
Comm4(C)	Provide public computer classes for basic skill development						
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			
Comm4(C)	Provide public computer classes for basic skill development	Sonny Lew	Assess effectiveness and recommend ongoing program parameters	2/28/2014			
Comm4(C)	Provide public computer classes for basic skill development	Sonny Lew	Completion	3/31/2014			
Comm4(D)	Outreach to prison inmates and other homebound people						
Comm4(D)	Outreach to prison inmates and other homebound people	Ralph Stahlberg	Identify user groups	1/1/2015			
Comm4(D)	Outreach to prison inmates and other homebound people	Ralph Stahlberg	Determine information needs	3/3/2015			
Comm4(D)	Outreach to prison inmates and other homebound people	Ralph Stahlberg	Research methods to fulfill identified needs	6/30/2015			
Comm4(D)	Outreach to prison inmates and other homebound people	Ralph Stahlberg	Create program to disseminate information to user groups	9/1/2015			
Comm4(D)	Outreach to prison inmates and other homebound people	Ralph Stahlberg	Evaluate and assess	1/1/2016			
Comm4(D)	Outreach to prison inmates and other homebound people	Ralph Stahlberg	Completion	3/31/2016			
F1(A)	Promote awareness at local and state government levels through CCCLL and lobbying efforts	Sandi Levin	Develop talking points	9/30/2013	Y		
F1(A)	Promote awareness at local and state government levels through CCCLL and lobbying efforts	Sandi Levin	Identify contacts, key legislators	10/31/2013	y		
F1(A)	Promote awareness at local and state government levels through CCCLL and lobbying efforts						
F1(A)	Promote awareness at local and state government levels through CCCLL and lobbying efforts	Sandi Levin	Meet with each at least once	2/15/2014			
F1(A)	Promote awareness at local and state government levels through CCCLL and lobbying efforts	Sandi Levin	Develop program for follow up in FY 15	3/15/2014			
F1(A)	Promote awareness at local and state government levels through CCCLL and lobbying efforts	Sandi Levin	Completion/report to BOT	4/30/2014			

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
F1(B)	Assist in development of statewide strategy to protect or enhance revenue stream	Sandi Levin	Confer with CCCLL directors	10/31/2013	Y		
F1(B)	Assist in development of statewide strategy to protect or enhance revenue stream	Sandi Levin	Meet with CCCLL lobbyist	11/30/2013	Y		
F1(B)	Assist in development of statewide strategy to protect or enhance revenue stream	Sandi Levin	Present proposal for BOT review	12/31/2013	y		
F1(B)	Assist in development of statewide strategy to protect or enhance revenue stream						
F1(B)	Assist in development of statewide strategy to protect or enhance revenue stream	Sandi Levin	Present proposal to CCCLL executive board for consideration	1/31/2014			
F1(B)	Assist in development of statewide strategy to protect or enhance revenue stream	Sandi Levin	Present proposal to CCCLL at annual conference	3/30/2014			
F1(B)	Assist in development of statewide strategy to protect or enhance revenue stream	Sandi Levin	Completion				
F1(C)	Reevaluate, re-bid and expand parking services	Finance Director	Update and issue RFP to current provider and other qualified parking management companies	6/30/2013	Y		
F1(C)	Reevaluate, re-bid and expand parking services	Finance Director	Summarize proposals, reconcile inconsistencies, and recommend vendor	8/31/2013	Y		
F1(C)	Reevaluate, re-bid and expand parking services	Finance Director	Execute contract (Board Approval)	9/30/2013	Y		
F1(C)	Reevaluate, re-bid and expand parking services	Finance Director	Commence with new vendor and implement service and hours changes, if necessary	11/1/2013	Y		
F1(C)	Reevaluate, re-bid and expand parking services	Finance Director	Completion	12/31/2013	Y		New vendor commenced service on 10/1/13
F1(C)	Reevaluate, re-bid and expand parking services						
F1(D)	Evaluate and renegotiate relationships with vendors to maximize value/resources						
F1(D)	Evaluate and renegotiate relationships with vendors to maximize value/resources	Finance Director	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		?	A new schedule will be developed once the Finance Director position is filled.
F1(D)	Evaluate and renegotiate relationships with vendors to maximize value/resources	Finance Director	Develop a negotiation protocol for each vendor including expected outcomes	11/30/2013		?	A new schedule will be developed once the Finance Director position is filled.

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
F1(D)	Evaluate and renegotiate relationships with vendors to maximize value/resources	Finance Director	Evaluate interim success with vendor negotiations and revise as necessary	3/31/2014		?	A new schedule will be developed once the Finance Director position is filled.
F1(D)	Evaluate and renegotiate relationships with vendors to maximize value/resources	Finance Director	Completion	4/30/2014		?	A new schedule will be developed once the Finance Director position is filled.
F1(E)	Consider annual merit increases						
F1(E)	Consider annual merit increases	Finance Director	Document salary adjustment history for staff and benchmark comparable institutions	2/28/2014		?	A new schedule will be developed once the Finance Director position is filled.
F1(E)	Consider annual merit increases	Finance Director	Make recommendation to ED subject to budget constraints	4/30/2014		?	A new schedule will be developed once the Finance Director position is filled.
F1(E)	Consider annual merit increases	Finance Director	Completion	6/30/2014		?	A new schedule will be developed once the Finance Director position is filled.
F2(A)	Apply for grants	Linda Taylor	Identify areas/ projects for desired grant funding	10/31/2013	Y	12/31/2013	
F2(A)	Apply for grants						
F2(A)	Apply for grants	Linda Taylor	Determine slate of potential grants and grant cycles through FY2015	12/31/2013		3/31/2014	Immediate grant opportunities identified; longer term opportunities still under consideration
F2(A)	Apply for grants	Linda Taylor	Develop schedule of grant opportunities and assign responsibilities	1/31/2014		6/30/2014	
F2(A)	Apply for grants	Linda Taylor	Apply for minimum of 3 grants	6/30/2014		12/31/2014	
F2(A)	Apply for grants	Linda Taylor	Target budget line item, forecast for grants.	6/30/2015			
F2(A)	Apply for grants	Linda Taylor	Completion	Ongoing		6/30/2015	
F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Confer with CCCLL directors	10/31/2013	Y		
F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Meet with CCCLL lobbyist	11/30/2013	Y		
F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Present proposal for BOT review	1/31/2014	Y		
F2(B)	Consider legislative proposal to authorize revenue-generating activities						
F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Present proposal to CCCLL executive board for consideration	3/31/2014			
F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Identify sponsors	4/30/2014			
F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Present proposal to CCCLL at annual conference	9/30/2014			

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Lobby legislators	12/31/2014			
F2(B)	Consider legislative proposal to authorize revenue-generating activities	Sandi Levin	Completion	6/30/2015			
F2(C)	Promote conference room rentals and develop informational outreach	Leigh Garcia	Finalize marketing material, content	8/1/2013	Y		
F2(C)	Promote conference room rentals and develop informational outreach	Leigh Garcia	Identify key marketing opportunities	8/15/2013	Y		
F2(C)	Promote conference room rentals and develop informational outreach						
F2(C)	Promote conference room rentals and develop informational outreach	Leigh Garcia	Create marketing campaign/timeline / kick-off campaign	9/1/2013		4/1/2014	Partially complete. Continuing to work on marketing campaign draft and will submit recommendations to supervisor. Increase in special events contributed to delay.
F2(C)	Promote conference room rentals and develop informational outreach	Leigh Garcia	Evaluate/ measure success	12/31/2013		6/1/2014	
F2(C)	Promote conference room rentals and develop informational outreach	Leigh Garcia	Recommend budget line item for FY2015	3/31/2014			
F2(C)	Promote conference room rentals and develop informational outreach	Leigh Garcia	Completion	Ongoing			
F2(D)	Develop conceptual plan for café						
F2(D)	Develop conceptual plan for café	Jaye Nelson	Identify footprint / services	5/14/2014			
F2(D)	Develop conceptual plan for café	Jaye Nelson	Identify potential vendors				
F2(D)	Develop conceptual plan for café	Jaye Nelson	Identify funding resources and partner agencies	6/14/2014			
F2(D)	Develop conceptual plan for café	Jaye Nelson	Present a conceptual plan to the Board of Trustees	9/1/2014			
F2(D)	Develop conceptual plan for café	Jaye Nelson	Completion				
F2(E)	Provide a notary service for a fee						
F2(E)	Provide a notary service for a fee	Eustorgio Barajas	Identify options (in-house; contract; etc.)	3/31/2014			
F2(E)	Provide a notary service for a fee	Eustorgio Barajas	Write proposal to coordinate notary services and training	4/30/2014			
F2(E)	Provide a notary service for a fee	Eustorgio Barajas	Work with notary candidates and coordinate training	8/30/2014			
F2(E)	Provide a notary service for a fee	Eustorgio Barajas	Write policies and procedures	9/30/2014			
F2(E)	Provide a notary service for a fee	Eustorgio Barajas	Announce and roll-out	11/30/2014			
F2(E)	Provide a notary service for a fee	Eustorgio Barajas	Evaluate effectiveness and usage	2/28/2015			
F2(E)	Provide a notary service for a fee	Eustorgio Barajas	Completion	3/31/2015			
F2(F)	Provide e-filing for a fee						
F2(F)	Provide e-filing for a fee	Ryan Metheny	Research court requirements, existing needs and solutions	6/30/2014			
F2(F)	Provide e-filing for a fee	Ryan Metheny	Identify potential services and prospective user groups	8/30/2014			
F2(F)	Provide e-filing for a fee	Ryan Metheny	Draft procedures and policy	11/30/2014			
F2(F)	Provide e-filing for a fee	Ryan Metheny	Present recommendation to Board of Trustees	1/31/2015			
F2(F)	Provide e-filing for a fee	Ryan Metheny	Implement	3/31/2015			

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
F2(F)	Provide e-filing for a fee	Ryan Metheny	Assess and revise as needed	5/31/2015			
F2(F)	Provide e-filing for a fee	Ryan Metheny	Completion	6/30/2015			
F2(G)	Offer fee-based collection acquisition and management services to other libraries	Sandi Levin	Assess capacity for contract services and performance standards	12/31/2013	Y		
F2(G)	Offer fee-based collection acquisition and management services to other libraries						
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.
F2(G)	Offer fee-based collection acquisition and management services to other libraries	Sandi Levin	Identify potential 'customers'	1/31/2014		12/31/2014	
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	
F2(G)	Offer fee-based collection acquisition and management services to other libraries	Sandi Levin	Evaluate success and performance metrics	2/28/2015			
F2(G)	Offer fee-based collection acquisition and management services to other libraries	Sandi Levin	Recommend program for future contracts	4/30/2015			
F2(G)	Offer fee-based collection acquisition and management services to other libraries	Sandi Levin	Completion	5/31/2015			
F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Establish rapport with bar association leaders	1/31/2014	Y		
F3(A)	Outreach to law firms & bar associations						
F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Select target organizations to work with	3/30/2014			
F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Conduct needs assessments	3/30/2014			
F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Assess and document options	6/30/2014			
F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Devise mutually agreed upon programs	6/30/2014			
F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Implement programs	9/30/2014			
F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Assess results & recommend ongoing programs	10/31/2014			
F3(A)	Outreach to law firms & bar associations	Ryan Metheny	Completion	11/30/2014			
F3(B)	Build relationships with relevant corporate entities						
F3(B)	Build relationships with relevant corporate entities	Sandi Levin	Identify candidate organizations	3/30/2014			

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
F3(B)	Build relationships with relevant corporate entities	Sandi Levin	Contact organizations and discuss opportunities (min 4)	6/30/2014			
F3(B)	Build relationships with relevant corporate entities	Sandi Levin	Implement test programs	9/30/2014			
F3(B)	Build relationships with relevant corporate entities	Sandi Levin	Assess results & recommend ongoing programs	10/31/2014			
F3(B)	Build relationships with relevant corporate entities	Sandi Levin	Completion	11/30/2014			
F3(C)	Establish a speakers' bureau	Sandi Levin	Research and review existing models	9/30/2013	Y		
F3(C)	Establish a speakers' bureau						
F3(C)	Establish a speakers' bureau	Sandi Levin	Develop parameters, incentives and program	12/31/2013		3/31/2014	Awaiting further development of in-house MCLE programs
F3(C)	Establish a speakers' bureau	Sandi Levin	Announce program	1/31/2014		4/30/2014	
F3(C)	Establish a speakers' bureau	Sandi Levin	Conduct outreach	3/31/2014		5/31/2014	
F3(C)	Establish a speakers' bureau	Sandi Levin	Launch	4/30/2014		6/30/2014	
F3(C)	Establish a speakers' bureau	Sandi Levin	Assess and revise, as needed	6/30/2014		8/31/2014	
F3(C)	Establish a speakers' bureau	Sandi Levin	Completion	9/30/2014			
S1(A)	Preserve service levels by maintaining adequate staffing						
S1(A)	Preserve service levels by maintaining adequate staffing	Finance Director	Working with supervisors and employee groups, establish baseline productivity metrics	9/30/2014		?	A new schedule will be developed once the Finance Director position is filled.
S1(A)	Preserve service levels by maintaining adequate staffing	Finance Director	Benchmark productivity at comparable institutions	11/30/2014		?	A new schedule will be developed once the Finance Director position is filled.
S1(A)	Preserve service levels by maintaining adequate staffing	Finance Director	Establish target metrics	1/31/2015		?	A new schedule will be developed once the Finance Director position is filled.
S1(A)	Preserve service levels by maintaining adequate staffing	Finance Director	Recommend changes in staffing to achieve targets	3/31/2015		?	A new schedule will be developed once the Finance Director position is filled.
S1(A)	Preserve service levels by maintaining adequate staffing	Finance Director	Completion	6/30/2015		?	A new schedule will be developed once the Finance Director position is filled.
S1(B)	Expand legal resources available & visible on the internet	Austin Stoub	Assess current internet-based resources for gaps in coverage	12/31/2013	Y		
S1(B)	Expand legal resources available & visible on the internet						
S1(B)	Expand legal resources available & visible on the internet	Austin Stoub	Identify potential resources that can be added to collection	3/31/2014			
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			
S1(B)	Expand legal resources available & visible on the internet	Austin Stoub	Implement new resources on test site	9/30/2014			
S1(B)	Expand legal resources available & visible on the internet	Austin Stoub	Develop metrics to evaluate user satisfaction and assess	10/31/2014			
S1(B)	Expand legal resources available & visible on the internet	Austin Stoub	Launch resources on website	12/31/2014			
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			

