SAN DIEGO LAW LIBRARY

ANNUAL REPORT

2018-2019

Submitted to the San Diego County Board of Supervisors pursuant to California Business & Professions Code section 6349 by Mara Elliott, President of the Board of Trustees & John W. Adkins, Director of Libraries
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Mara W. Elliott, President of the Board of Trustees
&
John W. Adkins, Director of Libraries

September 2019
# Table of Contents

Table of Contents ............................................................................................................. 1
Message From The Director.......................................................................................... 2
Overview & History ........................................................................................................... 4
Library Board of Trustees ............................................................................................... 8
Organizational Chart ....................................................................................................... 10
Library Collections ......................................................................................................... 11
Library Donations ............................................................................................................ 12
Financial Recap ............................................................................................................... 14
Law Library Highlights for 2017-18 ............................................................................ 15
Strategic Plan: Significant Progress ............................................................................... 31
Social Media Report & Statistics .................................................................................... 42
Internet & Web Report .................................................................................................... 47
Appendix A: CA Business & Professional Code ............................................................... 50
Appendix B: Independent Auditor’s Report .................................................................... 65
Appendix C: Summary of Matthews Report .................................................................... 70
Message From The Director

The San Diego Law Library stands alone in offering County residents free access to legal materials, online resources, and assistance to self-represented litigants and attorneys.

Not to belabor the point, but: we help everyone access justice for free.

What the San Diego Law Library offers is unique\(^1\). Since 1891 we have proudly served County residents and worked each year to add new ways to increase their access to the law, to the courts, and to justice itself. This past year has been no exception.

This year marked a significant point in our finances, for the third year in a row, we received higher than predicted filing fee revenues, and for the second year our filing revenues increased. Although we remain severely underfunded, we are living within our means, steadily replenishing our reserves, and paying down a huge amount of our CalPERS unfunded liability. On the up side, we are investing in the future by purchasing new equipment and hiring more staff to achieve our goal of helping every County resident with their legal needs.

Assessment and Measuring Value
In 2018-19, we spent a good deal of time using the talents of consultant Joe Matthews, who helped us create a new framework for reaching our goals and objectives. His full report is available at the Law Library administrative office, but a synopsis of the findings is included in Appendix C. Based on actual data of law library usage, expenditures, resource management, and more, the report included several patron focus groups. We now have a basis for our next Strategic Plan, which will cover 2021-2025.

Our Courthouse Law Libraries in South Bay and East County Are Now Closed
After the opening of the new Central Courthouse in downtown San Diego, the Superior Court decided to consolidate civil cases there. The result: both self-represented litigants and civil attorneys ceased to use both our regional courthouse branches. We allowed others to use the spaces for legal clinics, workshops, and educational activities. Since these spaces were underutilized, these two law libraries were made available to the District Attorney and Public Defender for their expanding staffs in the Spring of 2019. We are pleased that these spaces will continue to be used for the needs of County residents.

\[^1\text{Unique. single, sole, peerless, matchless, incomparable, unprecedented, unparalleled, unequaled, unrivaled, unsurpassed, novel, nonpareil, unapproachable, unapproached, anomalous, individual, sole, sui generis (Latin), unexampled, lone, different, unequaled.}\]https://www.merriam-webster.com/thesaurus/unique
Coming Attractions
In the coming year we are planning to use the generous one-time funding from the State to create and grow the following programs:

1) law librarians in County library branches to better serve rural communities;
2) a civil self-help legal clinic to assist self-represented litigants
3) increase our Spanish language legal guides; and
4) invest in remote access technology for County residents

My Thanks
I consider this Law Library to be the heart of our legal community, working cooperatively to bring everyone together for the good of the people. I am grateful for our partners: the County Library, city libraries, courts, law schools, government agencies, nonprofits, bar associations, and law firms. I am grateful, too, for the stewardship of a fine board of trustees, each one of them dedicated to helping the Law Library survive and thrive for years to come. I cannot thank them enough for their commitment.

In my experience, a good public law library cannot make its mark unless it has one thing: a truly dedicated staff passionate about public service. Our staff help people with their sensitive legal issues day after day, and that takes resolve, character, and the ability to give someone hope. I humbly thank them for all their great work and dedication.

As always, the Law Library stands ready to serve you: come one, come all!

Best regards,

John W. Adkins
Director of Libraries
Overview & History

About the Law Library

The San Diego Law Library is an independent local government agency with an appointed volunteer Board of Trustees having oversight and authority for its budget, operations, staffing, and strategic planning. Our staff is led by the Director of Libraries, who plans policy, strategy, and programming and guides the Board in its decision-making. The Board meets regularly every month.

The Law Library’s only source of public funding is a small portion of the fees paid for first pleadings filed in the Superior Court pursuant to Business & Professions Code Section 6321 (stating that San Diego receives $38 for each eligible filing). It receives no tax dollars. Any other income comes from its Borrower’s Program, Benefits Program, and donations, which amount to about 2% of its total income.

In the past 7 years, a decrease in the number of case filings combined with an increase in the number of fee waivers granted, changes to jurisdictional limits, and new exemptions adopted into law have caused law library revenue to drop precipitously. Funding for County Law Libraries has diminished by nearly 40% (or $16.5 million) since 2009.

History of the Law Library

We began serving the legal community and citizens of San Diego County in 1891. In 1895 the Library’s book collection numbered 1,500 volumes and was housed in the judges’ chambers in the Courthouse. This arrangement continued until 1900, when a small room was set aside in the Courthouse for the Law Library, and in 1903 Henry W. Talcott, a local attorney was appointed the first Law Librarian.

In 1951, Leland G. Stanford, (distantly related to the Stanfords of Stanford University), an attorney and founder of the Balboa Law School (now California Western School of Law), was appointed Law Librarian. Under Mr. Stanford’s leadership, the Library’s collection grew to 50,000 volumes by 1955 and tripled to 150,000 volumes by 1971, when he retired. During this time, the present building located at 1105 Front Street was planned, built, and dedicated in 1958.

After Mr. Stanford’s retirement in 1971, O. James Werner, Assistant Professor and Law Librarian at the University of Oklahoma College of Law, was appointed Library Director. Under Mr. Werner, the collection was cataloged and classified by Library of Congress standards. The
Law Library began computerization of its records in 1982 and by 1987 all of the Library’s major files were computerized.

The first branch of the San Diego County Law Library was opened in September 1973 at the North County Courthouse in Vista. Additional branches at the Courthouses in Chula Vista and El Cajon were established in 1982 and 1983, respectively.

