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I just have to smile. Toward the end of this report is a two page summary of an informal 5 year plan I created when I first came here. Every year has a theme and a fairly detailed outline of what I wanted to accomplish. It gives me great satisfaction to see that much of it has been accomplished, even if in a different year.

I am proud to report that after working through that plan, this year we worked with the Board of Trustees and Foundation to develop a strategic plan to take the Law Library all the way to 2020. The plan is attached as Appendix G.

What makes me most proud, however, is the dedication and hard work of the Law Library staff who made it all happen.

Nothing about the work of this Law Library is simple or easy. We are always juggling, passing the ball, or going for the jump shot. Hit or miss, we make our best shot and move on.

John W. Adkins  
Director of Libraries
overview & background about the san diego law library

The San Diego County Public Law Library (now using the moniker “San Diego Law Library” for marketing purposes) is a community center where people can access legal information and use the law to solve legal problems and take advantage of opportunities. The law library is open to the public and is funded in part by a small portion of court filing fees, membership dues, and private donations.

The library's four core services – its print collection, electronic resources, education programs and reference librarians—can be accessed in a welcoming environment that encourages community interaction. The library provides educational programs, hosts legal clinics, and free access to print and electronic legal research (including Lexis and Westlaw) at its 4 branches around the County.

The San Diego Law Library is home to the largest collection of printed legal materials in the county. These materials include many resources, including Nolo Press and CEB publications that are written with the non-attorney in mind. In addition, we offer free access to expensive online legal databases, including Lexis and Westlaw.

The law library hosts a variety of educational programs and legal clinics to support small businesses. We hold a quarterly Law Made Public Business Series, as well as a variety of other business-focused topics and clinics. A complete list of offerings is available on our website.

Navigating the complexity of legal information can be intimidating. Our experienced reference staff can help guide you to the right resources for your specific need. They are available onsite, as well as online through our live webchat service and a host of other social media that will be reviewed later in this report.

The San Diego Law Library is more than a place to study and research. Throughout all of our branches, we are a community center where businesses can network with each other and with clients. In particular, our newly renovated Main Branch in downtown San Diego provides private conference rooms and meeting space that are available to area businesses.
vision & mission statements

VISION

The San Diego Law Library will become everyone’s first choice for finding legal solutions, pursuing access to justice, using advanced technology, and learning how the law works for them.

MISSION

LAW MADE PUBLIC

The Law Library is dedicated to bringing law to the people:

- We welcome all people to help them find the law.
- We partner with legal services providers to help people understand and use the law.
- We advocate for free and open access to the law and the justice system.
library highlights

The following are new or expanded projects completed in 2013-2014. These are above and beyond our normal day-to-day activities and events.

OPERATIONS:

Assessment Committee & Survey

An Assessment Committee was formed to review library services, in particular to create, implement, and evaluate a customer service satisfaction survey. The Committee was comprised of: Nathan Low, Trustee (Chair); Judge Esteban, Trustee; Lorena Slomanson, Trustee; Kathleen Walker, Foundation Trustee; John Adkins, Director; Gina Catalano, Staff Lead; Chris Cox, Staff Support; and Michelle DeFazio, Student Intern. The survey ran from July 5, 2013 to September 9, 2013, and generated 263 responses from members and the general public. The information from the survey was used to help guide the strategic planning process.

Strategic Planning Committee & Strategic Plan

A Strategic Planning Committee was formed to create an action plan for the library that would serve as a road map for success through 2020. The Committee was comprised of: Carolyn Brock, Trustee (Chair); Jeffrey Cawdrey, Trustee; Judge Yvonne Campos, Trustee; Heather Stone, Foundation Trustee; John Adkins, Director; Kelly Keach, Staff Lead; and Stephanie Schweter, Staff Support. Based upon input from the user Survey, a special joint Board retreat, and staff, the Strategic Plan was completed June 2014.

Adjustment of South Bay Branch Hours

Due to budget and staffing reductions, as well as decreased use of the South Bay location, in October 2013 hours were adjusted to Monday – Thurs 9am to 1pm and Friday 8am to 12pm.

This allowed us to achieve a better balance of staff resources and cost savings. The South Bay location now operates with one part-time employee, allowing a full-time law librarian to move to Downtown and East County where she was most-needed.

New iDesk Statistics Program

To help streamline the process of collecting and analyzing service statistics at each branch information desk, we implemented a new software system called Gimlet. In the past, we’ve kept paper statistics with handwritten tick marks. The info was then compiled by a staff member on a monthly basis and entered into a spreadsheet to track monthly/annual statistics. With this new software, each staff member enters their own statistics while on desk, so no compilation is necessary. We can easily generate reports in a matter of minutes. Also, this new program allows us to enter our own categories, for more detailed statistics.

We now track the type of patron (attorney, self-represented, student, unknown, other). For reference questions we track the area of law, the difficulty level of the interaction in terms of knowledge required to help the patron, and the amount of time for the interaction. We believe this new information will help us with grants, creating collection access points, collection development, and determining necessary staffing levels.
In addition to keeping statistics, this new database allows us to build a searchable database to collect reference knowledge for future training and reference use. For unique or difficult questions, we input the information in a question/answer format. Staff can search the database using key words for quick answers and resources to patron inquiries.

We tested the database at the Downtown location first, starting in February 2014. After a month of testing, all branches rolled out the new system in March 2014.

PARTNERSHIPS:

Legal Futures Summit 2.0 (February 2014)

Along the same line as Legal Futures Summit 1.0 (held in June 2013), the 2.0 Futures Summit sought to bring our legal community into better alignment for the delivery of legal services/information/partnerships for the people of San Diego County. Various members of the legal community were invited to attend, including the Superior Court, legal aid providers, and local law schools.

We looked at how we can best work together toward fulfilling the promise of finding legal work for new and current lawyers while helping those in need. A survey was sent to all attendees to gauge the interest in various projects, partnerships, and collaborative work to enhance the likelihood that law students can find work, and that people seeking legal help can find a lawyer. Results of that survey will serve as a guide to future legal community collaborators.

Civil Appellate Self-Help Workshop – NEW

Over a year in the making, this is the first appellate workshop of its kind in the nation, and we are proud to say that it is being held in our law library.

This is a joint project of the California Court of Appeal, Fourth Appellate District, Division One; the Legal Aid Society of San Diego; the San Diego County Bar Association’s Appellate Court Committee; and the San Diego Law Library.

Volunteer appellate attorneys from the SDCBA Appellate Court Committee share information about procedures and resources to help self-represented litigants handle their own appeal. At the end of the workshop, attendees also receive an individual consultation with an appellate attorney to answer specific questions.

The Workshop began in May, 2013 and is held on the third Tuesday of each month.