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
S1(B)	Expand legal resources available & visible on the internet	Austin Stoub	Completion	6/31/15			
S1(C)	Create an advance reservation system for Library computers						
S1(C)	Create an advance reservation system for Library computers	Adam Rosenblum	Add option into public website	9/1/2013		2/13/2014	IT has implemented the basic framework. Waiting for approval before implementation and moving on to the next step.
S1(C)	Create an advance reservation system for Library computers	Adam Rosenblum	Work with IT staff to test implementation	9/15/2013		2/27/2014	IT has implemented the basic framework. Waiting for approval before implementation and moving on to the next step.
S1(C)	Create an advance reservation system for Library computers	Adam Rosenblum	Training and testing with reference staff	9/30/2013		3/27/2014	Need to schedule training sessions with reference staff.
S1(C)	Create an advance reservation system for Library computers	Adam Rosenblum	Create promotional materials	10/1/2013		4/15/2014	Above steps need to be completed before promotional materials can be created.
S1(C)	Create an advance reservation system for Library computers	Adam Rosenblum	Completion	11/15/2013		4/15/2014	All of the above steps need to be completed.
S1(D)	Provide self-serve scanning equipment in the Library						
S1(D)	Provide self-serve scanning equipment in the Library	Jaye Nelson	Work with staff and patrons to evaluate technology requirements.	10/15/2014			
S1(D)	Provide self-serve scanning equipment in the Library	Jaye Nelson	Evaluate existing solutions and make final recommendation, proceed with purchasing.	11/15/2014			
S1(D)	Provide self-serve scanning equipment in the Library	Jaye Nelson	Install public scanner with signage and print materials	2/1/2014			
S1(D)	Provide self-serve scanning equipment in the Library	Jaye Nelson	Assess effectiveness of implementation and make adjustments as needed.	5/31/2014			
S1(D)	Provide self-serve scanning equipment in the Library	Jaye Nelson	Completion	5/31/2014			
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	N		Yet to share with staff, generally follow current practices
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
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		
S1(E)	Establish and implement a policy for how to handle patrons with greater needs and time demands						
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	6/30/2014			
S1(E)	Establish and implement a policy for how to handle patrons with greater needs and time demands	Ralph Stahlberg	Completion	9/30/2014			

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
S1(F)	Establish regular office hours at partnership libraries	Linda Taylor	Develop possibilities for office hours at partnership libraries	9/30/2013	Y		
S1(F)	Establish regular office hours at partnership libraries	Linda Taylor	Evaluate options and select viable model(s)	1/31/2014	Y		
S1(F)	Establish regular office hours at partnership libraries						
S1(F)	Establish regular office hours at partnership libraries	Linda Taylor	Formalize Branch Assistant office hours/professional training	3/30/2014		6/30/2014	Need full six month pilot to evaluate, report to Board, determine next steps for overall project.
S1(F)	Establish regular office hours at partnership libraries	Linda Taylor	Completion	7/30/2014			
S1(G)	Present intermittent but regular, free classes	Janine Liebert	Assess success of existing free classes and information sessions	11/30/2013	Y		
S1(G)	Present intermittent but regular, free classes	Janine Liebert	Identify and prioritize new class/information session offerings	1/31/2014	Y		
S1(G)	Present intermittent but regular, free classes	Janine Liebert	Identify and confirm partner organizations and presenters	2/28/2014	Y		
S1(G)	Present intermittent but regular, free classes	Janine Liebert	Implement	3/28/2014	Y		
S1(G)	Present intermittent but regular, free classes						
S1(G)	Present intermittent but regular, free classes	Janine Liebert	Determine frequency and assess impact on existing fee-based classes	1/31/2014		5/31/2014	Commenced but extended due to scheduling of classes in Feb-Mar and during Law Week
S1(G)	Present intermittent but regular, free classes	Janine Liebert	Assess	6/28/2014			
S1(G)	Present intermittent but regular, free classes	Janine Liebert	Completion	6/28/2014			
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		
S1(H)	Create a plan to provide ebooks in the Library, beginning with research to determine patron needs and preferences						
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		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).
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		4/15/2014	This project is being coordinated with objective C1(B). Extended dates for focus groups and survey reflect extended dates for objective C1(B).
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			

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
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			
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			
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		
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
S1(I)	Provide quality, comprehensive, face-to-face reference services by trained librarians						
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			Not yet shared with staff, project conflicts to some extent with others that are having non-librarians work at ref
S1(I)	Provide quality, comprehensive, face-to-face reference services by trained librarians	Ralph Stahlberg	Evaluate effectiveness of new standards/techniques by surveying users	3/31/2014			
S1(I)	Provide quality, comprehensive, face-to-face reference services by trained librarians	Ralph Stahlberg	Amend training regime as needed based upon survey results.	6/30/2014			
S1(I)	Provide quality, comprehensive, face-to-face reference services by trained librarians	Ralph Stahlberg	Completion	6/30/2014			
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	Commenced but not completed. Delayed due to other priorities.
S2(A)	Development of online self-help and lay-friendly substantive materials (similar to eBranch)						
S2(A)	Development of online self-help and lay-friendly substantive materials (similar to eBranch)	Janine Liebert	Generate report of findings and make recommendations	11/30/2013		3/31/2014	Commenced but not completed. Delayed due to other priorities.
S2(A)	Development of online self-help and lay-friendly substantive materials (similar to eBranch)	Janine Liebert	Identify and seek funding sources	3/30/2014			
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			
S2(A)	Development of online self-help and lay-friendly substantive materials (similar to eBranch)	Janine Liebert	Develop content	6/30/2014			

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
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			
S2(A)	Development of online self-help and lay-friendly substantive materials (similar to eBranch)	Janine Liebert	Upload and implement	12/31/2014			
S2(A)	Development of online self-help and lay-friendly substantive materials (similar to eBranch)	Janine Liebert	Completion	3/31/2014			
S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Assess feasibility	9/30/2013	Y	11/30/2013	Commenced but not completed. Delayed due to other priorities.
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	Commenced but not completed. Delayed due to other priorities.
S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)						
S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Identify and establish cooperative legal aid partner	12/30/13		3/31/2014	I have generated interest from several legal aid partners but commitment from partnering agency hinges on opportunities to pilot programs and sources of funding. Feb 27 program with Bet Tzedek on talking to a lawyer a likely candidate.
S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Identify and seek funding sources	3/30/2014		6/30/2014	Deferred because topic and partnering agency still need to be identified and confirmed.
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		6/30/2014	Deferred because topic and partnering agency still need to be identified and confirmed.
S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Produce video	9/30/2014			
S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Publish and create distribution plan	9/30/2014			
S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Duplicate in Spanish and other languages	3/30/2015			
S2(B)	Create video programs addressing basic legal issues (e.g., Courtroom Basics)	Janine Liebert	Completion	4/30/2015			
S2(C)	Develop transportation resource handouts for litigants	Adam Rosenblum	Collect and evaluate available information	8/1/2013	Y		
S2(C)	Develop transportation resource handouts for litigants						
S2(C)	Develop transportation resource handouts for litigants	Adam Rosenblum	Assemble information into usable print and online resources / present draft	10/1/2013		6/15/2014	Delay is due to complex layout, need more time to complete.
S2(C)	Develop transportation resource handouts for litigants	Adam Rosenblum	Make information available to the public.	10/15/2013		7/15/2014	After layout, it needs to go to supervisors for approvals and edits. I have the information necessary to complete the task.

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S2(C)	Develop transportation resource handouts for litigants	Adam Rosenblum	Completion	10/15/2013		7/15/2014	
S2(D)	Develop translation resource handouts						
S2(D)	Develop translation resource handouts	Linda Taylor	Establish committee to assess needs	1/31/2014		3/31/2014	Prioritization given to grant applications, eBranch launch and other strategic plan projects
S2(D)	Develop translation resource handouts	Linda Taylor	Identify existing resources	6/30/2014			
S2(D)	Develop translation resource handouts	Linda Taylor	Evaluate effectiveness of existing process	9/30/2014			
S2(D)	Develop translation resource handouts	Linda Taylor	Develop handout	12/31/2014			
S2(D)	Develop translation resource handouts	Linda Taylor	Recommend plan for future improvements	3/31/2015			Recommendation to follow 3 months after initial development of handout.
S2(D)	Develop translation resource handouts	Linda Taylor	Completion	3/31/2015			
S2(E)	Establish regular "Lawyer in the Library" programs (mediators, collaborative divorce, small claims advisor, etc.)	Janine Liebert	Identify models and scope of services	8/30/2013	Y		
S2(E)	Establish regular "Lawyer in the Library" programs (mediators, collaborative divorce, small claims advisor, etc.)	Janine Liebert	Identify prospective partners and gauge interest	9/30/2013	Y	11/30/2013	Commenced but not completed. Pilot programs in progress.
S2(E)	Establish regular "Lawyer in the Library" programs (mediators, collaborative divorce, small claims advisor, etc.)	Janine Liebert	Identify potential host locations (including the Law Library)	9/30/2013	Y	11/30/2013	
S2(E)	Establish regular "Lawyer in the Library" programs (mediators, collaborative divorce, small claims advisor, etc.)						
S2(E)	Establish regular "Lawyer in the Library" programs (mediators, collaborative divorce, small claims advisor, etc.)	Janine Liebert	Design, structure and plan program	12/30/2013		3/31/2014	Commenced but not completed. UD Clinic at Pasadena PL ongoing on weekly basis. Divorce Options Workshop piloting 2/13/2014. In discussions/planning phase with Bet Tzedek, Public Counsel, Christian Legal Aid and LACBA Barristers.
S2(E)	Establish regular "Lawyer in the Library" programs (mediators, collaborative divorce, small claims advisor, etc.)	Janine Liebert	Implement soft launch	3/30/2014		4/28/2014	Pilot programs underway - topic-specific Lawyers in the Library slated for Law Week (4/28 - 5/1)
S2(E)	Establish regular "Lawyer in the Library" programs (mediators, collaborative divorce, small claims advisor, etc.)	Janine Liebert	Assess	3/30/2014			
S2(E)	Establish regular "Lawyer in the Library" programs (mediators, collaborative divorce, small claims advisor, etc.)	Janine Liebert	Expand	6/30/2014			

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
S2(E)	Establish regular "Lawyer in the Library" programs (mediators, collaborative divorce, small claims advisor, etc.)	Janine Liebert	Completion	12/30/2014			
S2(F)	Coordinate with lawyer referral services, judiciary and local bar associations on unbundling of legal services and development of delivery model at library						
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			
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			
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			
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			
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			
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			
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			

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
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			
S2(G)	Develop and implement model for library-based clinics and self-help workshops for delivery of civil self-help services.	Janine Liebert	Conduct Needs Assessment	12/30/2013	Y		
S2(G)	Develop and implement model for library-based clinics and self-help workshops for delivery of civil self-help services.						
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		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.
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			
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			
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			
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			
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			
S2(H)	Offer more training from vendors and publishers	Katie O'Laughlin	Identify training needs	7/22/2013	Y		
S2(H)	Offer more training from vendors and publishers	Katie O'Laughlin	Develop contact list of vendors and publishers	8/26/2013	Y		
S2(H)	Offer more training from vendors and publishers						
S2(H)	Offer more training from vendors and publishers	Katie O'Laughlin	Create schedule of training events and intended audience	9/23/2013		3/1/2014	Lexis and westlaw classes are scheduled - need more time to develop other classes
S2(H)	Offer more training from vendors and publishers	Katie O'Laughlin	Develop and distribute summary of training opportunities	10/21/2013		6/1/2014	Continuing to contact vendors other than Lexis & Westlaw and investigate possibility of public training classes