Mr. Werner retired in June, 1987, and was succeeded by Charles R. Dyer, formerly Associate Professor of Law and Law Librarian at the University of Missouri, Kansas City School of Law. In 2005, Robert E. Riger became the Director of San Diego County Public Law Library, and was succeeded by John Adkins, our current Director, in 2010.

Our Purpose

Vision

We envision 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

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.

What We Do Is Important

Public law libraries are important because everyone has a right to know the law. We were established in 1891 by the State of California to provide legal information not only to attorneys and judges, but to businesses, self-represented litigants, and people who want to know more about their rights. We make it possible for the general public to learn about and use the law to solve problems, access justice and leverage opportunities.

Through print and electronic legal resources, educational programs, legal clinics and the help of experienced legal research librarians, we support the entire community. Consider the different types of people we help:

- The mother, father, or grandparent fighting for custody of a child
• A recently laid off employee who is unsure whether she should sign a severance agreement
• A single mother who was defrauded by a contractor and wants to take him to small claims court
• The family facing foreclosure or eviction
• The landlords/tenants who are having legal issues regarding rental property
• The entrepreneur who wants to start a business
• The small business owner who just received notice of an IRS audit
• The inventor who wants to patent a new product and protect her intellectual property rights
• A criminal defendant trying to expunge his/her record
• The recent retiree who needs to secure the SSI Benefits owed to them

The Law Library is also a place for businesses to learn about and use the law to address business issues and take advantage of market opportunities.

We serve as a satellite office where attorneys can conduct free legal research, have a quiet space to work, meet with clients in private conference rooms, hold meetings and attend free and low-cost educational programs. Judges and court personnel can refer self-represented litigants to us, where those individuals can access legal forms, research guides and legal resources written for non-attorneys.

Our Collection

We house an estimated 108,000 print volumes and provide access to many electronic resources. As a selective Federal Depository Library and California State Document Depository Library, we maintain a collection of United States and California government documents and make them accessible in print and electronic formats.

Our collection includes a large selection of legal materials in print and electronic format including annotated codes, administrative regulations and case reporters. The Downtown San Diego location keeps the older editions of these annotated codes and the administrative codes for historical research purposes. The collection also includes detailed practice guides on specific law subjects. These guides include checklists, forms and instructions on various legal transactions and court filings. In addition to practice guides, we also carry popular self-help titles to assist the self-represented.
The Law Library is a California Appellate Brief Depository. Although we no longer house print briefs, we have access to an extensive California Brief collection through our electronic databases and microfiche collection. Municipal ordinances and codes are collected for cities within San Diego County and the southern California region. Local court rules and bar association materials can also be found here.

Self-Help Law Materials

Our popular “Do it Yourself” (DIY) collection includes an extensive selection of law books written for non-attorneys. These materials guide the reader through the legal process by providing explanations and instructions on how to handle a case, from initial court filings to enforcing judgments.

Electronic Resources

We provide an extensive electronic collection including Legal Databases such as Lexis and OnLaw. These databases help locate statutes, case law, legal and transactional forms and legal treatises covering both federal and state laws. In addition to electronic legal databases, other useful and frequently used websites are searchable via our online catalog system, as is our extensive collection of California State and Federal electronic government documents. Use Free Legal Websites to find links to reliable legal information.

Archives and Special Collection

We maintain numerous archive materials. Specifically, we house California and Federal codes, court rules, and jury instructions for historical research purposes. We also maintain an archive of materials relating to the history of California and the history of the San Diego Legal Community. If you are looking for a rare book or for historical legal information, please contact us for assistance.
The San Diego Law Library is governed by a nine-member Board of Trustees composed of five Superior Court judges and four attorney members. 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 throughout San Diego County.

At the 2019 officer elections, Mara Elliott was elected as Board President; The Honorable Joseph Brannigan, Vice-President; Lorena Slomanson, Treasurer; and Jeffrey Cawdrey, Secretary.

<table>
<thead>
<tr>
<th>MEMBER</th>
<th>TERM</th>
<th>OFFICE / AFFILIATION</th>
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<tr>
<td>Jeffrey D. Cawdrey, Esq.</td>
<td>January 2019 - December 31, 2021 (Started in May 2007)</td>
<td>Board of Supervisors Delegate Seat #1</td>
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<tr>
<td>Lorena Slomanson, Esq.</td>
<td>January 2017 - December 31, 2019 (Started February 2012)</td>
<td>Board of Supervisors Delegate Seat #2</td>
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<td>Mara Elliott, Esq.</td>
<td>January 2018 - December 31, 2020 (Started April 2015)</td>
<td>Board of Supervisors Delegate Seat #3</td>
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<td>Carla DiMare, Esq.</td>
<td>March 2019 - December 31, 2021 (Started March 2019)</td>
<td>Board of Supervisors Delegate Seat #4</td>
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<td>Notes</td>
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<td>The Hon. Julia Craig Kelety</td>
<td>January 2019 – December 31, 2021</td>
<td>(Started in December 2006)</td>
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<tr>
<td>The Hon. Joseph Brannigan</td>
<td>January 2017 - December 31, 2019</td>
<td>(Started in January 2014)</td>
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<td>Vice President</td>
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<tr>
<td>Books (volumes) Added</td>
<td>3,179</td>
<td>2,518</td>
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<td>Total books and</td>
<td>118,621</td>
<td>118,781</td>
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<td>publications on hand</td>
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<tr>
<td>(volumes)</td>
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<tr>
<td>Microform</td>
<td>580,776</td>
<td>597,350</td>
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<tr>
<td>Current</td>
<td>652</td>
<td>600</td>
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<tr>
<td>Continuations/Subs</td>
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<tr>
<td>Video</td>
<td>74</td>
<td>86</td>
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<tr>
<td>Audio (tapes, CDs,</td>
<td>570</td>
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<td>DVDs)</td>
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<tr>
<td>Internet Resources</td>
<td>84,159</td>
<td>94,008</td>
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<tr>
<td>Discards</td>
<td>4,367</td>
<td>2,726</td>
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<td>Lost or Missing Books</td>
<td>5</td>
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*The library is currently conducting an inventory. Many books that are currently marked missing will be found or are errors in the item records in the library catalog.

