



SAN DIEGO

LAW LIBRARY

Law Made Public™

20/20 vision:

strategic plan

2014 - 2020

July 2014

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.

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.

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.

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.
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- 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)