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S2(H)	Offer more training from vendors and publishers	Katie O'Laughlin	Administer training events	12/31/2013		12/1/2014	
S2(H)	Offer more training from vendors and publishers	Katie O'Laughlin	Completion	2/28/2014		12/1/2014	
S3(A)	Conversion of Torrance space to training and education facility	Linda Taylor	Assess needs and resources, develop plan for conversion	12/31/2013	Y		
S3(A)	Conversion of Torrance space to training and education facility						
S3(A)	Conversion of Torrance space to training and education facility	Linda Taylor	Establish relationships with local bar associations, legal service agencies, other groups and identify programing	3/31/2014			
S3(A)	Conversion of Torrance space to training and education facility	Linda Taylor	Secure funding for conversion	6/30/2014			
S3(A)	Conversion of Torrance space to training and education facility	Linda Taylor	Conduct programming	6/30/2015			
S3(A)	Conversion of Torrance space to training and education facility	Linda Taylor	Completion	7/30/2015			
S3(B)	Confirm plan for new Long Beach Branch	Linda Taylor	Discuss options for Long Beach presence	7/31/2013	Y		
S3(B)	Confirm plan for new Long Beach Branch	Linda Taylor	Pilot eBranch and/or mini-branch (LBPL)	9/30/2013	Y	12/31/2013	90-day moratorium on room alteration; delay in installing data lines.
S3(B)	Confirm plan for new Long Beach Branch						
S3(B)	Confirm plan for new Long Beach Branch	Linda Taylor	Evaluate and assess LB presence	12/31/2013		6/30/2014	6 month pilot after launch
S3(B)	Confirm plan for new Long Beach Branch	Linda Taylor	Completion	3/31/2014		9/30/2014	3 months to recommend adjustments after evaluation.
S3(C)	Expand access to form templates and precedent beyond court-provided forms (e.g., commonly requested motions).						
S3(C)	Expand access to form templates and precedent beyond court-provided forms (e.g., commonly requested motions).	Janine Liebert	Asses needs and models of delivery	3/30/2015			
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			
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			
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			

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
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			
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			
S3(C)	Expand access to form templates and precedent beyond court-provided forms (e.g., commonly requested motions).	Janine Liebert	Assess	12/31/2016			
S3(C)	Expand access to form templates and precedent beyond court-provided forms (e.g., commonly requested motions).	Janine Liebert	Completion	12/31/2016			
S3(D)	Establish a program for legal document assistants in the library						
S3(D)	Establish a program for legal document assistants in the library	MaLinda Taylor	Identify and assess viability with organization leaders	12/30/2014			
S3(D)	Establish a program for legal document assistants in the library	MaLinda Taylor	Assess components and recommend policies and procedures	3/30/2015			
S3(D)	Establish a program for legal document assistants in the library	MaLinda Taylor	Determine liability, write contracts / MOU	3/30/2015			
S3(D)	Establish a program for legal document assistants in the library	MaLinda Taylor	Soft launch program	6/30/2015			
S3(D)	Establish a program for legal document assistants in the library	MaLinda Taylor	Create feedback mechanism and metrics	6/30/2015			
S3(D)	Establish a program for legal document assistants in the library	MaLinda Taylor	Assess success of program	9/30/2015			
S3(D)	Establish a program for legal document assistants in the library	MaLinda Taylor	Completion	12/30/2015			
S3(E)	Offer training and materials to the courts, including library resources, FAQ's and referral sheets						
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		4/1/2014	Meeting with Court Administrator scheduled for early February 2014, have had discussions with Court Librarian
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			
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			
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			

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
S3(E)	Offer training and materials to the courts, including library resources, FAQ's and referral sheets	Ralph Stahlberg	Completion	Ongoing?			
S4(A)	Establish eBranches throughout the County						
S4(A)	Establish eBranches throughout the County	Linda Taylor & Jaye Nelson	SWOT assessment based upon pilot program	3/31/2014		9/30/2014	Delay in eBranch deployment (est late Feb 2014); need at least 6 months operation of eBranch before SWOT assessment take place.
S4(A)	Establish eBranches throughout the County	Linda Taylor & Jaye Nelson	Develop additional technology and tools	6/30/2014		3/31/2015	Longer lead time for technology development
S4(A)	Establish eBranches throughout the County	Linda Taylor & Jaye Nelson	Identify strategic locations and develop partnerships	7/31/2014		9/30/2015	6 month pilot after tool development
S4(A)	Establish eBranches throughout the County	Linda Taylor & Jaye Nelson	Pilot new tools	9/30/2014		12/31/2015	3 month launch after tools piloted
S4(A)	Establish eBranches throughout the County	Linda Taylor & Jaye Nelson	Launch "next phase" eBranch	12/31/2014		5/1/2016	6 month launch, 1 month compiling recommendation
S4(A)	Establish eBranches throughout the County	Linda Taylor & Jaye Nelson	Completion	Ongoing?		5/1/2016	Completion to correspond with recommendation for ongoing implementation
S4(B)	Expand training at partnership locations	Linda Taylor	Develop slate of public and staff training	9/30/2013	Y	12/31/2013	Staff changes/lack of engaged interest among some partnership libraries.
S4(B)	Expand training at partnership locations	Linda Taylor	Launch public and staff training	1/31/2014	Y	3/31/2014	
S4(B)	Expand training at partnership locations						
S4(B)	Expand training at partnership locations	Linda Taylor	Assess and revise as needed	4/30/2014		9/30/2014	6 month evaluation period
S4(B)	Expand training at partnership locations	Linda Taylor	Recommend program for ongoing, regular, public and staff training	6/30/2014		12/31/2014	3 month recommendation after evaluation
S4(B)	Expand training at partnership locations	Linda Taylor	Completion	7/31/2014		12/31/2014	
T1(A)	Develop eBranches for distribution throughout the County						
T1(A)	Develop eBranches for distribution throughout the County	Linda Taylor & Jaye Nelson	SWOT assessment based upon pilot program	3/31/2014		9/30/2014	Delay in eBranch deployment (est late Feb 2014); need at least 6 months operation of eBranch before SWOT assessment take place.
T1(A)	Develop eBranches for distribution throughout the County	Linda Taylor & Jaye Nelson	Develop additional technology and tools	6/30/2014		3/31/2015	Longer lead time for technology development
T1(A)	Develop eBranches for distribution throughout the County	Linda Taylor & Jaye Nelson	Pilot new tools	9/30/2014		9/30/2015	6 month pilot after tool development
T1(A)	Develop eBranches for distribution throughout the County	Linda Taylor & Jaye Nelson	Launch "next phase" eBranch	12/31/2014		12/31/2015	3 month launch after tools piloted
T1(A)	Develop eBranches for distribution throughout the County	Linda Taylor & Jaye Nelson	Recommend program for ongoing implementation	3/31/2015		5/1/2016	6 month launch, 1 month compiling recommendation
T1(A)	Develop eBranches for distribution throughout the County	Linda Taylor & Jaye Nelson	Completion	6/30/2015		5/1/2016	Completion to correspond with recommendation for ongoing implementation

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
T1(B)	Develop next-generation collection management practices, including replacement of Voyager (Integrated Library Systems software)						
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			
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		10/30/2014	Impact on project workflow resulting from the unexpected Cataloging staff change (loss of Head of Cataloging in Sept 2013) attributes to the delay.
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			
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			
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			
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			
T1(B)	Develop next-generation collection management practices, including replacement of Voyager (Integrated Library Systems software)	Meiling Li	Conduct staff training	8/31/2015			
T1(B)	Develop next-generation collection management practices, including replacement of Voyager (Integrated Library Systems software)	Meiling Li	Go live	9/30/2015			
T1(B)	Develop next-generation collection management practices, including replacement of Voyager (Integrated Library Systems software)	Meiling Li	Completion	10/31/2015			
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 out website into a mobile version.
T1(C)	Develop a Law Library mobile application						
T1(C)	Develop a Law Library mobile application	Adam Rosenblum	Create beta web-app for testing	9/15/2014			

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
T1(C)	Develop a Law Library mobile application	Adam Rosenblum	Staff review of content & functionality	9/30/2014			
T1(C)	Develop a Law Library mobile application	Adam Rosenblum	Go live - Make web-application available online	11/1/2014			
T1(C)	Develop a Law Library mobile application	Adam Rosenblum	Develop ongoing program to review and expand content	12/31/2014			
T1(C)	Develop a Law Library mobile application	Adam Rosenblum	Completion	12/31/2014			
T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks						
T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks	Jaye Nelson	Determine available, relevant content	3/1/2014			
T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks	Jaye Nelson	Review technology, create budget estimates & recommendation	5/1/2014			
T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks	Jaye Nelson	Create 90 day pilot implementation plan / Order equipment	7/15/2014			
T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks	Jaye Nelson	Test pilot configurations	9/15/2014			
T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks	Jaye Nelson	Make available to patrons	10/15/2014			
T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks	Jaye Nelson	Develop ongoing program to review and expand	12/31/2014			
T1(D)	Non-circulating mobile devices for use in Library with legal apps/ebooks	Jaye Nelson	Completion	12/31/2014			
T2(A)	Upgrade Navision						
T2(A)	Upgrade Navision	Finance Director	Conduct RFP	10/30/2013		?	A new schedule will be developed once the Finance Director position is filled.
T2(A)	Upgrade Navision	Finance Director	Confirm whether Navision is the right solution	11/30/2013		?	A new schedule will be developed once the Finance Director position is filled.
T2(A)	Upgrade Navision	Finance Director	Plan and implement data migration including software customization	1/31/2014		?	A new schedule will be developed once the Finance Director position is filled.
T2(A)	Upgrade Navision	Finance Director	Plan for rollout and training	3/31/2014		?	A new schedule will be developed once the Finance Director position is filled.
T2(A)	Upgrade Navision	Finance Director	Go live and document	4/30/2014		?	A new schedule will be developed once the Finance Director position is filled.
T2(A)	Upgrade Navision	Finance Director	Completion	5/31/2014		?	A new schedule will be developed once the Finance Director position is filled.
T2(B)	Provide the option to pay fees, fines and charges online	Meiling Li	Finalize PayPal account banking requirements	6/30/2013	Y		
T2(B)	Provide the option to pay fees, fines and charges online	Meiling Li	Determine system capabilities	7/31/2013	Y		
T2(B)	Provide the option to pay fees, fines and charges online	Meiling Li	Create workflow processing chart(s)	9/15/2013	Y		
T2(B)	Provide the option to pay fees, fines and charges online	Meiling Li	Begin programming/Implementation	10/1/2013	Y		The new website has integrated Paypal as payment option for class registration.
T2(B)	Provide the option to pay fees, fines and charges online						

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T2(B)	Provide the option to pay fees, fines and charges online	Meiling Li	Test and assure functionality	11/30/2013			
T2(B)	Provide the option to pay fees, fines and charges online	Meiling Li	Go live and document changes	2/1/2014			
T2(B)	Provide the option to pay fees, fines and charges online	Meiling Li	Completion	2/28/2014			
T2(C)	Provide the option to renew materials and manage Library user account online	Jaye Nelson & Angelica Buenrostro	Evaluate technical requirements	7/1/2013	Y		
T2(C)	Provide the option to renew materials and manage Library user account online	Jaye Nelson & Angelica Buenrostro	Turn-on/test Functionality	8/1/2013	Y	11/15/2013	Database access problem arose on 1st test & needs to be addressed.
T2(C)	Provide the option to renew materials and manage Library user account online						
T2(C)	Provide the option to renew materials and manage Library user account online	Jaye Nelson & Angelica Buenrostro	Work with communications to notify borrowers	9/1/2013		3/19/2014	Software issues with ILS system have delayed this project.
T2(C)	Provide the option to renew materials and manage Library user account online	Jaye Nelson & Angelica Buenrostro	Establish online payment options (see T2(B))	2/1/2014		7/25/2014	
T2(C)	Provide the option to renew materials and manage Library user account online	Jaye Nelson & Angelica Buenrostro	Completion	2/15/2014		8/4/2014	
T2(D)	Improve and maintain user-friendly website with expanded audio-visual and interactive tools	Jaye Nelson	Go Live with newly expanded website	8/15/2013	Y	10/17/2013	Online payment obstacles delayed project.
T2(D)	Improve and maintain user-friendly website with expanded audio-visual and interactive tools	Jaye Nelson	Assess effectiveness and accessibility	9/30/2013	Y	12/31/2013	
T2(D)	Improve and maintain user-friendly website with expanded audio-visual and interactive tools						
T2(D)	Improve and maintain user-friendly website with expanded audio-visual and interactive tools	Jaye Nelson	Develop ongoing program to review and expand content	10/30/2013		1/30/2014	
T2(D)	Improve and maintain user-friendly website with expanded audio-visual and interactive tools	Jaye Nelson	Completion	10/30/2013		1/30/2014	Ongoing
T2(E)	Provide catalog searching capabilities in closed stacks	Jeremy Samler	Identify locations in the stacks for deployment	7/1/2013	Y		
T2(E)	Provide catalog searching capabilities in closed stacks	Jeremy Samler	Verify and/or expand Wi-Fi coverage	9/1/2013	Y		
T2(E)	Provide catalog searching capabilities in closed stacks	Jeremy Samler	Repurpose existing, available hardware as search stations	10/1/2013	Y		
T2(E)	Provide catalog searching capabilities in closed stacks						