**The large number of discards reflects the removal of the East County branch location materials from the Library Catalog in this Fiscal Year.
### Library Donations

**DONATIONS:** Total volumes donated = 28

<table>
<thead>
<tr>
<th>TITLE</th>
<th>#</th>
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<tr>
<td>Bad-ass librarians of Timbuktu : and their race to save the world's most precious manuscript / by Joshua Hammer</td>
<td>1</td>
<td>Donated by Chris Pickford</td>
</tr>
<tr>
<td>Blind injustice : a former prosecutor exposes the psychology and politics of wrongful convictions / by Mark Godsey</td>
<td>1</td>
<td>Donated by Tom Mininger</td>
</tr>
<tr>
<td>Constitutional governance and judicial power : the history of the California Supreme Court / edited by Harry N. Scheiber</td>
<td>2</td>
<td>Donated by Laurel Moran</td>
</tr>
<tr>
<td>Family guide to mental illness / by Linda Tashbook</td>
<td>2</td>
<td>Donated by Laurel Moran</td>
</tr>
<tr>
<td>Forensic document examination for legal professionals : a science-based approach / by Michael N. Waskshull</td>
<td>1</td>
<td>Donated by author, Michael N. Waskshull</td>
</tr>
<tr>
<td>Furious hours : murder, fraud, and the last trial of Harper Lee / by Casey Cep</td>
<td>1</td>
<td>Donated by John Adkins</td>
</tr>
<tr>
<td>The good fight : America's ongoing struggle for justice / by Rick Smolan and Jennifer Erwitt</td>
<td>1</td>
<td>Donated by Valerie Gragg</td>
</tr>
<tr>
<td>History of American law / by Lawrence M. Friedman</td>
<td>1</td>
<td>Donated by Chris Pickford</td>
</tr>
<tr>
<td>Law 101 / by Jay M. Feinman</td>
<td>1</td>
<td>Donated by Laurel Moran</td>
</tr>
<tr>
<td>Lawyers without rights : the fate of Jewish lawyers in Berlin after 1933 / by Simone Ladwig-Winters</td>
<td>2</td>
<td>Donated by Law Library Justice Foundation</td>
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<tr>
<td>Lay of the land : the history of land surveying in San Diego County / by Michael J. Pallamary</td>
<td>1</td>
<td>Donated by Marianne Sterna</td>
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<td>Librarian's guide to homelessness / by Ryan Dowd</td>
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<td>Donated by Laurel Moran</td>
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<tr>
<td>Library book / by Susan Orlean</td>
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<td>Donated by John Adkins</td>
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<tr>
<td>Majesty of the law / by Sandra Day O'Connor</td>
<td>1</td>
<td>Donated by John Adkins</td>
</tr>
<tr>
<td>Makerspaces in libraries / by Theresa Willingham and Jeroen DeBoer</td>
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<td>Donated by John Adkins</td>
</tr>
<tr>
<td>Mindful librarian : connecting the practice of mindfulness to librarianship / by Richard Moniz, et al.</td>
<td>1</td>
<td>Donated by Chris Pickford</td>
</tr>
<tr>
<td>My beloved world / by Sonia Sotomayor</td>
<td>1</td>
<td>Donated by Laurel Moran</td>
</tr>
<tr>
<td>Title</td>
<td>Quantity</td>
<td>Donated by</td>
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<tr>
<td>My grandfather's son: a memoir / by Clarence Thomas</td>
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<td>Laurel Moran</td>
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<tr>
<td>My own words / by Ruth Bader Ginsburg with Mary Hartnett and Wendy W. Williams</td>
<td>1</td>
<td>Laurel Moran</td>
</tr>
<tr>
<td>No time to spare: thinking about what matters / by Ursula K. Le Guin</td>
<td>1</td>
<td>John Adkins</td>
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<tr>
<td>Protecting patron privacy / edited by Bobbi Newman, Bonnie Tijerina</td>
<td>1</td>
<td>Laurel Moran</td>
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<tr>
<td>Stories from trailblazing women lawyers / by Jill Norgren</td>
<td>1</td>
<td>Laurel Moran</td>
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<tr>
<td>To establish justice for all: the past and future of civil legal aid in the United States / by Earl Johnson, Jr.</td>
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<td>Law Library Justice Foundation (Rubin Fund)</td>
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<td>West's federal rules decisions: opinions, decisions and rulings involving the Federal rules of civil procedure and Federal rules of criminal procedure</td>
<td>1</td>
<td>William R. Slomanson</td>
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</table>
A copy of a portion of the audited financial statements of the Law Library is included in this report as Appendix B.

FINANCIAL RECAP FOR THE FISCAL YEAR ENDING JUNE 30, 2019:

- The Law Library’s total revenue increased 61%, from $2,952,894 to $4,766,244.
- This increase is largely due to a one time grant from the state for $1,649,283. Filing fees also increased by 6% from $2,801,526 in FY 2018 to $2,957,371 in FY 2019.
- Filing Fee Revenue dropped steadily from FY 2009 to FY 2016, but Filing Fees have been trending slightly higher the past few years.
- Total expenses increased 9% or $264,981, primarily due to an increase in personnel expenses. There was also an expense of $16,493 related to the $1,649,283 awarded from the state as well as a $29,460 increase in print materials and electronic resources.
- The Law Library made a payment of $1,841,735 in April substantially reducing the Unfunded Pension Liability amount for FY 2019 to $323,893.
WE ARE LAW MADE PUBLIC

IMPORTANT PROGRESS, PROGRAMS & IMPROVEMENTS FOR FISCAL YEAR 2018-2019
91,803 webpage visits
267,458 page views

304 legal clinics with community partners

483 Borrower & Benefit Purchases

17 specialized legal databases for public

7,079 materials borrowed

LEGAL RESEARCH BEGINS HERE
Advocacy

STATE LEGISLATIVE ADVOCACY
The Council of California County Law Librarians (CCCLL) continued its legislative advocacy campaign to secure supplemental funding for California county law libraries. Although our efforts ensured that county law libraries made it on to the Budget Committee priority list, unfortunately the Committee recommended funding for other access to justice programs.

PLANNING FOR USE OF $1.6 MILLION
In FY2019 SDLL received $1.6 million in supplemental funding from the State; we are taking time to plan the best use of this money. Several projects are in the planning stage. First, we are in discussions with local legal aid organizations to bring an in-house “Lawyer in the Library” type of program to SDLL. We feel that this will have the most impact on our community, both in person and via our online Self-Help Center. With the loss of our South Bay and East County locations, we are having to re-think space usage at the downtown location to house such a program.

Second, we are planning on expanding our public library partnerships to reach more of the community. Staff is in discussion with the San Diego County Library system to determine which areas of the county are in need of legal resources and have locations that are suitable to host print and electronic materials, legal reference librarians, and have the space for classes and events. We are also exploring ways to reach rural parts of the community with use of online chat services and/or video conferencing with reference librarians and the Lawyer in the Library program.

Third, our North County location is in serious need of renovation. Our training rooms and public education space was closed for good 4 years ago due to age and dilapidation of the trailer attached to our building. At present, and for the last few years, we no longer have staff offices, space for educational events, or an adequate data line for speedy response rates when using our databases. To ensure that the renovation will move forward, SDLL has pledged $220,000 of the money received from the State to the County for supplemental funding of this project.