Family Law Clinic – NEW

In partnership with the San Diego Volunteer Lawyer Program (SDVLP), a new Family Law Clinic started in January 2013 with two clinics a month. This is the first Family Law Clinic of its kind held by the SDVLP. Due to increasing demand, the clinic was expanded in February 2013 to once a week. The SDVLP provides training and guidance to volunteer attorneys that participate in the clinic. The clinic pairs volunteer attorneys with self-represented litigants for ongoing guidance throughout their case. The Clinic is held every Wednesday at our downtown location from 2pm – 5:45pm.
District Attorney Truancy Mediation Clinics – EXPANDED

In partnership with the San Diego District Attorney’s Office, the monthly Clinics started at our South Bay location in November 2012. In November 2013, the Clinics expanded to our Vista Location, and in January 2014 expanded to our East County location. At this time, all East County Schools, three North County School Districts, two South Bay Schools, and San Diego Unified School District are participating, with additional school districts requesting the program.

Consumer Law Clinic – EXPANDED

The Legal Aid Society of San Diego (LASSD) now holds weekly Consumer Law Clinics at our South Bay & North County locations. This clinic is for self-represented litigants that are being sued for debt collection.

The clinics started at South Bay in July 2012 and were held every other week. In May 2013 the clinics in South Bay expanded to every week. Since the program was so successful in South Bay the LASSD not only expanded the hours, but also reached out to our North County location and in February 2013 started holding weekly clinics in North County.

Human Trafficking Awareness Half-Day Event – NEW

The Law Library partnered with the Bilateral Safety Corridor Coalition (BSCC), to develop a legal community training program for lawyers, judges, and individuals interested in learning more about human trafficking. The first event, of a three part series, was held on April 26, 2014. The event provided information about existing laws and provided a venue to help facilitate a conversation about how agencies can work together to combat this issue. This series is funded with a grant from the Lawyers Club of San Diego.

The event featured a very impressive roster of speakers, and was moderated by the Hon. Carolyn M. Caietti, San Diego Superior Court. Speakers included: Wendy Patrick, Deputy District Attorney; Summer Stephan, Chief Deputy District Attorney; Mary Ellen Barrett, Deputy District Attorney; Marian Gaston, Public Defender; Carmen Chavez, Executive Director of Casa Cornelia; Alessandra Serano, Assistant US Attorney; and Marisa Ugarte, Executive Director Bilateral Safety Corridor Coalition. The training rooms were filled to capacity at this sold out event.
Events:

Bookmas Tree Fundraiser & 2nd Annual Open House

The Bookmas Tree was an instant hit and our Celebrate Books! campaign will be an annual fundraising event to build a special collection representing each year’s most important legal issues. *Chasing Gideon: The Elusive Quest for Poor People’s Justice* was selected as the 2013 book and was added to our collection.

Upon completion, the Bookmas Tree stood over 9 feet tall with over 800 bound periodicals and superseded statutes, weighing approximately 3,000 pounds. The tree was the highlight of our Open House event on December 13, 2013.

The Open House is a chance for us to welcome in the community we serve, share the projects we’ve been working on throughout the year, and highlight new projects and partnerships coming in the new year.

This year we were honored to welcome specials guests, County Board Supervisor, Dave Roberts and Interim Mayor, Todd Gloria who posed with guests in front of our first ever Bookmas Tree.

4th Annual Lindley Law & Comics

On July 16, 2013, Charles Brownstein, executive director of the nonprofit Comic Book Legal Defense Fund spoke on “Censorship: From 1950s Superheroes to Today’s Manga.” This popular community event, held the day before San Diego Comic-Con started, drew 43 attendees and received much favorable press. In addition, the downtown library featured a display on censored comic books and First Amendments rights.

MCLE Crunch Time – 6th Annual

During the December 2013 – January 2014 MCLE Crunch period the Library held 43 classes across its branches and had a total of 631 attendees. This popular event helps local attorneys fulfill credits, especially in required subjects, such as Ethics, Prevention / Detection / Treatment of Substance Abuse or Mental Illness, and Elimination of Bias. Since 2008-2009 we have offered at least 30 MCLE classes each year during the crunch period of December and January to help local attorneys fulfill their credits.
community outreach

With the goal of increasing community awareness of the role and value of the San Diego Law Library to the community, we hosted and participated in a variety of activities to promote and expand library services to current and potential users.

Writers & The Law Series: The Writers & The Law Series is an opportunity for the Law Library to form community partnerships, provide opportunities for patrons to meet national and regional authors and introduce the Law Library to new audiences.

Together with Warwick’s Bookstore and the La Jolla Library, we presented Karin Slaughter (Unseen). In addition to partnering with Warwick’s, we became a named “Community Partner” for two events with the San Diego Jewish Book Fair. Writers presented were Stephen Shepard (Deadlines and Disruption), Lynn Povich (The Good Girls Revolt) and Alan Dershowitz (Taking the Stand, My Life in the Law). The Dershowitz event drew approximately 500 attendees. San Diego Law Library brochures were handed out at the events and library staff was on hand to answer any questions about the Law Library’s services.

Law Week Celebration: This year’s Law Day theme was American Democracy and the Rule of Law: Why Every Vote Matters. To celebrate the theme, we joined other California County Law Libraries in celebrating Law Day by participating in an online simulation program designed to demonstrate obstacles to voting in American history. Voter Registration forms were available at all branches. Information for registering to vote online was also available.

We also continued our tradition of celebrating Law Week in partnership with local bar associations. Together with the Foothills, San Diego County and Northern San Diego County Bar Associations, the San Diego Paralegal Association, the San Diego Volunteer Lawyer Program, and Family Law Facilitators Office, Community Outreach organized Free Law Day Legal Clinics and panel discussions on topics such as Family Law, Conservatorships, Landlord/Tenant issues and Restraining Orders as part of our Law Day celebration. Held in conjunction with Law Day on May 1st, the local bar associations provided attorney volunteers to provide free consultations to people seeking legal advice. This year, forty (40) volunteer attorneys participated. Approximately eighty (80) patrons attended events hosted by the four SDLL locations. Also part of our Law Week activities, we collected 50 books for the San Diego Bar Association’s Law Week Children at Risk book drive.

Get Out the Vote (GoTV): Through the GoTV campaign, the San Diego Law Library provides information and resources on candidates and issues related to upcoming elections. The Law Library also provides potential voters with Voter Registration Cards and information on how to register to vote. In November, our website featured a ten day countdown to the San Diego Special Mayor Election.
Women’s Resource Fair: New this year was representing the Law Library at the San Diego Volunteer Program’s 25th Annual Women’s Resource Fair. The San Diego Law Library was one of 70 community organizations providing a variety of free services to women in need. About half of the 800 attendees stopped by the SDLL information table to ask questions about resources and services available.

Practical Legal Research for New Attorneys: At the request of and in partnership with the San Diego County Bar Association, reference staff again taught a hands-on legal research class for new attorneys. The class focused on touring the downtown branch to locate print materials, as well as using electronic resources, to find answers to real life reference questions.

Crawford Academy High School Lexis Training: When Lexis training for students in Crawford Academy High School’s school of law program fell through, Law Library staff stepped in to help. Approximately 25 students arrived by bus at the Downtown branch. The students received a short overview of the Lexis database and its use in legal research and a basic Civics review followed by hands on experience doing basic searches.