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMP L E T E D (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
T2(E)	Provide catalog searching capabilities in closed stacks	Jeremy Samler	Installation and training	3/31/2014			
T2(E)	Provide catalog searching capabilities in closed stacks	Jeremy Samler	Completion	4/30/2014			
W1(A)	Draft and implement Safety and Emergency Preparedness Plans	Jaye Nelson & Facility	Review and edit existing plan as needed.	8/1/2013	Y		
W1(A)	Draft and implement Safety and Emergency Preparedness Plans	Jaye Nelson & Facility	Present plan to BOT for adoption	8/20/2013	Y		
W1(A)	Draft and implement Safety and Emergency Preparedness Plans	Jaye Nelson & Facility	Conduct quarterly safety committee meetings	9/30/2013	Y	Ongoing	
W1(A)	Draft and implement Safety and Emergency Preparedness Plans	Jaye Nelson & Facility	Completion	9/30/2013	Y		
W1(A)	Draft and implement Safety and Emergency Preparedness Plans						
W1(B)	Maintain high-quality, comfortable physical facilities and working conditions						
W1(B)	Maintain high-quality, comfortable physical facilities and working conditions	Jaye Nelson & TBD	Survey staff / conduct needs assessment	9/1/2013		2/10/2014	Aligned with security & facilities survey.
W1(B)	Maintain high-quality, comfortable physical facilities and working conditions	Jaye Nelson & TBD	Create needs list, and implement low or no-cost items	10/15/2013		2/21/2014	
W1(B)	Maintain high-quality, comfortable physical facilities and working conditions	Jaye Nelson & TBD	Identify funding and timeframe for additional items	12/1/2013		4/11/2014	
W1(B)	Maintain high-quality, comfortable physical facilities and working conditions	Jaye Nelson & TBD	Completion	6/30/2014		10/31/2014	
W1(C)	Improve accessibility						
W1(C)	Improve accessibility	Jaye Nelson & TBD	Gather input from staff/patrons/experts - complete needs assessment	2/1/2014			
W1(C)	Improve accessibility	Jaye Nelson & TBD	Develop accessibility checklist for use in all future projects/programs	2/15/2014			
W1(C)	Improve accessibility	Jaye Nelson & TBD	Review accessibility software & hardware needs	3/31/2014			
W1(C)	Improve accessibility	Jaye Nelson & TBD	Complete software & hardware installations	4/15/2014			
W1(C)	Improve accessibility	Jaye Nelson & TBD	Review facility accessibility needs – make 2014-15 budget recommendations	5/1/2014			
W1(C)	Improve accessibility	Jaye Nelson & TBD	Completion	6/30/2015			
W1(D)	Automate elevator functions	Jaye Nelson	Create RFP	8/1/2013		1/29/2014	In Process / Almost Complete
W1(D)	Automate elevator functions	Jaye Nelson	Send approved RFP out to public bid	8/5/2013		2/3/2014	
W1(D)	Automate elevator functions	Jaye Nelson	Award Bid, begin elevator updates	8/20/2013		3/25/2014	Board Meeting Date - March
W1(D)	Automate elevator functions	Jaye Nelson	Completion	4/1/2014		12/31/2014	

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
W1(E)	Draft HR Procedures Manual	Finance Director	Outline Procedures Manual organization and content; develop a table of contents.	9/30/2013	Y		
W1(E)	Draft HR Procedures Manual						
W1(E)	Draft HR Procedures Manual	Finance Director	Outline each chapter	11/30/2013		?	Partially complete; A new schedule will be developed once the Finance Director position is filled.
W1(E)	Draft HR Procedures Manual	Finance Director	Write draft	1/31/2014		?	A new schedule will be developed once the Finance Director position is filled.
W1(E)	Draft HR Procedures Manual	Finance Director	Solicit feedback from ED, Sr. Director, and other directors	2/28/2014		?	A new schedule will be developed once the Finance Director position is filled.
W1(E)	Draft HR Procedures Manual	Finance Director	Incorporate suggestions into final draft	3/31/2014		?	A new schedule will be developed once the Finance Director position is filled.
W1(E)	Draft HR Procedures Manual	Finance Director	Completion	4/30/2014		?	A new schedule will be developed once the Finance Director position is filled.
W2(A)	Annual employee picnic	Leigh Garcia	Survey employees about venue, date, and activities	6/15/2013	Y		COMPLETE
W2(A)	Annual employee picnic	Leigh Garcia	Confirm venue	6/30/2013	Y		COMPLETE - reach out for 2014 quotes has commenced
W2(A)	Annual employee picnic	Leigh Garcia	Coordinate potluck, arrange paper products, enlist volunteers, communicate event	7/15/2013	Y		COMPLETE - 2014 DRAFT events calendar started
W2(A)	Annual employee picnic	Leigh Garcia	Conduct event and debrief	8/31/2013	Y		COMPLETE
W2(A)	Annual employee picnic	Leigh Garcia	Completion	8/31/2013	Y		COMPLETE
W2(A)	Annual employee picnic						
W2(B)	Hold occasional events open to family and friends	Leigh Garcia	Survey employees about frequency and suggested activities	10/31/2013	y		
W2(B)	Hold occasional events open to family and friends	Leigh Garcia	Calendar and plan events	12/31/2013	y		2014 calendar commenced
W2(B)	Hold occasional events open to family and friends	Leigh Garcia	Assess success and propose ongoing program	3/31/2014	Y		
W2(B)	Hold occasional events open to family and friends	Leigh Garcia	Completion	6/30/2014	Y		
W2(B)	Hold occasional events open to family and friends						
W2(B)	Hold occasional events open to family and friends	Leigh Garcia	Develop and propose events schedule to ED	11/30/2013		1/30/2014	Formal event proposal is almost complete: P:\Communications\Events\Employee Events S.P
W2(C)	Evaluate feasibility and cost of alternative scheduling options (e.g., flexible scheduling, adjusted shift lengths, shortened work weeks)						
W2(C)	Evaluate feasibility and cost of alternative scheduling options (e.g., flexible scheduling, adjusted shift lengths, shortened work weeks)	Finance Director	Poll directors and employees about desirable alternative work arrangements	12/31/2013		?	A new schedule will be developed once the Finance Director position is filled.
W2(C)	Evaluate feasibility and cost of alternative scheduling options (e.g., flexible scheduling, adjusted shift lengths, shortened work weeks)						
W2(C)	Evaluate feasibility and cost of alternative scheduling options (e.g., flexible scheduling, adjusted shift lengths, shortened work weeks)	Finance Director	Analyze costs and feasibility and write proposal	2/28/2014		?	A new schedule will be developed once the Finance Director position is filled.

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
W2(C)	Evaluate feasibility and cost of alternative scheduling options (e.g., flexible scheduling, adjusted shift lengths, shortened work weeks)	Finance Director	Discuss proposal with union	3/31/2014		?	A new schedule will be developed once the Finance Director position is filled.
W2(C)	Evaluate feasibility and cost of alternative scheduling options (e.g., flexible scheduling, adjusted shift lengths, shortened work weeks)	Finance Director	Implement program	6/30/2014		?	A new schedule will be developed once the Finance Director position is filled.
W2(C)	Evaluate feasibility and cost of alternative scheduling options (e.g., flexible scheduling, adjusted shift lengths, shortened work weeks)	Finance Director	Completion	7/31/2014		?	A new schedule will be developed once the Finance Director position is filled.
W2(D)	Provide stretch classes or other physical activities at break times						
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			
W2(D)	Provide stretch classes or other physical activities at break times	Eustorgio Barajas	Enlist employee leaders or acquire video classes	5/31/2014			
W2(D)	Provide stretch classes or other physical activities at break times	Eustorgio Barajas	Develop a schedule	6/30/2014			
W2(D)	Provide stretch classes or other physical activities at break times	Eustorgio Barajas	Completion	7/31/2014			
W2(E)	Establish an employee of the month/year program						
W2(E)	Establish an employee of the month/year program	Finance Director	Enlist participation from managers and staff to develop nomination and selection criteria and procedures	6/30/2014			
W2(E)	Establish an employee of the month/year program	Finance Director	Write EOM/Y program for review by focus group and ED	9/30/2014			
W2(E)	Establish an employee of the month/year program	Finance Director	Announce program, develop schedule and implement	11/30/2014			
W2(E)	Establish an employee of the month/year program	Finance Director	Review success of program, revise as necessary	3/31/2015			
W2(E)	Establish an employee of the month/year program	Finance Director	Completion	4/30/2015			
W3(A)	Cross-train employees in related positions						
W3(A)	Cross-train employees in related positions	Finance Director	Work with directors to identify opportunities for cross-training	2/28/2015			
W3(A)	Cross-train employees in related positions	Finance Director	Develop and document a plan and timeline for each area	4/30/2015			
W3(A)	Cross-train employees in related positions	Finance Director	Ensure plans are implemented	7/31/2015			
W3(A)	Cross-train employees in related positions	Finance Director	Assess success of cross-training and revise as necessary	9/30/2015			
W3(A)	Cross-train employees in related positions	Finance Director	Completion	10/31/2015			

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
W3(B)	Evaluate and improve process efficiency in all library functions						
W3(B)	Evaluate and improve process efficiency in all library functions	Finance Director	Work with directors to map function processes	12/31/2013		?	A new schedule will be developed once the Finance Director position is filled.
W3(B)	Evaluate and improve process efficiency in all library functions	Finance Director	Analyze process maps within and between departments and identify opportunities for streamlining, simplification, automation, or elimination	3/31/2014		?	A new schedule will be developed once the Finance Director position is filled.
W3(B)	Evaluate and improve process efficiency in all library functions	Finance Director	Benchmark other libraries/organizations and document best practices and appropriate metrics	3/31/2014		?	A new schedule will be developed once the Finance Director position is filled.
W3(B)	Evaluate and improve process efficiency in all library functions	Finance Director	Implement no-cost improvements.	5/31/2014		?	A new schedule will be developed once the Finance Director position is filled.
W3(B)	Evaluate and improve process efficiency in all library functions	Finance Director	Propose and budget for other improvements including costs and impacts on other departments	5/31/2014		?	A new schedule will be developed once the Finance Director position is filled.
W3(B)	Evaluate and improve process efficiency in all library functions	Finance Director	Plan, document, and implement process changes and success metrics	9/30/2014		?	A new schedule will be developed once the Finance Director position is filled.
W3(B)	Evaluate and improve process efficiency in all library functions	Finance Director	Review changes and revise as necessary. Document revisions.	12/31/2014		?	A new schedule will be developed once the Finance Director position is filled.
W3(B)	Evaluate and improve process efficiency in all library functions	Finance Director	Completion	1/15/2015		?	A new schedule will be developed once the Finance Director position is filled.
W3(C)	Merge Programs & Partnerships and Reference functions	Sandi Levin	Reconfigure desk/office locations	9/1/2013	Y		
W3(C)	Merge Programs & Partnerships and Reference functions	Sandi Levin	Adjust reference desk schedule	9/1/2013	Y		
W3(C)	Merge Programs & Partnerships and Reference functions	Sandi Levin	Develop project teams comprised of both groups	12/31/2013	Y		
W3(C)	Merge Programs & Partnerships and Reference functions	Sandi Levin	Conduct cross-training	12/31/2013		6/30/2014	Partially complete.
W3(C)	Merge Programs & Partnerships and Reference functions	Sandi Levin	Completion	2/28/2014		7/31/2014	
W3(D)	Establish a law student intern / extern program	Malinda Muller	Identify partner schools	6/30/2013	Y		
W3(D)	Establish a law student intern / extern program	Malinda Muller	Build program components	6/30/2013	Y		
W3(D)	Establish a law student intern / extern program	Malinda Muller	Implement pilot program	6/30/2013	Y		
W3(D)	Establish a law student intern / extern program	Malinda Muller	Assess	9/30/2013	Y		
W3(D)	Establish a law student intern / extern program						
W3(D)	Establish a law student intern / extern program	Malinda Muller	Create handbook and guidelines	12/31/2013		2/28/2014	Partially complete

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
W3(D)	Establish a law student intern / extern program	Malinda Muller	Recruit and expand program to new institutions if applicable	3/31/2014			
W3(D)	Establish a law student intern / extern program	Malinda Muller	Completion	3/31/2014			
W3(E)	Establish a library student/recent graduate unpaid Internship program						
W3(E)	Establish a library student/recent graduate unpaid Internship program	Malinda Muller	Identify current practices and assess strengths and weaknesses	12/30/2013		2/28/2014	Partially complete
W3(E)	Establish a library student/recent graduate unpaid Internship program	Malinda Muller	Redesign, incorporate and expand on current practices	3/30/2014			
W3(E)	Establish a library student/recent graduate unpaid Internship program	Malinda Muller	Research, evaluate and implement best practices	9/30/2014			
W3(E)	Establish a library student/recent graduate unpaid Internship program	Malinda Muller	Design and implement staff and participant feedback mechanism	9/30/2014			
W3(E)	Establish a library student/recent graduate unpaid Internship program	Malinda Muller	Create handbook and guidelines	12/31/2014			
W3(E)	Establish a library student/recent graduate unpaid Internship program	Malinda Muller	Completion	12/31/2014			
W3(F)	Establish an "on-call list" of contract employees available to cover occasional absences						
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			
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			
W3(F)	Establish an "on-call list" of contract employees available to cover occasional absences	Eustorgio Barajas	Recruit on-call staff	6/30/2015			
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			
W3(F)	Establish an "on-call list" of contract employees available to cover occasional absences	Eustorgio Barajas	Completion	10/31/2015			
W4(A)	Provide continuing education and training opportunities						
W4(A)	Provide continuing education and training opportunities	Eustorgio Barajas	Working with staff, identify training needs and desires	2/28/2014			
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			
W4(A)	Provide continuing education and training opportunities	Eustorgio Barajas	Working with trainers, develop curricula and training materials	6/30/2014			
W4(A)	Provide continuing education and training opportunities	Eustorgio Barajas	Schedule and promote training events	7/31/2014			