VIDEO PROJECT
In June 2019 we completed a video about the Law Library featuring some of our Board Members and Patrons. The video will be used to educate the community, local leaders, and potential donors of the importance of the Law Library to our community. The video supplements our new “Support & Advocate for your Law Library” brochure and webpage.
Assessment of Strategic Plan

ACTION PLAN: FROM TRANSACTIONS TO ENGAGEMENT
This year we received a grant from the Hervey Foundation to hire a consultant to help us assess the changing nature of law libraries and focus SDLL efforts for the greatest impact in our community. Library consultant Joe Matthews worked with staff to create a measurement tool called a Balanced Score Card which gives SDLL guidance on how to work toward the goals and objectives in the Law Library’s 20/20 Strategic Plan. It also provides an assessment framework by which we can measure progress. Mr. Matthews’ final report was submitted to the Board of Trustees in June 2019.

FOCUS GROUPS
As part of consultant Joe Matthews’s research on community needs, we held two focus groups (Downtown & North County) with solo and small firm attorneys, and one focus group (Downtown) with self-represented litigants.

SURVEY FOR MCLE CLASSES
In April 2019 we sent a short survey to our Unlimited MCLE and Benefit Package holders asking for feedback about the topics they wanted to see covered in MCLE classes. We received positive comments about the MCLE program overall content and value.

The structure set out in the consultant’s report and the information from the focus groups and survey will help inform future programing, the creation of resources, and new services.

Borrowing Program

BORROWING PROGRAM
This was our first full fiscal year under the new borrowing program. The Law Library now offers two options:

- Patrons can pay a $50 annual charge to borrow one item at a time for 4 days with one renewal period.
- Patrons can pay a $75 annual charge to borrow up to five items at a time for 4 days with two renewal periods.
Benefit Packages

Benefit Packages

The Benefit Packages began December 1, 2018. We currently have two benefit packages to choose from:

- **Unlimited MCLE Package**—$75 annual charge
  Holders can attend as many MCLE classes as they would like between December 1, 2018 and December 31, 2019. A general MCLE class costs $25 so this package is a great deal for attorneys looking to complete their MCLE requirements.

- **Discount Package**—$75 annual charge
  Holders receive the following benefits: access to WiFi and charging stations; 1/2 price MCLE classes; 1/2 price Conference Rooms; 1/2 price electronic document delivery; and 1/2 price interlibrary loans. Additionally, they receive the first option on used book sales and registering for networking events.

Wrapping Up The Membership Program

Deposit Drawdown

According to our 2016 plan, we are no longer taking deposits and continue to draw down the deposits we have on account. Staff personally contacted hundreds of account holders who still have deposits on file to offer a refund; to apply their balance toward Law Library benefits or borrowing privileges; or to donate their deposit. By the end of fiscal year 2018-2019, $86,014 worth of security deposits had been refunded, applied to benefit or borrowing charges, or donated to the Law Library Justice Foundation. We have $39,616 remaining on deposit still waiting for account holders to claim.
Public Library Partnerships

The Law Library’s mission is to bring the law to the public. We cannot attempt to reach for this goal any better than by placing ourselves in the middle of the most diverse, populous, and curious group of people in the county: patrons of our public libraries.

Our North County librarians have been working with the San Diego County Libraries in Encinitas, San Marcos, and Vista to host educational events to benefit our residents in the North.

At our Downtown Location, we have partnered with Chula Vista Public Library and the El Cajon Branch of the San Diego County Library to provide access to our Lexis, HeinOnline, and CEB OnLaw databases. In addition to the databases, which are available whenever the branch is open, we have a legal reference librarian onsite every other Monday at each location to answer questions and teach people how to use the databases. We have provided training to the public library staff about how to help patrons with using the databases and finding legal information. Additionally, our reference librarians refer public library patrons needing legal advice to various clinics and legal service providers in the community.

A meeting was held on February 26th, 2019 with the Directors of the Chula Vista Libraries and the San Diego County Libraries to discuss expanding our programs and bringing more services to the residents of San Diego County. During the meeting a plan was born for a presentation about the benefit of having a law librarian embedded in the public library. The presentation will take place at the 2019 California Library Association Conference.

The Statistics show we are off to a strong start:

- 549 Legal Reference Questions Answered at Partner Libraries
- Most common topics: landlord/tenant, criminal, trusts, estates & probate, and civil procedure
- 118 Referrals to Clinics and Legal Services
North County Events & Outreach

Know the Law Series
The Law Library once again partnered with the Vista branch of the San Diego County Library and the North County Bar Association to produce a number of events. In the Fall and Spring we produced six evenings of free lectures to the public. The Know the Law Series featured attorney speakers from the North County Bar Association on a wide variety of topics: Small Business Law, Small Claims, Landlord Tenant, Immigration, Trusts and Estates, and more. 57 members of the public attended these lectures.

Small Business 101
Due to popular demand, we worked with the City of Encinitas and other local partners to offer events designed to assist small business owners and members of the public. The Small Business 101 series is a panel discussion including all aspects of business startup, and includes speakers from the City licensing, zoning, and management offices, local attorneys, accountants, insurance professionals, and representatives from the local chambers of commerce. We held two seminars in November and June, and 47 members of the public attended. The response has been so welcoming that we are shifting the venue to a larger location, and have two seminars planned for the Fall.

San Marcos Branch of the San Diego County Library

Know your Rights: Freedom of Speech
In partnership with the San Diego County Library San Marcos branch and as part of the One Book One San Diego series, our own Board Trustee Carla DiMare presented a class called Know Your Rights, Freedom of Speech. Eight members of the public attended this event.

Small Claims Workshops
We formed a new partnership with the Thomas Jefferson School of Law to produce six small claims workshops; 28 members of the public attended. The workshops have recently expanded to include clinics.

Partnerships:
• Vista & San Marcos Branch, San Diego County Library
• North County Bar Association
• City of Encinitas
• Encinitas Chamber of Commerce
• 101 Business Organizations
• Thomas Jefferson School of Law
Military Law
Each year we give special focus to an area of law intrinsic to the fabric of San Diego County’s culture, history, and modern day life. From July 2018 to June 2019, we focused on Military Law. Since San Diego County has the largest concentration of military personnel and the third largest concentration of military veterans in the United States, we chose to highlight legal issues and services specific to our service members.

New Resource Guide
We launched our year of military law by debuting a resource guide with links to laws, resources, and agencies that provide assistance to active duty, reserve, and retired military members.