Volunteer Program: After its inaugural year, the Volunteer Program is continually being reevaluated to bring in more and more volunteers. In 2013, for example, three volunteers put in close to 40 hours monitoring MCLE classes and helping at Library events.

Ongoing events and programs: San Diego Law Library staff also represents the Law Library at several annual and semi-annual events geared towards the legal community. Each year we attend the following:

- California State Bar Swearing in Ceremonies (June & December)
- North County Bar Association and San Diego Superior Courts Bridging the Gap program (June & December)
- San Diego County Bar Association’s Law Student Welcome Reception (September)
- San Diego Superior Courts Justice Corps Orientation program (September)

These events provide opportunities to distribute information about the Law Library’s services and resources to new members of the legal community. In addition to attending these events, staff regularly attends other events and monthly meetings sponsored by local bar associations.
law library board of trustees

The San Diego County Public Law Library is a special district governmental organization established under California Business and Professions Code sections 6300 through 6364. It is governed by a nine-member Board of Trustees composed of five Superior Court judges and four attorney members of the San Diego County Bar Association. San Diego County, by statute, has more trustees than any other. The Board’s time, energy and dedication made it possible for the Law Library to continually provide San Diego residents access to its collections and services at its four locations: 1105 Front Street in downtown San Diego, the East County Regional Courthouse at 250 E. Main Street in El Cajon, the court campus at the North County Regional Center at 325 S. Melrose Drive in Vista, and the South Bay Regional Courthouse at 500 Third Avenue in Chula Vista.

In FY 2013-14 we bid farewell to Trustee Albert T. Harutunian, III with appreciation for his dedication during his tenure. Replacing Judge Harutunian was the Hon. David Berry. Officer elections were held in January 2014 and the results were: Jeffrey Cawdrey, President; Carolyn Brock, Vice President; Judge Julia Kelety, Treasurer; and Lorena Slomanson, Assistant Secretary.

<table>
<thead>
<tr>
<th>member</th>
<th>office / affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jeffrey Cawdrey, Esq. President</td>
<td>Board of Supervisors Delegate Seat #1</td>
</tr>
<tr>
<td>Carolyn Brock, Esq. Vice President</td>
<td>Board of Supervisors Delegate Seat #3</td>
</tr>
<tr>
<td>Lorena Slomanson Assistant Secretary</td>
<td>Board of Supervisors Delegate Seat #2</td>
</tr>
<tr>
<td>The Hon. Julia Craig Kelety Treasurer</td>
<td>Superior Court Judge Seat #5</td>
</tr>
<tr>
<td>Nathan L. Low, Esq.</td>
<td>Board of Supervisors Delegate Seat #4</td>
</tr>
<tr>
<td>The Hon. David Berry</td>
<td>Superior Court Judge Seat #6</td>
</tr>
<tr>
<td>The Hon. Joseph Brannigan</td>
<td>Superior Court Judge Seat #7</td>
</tr>
<tr>
<td>The Hon. David Gill</td>
<td>Superior Court Judge Seat #8</td>
</tr>
<tr>
<td>The Hon. Yvonne Esperanza Campos</td>
<td>Superior Court Judge Seat #9</td>
</tr>
</tbody>
</table>
organizational chart
A copy of a portion of the audited financial statements of the library is included in this report as Appendix A.

FINANCIAL RECAP FOR THE FISCAL YEAR ENDING JUNE 30, 2014:

- The Library’s total revenue decreased 14%, from $3,429,769 to $2,948,077.

- Filing Fee Revenue decreased 9%, from $3,045,644 to $2,783,894. Actual Filing Fees were 10% less than budgeted.

- Total expenses decreased 9% from $3,438,557 to $3,123,835. Expenses for operations were 35% lower than budgeted because the Law Library computer server was able to continue with a maintenance program rather than being required to purchase a new server.
## Library Collections

### Collection Statistics

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<tr>
<th>FORMAT</th>
<th>2009-2010</th>
<th>2010-2011</th>
<th>2011-2012</th>
<th>2012-2013</th>
<th>2013-014</th>
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<tr>
<td>Books (volumes) Added</td>
<td>8,348</td>
<td>7,401</td>
<td>6,162</td>
<td>3,811</td>
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<tr>
<td>Total books (volumes)</td>
<td>221,154</td>
<td>175,261</td>
<td>120,820*</td>
<td>119,357</td>
<td>118,621</td>
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<tr>
<td>Microform</td>
<td>613,315</td>
<td>625,895</td>
<td>645,352</td>
<td>647,352</td>
<td>580,776</td>
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<td>Current Continuations/Subs</td>
<td>1,421</td>
<td>1,410</td>
<td>1,149</td>
<td>751</td>
<td>652</td>
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<tr>
<td>Video</td>
<td>135</td>
<td>111</td>
<td>110</td>
<td>68</td>
<td>74</td>
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<tr>
<td>Audio (tapes, CDs, DVDs)</td>
<td>575</td>
<td>652</td>
<td>636</td>
<td>673</td>
<td>570</td>
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<tr>
<td>Internet Resources</td>
<td>56,471</td>
<td>63,739</td>
<td>75,831</td>
<td>84,542</td>
<td>84,159</td>
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<td>Discards</td>
<td>14,912</td>
<td>53,527</td>
<td>4,677</td>
<td>5,667</td>
<td>4,367</td>
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<tr>
<td>Missing Books</td>
<td>33</td>
<td>7</td>
<td>17</td>
<td>29</td>
<td>5</td>
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</tbody>
</table>

*Calculation method changed. Using Millennium catalog count of books (rather than a manual calculation based on past annual reports)
Appendix A: independent auditor report

INDEPENDENT AUDITOR’S REPORT

To the Board of Trustees of
San Diego County Public Law Library

We have audited the accompanying financial statements of San Diego County Public Law Library (the Library) as of and for the year ended June 30, 2014, and the related notes to the financial statements, as listed in the table of contents.

Management’s Responsibility for the Financial Statements
Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor’s Responsibility
Our responsibility is to express opinions on these financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor’s judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity’s preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity’s internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

Opinions
In our opinion, the financial statements referred to above present fairly, in all material respects, the respective financial position of San Diego County Public Law Library as of June 30, 2014 and the respective changes in financial position for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Member: The American Institute of Certified Public Accountants and California Society of Certified Public Accountants
San Diego County Public Law Library

Independent Auditor's Report

Report on Summarized Comparative Information
We have previously audited San Diego County Public Law Library’s June 30, 2013 financial statements and we expressed an unmodified opinion on those financial statements in our report dated September 6, 2013. In our opinion, the summarized comparative information presented herein as of and for the year ended June 30, 2013, is consistent, in all material respects, with the audited financial statements from which it has been derived.