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
W4(A)	Provide continuing education and training opportunities	Eustorgio Barajas	Completion	8/31/2014			
W4(B)	Establish a volunteer program to provide additional support and outreach	Sandi Levin	Research existing public/nonprofit/govt programs	7/31/2013	Y		
W4(B)	Establish a volunteer program to provide additional support and outreach	Sandi Levin	Participate in available trainings and workshops	8/30/2013	Y		
W4(B)	Establish a volunteer program to provide additional support and outreach	Sandi Levin	Build program components and Develop handbook	9/1/2013	Y		
W4(B)	Establish a volunteer program to provide additional support and outreach						
W4(B)	Establish a volunteer program to provide additional support and outreach	Sandi Levin	Develop recruitment procedures	10/31/2013		2/28/2014	Project delayed due to other HR projects and transitions
W4(B)	Establish a volunteer program to provide additional support and outreach	Sandi Levin	Recruit and Implement	12/31/2013		4/30/2014	
W4(B)	Establish a volunteer program to provide additional support and outreach	Sandi Levin	Assess effectiveness, SWOT	3/31/2014		7/31/2014	
W4(B)	Establish a volunteer program to provide additional support and outreach	Sandi Levin	Completion	3/31/2014		7/31/2014	
W4(C)	Expand the high school intern program	Shohreh Saljooghi	Coordinate and complete current pilot project (4 interns)	8/2/2013	Y		
W4(C)	Expand the high school intern program	Shohreh Saljooghi	Build and refine program components	4/30/2014	Y		
W4(C)	Expand the high school intern program	Shohreh Saljooghi	Document procedures for expanded program	5/31/2014	Y		
W4(C)	Expand the high school intern program						
W4(C)	Expand the high school intern program	Shohreh Saljooghi	Identify partner organizations to maximize recruitment opportunities	3/31/2014			
W4(C)	Expand the high school intern program	Shohreh Saljooghi	Completion	6/30/2014			
W4(E)	Conduct a space needs assessment for employee workspaces	Sandi Levin & Jaye Nelson	Interview directors	9/30/2013	Y		
W4(E)	Conduct a space needs assessment for employee workspaces						
W4(E)	Conduct a space needs assessment for employee workspaces	Sandi Levin & Jaye Nelson	Survey staff	10/31/2013		2/28/2014	Commenced but not completed. Workplace safety issues have taken priority.
W4(E)	Conduct a space needs assessment for employee workspaces	Sandi Levin & Jaye Nelson	Analyze trends, future projects and anticipated changes	12/31/2013		3/31/2014	
W4(E)	Conduct a space needs assessment for employee workspaces	Sandi Levin & Jaye Nelson	Draft report with recommendations	1/31/2014		4/30/2014	

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GOAL	PROJECT	COORDINATOR (S)	MILESTONE	TARGET DATE	COMPLETED (Y/N)	EXTENDED DATE	EXPLANATION/COMMENTS
W4(E)	Conduct a space needs assessment for employee workspaces	Sandi Levin & Jaye Nelson	Completion	2/28/2014		5/31/2014	
W4(F)	Install document management and/or collaboration software	Meiling Li	Acquire licensing	7/31/2013	Y		
W4(F)	Install document management and/or collaboration software	Meiling Li	Install software including required workflow definitions	12/1/2013	Y		
W4(F)	Install document management and/or collaboration software						
W4(F)	Install document management and/or collaboration software	Meiling Li	Meet with staff and vendor to create implantation plan	11/15/2013		2/28/2014	Initial component complete; additional components in development
W4(F)	Install document management and/or collaboration software	Meiling Li	Completion	2/1/2014		7/31/2014	Software has been installed but testing and training has taken longer than anticipated.



**MEMORANDUM**

**DATE:** January 28, 2014  
**TO:** Board of Law Library Trustees  
**FROM:** Sandra Levin, Executive Director  
**RE:** Law Library Job Descriptions

**SUMMARY**

This is a recommendation to approve the Law Library's job descriptions for all current positions at the Law Library.

**BACKGROUND**

Although the Law Library has made efforts in the past to compile job descriptions for all positions at the Law Library, due to changes in positions, transitions in personnel and lost files, the existing set of job descriptions is incomplete. Human resources staff has therefore attempted to create a complete, internally consistent set, adhering as closely as possible to the known existing descriptions. Specifically, staff gathered descriptions from various physical files and server locations, as well as employees' own records where available, standardized format and terminology, updated descriptions where duties had evolved over time, and, in consultation with the Law Library's various supervisors, wrote descriptions to reflect current duties where descriptions could not be located.

The revised job descriptions are stored on the Law Library's server and are available via an index on the Law Library's website here:

[http://www.lalawlibrary.org/pdfs/JD/JD\\_current.pdf](http://www.lalawlibrary.org/pdfs/JD/JD_current.pdf). Law Library employees were also given a link to these descriptions prior to writing this report. A copy of the descriptions was given to the SEIU on December 20, 2013 and a meeting to discuss them is scheduled to take place on January 24, 2014. Any changes, issues or concerns will be brought to the Board's attention at the meeting (and the item moved to the discussion portion of the agenda).

**RECOMMENDATION**

Staff recommends that the Board approve the proposed job descriptions.





# AGENDA ITEM 4

## DISCUSSION ITEMS

- 4.1 Approval of OPEB Prepayment as Recommended by Board Subcommittee.
- 4.2 FY14 Mid-Year Budget Review and Forecast.
- 4.3 Approval of Law Library Organizational Restructure.
- 4.4 E-Branch Demonstration.



**MEMORANDUM**

**DATE:** January 28, 2014

**TO:** Board of Law Library Trustees

**FROM:** Reva Goetz, Chair of Budget and Finance Committee  
Sandra Levin, Executive Director

**RE:** Investment Options: Recommendation from the Finance Committee

**SUMMARY**

At its meeting in December, the Board asked the Budget and Finance Committee to review Staff's recommendation to prefund retiree health insurance costs through the California Employers' Retirement Benefit Trust (CERBT) managed by CalPERS and to invest a substantial portion of the Law Library's cash reserve in U.S. Treasury notes. The Committee recommends: 1) prefunding OPEB through the CERBT in the amount of \$2,000,000; and 2) investing a substantial portion of the Law Library's cash reserve in U.S. Treasury notes pursuant to a laddered structure to be determined based upon expert advice from an investment professional.

**BACKGROUND**

The Finance Committee met on January 13, 2014 at the Law Library to discuss these issues.

**CERBT**

The Committee believes there is considerable merit to prefunding up to \$2 million of the Law Library's:

- Prefunding retiree health insurance costs addresses the net unfunded OPEB obligation that Staff expects will grow to \$2 million by the end of the current fiscal year.
- Investments in CalPERS's CERBT, which is designed to achieve long term capital appreciation through asset diversification, will almost certainly earn considerably more over time than the Law Library's current investment at the State's Local Agency Investment Fund (LAIF) or the Los Angeles County's pooled investments (County pool) which are conservatively invested in short-duration debt instruments such as treasury bills, bankers acceptances, certificates of deposit, etc. In fact, the Committee expects earnings from the Law Library's CERBT investment will be sufficient to fund most of the Law Library's annual contributions toward retiree health insurance costs.
- There is little risk that the Law Library's other post-employment benefit (OPEB) obligations will ever fall below the level of \$2 million. To the contrary, the



Committee expects the liability will continue to grow to more than \$6 million over time based upon the last actuarial analysis prepared for the Law Library.

- A decision by the Board to prefund through a CERBT will not limit it from making future decisions to prefund additional amounts should the Board determine that additional amounts are necessary and prudent.

The Finance Committee recommends the investment be made in the most moderate (neither the least risky nor the most risky) of three risk/return investment options offered by CalPERS.

Attached are the written agreement to prefund other post employment benefits through CalPERS and a delegation of authority to the Executive Director and senior Law Library staff to request disbursements from the prefunded balance, both of which will require the President's signature. These forms, along with other information are required to establish a prefunding account.

#### **U.S. TREASURY NOTES**

The Finance Committee believes the concept of investing some of the Law Library's cash reserves in 5-year and 10-year U.S. Treasury Notes would be a sound and safe way to increase the Law Library's return on its cash reserve over the current LAIF and County pool investments:

- Treasury notes, backed by the full faith and credit of the U.S. government, are undeniably safe investments (although not immune to the vicissitudes of the marketplace should the Law Library be forced to liquidate its investments to meet unplanned needs).
- A laddered structure would create some investment diversity and allow for some liquidity -- as a result of the staggered due dates -- to accommodate necessary future expenses.
- The current yield on 10-year treasury notes is about 2.9%, almost 5 times the return the Law Library's assets are currently earning at LAIF or the County pool. The current difference over one year between treasury notes and LAIF or the County pool would be over \$100,000 on an investment of \$5 million. This difference would provide useful investment income during the Law Library's ongoing fiscal challenges.

The Finance Committee desires expert guidance about the timing, amounts and structure of the investments and believes the Committee and the Board would benefit from the guidance of an experienced investment advisor. The Committee directed Staff to invite an investment advisor to give the full Board a presentation about various ways to structure an investment in treasury notes. That presentation has been scheduled for the February 25 meeting.

#### **RECOMMENDATION**

Approve the Law Library's participation in the CalPERS CERBT to prefund retiree health insurance expense with a lump sum contribution of \$2 million and delegate authority to the Executive Director to complete all necessary forms and execute all necessary agreements.



**AGENDA ITEM 4.0 | DISCUSSION ITEM 4.2**

**MEMORANDUM**

**DATE:** January 28, 2014

**TO:** Board of Law Library Trustees

**FROM:** Sandra Levin, Executive Director  
Marcelino Juarez, Finance Manager

**RE:** FY 2014 Financial Forecast

**SUMMARY**

This will report on Staff’s revised financial forecast for the current fiscal year. The continuing slide in civil filing fee revenue (projected at \$416k below budget) will produce a net operating loss of \$260k before extraordinary items, despite cost conservation efforts. Although the Board has taken steps over the past year to address the structural imbalance between revenues and expenses, it is apparent that further action will be required. Actions currently under review, such as improving income from investments, bolstering rental income and seeking grant revenues are likely to improve, but not entirely eliminate the deficit for future years. Staff believes that further cuts to expenses would decrease levels of service or defer necessary maintenance and does not recommend them at this time. Rather, Staff recommends that the Board use the cash surplus to fund the current fiscal year’s deficit and form a Board Budget Committee to discuss budget options for the 2014/15 fiscal year.

**FY2014 FORECAST**

	Actual 2013	Budget 2014	Forecast 2014	\$ Inc (Dec) over Budget	% Inc (Dec) over Budget	\$ Inc (Dec) over 2013	% Inc (Dec) over 2013
<b>Summary:</b>							
<b>Income</b>							
L.A. Superior Court Fees	7,684,540	7,520,156	7,104,476	-415,680	-5.5%	-580,064	-7.5%
Interest (1)	64,286	60,504	49,759	-10,745	-17.8%	-14,527	-22.6%
Parking	556,182	540,000	600,827	60,827	11.3%	44,645	8.0%
Library Services	420,309	560,137	531,837	-28,300	-5.1%	111,528	26.5%
<b>Total Income</b>	<b>8,725,317</b>	<b>8,680,797</b>	<b>8,286,899</b>	<b>-393,898</b>	<b>-4.5%</b>	<b>-438,418</b>	<b>-5.0%</b>
<b>Expense</b>							
Staff (2)	4,217,089	4,178,130	4,108,514	-69,616	-1.7%	-108,575	-2.6%
Library Materials	3,400,726	3,300,000	3,300,000	0	0.0%	-100,726	-3.0%
Library Materials Trans. to Assets	-3,400,726	-3,300,000	-3,300,000	0	0.0%	100,726	-3.0%
Facilities	818,429	844,925	781,001	-63,924	-7.6%	-37,428	-4.6%
Technology & Data	123,805	151,045	129,253	-21,792	-14.4%	5,448	4.4%
General	114,937	108,745	100,251	-8,494	-7.8%	-14,686	-12.8%