Tours for Service Providers
Our next step was to reach out to local military and veteran service providers. We provided informational tours to over a dozen people from Veterans Village of San Diego, the Office of Military & Veterans Affairs, Thomas Jefferson School of Law, and the Legal Assistance Departments from four local military bases. During these tours, we assessed how SDLL can partner more effectively with our local service providers to assist and educate service members and veterans. These relationships brought in many benefits for our patrons. In the Fall, we partnered with Thomas Jefferson School of Law to host seven Active Duty and Veterans Legal Workshops, which assisted 15 patrons. An SDLL Staff member attended the San Diego Superior Court’s Homeless Court Provider Meeting to learn about the homeless court process and share information about SDLL with the attending organizations.

Educational Events
We were also able to set up a free Veterans Benefits Seminar with the Office of Military and Veterans Affairs to help veterans and their families understand the benefits available from federal, state, and county programs. In addition to the Veterans Benefits Seminar, SDLL provided three MCLE classes that focused on military issues such as military discharge upgrades, the effects of criminal convictions on military personnel, and military family law. Over 50 people attended these four events.

Stand Down San Diego
Finally, we ended the year of military law by supporting Stand Down 2019. We partnered with Veterans Village of San Diego to be an intake site for homeless veterans, and partnered with California State Senator Toni Adkins to be a “Skivvies for Stand Down” drop off location. With the relationships that we have built and the resources that we created, we can continue to support our military and veteran patrons for years to come.
We offer a wide variety of legal education classes. In addition to the highly sought after required credits of eliminating bias, competency in the legal profession, and ethics, we also offered classes on trending issues such as:

- Gender and Name Change in California
- Authentication of Handwriting
- Update on Family Separation
- Mental Health Diversion in Criminal Cases
- Lawyer's Guide to the New Cannabis Market
- Animal Law

Every December and January we offer MCLE Crunch Time with several classes a week to help attorneys fulfill their CLE requirements. This year, attorneys seeking MCLE credit had the opportunity to join our new Benefits Program to get unlimited or discounted MCLE.

**LAW PRACTICE MANAGEMENT**

We received focus group feedback asking for more programs about law practice management, particularly for solo or small firm attorneys. In response to that feedback we scheduled two two-hour Saturday MCLE sessions on Law Practice Management. The first class on May 11, 2019 covering Formation and Operation had 18 participants. The second class on June 1 covered Finance and Technology and had 22 participants. We also created a new research guide for Law Practice Management, which includes a number of resources for solo and small law firm practice.

**Law Made Public Classes**

Since we have access to so many specialized legal databases, we need to make sure people have the tools and skills necessary to access the information and use the databases to their advantage. We continue to have Law Made Public Classes every Saturday at 10:00 a.m. These quick 20 minutes classes show users how to navigate our Lexis, CEB OnLaw, and HeinOnline databases. This is an opportunity for people to learn in a friendly and inviting environment and have one-on-one time with librarians that can show them tips and tricks to make their research easier and more productive. In addition to these scheduled classes, patrons also receive database assistance on a daily basis from our reference librarians.

- Free Legal Research Classes Every Saturday
- 1,367 questions answered regarding use of databases
Improving Access to Legal Information

SDLL is always working to improve access to legal information with a focus on self-represented litigants and solo and small firm attorneys.

We added The Gale Legal Forms database this year to provide a forms-based solution for a wide-variety of practice areas. It offers California specific “attorney forms” – officially approved forms actually used by law firms. Many of the forms and documents are available in Word and Adobe format so users just need to simply “fill in the blanks.” In the coming year this resource will be accessible to library patrons from their home computers. Stay tuned!

We also worked with other County Public Law Libraries and vendors to keep important legal resources accessible at the Law Library. We worked with Nolo Press Occidental to ensure their title How to Do Your Own Divorce in California (now offered only as an ebook) remains available at participating county law libraries via IP authentication on all law library computer terminals. Similarly, we worked with the National Housing Law Project to ensure access to the title HUD Housing Programs: Tenant’s Rights at 20 law libraries state-wide. San Diego Law Library took the lead in negotiating and acting as the point library for this online and print access to an important title.

At the February 20, 2019 Board of Trustees meeting, the Board decided to invite pro bono immigration lawyers to use Law Library spaces for training and meeting clients.

Focus on Staff Education

During Fiscal Year 2018-2019 Law Library staff participated in a number of trainings and conferences including AALL in Baltimore (July 2018); KohaCon (September 2018) in Portland, Oregon regarding our Integrated Library System software; CCCLL Spring Institute (Sacramento, CA); SANDALL Institute; and the ABA Equal Justice Conference (Louisville, KY). Staff also completed numerous webinars in order to better serve our library users; including an FDLP webinar on Federal Legislative History.

This year the SDLL staff also hosted librarians from over seven different library systems in a first ever Koha Law Library Summit held in January 2019 at the San Diego Law Library. Libraries from all over California learned about SDLL’s Integrated Library System migration (in 2016) and the Law Library’s Laurel Moran and Chris Pickford were featured speakers at this event. Our ILS service provider Bywater Solutions also provided an overview of their system and brought in additional speakers from a law firm library. We enjoyed sharing what we have learned and how we operate our library—with other librarians!
Law Day 2018

This year’s law day theme “Free Speech. Free Press. Free Society.” was celebrated with a legal clinic in North County, a presentation on assessing news media in South Bay, a legal resource fair in City Heights, and an ABA traveling exhibit. This year we touched 280 people with our Law Day activities.

Legal Clinic - North County

**PARTNERSHIP WITH NORTH COUNTY BAR ASSOCIATION AND VISTA PUBLIC LIBRARY**

- **65 Attendees**
- **29 Volunteer Attorneys**
- Areas of law represented:
  - Bankruptcy, Criminal, Debt Collection,
  - Family, General Civil, Immigration,
  - Landlord-Tenant, & Probate

Community Events

**CITY HEIGHTS LAW DAY EVENT**

For the fourth year in a row we participated in the City Heights Law Day event. 32 people visited our Legal Resource Information Table and learned about the law library.

**Fake News. Bad News. Shoddy News.**

In partnership with the Chula Vista Public Library, speaker Lorie Hearn from *inewsourse* gave attendees tips on how to assess the credibility of news stories.