Other Matters

Required Supplementary Information
Accounting principles generally accepted in the United States of America require that the Management's Discussion and Analysis information and on pages i through vi and budgetary comparison information on page 18 be presented to supplement the basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board, who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management’s responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

September 22, 2014

Sonnenberg & Company, CPAs
SAN DIEGO COUNTY PUBLIC LAW LIBRARY
STATEMENT OF NET POSITION
June 30, 2014
(With Comparative Totals for 2013)

<table>
<thead>
<tr>
<th>Assets</th>
<th>2014</th>
<th>2013</th>
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<tr>
<td>Cash and Investments</td>
<td>$2,115,795</td>
<td>$1,847,997</td>
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<td>Restricted Cash</td>
<td>204,498</td>
<td>213,225</td>
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<tr>
<td>Deposits on Construction Project</td>
<td>74,049</td>
<td>77,573</td>
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<td>Accounts Receivable</td>
<td>449,697</td>
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<td>Prepaid Subscriptions</td>
<td>31,681</td>
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<td>Prepaid Insurance</td>
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<td>22,980</td>
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<td>Capital Assets, net</td>
<td>4,530,876</td>
<td>4,925,420</td>
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<td><strong>Total Assets</strong></td>
<td><strong>$7,429,811</strong></td>
<td><strong>$7,626,654</strong></td>
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<table>
<thead>
<tr>
<th>Liabilities</th>
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<td>Accounts Payable</td>
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<td>Capital Lease Payable</td>
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<td>Accrued Payroll</td>
<td>176,955</td>
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<td>Borrower's Deposits</td>
<td>119,363</td>
<td>112,887</td>
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<td>Other Liabilities</td>
<td>5,590</td>
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<td><strong>Total Liabilities</strong></td>
<td>334,270</td>
<td>355,355</td>
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</table>

Deferred Inflows of Resources

| Advanced Payment of Filing Fees | $223,022 | $223,022 |

Net Position

| Net Investment in Capital Assets | 4,530,876 | 4,925,420 |
| Restricted for IT Projects      | 204,498   | 213,225   |
| Unrestricted                    | 2,137,145 | 1,909,632 |
| **Total Net Position**          | **$6,872,519** | **$7,048,277** |

The accompanying notes are an integral part of these financial statements.
SAN DIEGO COUNTY PUBLIC LAW LIBRARY
STATEMENT OF REVENUES, EXPENDITURES AND
CHANGES IN FUND BALANCE
For the Year Ended June 30, 2014
(With Comparative Totals for 2013)

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<th></th>
<th>2014</th>
<th>2013</th>
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<tr>
<td><strong>Revenues:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Filing Fees - Superior Court</td>
<td>$2,777,117</td>
<td>$3,039,776</td>
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<td>Interest</td>
<td>$6,777</td>
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<td>Donations</td>
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<td>Charges for Services</td>
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<td><strong>Total Revenues</strong></td>
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<td>Personnel</td>
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<td>Salaries and Wages</td>
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<td>Employee Benefits</td>
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<tr>
<td><strong>Total Personnel</strong></td>
<td>$1,653,889</td>
<td>$1,812,400</td>
</tr>
<tr>
<td>Non-personnel</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Books and Other Media</td>
<td>$484,398</td>
<td>$606,700</td>
</tr>
<tr>
<td>Computer Equipment and Software</td>
<td>$71,167</td>
<td>$71,892</td>
</tr>
<tr>
<td>Conferences and Travel</td>
<td>$14,407</td>
<td>$10,723</td>
</tr>
<tr>
<td>Data Searches</td>
<td>$228,456</td>
<td>$227,705</td>
</tr>
<tr>
<td>Insurance</td>
<td>$36,209</td>
<td>$30,191</td>
</tr>
<tr>
<td>Membership and Public Relations</td>
<td>$31,987</td>
<td>$35,643</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>$10,300</td>
<td>$13,999</td>
</tr>
<tr>
<td>Mileage and Parking</td>
<td>$16,505</td>
<td>$19,633</td>
</tr>
<tr>
<td>Professional Services</td>
<td>$88,566</td>
<td>$108,657</td>
</tr>
<tr>
<td>Supplies</td>
<td>$76,648</td>
<td>$70,225</td>
</tr>
<tr>
<td>Capital Outlay</td>
<td>$16,759</td>
<td>$23,865</td>
</tr>
<tr>
<td><strong>Total Non-personnel</strong></td>
<td>$1,075,402</td>
<td>$1,219,233</td>
</tr>
<tr>
<td><strong>Total Expenditures</strong></td>
<td>$2,729,291</td>
<td>$3,031,633</td>
</tr>
<tr>
<td><strong>Excess of Revenues over Expenditures</strong></td>
<td>$218,786</td>
<td>$398,136</td>
</tr>
<tr>
<td><strong>Fund Balance, Beginning of Year</strong></td>
<td>$2,345,879</td>
<td>$1,947,742</td>
</tr>
<tr>
<td><strong>Fund Balance, End of Year</strong></td>
<td>$2,564,666</td>
<td>$2,345,879</td>
</tr>
</tbody>
</table>

Reconciliation to Statement of Activities

| Excess of Revenues over Expenditures | $218,786 | $398,136 |

The Library Reports Outlays as Expenditures. However, in the Statement of Activities, the Cost of Capital Assets is allocated over their Estimated Useful Lives as Depreciation Expenses.

| Capital Assets Additions | $16,759 | $23,865 |
| Capital Assets Deletions | -       | (4,799,195) |
| Depreciation Expense    | (411,303) | (430,789) |

**Increase (Decrease) in Net Position**

| $ (175,758) | $ (4,807,983) |

The accompanying notes are an integral part of these financial statements.
SAN DIEGO COUNTY PUBLIC LAW LIBRARY
SUPPLEMENTAL INFORMATION
BUDGET COMPARISON INFORMATION
For the Year Ended June 30, 2014