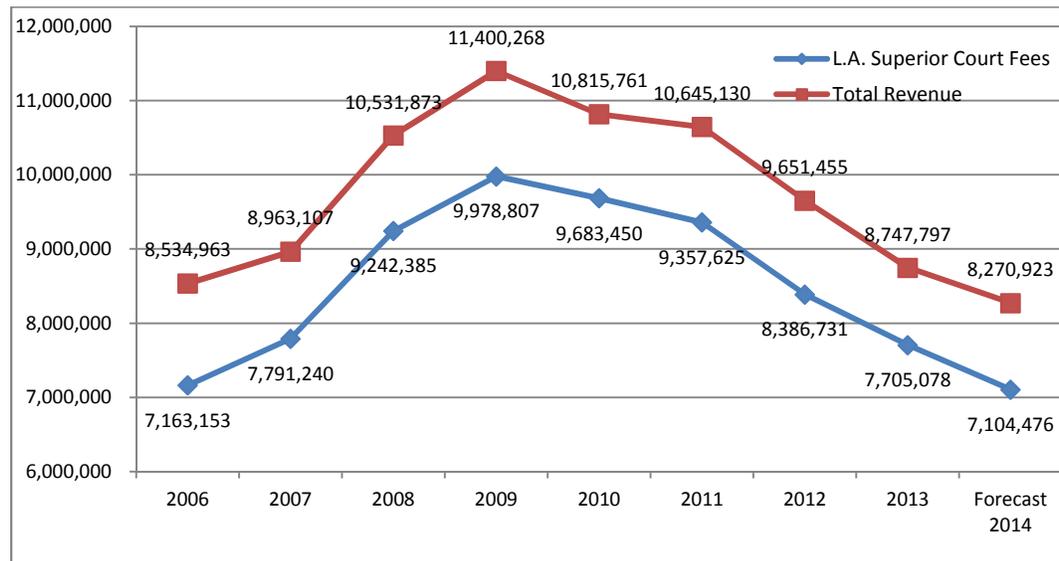


Prof. Development	29,557	18,415	16,262	-2,153	-11.7%	-13,295	-45.0%
Comm. & Mktg	26,675	38,000	18,267	-19,733	-51.9%	-8,408	-31.5%
Travel & Ent.	7,221	3,800	2,704	-1,096	-28.8%	-4,517	-62.6%
Prof. Services	78,188	50,750	57,061	6,311	12.4%	-21,127	-27.0%
Depreciation	3,412,815	3,280,356	3,327,908	47,552	1.4%	-84,907	-2.5%
<b>Total Expenses</b>	<b>8,828,716</b>	<b>8,674,167</b>	<b>8,541,222</b>	<b>-132,945</b>	<b>-1.5%</b>	<b>-287,494</b>	<b>-3.3%</b>
<b>Net Income</b>	<b>-103,399</b>	<b>6,631</b>	<b>-254,323</b>	<b>-260,954</b>	<b>-3935.4%</b>	<b>-150,924</b>	<b>146.0%</b>
Extraordinary Income	0	1,687,950	1,687,950	0	0.0%	1,687,950	0.0%
Extraordinary Expense	1,270,607	246,976	262,732	15,756	6.4%	-1,007,875	-79.3%
OPEB Expense	291,978	325,000	325,000	0	0.0%	33,022	11.3%
Net Income Incl. Ext. Items	-1,665,984	1,122,605	845,895	-276,710	-24.6%	2,511,879	-150.8%
<b>Capitalized Expenditures</b>	<b>358,753</b>	<b>698,400</b>	<b>394,000</b>	<b>-304,400</b>	<b>-43.6%</b>	<b>35,247</b>	<b>9.8%</b>

1. The interest income forecast assumes no increase from the possible plan to invest some of the Law Library's cash reserve in Treasury notes.
2. Staff costs do not include any reduction from the possible prefunding of retiree health insurance costs.

### REVENUE

Civil filing fees continue to drop. Based on fees filed through November 30, 2013, Staff projects filing fees will drop 5.5% below budget and 7.5% below FY2013. If we are right, fees would fall below the amount collected in FY2006 when expenses were \$2.2 million below the current level.



Although parking income will be above budget, interest income and library services will fall below budget. Both interest income and library services revenues are expected to increase due to improvements that are scheduled to be made or that have been made but whose effects have not yet been fully realized.



### **EXPENSES AND NET INCOME**

Although ordinary operating expenses will be 1.5% below budget -- as the result of savings from temporary position vacancies and the deferral of some IT and facilities projects into the next fiscal year -- the savings will be insufficient to offset the revenue decline. Extraordinary items including the sale of rare books, write-off of abandoned partnership materials, and OPEB costs will be close to the amount budgeted.

### **STRUCTURAL DEFICIT**

Even if the civil filing fee decline abates during FY2015, the excess of recurring costs over revenue will likely continue. Incremental steps, such as the Law Library has taken in the recent past to improve profitability, will likely be insufficient to counter the magnitude of decline in filing fees. Staff will explore with the Board as a whole, or its subcommittee if appointed, various options, including programmatic changes to bring the Law Library's finances into better balance.

### **OPTIONS**

The Board has several options to address the forecast deficit for the current fiscal year:

1. Take no action to cut expenses or levels of service at this time and plan to fund the anticipated deficit for the current fiscal year with reserves;
2. Appoint a subcommittee to discuss options and provide recommendations for Fiscal Year 2014-15;
3. Direct Staff to develop a proposal for presentation at the next meeting to bring the net income to a specified level by 6/30/14; or
4. Identify specific changes to reduce expenses or increase revenue and direct staff to implement those changes.

### **RECOMMENDATION**

Staff recommends options 1 and 2.



# Los Angeles Law Library: Summary

Forecast: Fiscal Year Ending 6/30/14

GL No.	Actual				Budget 2014	Forecast 2014	\$ Inc (Dec) relative to Budget	% Inc (Dec) relative to Budget	\$ Inc (Dec) relative to 2013	% Inc (Dec) relative to 2013
	2010	2011	2012	2013						
<b>Summary:</b>										
<b>Income</b>										
L.A. Superior Court Fees	9,683,450	9,357,625	8,386,731	7,684,540	7,520,156	7,104,476	(415,680)	-5.5%	(580,064)	0.0%
Interest	137,278	121,846	108,349	64,286	60,504	49,759	(10,745)	-17.8%	(14,527)	-22.6%
Parking	715,260	703,988	718,308	556,182	540,000	600,827	60,827	11.3%	44,645	8.0%
Library Services	417,051	461,671	438,065	420,309	560,137	531,837	(28,300)	-5.1%	111,528	26.5%
<b>Total Income</b>	<b>10,953,039</b>	<b>10,645,130</b>	<b>9,651,454</b>	<b>8,725,317</b>	<b>8,680,797</b>	<b>8,286,899</b>	<b>(393,898)</b>	<b>-4.5%</b>	<b>(438,418)</b>	<b>-5.0%</b>
<b>Expense</b>										
Staff	3,679,138	4,025,862	4,319,591	4,217,089	4,178,130	4,108,514	(69,616)	-1.7%	(108,574)	-2.6%
Library Materials	3,456,319	3,736,623	3,879,820	3,400,726	3,300,000	3,300,000	0	0.0%	(100,726)	-3.0%
Library Materials Transferred to Assets	(3,456,319)	(3,736,623)	(3,879,820)	(3,400,726)	(3,300,000)	(3,300,000)	0	0.0%	100,726	-3.0%
Facilities	750,142	849,945	938,650	818,429	844,925	781,001	(63,924)	-7.6%	(37,428)	-4.6%
Technology & Data	119,289	147,149	145,052	123,805	151,045	129,253	(21,792)	-14.4%	5,448	4.4%
General	358,255	675,117	187,918	114,937	108,745	100,251	(8,494)	-7.8%	(14,686)	-12.8%
Professional Development	53,329	128,899	73,013	29,557	18,415	16,262	(2,153)	-11.7%	(13,295)	-45.0%
Communications & Marketing	7,924	27,020	39,237	26,675	38,000	18,267	(19,733)	-51.9%	(8,408)	-31.5%
Travel & Entertainment	3,666	3,516	5,301	7,221	3,800	2,704	(1,096)	-28.8%	(4,517)	-62.6%
Professional Services	41,339	140,254	105,032	78,188	50,750	57,061	6,311	12.4%	(21,127)	-27.0%
Depreciation	2,884,838	3,057,995	3,171,013	3,412,815	3,280,356	3,327,908	47,552	1.4%	(84,907)	-2.5%
<b>Total Expenses</b>	<b>7,897,918</b>	<b>9,055,756</b>	<b>8,984,808</b>	<b>8,828,716</b>	<b>8,674,167</b>	<b>8,541,222</b>	<b>(132,945)</b>	<b>-1.5%</b>	<b>(287,494)</b>	<b>-3.3%</b>
<b>Net Income</b>	<b>3,055,120</b>	<b>1,589,374</b>	<b>666,646</b>	<b>(103,399)</b>	<b>6,631</b>	<b>(254,323)</b>	<b>(260,953)</b>	<b>-3935.6%</b>	<b>(150,924)</b>	<b>146.0%</b>
Extraordinary Income	0	0	0	0	1,687,950	1,687,950	0	0.0%	1,687,950	0.0%
Extraordinary Expense	0	0	0	1,270,607	246,976	262,732	15,756	6.4%	(1,007,875)	-79.3%
OPEB Expense	569,360	556,446	323,182	291,978	325,000	325,000	0	0.0%	33,022	11.3%
<b>Net Income Including Extraordinary Items</b>	<b>2,485,760</b>	<b>1,032,928</b>	<b>343,464</b>	<b>(1,665,984)</b>	<b>1,122,605</b>	<b>845,895</b>	<b>(276,709)</b>	<b>-24.6%</b>	<b>2,511,879</b>	<b>-150.8%</b>
<b>Capitalized Expenditures</b>	<b>484,304</b>	<b>321,720</b>	<b>6,385,014</b>	<b>358,753</b>	<b>698,400</b>	<b>394,000</b>	<b>(304,400)</b>	<b>-43.6%</b>	<b>35,247</b>	<b>9.8%</b>
<b>Full-Time Equivalent Employees</b>	<b>NA</b>	<b>NA</b>	<b>NA</b>	<b>57.1</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0%</b>	<b>(57.1)</b>	<b>-100.0%</b>

# Los Angeles Law Library: Summary

Forecast: Fiscal Year Ending 6/30/14

GL No.		Actual				Budget 2014	Forecast 2014	\$ Inc (Dec) relative to Budget	% Inc (Dec) relative to Budget	\$ Inc (Dec) relative to 2013	% Inc (Dec) relative to 2013
		2010	2011	2012	2013						
<b>Detailed Budget:</b>											
<b>Income:</b>											
303300	L.A. Superior Court Fees	9,683,450	9,357,625	8,386,731	7,684,540	7,520,156	7,104,476	(415,680)	-5.5%	(580,064)	-7.5%
Interest:											
311000	Interest - LAIF	66,854	50,171	16,269	4,013	2,400	2,665	265	11.0%	(1,348)	-33.6%
312000	Interest - General Fund	66,903	68,548	89,699	58,563	56,160	45,377	(10,783)	-19.2%	(13,186)	-22.5%
313000	Interest - Deposit Fund	3,521	3,126	2,382	1,710	1,944	1,717	(227)	-11.7%	7	0.4%
	Subtotal	137,278	121,846	108,349	64,286	60,504	49,759	(10,745)	-17.8%	(14,527)	-22.6%
Parking:											
330100	Parking	715,260	703,988	718,308	556,182	525,000	600,827	75,827	14.4%	44,645	8.0%
330105	Valet Parking (NEW ACCOUNT)	0	0	0	0	15,000	0	(15,000)	-100.0%	0	0.0%
	Subtotal	715,260	703,988	718,308	556,182	540,000	600,827	60,827	11.3%	44,645	8.0%
Library Services:											
330150	Annual Borrowing Fee	100,745	50,795	10,475	5,600	6,000	3,194	(2,806)	-46.8%	(2,406)	-43.0%
330140	Annual Members Fee	18,481	59,493	76,632	95,117	91,962	89,845	(2,117)	-2.3%	(5,272)	-5.5%
330340	Course Registration	1,963	7,436	2,570	15,024	22,212	14,150	(8,062)	-36.3%	(874)	-5.8%
330129	Copy Center	82,811	85,126	75,371	73,958	57,000	63,171	6,171	10.8%	(10,787)	-14.6%
330205	Document Delivery	25,217	24,403	30,176	25,734	27,600	28,971	1,371	5.0%	3,237	12.6%
330210	Fines	53,581	46,472	45,980	49,962	50,400	49,742	(658)	-1.3%	(220)	-0.4%
330310	Miscellaneous	12,855	14,055	18,102	1,975	53,600	69,496	15,896	29.7%	67,521	3418.3%
330330	Room Rental	3,150	4,809	(309)	24,722	100,000	37,458	(62,542)	-62.5%	12,736	51.5%
330350	Book Replacement	4,091	5,833	720	3,250	2,735	4,955	2,220	81.2%	1,705	52.5%
330360	Forfeited Deposits	9,734	17,619	28,474	0	2,800	2,800	0	0.0%	2,800	0.0%
330400	Friends of Law Library	100,000	140,000	143,000	120,000	120,000	135,000	15,000	12.5%	15,000	12.5%
330420	Grants	0	0	0	0	20,000	4,000	(16,000)	-80.0%	4,000	0.0%
330450	Vending	4,424	5,631	6,874	4,967	5,828	4,220	(1,608)	-27.6%	(747)	-15.0%
330465	Special Events Income	0	0	0	0	0	24,835	24,835	0.0%	24,835	0.0%
	Subtotal	417,051	461,671	438,065	420,309	560,137	531,837	(28,300)	-5.1%	111,528	26.5%
	Total Income	10,953,039	10,645,130	9,651,454	8,725,317	8,680,797	8,286,899	(393,898)	-4.5%	(438,418)	-5.0%
<b>Expenses:</b>											
Staff:											
501000	Salaries (benefits eligible)	2,830,785	2,904,818	3,120,437	2,774,611	2,672,466	2,557,303	(115,162)	-4.3%	(217,308)	-7.8%
501050	Salaries (benefits ineligible)				349,078	317,332	309,485	(7,847)	-2.5%	(39,594)	-11.3%
502000	Social Security	164,928	169,884	181,290	180,729	185,367	169,757	(15,611)	-8.4%	(10,972)	-6.1%
503000	Medicare	39,877	40,750	43,562	43,427	43,352	40,638	(2,714)	-6.3%	(2,789)	-6.4%
511000	Retirement	0	33,228	156,881	117,765	178,968	286,776	107,808	60.2%	169,011	143.5%
512000	Health Insurance	444,326	554,436	550,361	551,922	601,757	551,501	(50,256)	-8.4%	(421)	-0.1%
513000	Disability Insurance	8,649	8,522	8,613	2,797	4,347	5,144	797	18.3%	2,347	83.9%
514000	Dental Insurance	47,059	54,745	57,087	61,733	64,800	61,498	(3,302)	-5.1%	(235)	-0.4%
514500	Vision Insurance	8,761	9,515	9,805	9,016	10,241	8,399	(1,842)	-18.0%	(617)	-6.8%
515000	Life Insurance	1,712	1,714	1,729	1,660	1,638	858	(780)	-47.6%	(802)	-48.3%
516000	Workers Compensation Insurance	30,870	36,560	73,908	114,345	108,563	117,990	9,427	8.7%	3,644	3.2%
517000	Unemployment Insurance	29,830	25,253	33,147	8,328	0	12,725	12,725	0.0%	4,397	52.8%
514010	Temporary Employment	38,274	98,327	37,417	22,551	10,000	5,000	(5,000)	-50.0%	(17,551)	-77.8%
514015	Recruitment	7,930	14,436	17,038	5,584	1,800	3,248	1,448	80.4%	(2,336)	-41.8%
517500	Accrued Sick Expense	(7,944)	30,977	1,803	(46,026)	(2,500)	(2,500)	0	0.0%	43,526	-94.6%