**Lawyers Without Rights**

For the entire month of May we hosted a traveling exhibit created by the American Bar Association and the German Federal Bar to honor the many Jewish attorneys that were practicing in Germany during the rise of the Third Reich in Germany. The exhibit consisted of 26 panels that profiled various victims of the Nazis. The panels were divided between the Downtown and North county locations. We partnered with Anti-Defamation League San Diego for an opening reception with 49 attendees.
Community Partners

**Access to Law Initiative**
**At California Western School of Law**
Neighborhood Business Law Clinic

**Business 101**
City of Encinitas
Encinitas Chamber of Commerce

**Civil Appellate Self-Help Workshop**
Fourth Appellate District Court of Appeal
SDCBA Appellate Practice Section
Legal Aid Society of San Diego

**DA Truancy Clinics in North County**
San Diego District Attorney’s Office

**EL Cajon Clinic & Law Day Clinic**
TJSL Center for Solo Practitioners

**Elder Law Virtual Clinic**
Elder Law & Advocacy

**Family Law Clinic**
San Diego Volunteer Lawyer Program

**Know the Law Series**
San Diego County Library, Vista branch
North County Bar Association

**Law & Comics**
San Diego City Library, Central Library

**Law Day North County Clinic**
North County Bar Association
San Diego County Library, Vista branch

**Legal Aid Society of San Diego Clinics**
Consumer Law
SSI for Minors
Tax Clinic

**Public Library Outreach Program**
El Cajon Branch of the San Diego County Library
Chula Vista Public Library

**Rose Bird Event Reception**
Lawyers Club of San Diego

**Small Claims Clinics and Workshops**
San Diego County Library, San Marcos Branch
Thomas Jefferson School of Law

**Stand Down San Diego**
California Senator Toni G. Atkins’ Office
Veterans Village of San Diego

**Veterans Benefits Seminar**
San Diego County Office of Veterans Affairs

**Veterans Self-Help Workshop**
Thomas Jefferson School of Law

- 23 Community Partners
- 318 Partner Activities
- 2070 Attendees
24/7 Access to Legal Information

**Self-Help Center**

Our Self-Help Center is a web based guide that acts as a one-stop source for information on various popular legal topics.

Information on each topic includes: court forms, court procedures, our own in-house research and motion guides with samples, online resources, books and databases in the library, and local clinics and workshops. This allows us to put all relevant information from a variety of sources in one place for the convenience of the user.

The Self-Help Center is a companion to our Research & Motion Guides page.

**Research & Motion Guides**

Our Research & Motion Guide page contains *41 guides* on locating material on specific topics in the library and online, a pleading paper sample template, sample motions including modifiable Microsoft Word templates for notice of motion, declaration, points and authorities and sample order on select topics. We updated 10 of the existing guides and created the following *5 new guides*:

- Military Law
- Law Practice Management
- Service Animal Basics
- Elder Abuse Law
- Native American Tribal Law

**NOLO Publications**

We continue to offer remote access to NOLO Legal Reference Information Center database via our website. NOLO is a very popular self-help legal publisher that creates how-to books on a variety of legal topics. It helps explain the law, court procedures and rules, court forms, and contains sample language for drafting transactional and court documents. This legal database is available to anyone in San Diego County via their own internet enabled device.

- *10883 Database Requests*
SDLL partnered with San Diego Lawyers Club to explore the life and legacy the first female Chief Justice of the California Supreme Court, Rose Bird. A sold out crowd of 60 enjoyed dessert and refreshments while Prof. Kathleen Cairns, of Cal Poly San Luis Obispo and author of the book *The Case of Rose Bird*, discussed Chief Justice Bird’s life and career. Then, Hon. Yvonne Campos of the San Diego Superior Court discussed Chief Justice Bird’s legacy and its impact on women in the judiciary. San Diego City Attorney Mara W. Elliot moderated the discussion.

**Witkin Event**

The Witkin Awards are presented annually to honor members of the San Diego legal community. This year’s event was held at Tom Ham’s Lighthouse and featured entertainment from comedian Mark Christopher Lawrence.

115 guests celebrated the contributions of the 2018 awardees:

- **Practice of Law**: David Casey, Jr., Esq.
- **The Adjudication of the Law**: Hon. Desirée A. Bruce-Lyle
- **Legal Education**: Margaret A. Dalton, Esq.
- **The Advancement of Access to Justice**: The Human Trafficking Collaborative of the Lawyers Club of San Diego

The Justice Foundation raised nearly $23,000 for the Witkin Fund, which is used for the benefit of the San Diego Law Library.

**The Case of Rose Bird**

SDLL partnered with San Diego Lawyers Club to explore the life and legacy the first female Chief Justice of the California Supreme Court, Rose Bird. A sold out crowd of 60 enjoyed dessert and refreshments while Prof. Kathleen Cairns, of Cal Poly San Luis Obispo and author of the book *The Case of Rose Bird*, discussed Chief Justice Bird’s life and career. Then, Hon. Yvonne Campos of the San Diego Superior Court discussed Chief Justice Bird’s legacy and its impact on women in the judiciary. San Diego City Attorney Mara W. Elliot moderated the discussion.
Open House

This year we moved our Annual Open House to the month of February to avoid holiday conflicts, February is a great fit for our *Come Share The Love* theme.

Our Open House is a chance for us to share our accomplishments, show upcoming projects and events, and get the community involved in a fun way.

Special Guests Speakers for our 7th Annual Open House included:

- Presiding Superior Court Judge Peter C. Deddeh
- SDCBA President Lilys McCoy

Lawyers Without Rights

This year we hosted an opening reception for the American Bar Association’s traveling exhibit “Lawyers Without Rights: Jewish Lawyers in Germany Under the Third Reich,” which took place the evening of May 2nd. The moving exhibit was part of SDLL’s Law Day celebrations and portrayed what can happen when the rule of law disappears. It documented the fates of twenty Jewish male and female attorneys and jurists living in Nazi Germany, using personal photos and documents. The opening reception was co-hosted by the Anti-Defamation League (ADL) San Diego. Local attorney and member of the ADL’s Global Advisory Council Richard “Rick” Barton spoke about the rule of law and the importance of an independent judiciary, and then lead a lively discussion with the 49 attendees.
STRATEGIC PLAN

UPDATE:

SIGNIFICANT PROGRESS MADE IN 2018-2019
GOAL 1:
Advance the Law Library’s Mission by Securing its Financial & Operational Stability

STRATEGIC ACTIONS FOR FINANCIAL STABILITY

Annual Audit

The Fiscal Year 2018 Audit was successfully completed in a timely manner by Sonnenberg & Company, CPAs.

FY 2020 Annual Budget

The Budget Committee met to discuss the FY 2020 proposed Budget. The final Budget was approved at the May 15, 2019 meeting of the Board of Trustees.

Borrowing Program

Invoices were sent by email for the borrower’s program in October 2018.

Copiers

Extensive research resulted in a change of copier contracts resulting in a savings of over 35% in costs.