<table>
<thead>
<tr>
<th>Revenues:</th>
<th>Budget</th>
<th>Actual</th>
<th>Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filing Fees</td>
<td>$3,100,000</td>
<td>$2,777,117</td>
<td>$(322,883)</td>
</tr>
<tr>
<td>Donations</td>
<td>56,000</td>
<td>28,828</td>
<td>$(27,172)</td>
</tr>
<tr>
<td>Interest</td>
<td>7,000</td>
<td>6,777</td>
<td>$(223)</td>
</tr>
<tr>
<td>Charges for Services</td>
<td>136,200</td>
<td>135,355</td>
<td>$(845)</td>
</tr>
<tr>
<td><strong>Total Revenues</strong></td>
<td><strong>$3,299,200</strong></td>
<td><strong>$2,948,077</strong></td>
<td><strong>$(351,123)</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenditures:</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salaries and Wages</td>
<td>$1,438,000</td>
<td>$1,270,567</td>
<td>$167,433</td>
</tr>
<tr>
<td>Employee Benefits</td>
<td>597,500</td>
<td>383,322</td>
<td>214,178</td>
</tr>
<tr>
<td><strong>Total Personnel</strong></td>
<td><strong>2,035,500</strong></td>
<td><strong>1,653,889</strong></td>
<td><strong>381,611</strong></td>
</tr>
<tr>
<td>Information Services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Books and Other Media</td>
<td>496,589</td>
<td>484,398</td>
<td>12,191</td>
</tr>
<tr>
<td>Data Searches</td>
<td>227,285</td>
<td>228,456</td>
<td>$(1,171)</td>
</tr>
<tr>
<td><strong>Total Information Services</strong></td>
<td><strong>723,874</strong></td>
<td><strong>712,854</strong></td>
<td><strong>11,020</strong></td>
</tr>
<tr>
<td>Operations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Library Insurance</td>
<td>60,000</td>
<td>36,209</td>
<td>23,791</td>
</tr>
<tr>
<td>Supplies</td>
<td>99,050</td>
<td>76,648</td>
<td>22,402</td>
</tr>
<tr>
<td>Professional Services</td>
<td>111,000</td>
<td>88,566</td>
<td>22,434</td>
</tr>
<tr>
<td>Mileage and Parking</td>
<td>25,000</td>
<td>16,505</td>
<td>8,495</td>
</tr>
<tr>
<td>Conferences and Travel</td>
<td>10,000</td>
<td>14,407</td>
<td>(4,407)</td>
</tr>
<tr>
<td>Equipment and Software</td>
<td>189,680</td>
<td>71,167</td>
<td>118,513</td>
</tr>
<tr>
<td>Membership and Public Relations</td>
<td>29,000</td>
<td>31,987</td>
<td>(2,987)</td>
</tr>
<tr>
<td>Depreciation</td>
<td>-</td>
<td>411,303</td>
<td>(411,303)</td>
</tr>
<tr>
<td><strong>Miscellaneous</strong></td>
<td>11,500</td>
<td>10,300</td>
<td>1,200</td>
</tr>
<tr>
<td><strong>Total Operations</strong></td>
<td><strong>535,230</strong></td>
<td><strong>757,092</strong></td>
<td><strong>(221,862)</strong></td>
</tr>
<tr>
<td><strong>Total Expenditures</strong></td>
<td><strong>3,294,604</strong></td>
<td><strong>3,123,835</strong></td>
<td><strong>170,769</strong></td>
</tr>
<tr>
<td><strong>Excess of Revenues over Expenditures</strong></td>
<td><strong>$4,596</strong></td>
<td><strong>($175,758)</strong></td>
<td><strong>$180,354</strong></td>
</tr>
</tbody>
</table>

Note: The Budget Schedule above includes expenditures for capitalized Equipment, excludes Depreciation.

## Appendix B: Library Donations

Donations: Total volumes donated is 5

<table>
<thead>
<tr>
<th>Title</th>
<th>Quantity</th>
<th>Donor</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>An Illegal Alien’s Journey into the United States/</em> Ruy Ruffino</td>
<td>2</td>
<td>Genaro Lara, author of the book</td>
</tr>
<tr>
<td><em>Literally speaking: a journey in two words/</em> by Jennifer L. Hughes</td>
<td>1</td>
<td>John Adkins</td>
</tr>
<tr>
<td><em>Literally speaking too: more to the point/</em> by Jennifer L. Hughes</td>
<td>1</td>
<td>John Adkins</td>
</tr>
<tr>
<td><em>Taking the stand: my life in the law/</em> Alan Dershowitz</td>
<td>1</td>
<td>Jodi and Steven Lasensky</td>
</tr>
</tbody>
</table>
Appendix C: Library Statistics

CHART 1: GATE COUNT BY BRANCH

Gate count reflects people coming into the branch, no matter their reason.

South Bay: The gate count for the South Bay branch is not necessarily an accurate reflection of the number of people actually using our services and resources. Many members of the court staff use the SB branch for its restrooms and kitchen facilities. The Revenue and Recovery office just outside of the SB branch, also directs the general public into our branch to use the restrooms.

East County: Similar to South Bay, the gate count for East County is not necessarily an accurate reflection of the number of people actually using our services and resources. The El Cajon courthouse does not have a public photocopier. Thus, the entire court staff refers people to the library for photocopies. This is great for our photocopy revenue, but it skews the statistics for the number of people who actively use the library resources.
**Downtown:** The downtown location was closed from January 2011 through mid-February 2012. While in temporary premises, no gate count was kept. Thus, our numbers are low for that time period at the Downtown location and higher at each of the other locations.

**North County:** North County numbers remain similar to last year’s gate count numbers.

As you can see from the bar graph, Downtown numbers were slightly up this year, while all other locations were slightly down. North County, East County, and South Bay numbers continue to fall. We believe this is largely due to the court closures that began in October 2012.
CHART 2: ACTIVE MEMBERSHIPS COUNT BY BRANCH
(Previous years’ totals including members not active in the current year.)

2010-2011: Due to the Downtown closure for renovation during the 2011/2012 period, the library had free membership and did not require a deposit. The membership rolls expanded greatly, but the library did not receive any money for any of the memberships.

2011-2012: The library returned to its historic membership requirements of a yearly membership fee and a one-time security deposit. Many people that had a free membership for the previous year did not renew.

2012-2013 and 2013-2014: Since the membership requirements returned to its historic membership requirements, the membership numbers have stayed consistent.
CHART 3: CIRCULATION TRANSACTIONS BY BRANCH

2013-2014 Transactions include the following:
- Checkouts
- Renewals (in person, by phone, online)
- Holds

2010-2013 Transactions include the following:
- Check-outs
- Check-ins
- Renewals (in person, by phone, online)
- Holds

Circulation Transactions rose starting February 2011 because most materials were changed to circulating. South Bay's numbers increased also because it housed our loose-leaf material during the 2011-2012 renovation.

The drop in 2012-2013 at SB & EC reflects the slowdown in branch traffic.

Explanation for 2013-2014: The Library began to track just the number of items circulated, renewed, and put on hold, but not the number of items that were checked-in. Adding the number of books checked in brings the total to 21610, slightly below last fiscal year.
CHART 4: TOTAL PATRON INQUIRIES BY BRANCH

January 2011 – January 2012 the Main location was closed for renovation, the temporary site offered limited services. Branches took over the lead on providing services.

EC & SB - January 2012 reflects assisting with Phone / Email Reference / Chat duties.

EC & SB 2012-2013 – inquiries regarding court facilities & closures. Since the library remains open, we have numerous questions regarding court department hours and services.

February 2014 – all branches begin using Gimlet software to track patron inquiries.

Main & NC 2013-2014 – Due to multiple staff users, Downtown and North County branches have a difficult adjustment period adapting to Gimlet software. Reduction in patron inquiries is mainly explained by this. Another significant factor at Main is the drop in the number of patrons entering the library in 2014.

EC & SB 2013-2014 – branches are significantly affected by the closure of most civil court rooms in their respective courthouses. Also, South Bay began reduced hours due to reduced demand in October 2013.
Since moving back into the renovated building in February 2012, phone count is decreasing. Some of this is due to combining the Circulation and Reference desks at the Downtown branch. Previously, the Circulation desk would answer all phone calls and mark it as a statistic. If the call was forwarded to the Reference desk, then the reference staff counted it as a phone call as well.