# Los Angeles Law Library: Summary

Forecast: Fiscal Year Ending 6/30/14

GL No.		Actual				Budget 2014	Forecast 2014	\$ Inc (Dec) relative to Budget	% Inc (Dec) relative to Budget	\$ Inc (Dec) relative to 2013	% Inc (Dec) relative to 2013
		2010	2011	2012	2013						
518000	Accrued Vacation Expense	7,068	14,718	(4,125)	(10,846)	(50,000)	(50,000)	0	0.0%	(39,154)	361.0%
518550	TMP	9,451	13,854	14,539	13,815	12,000	12,364	364	3.0%	(1,451)	-10.5%
518560	Payroll and Benefit Administration	17,563	14,125	16,099	16,600	18,000	18,329	329	1.8%	1,729	10.4%
	<b>Total - Staff</b>	<b>3,679,138</b>	<b>4,025,862</b>	<b>4,319,591</b>	<b>4,217,089</b>	<b>4,178,130</b>	<b>4,108,514</b>	<b>(69,616)</b>	<b>-1.7%</b>	<b>(108,574)</b>	<b>-2.6%</b>
	<b>Library Materials:</b>										
<b>601999</b>	American Continuations	2,061,832	2,323,126	2,456,456	2,436,509	2,419,435	2,419,435	0	0.0%	(17,074)	-0.7%
<b>602999</b>	American New Orders	214,198	141,030	104,494	64,323	98,977	98,977	0	0.0%	34,654	53.9%
<b>609199</b>	Branch Continuations	336,981	360,265	364,945	82,479	56,087	56,087	0	0.0%	(26,392)	-32.0%
<b>609299</b>	Branch New Orders	2,192	18,048	2,580	5,262	1,320	1,320	0	0.0%	(3,942)	-74.9%
<b>603999</b>	Commonwealth Continuations	373,214	411,086	475,894	417,153	349,718	349,718	0	0.0%	(67,435)	-16.2%
<b>604999</b>	Commonwealth New Orders	6,587	6,417	5,474	3,053	2,309	2,309	0	0.0%	(744)	-24.4%
<b>605999</b>	Foreign Continuations	226,351	218,653	236,912	209,387	197,954	197,954	0	0.0%	(11,433)	-5.5%
<b>606999</b>	Foreign New Orders	21,959	33,692	32,572	5,055	19,795	19,795	0	0.0%	14,740	291.6%
<b>607999</b>	International Continuations	142,305	137,504	144,425	138,264	112,174	112,174	0	0.0%	(26,090)	-18.9%
<b>608999</b>	International New Orders	13,500	13,811	15,397	6,756	6,598	6,598	0	0.0%	(158)	-2.3%
<b>609399</b>	General/Librarianship Continuations	54,228	70,782	37,736	30,861	32,992	32,992	0	0.0%	2,131	6.9%
<b>609499</b>	General/Librarianship New Orders	2,971	2,210	2,935	1,624	2,639	2,639	0	0.0%	1,015	62.5%
	<b>Subtotal</b>	<b>3,456,319</b>	<b>3,736,623</b>	<b>3,879,820</b>	<b>3,400,726</b>	<b>3,300,000</b>	<b>3,300,000</b>	<b>0</b>	<b>0.0%</b>	<b>(100,726)</b>	<b>-3.0%</b>
690000	Library Materials Transferred to Assets	(3,456,319)	(3,736,623)	(3,879,820)	(3,400,726)	(3,300,000)	(3,300,000)	0	0.0%	100,726	-3.0%
	<b>Balance</b>	<b>0</b>	<b>0.0%</b>	<b>0</b>	<b>0.0%</b>						
	<b>Facilities:</b>										
801005	Repair & Maintenance	24,713	33,406	67,701	32,558	36,060	12,949	(23,111)	-64.1%	(19,609)	-60.2%
801010	Building Services	16,059	19,547	16,209	15,127	21,090	20,052	(1,038)	-4.9%	4,925	32.6%
801015	Cleaning Supplies	20,287	42,019	20,566	19,336	21,700	18,139	(3,561)	-16.4%	(1,197)	-6.2%
801020	Electricity & Water	104,899	119,814	118,730	114,028	126,618	125,438	(1,180)	-0.9%	11,410	10.0%
801025	Elevator Maintenance	14,203	14,393	44,034	15,612	14,610	14,964	354	2.4%	(648)	-4.1%
801030	Heating & Cooling	29,868	27,267	35,288	33,598	35,900	32,237	(3,663)	-10.2%	(1,361)	-4.0%
801035	Insurance	255,762	265,871	285,074	264,955	273,978	257,924	(16,054)	-5.9%	(7,031)	-2.7%
801040	Janitorial Services	84,990	87,458	87,841	98,174	100,521	100,521	0	0.0%	2,347	2.4%
801045	Landscaping	16,885	17,310	4,800	6,300	14,400	12,600	(1,800)	-12.5%	6,300	100.0%
801050	Security	165,352	185,265	252,126	197,875	180,632	172,555	(8,077)	-4.5%	(25,320)	-12.8%
801100	Furniture & Appliances (<3K)	5,379	16,287	2,176	3,012	5,000	2,936	(2,064)	-41.3%	(76)	-2.5%
801110	Equipment (<3K)	0	0	0	0	2,800	3,910	1,110	39.6%	3,910	0.0%
801115	Building Alterations (<3K)	11,744	21,309	4,105	17,853	11,616	6,776	(4,840)	-41.7%	(11,077)	-62.0%
	<b>Subtotal</b>	<b>750,142</b>	<b>849,945</b>	<b>938,650</b>	<b>818,429</b>	<b>844,925</b>	<b>781,001</b>	<b>(63,924)</b>	<b>-7.6%</b>	<b>(37,428)</b>	<b>-4.6%</b>
	<b>Technology &amp; Data:</b>										
801210	Services	35,731	44,828	53,459	30,476	36,110	32,163	(3,947)	-10.9%	1,687	5.5%
801215	Software (<\$3k)	0	0	0	0	30,375	17,618	(12,757)	-42.0%	17,618	0.0%
801220	Hardware (<\$3k)	15,587	31,530	23,361	12,815	5,000	5,069	69	1.4%	(7,746)	-60.4%
801225	Computer Supplies	0	0	0	0	2,000	1,146	(854)	-42.7%	1,146	0.0%
801230	Integrated Library System	39,464	42,367	39,794	42,078	43,560	42,900	(660)	-1.5%	822	2.0%
801235	Telecommunications	28,508	28,425	28,438	38,435	33,000	29,822	(3,178)	-9.6%	(8,613)	-22.4%
801245	Tech & Data - Misc	0	0	0	0	1,000	535	(465)	-46.5%	535	0.0%
	<b>Subtotal</b>	<b>119,289</b>	<b>147,149</b>	<b>145,052</b>	<b>123,805</b>	<b>151,045</b>	<b>129,253</b>	<b>(21,792)</b>	<b>-14.4%</b>	<b>5,448</b>	<b>4.4%</b>

# Los Angeles Law Library: Summary

Forecast: Fiscal Year Ending 6/30/14

GL No.		Actual				Budget 2014	Forecast 2014	\$ Inc (Dec) relative to Budget	% Inc (Dec) relative to Budget	\$ Inc (Dec) relative to 2013	% Inc (Dec) relative to 2013
		2010	2011	2012	2013						
General:											
801310	Bank Charges	4,927	5,768	6,222	6,276	5,940	5,998	58	1.0%	(278)	-4.4%
801315	Bibliographical Services	190,518	487,014	28,347	8,666	9,470	6,920	(2,550)	-26.9%	(1,746)	-20.1%
801320	Binding	37,284	17,081	0	0	0	0	0	0.0%	0	0.0%
801325	Board Expense	1,432	2,219	2,102	1,001	1,000	1,181	181	18.1%	180	18.0%
801330	Staff meals & events	17,139	19,037	8,485	9,420	2,600	2,280	(320)	-12.3%	(7,140)	-75.8%
801335	Supplies - Office	23,974	31,148	27,187	18,214	10,000	11,908	1,908	19.1%	(6,306)	-34.6%
801337	Supplies - Library materials	0	0	0	12,056	11,103	11,245	142	1.3%	(812)	-6.7%
801340	Stationery, business cards, etc.	8,565	11,762	4,734	4,388	6,000	1,976	(4,024)	-67.1%	(2,412)	-55.0%
801345	Delivery & Postage	17,647	20,425	20,337	12,108	10,000	4,164	(5,836)	-58.4%	(7,944)	-65.6%
801350	Kitchen supplies	3,565	7,880	10,451	10,100	6,132	4,488	(1,644)	-26.8%	(5,612)	-55.6%
801355	Room Rental Expenses	0	0	0	0	0	6,625	6,625	0.0%	6,625	0.0%
801360	Special Events Expenses	0	0	0	0	18,500	21,179	2,679	14.5%	21,179	0.0%
801365	Grant Application Expenses	0	0	0	0	1,000	1,000	0	0.0%	1,000	0.0%
801370	Copy Center Expense	28,028	27,372	32,521	28,855	27,000	20,262	(6,738)	-25.0%	(8,593)	-29.8%
801375	General - Misc	25,177	45,410	47,531	3,852	0	1,025	1,025	0.0%	(2,827)	-73.4%
	Subtotal	358,255	675,117	187,918	114,937	108,745	100,251	(8,494)	-7.8%	(14,686)	-12.8%
Professional Development:											
803105	Travel	10,600	24,176	17,577	11,652	5,100	3,553	(1,547)	-30.3%	(8,099)	-69.5%
803110	Meals	0	0	0	0	0	74	74	0.0%	74	0.0%
803113	Incidental and miscellaneous	0	0	0	0	565	310	(255)	-45.1%	310	0.0%
803115	Membership dues	11,767	26,584	16,085	11,675	6,200	6,735	535	8.6%	(4,940)	-42.3%
803120	Registration fees	30,963	78,139	39,351	6,230	3,550	4,190	640	18.0%	(2,040)	-32.7%
803125	Educational materials	0	0	0	0	3,000	1,400	(1,600)	-53.3%	1,400	0.0%
	Subtotal	53,329	128,899	73,013	29,557	18,415	16,262	(2,153)	-11.7%	(13,295)	-45.0%
Communications & Marketing:											
803205	Services	0	0	6,250	0	11,200	4,200	(7,000)	-62.5%	4,200	0.0%
803210	Collateral materials	7,924	27,020	32,987	26,675	9,500	2,500	(7,000)	-73.7%	(24,175)	-90.6%
803215	Advertising	0	0	0	0	7,800	5,775	(2,025)	-26.0%	5,775	0.0%
803220	Trade shows & Outreach	0	0	0	0	9,500	5,792	(3,708)	-39.0%	5,792	0.0%
	Subtotal	7,924	27,020	39,237	26,675	38,000	18,267	(19,733)	-51.9%	(8,408)	-31.5%
Travel & Entertainment											
803305	Travel	0	0	0	3,257	0	46	46	0.0%	(3,211)	-98.6%
803310	Meals	3,292	2,753	2,587	1,539	0	0	0	0.0%	(1,539)	-100.0%
803315	Entertainment	0	0	0	0	0	0	0	0.0%	0	0.0%
803320	Ground transportation & mileage reimt	374	763	2,715	2,425	3,600	2,658	(942)	-26.2%	233	9.6%
803325	Incidental travel expenses	0	0	0	0	200	0	(200)	-100.0%	0	0.0%
	Subtotal	3,666	3,516	5,301	7,221	3,800	2,704	(1,096)	-28.8%	(4,517)	-62.6%