CalPERS Unfunded Pension Liability

The CalPERS Unfunded Pension Liability was paid down by the amount of $1,841,735 in April, 2019. This brings the projected Unfunded Pension Liability from $2,380,091 to $692,660, saving the SDLL substantial future interest payments.

Law Library Foundation

The 2018 annual Witkin Dinner was held on October 4, 2018 at Tom Ham’s Lighthouse. The Law Library Justice Foundation raised $22,787 for the benefit of the SDLL including $3620 from the silent auction.

The Honorable Victor Bianchini’s name has been added to the Donor Wall in honor of his donation of $10,000 to the Foundation.
Grants

The Foundation received a $14,000 Hervey Foundation Grant to hire consultant Joe Matthews. His expertise was used to help the SDLL Management Team fine tune strategic planning and assessment for the Law Library. The final report was presented at the June 2019 Board of Trustees meeting.

Advocacy Efforts

California State Library added our library to the Public Library Survey, and the Institute of Museum and Library Services (IMLS) has assigned our library a Federal-State Cooperative System (FSCS) ID. This ID returns our library to the official public libraries list, which, in turn, provides opportunities to apply for grants and acquire products at a significant discount.

A master contact list for all local State, County, and City representatives was created. Drafted an advocacy plan for monthly contact with representatives.

In the spring of 2019, the Council of County Law Librarians sent a letter to Gov. Newsom regarding funding for county law libraries in the 2019 budget. The letter of support was signed by 18 Senators and Assemblymembers, including three representatives from San Diego. Unfortunately, funding was not provided for county law libraries in the final Budget.

In June 2019 we completed a video about the Law Library featuring some of our Board Members and Patrons. The video will be used to educate the community, local leaders, and potential donors of the importance of the Law Library to our community. The video supplements our new “Support & Advocate for your Law Library” brochure and webpage.

Money Making In Progress

The State of California included a one-time distribution of funds to law libraries in its FY 2019 Budget. The SDLL received almost $1.65 million in December as our portion of the disbursement.

In FY 2019, over $2,700 was received from members who chose to donate their deposits rather than receiving a refund.

Used book sales earned over $6,300 in FY 2019.

SDLL Benefits

Open Enrollment for 2019 staff Health Benefits took place in September 2018, followed by Dental/Vision and FSA Open Enrollment in October and November, respectively.

Collection

The collection has stabilized and some print titles have been added to the North County Branch. In July, several NEW print titles were purchased to add to the collection; particularly in the areas of Military Law (Topic of the Year), LGBTQ legal matters, Disability Law, and Marijuana legal issues.

The Law Library entered into a three year print renewal contract with Matthew Bender for the Main Downtown location and will renew database contracts throughout the coming
fiscal year. Recently the Law Library expanded Westlaw access and signed a three year contract for access, adding Practical Law as a resource for solo and small firm practitioners. These actions all saved the library money.

**Patron Benefits**

The Law Library created “Benefits Packages” for patrons based on popular services and MCLE classes. These package options were approved by the board and rolled out to the public during the Fall Invoicing in October 2018. The Unlimited MCLE Package started December 1, 2018 and the Discount Package started January 1, 2019.

**STRATEGIC ACTIONS FOR OPERATIONAL STABILITY**

**Downtown Facilities**

Server room renovation took place in July 2018 to help prevent extreme fluctuations in humidity and temperature within the space.

The County performed a thorough building inspection in the summer and noted several deficiencies. A Building Automation System was installed to monitor utility usage throughout the building. This system will monitor water, electrical, and heating and cooling systems. This project was completed in spring 2019 and is the next step in correcting problems with the building heating/cooling system, building vibrations on the South side, and the excessive humidity and temperature fluctuations in the server room.

Staff Lounge renovation is continuing with additional eating facilities and storage areas.

The Downtown facility received an emergency phone system and upgrades to the paging system in November and December 2018. Voice over IP phone upgrades took place throughout the year.

**North County Branch Facilities**

Several building upgrades completed in fall 2018. The main electrical feeder line was replaced, the fire sensors and alarm system was upgraded, the (3) 5-ton HVAC split units were replaced in late spring 2018.

The County of San Diego, Public Safety Group, committed funds to replace the broken down North County trailer with another unit of the same size. Kick off meetings were held in fall 2018 to begin the process of removing the existing trailer and to replace the trailer with the same size structure. This project includes moving staff offices and the server room from the existing trailer to the main building, removing the rotting structure, addressing the drainage issues and grading the site, installing and building out a replacement structure, and fixing egress issues at this site.

Rear emergency exit egress, cracked and missing stucco and roof weeds were reported to DGS project planners for repair. The drainage issues at the front of the building were also reported to the County for repair.

We are conducting site surveys to improve internet connectivity at this location.

The Board of Trustees committed $320,000 to the NC Trailer Renovation project and $150,000 for furniture and technology for the location.
Chula Vista Branch Facilities

Spring 2019: The Law Library moved out of the Chula Vista Branch after the Public Safety Group Chief Administrative Officer authorized the Public Defender to take over this location.

El Cajon Branch Facilities

Spring 2019: The Law Library moved out of the El Cajon Branch after the Public Safety Group Chief Administrative Officer authorized the District Attorney to take over this location.

Insurance

The annual Worker’s Compensation audit was successfully completed.
The Liability, Property & Officer, and Auto Insurance was renewed in February 2019.

Assessment: Focus Groups

As part of consultant Joe Matthews’s research on community needs, we held two focus groups (Downtown & North County) with solo and small firm attorneys and a self-represented litigant focus group. This information helped inform aspects of Joe Matthews’s report presented in June 2019.

Borrowers Program & Benefit Packages

A new Borrowers Program rolled out in the beginning of 2018 with new pricing structure and levels of borrowing. The new Benefit package rolled out January 2019. We had 423 borrowers and Benefit package holders this fiscal year.

Deposits continue to be returned to patrons or used to apply to their renewals. As of June 30, 2019, patron security deposits have been reduced to $39,616 from a starting total of $125,886.

Reorganization of User Experience Department

Borrowing Program and Benefit Package work duties were incorporated into the User Experience department. Two new positions, Reference Librarian for Partnerships & Communications and Reference Librarian for Education, were created based on critical needs and functions of the department after the loss of our Membership Librarian and Reference Librarian in the fall of 2017.

New Hires

The Core Operations department made good use of a volunteer to help with shelving and other projects. They will have Bryce Kelety worked with them again this Summer of 2019 on special archival projects.

The IT Department has contracted with an IT Services vendor to help fill the need for additional personnel within this department.
The User Experience Department is currently looking to hire a part-time staff member specifically for the North County Branch to allow us to expand our hours.