2013-14 – all the statistics were lower for two reasons. One, all the branches are seeing lower gate counts, including Main in the second half of the year. We believe this is due to less foot traffic in the courts due to business office and court room closures. Two, Main and North County are still adjusting to the new reference tracking software, Gimlet.
CHART 6: ATTENDEES BY BRANCH AT SPECIAL LECTURES AND EVENTS

2011-2012 – at EC & SB reflects more staff at branches and scheduling of events during downtown renovation. The numbers are also high for SB because they reflect outreach at festivals/street fairs.

2012-2013 – the SB branch event statistics rose due to Legal Aid Society and Consumer Law Attorneys clinics held on a regular basis.

2013-2014 – Main’s increase is due mainly to the Writers in the Law program partnership with Warwick’s and greater attendance at off-site events. The increase for NC is due to their participation in the San Diego Volunteer Lawyer Program’s Women’s Resource Fair.
Appendix D: Internet & Web Report

This is the first full fiscal year with our new site, and our visitors continue to increase. This year, we’re including our in-house web site visitors, too, because our in-house patrons rely on our web site resources as much as our remote visitors do.

270% increase in recorded visitors.

A list of our most popular web pages. Our Electronic Resources, Research Guides, and Web Resources pages continue to be heavily visited. Two of our new pages, Research a Legal Issue and the Individuals blog content – which mainly focuses on providing information to help self-represented litigants with their research needs - quickly became favorites with our visitors. Anyone interested in joining our Partner Program should consider one of these pages for their logo or video.
The following graph indicates the mobile device preferences of our web site users over a four-year period of time. No surprise that more and more users are accessing our site content from their mobile devices!

### Traffic Sources

- **Search Engines:** 26%
- **Direct Traffic:** 57%
- **Newsletter:** 11%
- **Referring Sites:** 6%

### Top 10 Mobile Devices accessing our web site

- Apple iPhone
- Apple iPad
- Samsung GR-I9500 Galaxy S IV
- Motorola DroidX
- Samsung GT-I9300 Galaxy SIII
- Apple iPod
- Motorola XT907 DROID RAZR M 4G LTE
- Samsung GT-P5210 Galaxy Tab 3 10.1
- Amazon KF JWI Kindle Fire HD 8.9
- Samsung SPH-L710 Galaxy S III

11% of our visitors continue to our web site from our newsletter.
Readers & researchers across the nation visit our web site and access our content.
Appendix E: social media report & statistics

FACEBOOK

- 2013-1014 showed a 20% increase from the prior year in followers to a solid 759 followers.
- The number of people actually reached is even greater due to followers sharing information or placing events on timelines.
- Demographics show 25-34 year olds are still the most active age group at 18% of users, 35-44 year olds are close behind at 17%, and 45-54 year olds are 15% of our users. This year remains the same as last year, with women comprising 64% and men 35% of our followers.
- FACEBOOK promotes classes, clinics, special events, partnered events, & general legal news from San Diego, CA and around the world.

2013-2014 - 759 Followers  
2012-2013 - 641 Followers

TWITTER

- 2014-15 showed a 39% increase from the prior year. We went from 525 to 730 followers.
- Library gained an average of 21.6 followers per month.
- We posted 501 tweets; an average of 46 tweets per month.
- Our followers retweeted 40 of our tweets; favorited 19 of our Tweets; and, replied to 12 of our tweets.
- Frequent Tweet content included: events offered by SDLL, news about SDLL, legal news stories of interest to the San Diego legal and law library community.

LINKEDIN

- LinkedIn is the largest professional social network online today. We use it to build relationships in the community.
- We had plans for 2013-2014 to grow our followers on LinkedIn to further our reach in the professional community. We achieved this goal with a 219% increase in followers from the previous year.

2013-2014 - 272 Followers  
2012-2013 - 124 Followers  
2011-2012 - 87 Followers
EVENTBRITE

- Total: $8,177 revenue for all classes, including crunch card sales.
- $5,250 of that revenue was from Eventbrite alone.
- We are offering around the same amount of classes as last year but this year we offered more free community-oriented classes such as Family Law classes for pro-pers, How to help domestic violence victims in immigration situations, E-filing and E-service classes, etc. We have also done more marketing/outreach to paralegals, legal secretaries, and minority attorneys by contacting their legal associations and offering them promo codes for free class attendance.
- The number of attendees remains stable with an average of 14 attendees per event.

YOUTUBE

- 2013-1014 showed a 14% increase in Law Library Videos uploaded.
- We have 28 videos right now.
- Videos were viewed 2973 times, an increase of 302% from last year.
- Added videos include:
  - ABC’s of Restraining Orders
  - How to reduce a Felony to a Misdemeanor in California
  - Lindley Lecture on Law and Comics

PINTEREST

- Pinterest is a social photo sharing website that lets you create and manage theme-based photo collections. We use it to promote our library and to post photos of events we have hosted.
  - 2012-2013 44 followers
  - 2013-2014 69 followers
- This year we have increased our number of followers to 69 followers, a 57% increase over last year.
WEBCHAT

- We currently use MyCustomerCloud for our live webchat service.
- This service is staffed by the Information Desk at all branches during our normal hours of operation.
- Chat numbers remain consistent with past years.
  - 2013-2014: 63
  - 2012-2013: 62
  - 2011-2012: 79

E-MAIL REFERENCE

- E-mail Reference numbers are comparable to last year. In 2011-2012 there was a large increase in activity during the Downtown renovation.
  - 2013-2014: 139
  - 2012-2013: 147
  - 2011-2012: 630
  - 2010-2011: 291

QUESTIONPOINT / ASK A LIBRARIAN

QuestionPoint is a live chat service. It is paid for and staffed by the Council of California County Law Librarians (CCCLL). Our library is a part of this Council and helps to staff the service. In addition to chatting live, reference librarians can send helpful websites directly to patrons, no matter their location. Patrons are often outside of San Diego County, as all county law libraries and the California Courts post a link to the Ask A Librarian service on their websites. Our library started monitoring the system one hour per week in January 2014. Since then, we responded to 71 questions.
Appendix F: a glimpse at a five year plan

Entering the third year of a loosely developed internal 5 year plan, there is great momentum going forward on many initiatives while some remain to be tapped due to weakening finances and lack of staff. However, the law library continues to flourish in ways never before possible despite the lack of funding. A building culture of commitment to service is being formed that will lift and carry the law library through whatever crises and challenges await it.

2010 – YEAR ZERO
The new director began his tenure in May and staff spent sixth months preparing for the renovation and massive organizational change that would involve the county-wide disposition of staff and resources. Marketing plans were put into place to sensitize the public of the potential and real hardships of the coming year, Membership fees were waived as a marketing promotion, and the renovation project moved forward.

2011 – REBUILT-REINVENTED-REINVIGORATED
Year 1 was a year of rebuilding, reinventing, and reinvigorating the law library. The renovation was in full swing, a marketing program was employed to give higher visibility to the law library, and the staff was challenged to embrace a new set of learning organization standards that would ask them to cross-train and become more well-rounded in their knowledge of library operations and services. This preparation was vital as funding began a precipitous and rapid decline.