# Los Angeles Law Library: Summary

Forecast: Fiscal Year Ending 6/30/14

GL No.		Actual				Budget 2014	Forecast 2014	\$ Inc (Dec) relative to Budget	% Inc (Dec) relative to Budget	\$ Inc (Dec) relative to 2013	% Inc (Dec) relative to 2013
		2010	2011	2012	2013						
Professional Services											
804005	Accounting	14,875	14,500	26,400	15,056	15,750	15,560	(190)	-1.2%	504	3.3%
804008	Consulting Services	14,613	8,405	8,136	26,940	5,000	16,667	11,667	233.3%	(10,273)	-38.1%
804010	Legal	11,851	117,349	70,496	36,192	30,000	14,418	(15,582)	-51.9%	(21,774)	-60.2%
804015	Other	0	0	0	0	0	10,417	10,417	0.0%	10,417	0.0%
	Subtotal	41,339	140,254	105,032	78,188	50,750	57,061	6,311	12.4%	(21,127)	-27.0%
Depreciation:											
806105	Depreciation - Library Materials	2,703,212	2,819,986	2,964,861	3,024,243	2,851,021	2,907,196	56,175	2.0%	(117,047)	-3.9%
806110	Depreciation Exp - FF&E	181,626	238,010	206,152	388,572	429,335	420,712	(8,623)	-2.0%	32,140	8.3%
	Subtotal	2,884,838	3,057,995	3,171,013	3,412,815	3,280,356	3,327,908	47,552	1.4%	(84,907)	-2.5%
	Total Expense	7,897,918	9,055,756	8,984,808	8,828,716	8,674,167	8,541,222	(132,945)	-1.5%	(287,494)	-3.3%
	Net Income Before Extraordinary Items	3,055,120	1,589,374	666,646	(103,399)	6,631	(254,323)	(260,953)	-3935.6%	(150,924)	146.0%
	Extraordinary Income	0	0	0	0	1,687,950	1,687,950	0	0.0%	1,687,950	0.0%
	Extraordinary Expense	0	0	0	1,270,607	246,976	262,732	15,756	6.4%	(1,007,875)	-79.3%
518500	OPEB Expense	569,360	556,446	323,182	291,978	325,000	325,000	0	0.0%	33,022	11.3%
	Net Income Including Extraordinary Items	2,485,760	1,032,928	343,464	(1,665,984)	1,122,605	845,895	(276,709)	-24.6%	2,511,879	-150.8%
Capital Expenditures:											
161100	Furniture / Appliances (>3k)	62,229	40,515	0	0	126,500	29,000	(97,500)	-77.1%	29,000	0.0%
161300	Electronics / Computer Hardware (>3k)	44,650	76,552	86,693	12,186	12,500	0	(12,500)	-100.0%	(12,186)	-100.0%
164500	Exterior Building Repairs/ Improvements (>3k)	0	0	6,238,354	215,242	12,400	0	(12,400)	-100.0%	(215,242)	-100.0%
164000	Interior Improvements / Alterations (>3k)	377,425	204,653	29,141	112,014	427,000	320,000	(107,000)	-25.1%	207,986	185.7%
168000	Computer Software	0	0	30,826	19,311	120,000	45,000	(75,000)	-62.5%	25,689	133.0%
	Total - Capitalized Expenditures	484,304	321,720	6,385,014	358,753	698,400	394,000	(304,400)	-43.6%	35,247	9.8%

**MEMORANDUM**

**DATE:** January 28, 2014  
**TO:** Board of Law Library Trustees  
**FROM:** Sandra Levin, Executive Director  
**RE:** Law Library Organizational Restructure

**SUMMARY**

In light of several retirements and resignations, the Board is asked to consider a restructure of several management positions at the Law Library. As Executive Director, I believe these changes will create greater efficiency, a more logical reporting structure and a more stable organization. The proposed changes are budget-neutral (and may even reduce costs slightly).

**BACKGROUND**

The Law Library has several positions open, including the Senior Director of Administrative Services (resignation), the Head of Cataloging (retirement) and Building Engineer (retirement). We also have several areas where either needs are not being met or where greater efficiency could be achieved. In particular, both the technology functions and the facilities management functions have expanded greatly over time. In addition, due to budget cuts and attrition, the Human Resources function was absorbed into Administrative Services, leaving no neutral HR function outside of the executive office. Accordingly, we propose taking the opportunity presented by the currently open positions to restructure certain aspects of the HR, facilities, technology and finance functions.

Charts depicting the current and proposed organizational structures are attached. New and revised descriptions for all affected positions can be found at [http://www.lalawlibrary.org/pdfs/JD-Proposed/JD\\_2014\\_Proposed.pdf](http://www.lalawlibrary.org/pdfs/JD-Proposed/JD_2014_Proposed.pdf). The significant changes are summarized below:

*Changes to Existing Positions:* The following positions are affected by the proposed restructure as indicated (in alpha order):

- Building Engineer – once vacant, this position will be eliminated and the duties shifted to the new Facilities Manager and Library Clerk positions.
- Communications Coordinator – this position will be modified to shift some duties related to events and rentals to the new Facilities Manager and add responsibility for supervising the Media Designer.



- Director, Technology Services – this currently over-burdened position will be split in two, with the duties shared between the new positions of Director of Collection Management Services and Technology Manager. (The current Technology Services Director will continue in the position of CMS Director, with the addition of some senior cataloging responsibilities.)
- Executive Assistant – this position will be modified to eliminate room setup and mailroom supervisory duties and enhance the HR and benefits management functions.
- Library Aide (mailroom) – this position will be eliminated and replaced with a slightly higher level, Library Clerk position due to the addition of some additional facilities responsibilities. The new position will report to the Facilities Manager.
- Senior Director, Administrative Services – this position will be eliminated and the duties shifted to the new Finance Director and an HR Consultant. The result will be a decrease in upper management costs and a more independent and robust HR function.
- Senior Librarian Cataloging – this position will be eliminated and the duties shifted to the Director of CMS and the cataloging librarians.

As a result of these changes, the following new positions will be created (replacing existing positions and within existing budget): Finance Director, Director of Collection Management Services, Facilities Manager, Technology Manager and Library Clerk (Facilities). All new positions except Director of CMS are open for recruitment. An HR Consultant would be contracted to work onsite part-time each week.

*SEIU Discussions:* The proposed restructure would eliminate two unrepresented positions and create two new unrepresented positions. It would also eliminate one represented position, modify the description of one represented position and modify to whom various represented employees report. Accordingly, we met with SEIU representatives to discuss the proposed changes and any anticipated impacts. The discussion was positive and quite helpful.

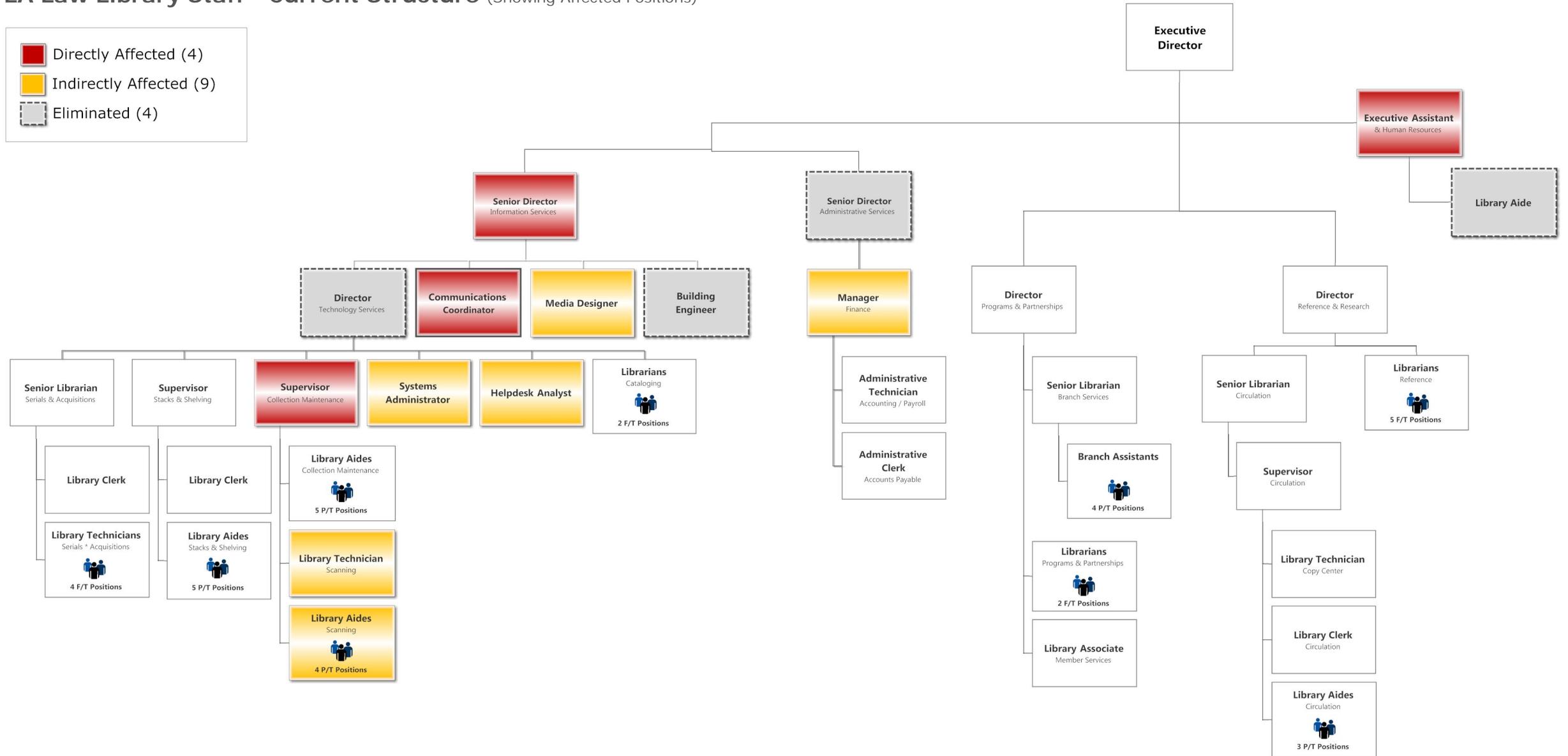
#### **RECOMMENDATION**

Staff recommends that the Board approve the elimination or modification of existing positions and the creation of new positions as depicted in the attached organization chart.



# LA Law Library Staff - Current Structure (Showing Affected Positions)

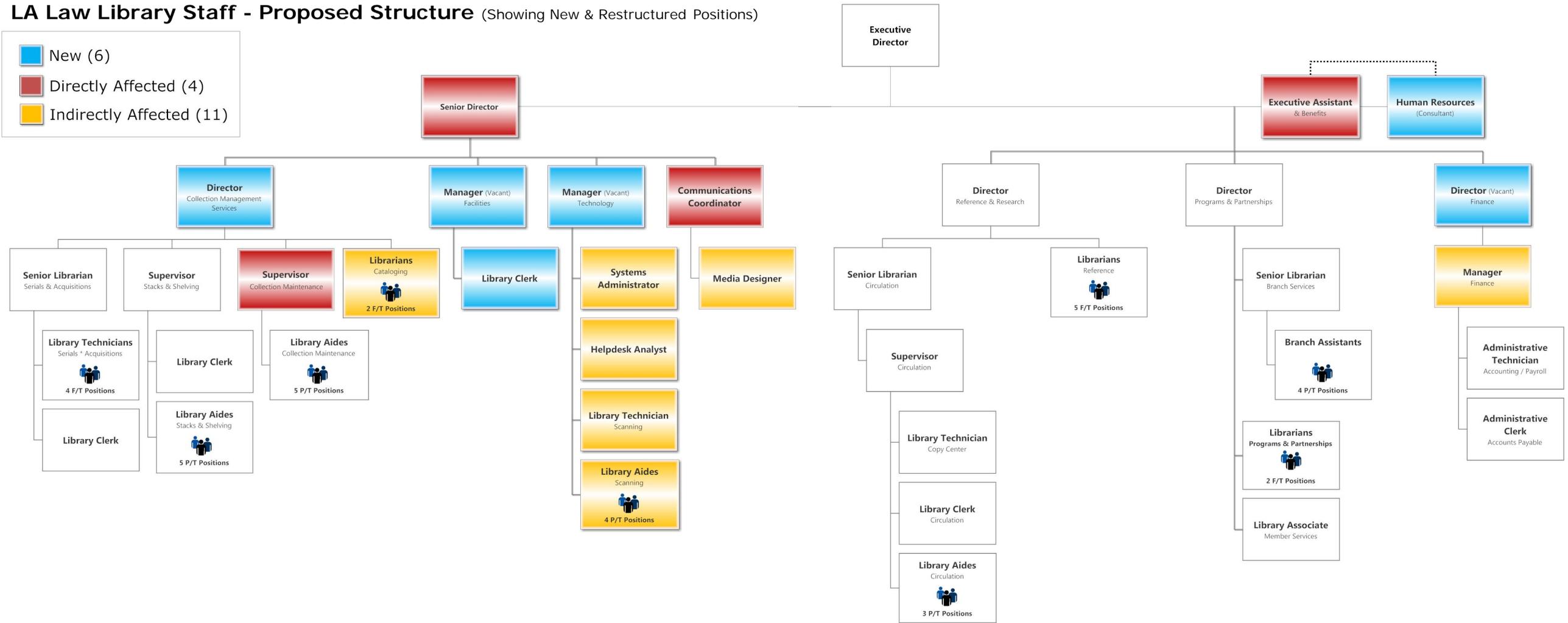
Directly Affected (4)  
 Indirectly Affected (9)  
 Eliminated (4)





# LA Law Library Staff - Proposed Structure (Showing New & Restructured Positions)

■ New (6)  
■ Directly Affected (4)  
■ Indirectly Affected (11)





# AGENDA ITEM 5

## CLOSED SESSION

5.1 Conference with Labor Negotiator (G.C. 54957.6).

Library Negotiators: Sandra J. Levin and Jaye Steinbrick;

Employee Organization: SEIU Local 721.