2012 - LAW MADE PUBLIC
Year 2 in 2012 saw the reopening of the downtown library, a new identity, a major political push to include local government officials, several public awareness pieces in our local and state legal communities. While the infrastructure of the downtown library had been essentially completed, the staff reorganization and building process was in mid-stream. Fiscal challenges arose that necessitated a drastic cut in part-time staff, creating stress on full time staff to continue operations. There was a reduction in full time staff. The tiny band of 20 [from high of 36 FTE] was challenged to make things work. New job descriptions and evaluation criteria were rolled out. A new evaluation system was presented and implemented that provided dialog throughout the year, not just a year-end review. A new web site was developed and introduced. Important relationships with the bar, governments, county organizations, libraries, and business groups were developed and promoted.
2013 - UNDERSTANDING & COMMUNICATING VALUE

Year 3 in 2013 was a year of assessment – in law library services, in the collection, and in the mission and vision of the law library. No longer could the law library afford to purchase and update duplicative print and online resources at all its four branches. This learning year involved public usage surveys and statistical applications to provide strength for the imperative digital initiative going forward. A new strategic plan was created to put the law library in the stream of digital commerce. Marketing and sales of products will be implemented for more revenue.

Patron surveys will be conducted in a variety of ways – online, in person, in focus groups, and via mail. The strategy here is to determine the strength of our online presence – awareness of web site and web offerings/resources, amount of training estimated to bring public up to a benchmark standard, etc.

More surveys and assessments will be in preparation for the Going Digital! Campaign for 2014.

2014 - GOING DIGITAL!

Year 4 in 2014 will be another transformative year in terms of the collection focus and services. As digital resources become primary, the law library will see its obligation and responsibility to train and familiarize all patrons with computer use, technology, and online research techniques in order to create broader avenues of access to legal information.

2015 - COLLABORATION

Year 5 in 2015 rounds out the cycle of reinvention by seeking out partners to collaborate on worthy projects throughout the city, county and state. With a new-found solidity in its structure, mission, attitude, and ability the law library will have more to offer and more to gain as it partners with the county library system, state-wide library system, and other California county law libraries in a potential new Joint Powers Authority alliance.
20/20 vision: strategic plan 2014 - 2020
20/20 Vision: 
The Strategic Plan 
for the San Diego Law Library 
2014-2020

executive summary

At the January 2013 meeting of the San Diego Law Library (“Law Library”) Board of Trustees (“Board”), director John Adkins called upon the Board to create a strategic plan to guide the future direction and governance of the Law Library. In particular, Mr. Adkins advised that this plan was needed to focus the Law Library’s finite resources and talents in meeting the challenges of a digital age with precipitously declining revenues.

The Board agreed, and they, along with the assistance of Mr. Adkins and key Law Library staff, began.

Next Steps

To accomplish this, the following occurred:

- Board President Jeffrey Cawdrey established two ad hoc committees with the following trustees:
  - Assessment Committee
    - Nathan Low, Trustee (*Chair*)
    - Judge Esteban, Trustee
    - Lorena Slomanson, Trustee
    - Kathleen Walker, Foundation Trustee
    - Gina Catalano, Staff Lead
    - Chris Cox, Staff Support
  - Strategic Planning Committee
    - Carolyn Brock, Trustee (*Chair*)
    - Jeffrey Cawdrey, Trustee
    - Judge Yvonne Campos, Trustee
    - Heather Stone, Foundation Trustee
    - Kelly Keach, Staff Lead
    - Stephanie Schweter, Staff Support

The director served *ex officio* on both ad hoc committees.

There was hope that the process would be completed within one year, but everyone agreed that target was unlikely to be met, but hoped it would spur a timely conclusion.
purpose

The stated goal of each committee was as follows:

Assessment Committee – to allow the law library to measure its progress by creating tools to do so.

Strategic Plan Committee – to create an action plan for the library that would serve as a road map for success through 2020.

process

Throughout 2013, each committee first met separately. Readings were distributed about the roles and functions of assessment committees and strategic plan committees. Ideas were gathered about the different ways the library could move forward. The committees learned from each other and developed an outline to chart a path forward. A patron/user survey was used to get important information about who we served and what they wanted from their law library.

After an initial half year of idea gathering and planning, the full Boards of the Law Library Trustees and the Law Library Foundation were called together for an evening retreat at the firm Foley & Lardner, LLP. Joined by select members of the library staff, the retreat resulted in the identification of action items and many possible objectives and strategies for attaining them.

Taking those retreat results back to the library, the staff was asked to evaluate and give their input. All staff input was combined, collated and organized with the retreat and survey information. The library staff members of the ad hoc committees then sifted through the materials and wrote this document over a period of months. In early 2014, four over-arching goals were identified and the objectives and action strategies put into place.

Many thanks go to the staff members who put so much time and thought into the creation of this plan. Foremost among them was Kelly Keach, iLead Reference Librarian, who was tasked with the collation and creation of the draft and finalizing the document. In addition, Stephanie Schweter, Gina Catalano, Chris Cox, Marcia O’Hara, Janet Liggett, Cheryl Weeks-Frey, and others contributed to the plan, along with staff and board input.

This strategic plan, 20/20 Vision, is designed to promote and achieve service excellence from now until the decade’s end. The Law Library is committed to deepening its collaboration with others in the legal services community of San Diego County and throughout California; and more deliberately aligning its collections, resources, services, and expertise for the benefit of the people we serve.

We hope that this plan, the result of more than a year of effort, will serve as a blueprint for successful navigation of the San Diego Law Library throughout the decade and, perhaps, beyond.
LAW MADE PUBLIC

The Law Library is dedicated to bringing law to the people:

- We welcome all people to help them find the law.
- We partner with legal services providers to help people understand and use the law.
- We advocate for free and open access to the law and the justice system.

The San Diego Law Library will become everyone’s first choice for finding legal solutions, pursuing access to justice, using advanced technology, and learning how the law works for them.
the four over-arching goals

GOAL ONE:
ADVANCE THE LAW LIBRARY’S MISSION BY SECURING ITS FINANCIAL & OPERATIONAL STABILITY

GOAL TWO:
ENRICH THE USER EXPERIENCE USING OUTREACH & COLLABORATION TO CREATE A MORE VISIBLE & VIBRANT COMMUNITY CENTER FOR LEGAL RESEARCH & LEARNING

GOAL THREE:
INCREASE OUR VALUE & IMPACT BY SUCCESSFULLY MIGRATING THE LAW LIBRARY’S COLLECTION & SERVICES TO A QUALITY DIGITAL PLATFORM

GOAL FOUR:
CREATE A CULTURE OF CONTINUOUS IMPROVEMENT & SERVICE EXCELLENCE BY BUILDING & SUSTAINING A LEARNING ENVIRONMENT
GOAL ONE:

ADVANCE THE LAW LIBRARY’S MISSION BY SECURING ITS
FINANCIAL & OPERATIONAL STABILITY

I. STRATEGIC ACTIONS FOR FINANCIAL STABILITY

A. Governing Bodies Must Assist in Generating Positive Fiscal Change Through Focus and Advocacy
   a. Law Library Board of Trustees
      i. All members understand Law Library’s funding and need to seek revenue sources
      ii. Board officers are lead advocates in directing Law Library advancement and promotion
      iii. Judicial members have a clear understanding of the political nature of library advocacy and fundraising
   b. Foundation Board
      i. Foundation Board must be a self-guided, organized advocacy body that will identify opportunities, take deliberate steps to seize those opportunities, and consistently meet fundraising targets.
      ii. Through public education, formulate, embrace, and promote the Foundation brand to create a prestigious fundraising entity.
      iii. Fundraising must be the sole focus of the Foundation.
         1. Grant opportunities must be exploited with positive results
            a. Work with Law Library to determine most important and necessary use of grant funding.
         2. Sponsorships must be actively recruited and engaged
         3. Advancement of the Law Library mission with donor support
         4. Examine methods of changing laws to increase revenue streams
         5. Joint venture fundraising/ partnerships/ military partnerships
         6. Bar partnerships

B. Develop Additional Sustainable Funding Models
   a. Create annual outreach campaigns to generate awareness and garner support
      i. Expand legislative outreach through relationship building
b. Work to strengthen, and support, legislation to support alternate county law library funding

c. Explore other potential funding sources

d. Assess Sponsors Program and review its viability

e. Create new membership model that better aligns with the needs of users and the library

C. Work with the CCCLL to explore creative opportunities for resource and cost sharing
   a. Joint Powers Authority
   b. Shared catalog
   c. Liberal interlibrary lending
   d. Study and implement state-wide sharing of legal resources

II. STRATEGIC ACTIONS FOR OPERATIONAL STABILITY

A. Law Library Must Operate at Optimal Capacity
   a. Budget allocations conform to highest needs.
   b. Examine the goals and aims of unspent revenue as potential usable resource
      i. Assess current spending practices to determine untapped efficiencies and cost savings.
      ii. Explore methods to improve financial mechanisms and controls.
      iii. Continue to reduce capital assets and overhead while sustaining reliable access to applications and content.
   c. Staffing must be adequate to achieve Law Library goals and mission
      i. Engage in rigorous quantitative assessment of usage of the Law Library and its resources
      ii. Engage in rigorous qualitative assessment of services
      iii. Actively compare staffing at similar law libraries
      iv. Assess staff coverage and productivity
      v. Assess staff abilities & provide professional development opportunities
      vi. Assess fair salary increases as part of the annual budget process.
   d. Develop better communication tools to describe state of library finances to board members, staff, and public.
   e. Assess branch library usage to determine possible future cost reductions or alternative usage.
   f. Work with County to improve library facilities and infrastructure.
i. Explore new work projects
ii. New trailer or building in North County
iii. Investigate possible new exit downtown
iv. Roof deck downtown
v. Skylight on 5th floor downtown
GOAL TWO:
ENRICH THE USER EXPERIENCE USING OUTREACH & COLLABORATION TO CREATE A MORE VISIBLE & VIBRANT COMMUNITY CENTER FOR LEGAL RESEARCH & LEARNING

A. Access and Diversity: Serve a larger, more diverse patron community

B. Ensure programs, resources, and services are accessible to all.
   a. Ensure progress by requiring staff outreach to diverse communities are reported
   b. Assess progress in reaching diverse communities using annual surveys, goals and standards
   c. Promote the Law Library system as an asset for all communities.
   d. Purchase resources annually that provide first language assistance
   e. Fully bilingual (English and Spanish) in all print, electronic media as available and provide information literacy opportunities for ESL students and other student populations.
   f. Have bilingual staff at all branches, at all times.
   g. Develop public relations plans tailored to specific needs of different communities

B. Partner with the bar, courts and government agencies to expand services to all user groups

C. Partner with local libraries and educational institutions to provide legal research training to their staff and patrons

D. Expand outreach to community groups and schools of all kinds – law, university, high school, middle and elementary

E. Continuously evolve the web site to stay current with emerging trends and provide a better user experience
   a. Develop different models of online participation to encourage learning about the law and access to justice
   b. Establish an online community center as a resource for remote users
   c. Create content delivery mechanisms that enable users to quickly get relevant content.
   d. Develop public relations campaigns to promote new web offerings and gather continuous feedback.
   e. Develop metric to determine the efficacy of new web offerings.

F. Assess community needs outside the library to improve community participation and cohesion
   a. E-government classes (finding things on .gov)
i. Collaborate with civics organizations
ii. Government Research Services
b. Arts and culture & their legal connections
c. Health and wellness programs
GOAL THREE:
INCREASE OUR VALUE & IMPACT BY SUCCESSFULLY MIGRATING THE LAW LIBRARY’S COLLECTION & SERVICES TO A QUALITY DIGITAL PLATFORM

A. Continually increase reliability and availability of digital delivery mechanisms to ensure user access to library information.
   a. Create an IT infrastructure that enables anywhere, anytime, any device access; resources will have reliable remote access
   b. Use technology to promote efficiency and effectiveness in public services.

B. Enhance library support for persons with physical challenges as new technologies emerge

C. Adopt a vision of future virtualization for data centers (branches), computer labs, and eliminate or curtail printing.
   a. Work toward making the library a paper-free organization.
   b. Develop plans to explore expanded authenticated remote access to library software and databases.

D. Budget for a 3-year replacement cycle for all technology user tools.

E. Plan for cloud-based technology to be the standard.

F. Develop a digital migration plan that includes maintaining access to print resources in so far as they are deemed to be 1) the best format for providing access to the law, and 2) fiscally responsible.
   a. Revise Collection Development Policy to shape collection priorities through 2020
   b. Investigate electronic vendors and products
   c. Establish key protocols and standards for purchase of online resources
   d. Determine unique collection resources that are only available in print kept and preserved, as practicable
   e. Create an archival plan to increase access to holdings; partner with appropriate people and organizations
   f. Increase access through electronic interface with collection

G. A technology solution for Information on demand resources

H. Examine utility of digitization program and progress made
GOAL FOUR:
CREATE A CULTURE OF CONTINUOUS IMPROVEMENT & SERVICE EXCELLENCE BY BUILDING & SUSTAINING A LEARNING ENVIRONMENT

A. Increase training opportunities to ensure staff can exploit current technology to provide excellent service
   a. Fully embrace a Learning Organization philosophy
   b. Staff encouraged to seek training opportunities to learn new skills and advance current skills and take the time to do so.
   c. Incorporate new skills and tools into daily operations.
   d. Develop program for proactive mentoring opportunities on multiple levels and across departments.
   e. Create a framework for evaluating training opportunities to get the maximum benefit based on staff time and money.
   f. Assess staff based upon new training.

A. Increase instructional opportunities for patrons
   a. Increase and improve relevant educational content for Self Represented Litigants
   b. Increase and improve relevant educational content for Attorneys
   c. Increase and improve relevant educational content for the General Public
   d. Establish an Internet portal to provide remote access to all instructional materials
      i. Seek potential partners for recording our current classes and posting online for remote viewing

B. Focus on Technology
   a. Partner with legal technology companies for classes geared toward legal research and law practice management tools
   b. Become a center for learning new technology (legal research, law practice management, life skills)