Collection Inventory Is Ongoing

Law Library staff has been working hard on inventorying the entire library physical collection. This important assessment measure will provide information on the contents & value of the library collection, as well as the accuracy of the library catalog, processing, and retention measures. The estimate right now is that the collection inventory process at the Downtown location is about half way complete.

GOAL 2:
Enrich the User Experience Using Outreach & Collaboration to Create a More Visible & Vibrant Community Center for Legal Research & Learning

STRATEGIC ACTIONS TO CREATE A MORE VISIBLE & VIBRANT COMMUNITY CENTER

Social Media

The Law Library’s Social Media presence continued a steady climb during the 2018-19 fiscal year maintaining 17% growth overall. In addition to relevant, and sometimes humorous, legal related articles, we also promoted several events. Some of the events were: ABA traveling exhibit “Lawyers Without Rights”, OH! San Diego Architectural Design tours, and our annual Law Week events. We have subscribed to Buffer Enterprise as our social media team management tool with training and implementation coming in FY 2020.

Open House

Our 7th annual Open House event moved to February so our theme “Share the Love” was a perfect fit with Valentine’s Day. The San Diego Law Library Foundation made nearly $1000 from the event.

Legal Topic of the Year

Military Law is our Topic of the Year for FY 2019. Staff prepared a research guide on the topic with information on Veterans Benefits, Military Law, Local Legal Help, and Web Resources.

We have had classes related to military law, including the impact of criminal convictions on military personnel, and military discharge upgrades. And we now host Thomas Jefferson
School of Law workshops on Veterans Benefits and Active/Reserve Military self-help on the first and third Thursday of the month.

In the last half of the fiscal year we had a Military Family Law MCLE and participated as a sign up location for Stand Down Veterans Village of San Diego and as a depository for the disposal of used flags.

**New Small Claims Self-Help Workshop**

We have a new partnership with Thomas Jefferson School of Law to host their Small Claims workshops. The self-help workshop is currently held twice a month at the downtown law library.

**Law Made Public Classes**

We continue our Law Made Public classes every Saturday at 10am at the Downtown location. These classes allow the public one-on-one training with our reference librarians on popular databases.

**Law & Comics: Partner with San Diego Central Library**

Partnership with San Diego Central Library to bring annual Law & Comics event to a larger audience. This was the 9th Annual Lindley Lecture on Law & Comics. This year the focus was on the legal implications of crowdfunding and blockchain technology. Guest speakers included Batton Lash, Rob Salkowitz, and Stu Rees.

**Know the Law Series: Partnerships**

In partnership with the North County Bar Association and Vista Public Library, our popular Know the Law Series continued. In the fall of 2018 we coordinated the following lectures: Landlord/Tenant, Trusts & Estates, and Immigration. In the spring of 2019 we coordinated the following lectures: Small Business Basics, Small Claims, and Trusts & Estates.

**Partner with City of Encinitas for Business 101 Class**

We continue our partnership with the City of Encinitas and held Business 101 classes in November 2018 and June 2019. A panel of experts and local support spoke on the mechanics, logistics, challenges, and benefits of starting a small business in Encinitas. Law Library staff assisted in production and promotion, and emceed the event.

**Public Library Partnership**

Our partnership with Chula Vista Public Library and El Cajon Public Library continues. Legal databases and legal reference is available at public library partner locations.

Outreach to the El Cajon Public Library staff. In September we met with public library staff to discuss our services and resources, how to use us as a referral source, and what resources are available in the legal databases located at their library.
Staff is preparing for a joint presentation with the Chula Vista Public Library and County Public Library at the California Library Association Annual Meeting in October 2019, on the value of this partnership and how others can use our experience to replicate the program.

**Partnership with San Marcos Public Library & TJS: Small Claims Workshops & Clinics**

Our new partnership with the San Marcos Public Library and the Thomas Jefferson School of Law continues, we are holding Small Claims Workshops and Clinics on a monthly basis at the San Marcos Public Library. This is part of our effort to expand our reach and provide more services to our North County community.

**Civil Appellate Self Help Workshop Partnership**

In addition to our regular monthly Civil Appellate Self Help Workshop, the Civil Appellate Practice Section of the SDCBA has formed a new Access to Appellate Justice Pilot Program where attendees of the workshop have the opportunity to be matched with a pro bono attorney. Both programs were the first of their kind in California, and they started here.

**Rose Bird Event**

The San Diego Law Library and the Lawyers Club of San Diego welcomed a sold out audience to the law library for a fascinating discussion of the groundbreaking career of California Supreme Court Chief Justice Rose Bird. Professor and author of the book, *The Case of Rose Bird*, Dr. Kathleen Cairns discussed the factors that contributed to her meteoric rise and fall. The Hon. Yvonne E. Campos spoke to the impact that Rose Bird had on women in the law and judiciary. San Diego City Attorney Mara W. Elliott moderated a lively question and answer session.

**Lawyers Without Rights Event**

As part of our Law Week Celebration, we hosted a national traveling ABA exhibit “Lawyers Without Rights”, highlighting the lives of Jewish attorneys practicing in Germany during the rise of the Third Reich. The opening reception for the event featured speakers from the ACLU of San Diego and discussed the current rise in hate speech and violence. The exhibit was offered throughout the month of May.

**Study Areas**

We are investigating layout and furniture changes in order to provide some semi-private spaces for research and/or collaboration.
GOAL 3:
Increase Our Value & Impact by Successfully Migrating the Law Library’s Collection & Services to a Quality Digital Platform

STRATEGIC ACTIONS TO MIGRATE COLLECTION AND SERVICES TO A QUALITY DIGITAL PLATFORM

New Library Catalog GILL roll out is complete

The GILL catalog logo is now on the Law Library website. New library cards were rolled out to complement the new name and logo in early 2019. The Law Library offered first cards to long-time active library members.

Replacement Hardware

We continued our hardware upgrades with our patron network equipment upgrades. We also replaced our public printing service at all locations.

Added network storage was included as the next phase before creating additional remote services for the staff and public.

Staff workstations and several servers, along with network services, were upgraded this year.

Online Collection Building Continues: Collection Development Policy revision planned

Staff continue to work with our online catalog service provider, Bywater, to authenticate access to remote databases and explored Open Athens as an authentication model. Staff worked with small publisher National Housing Law Project to make its GreenBook on tenant’s rights available at 20 public law libraries state-wide based on IP authentication—helping create a statewide program for library access to this important ebook.

Staff are working on a revision to the Law Library’s Collection Development policy. The plan is to submit a revised policy to the Board of Trustees in Fall 2019. The draft is complete and the committee is meeting one more time and then will present the draft to the Director and Board for approval. The last revision was approved in November 2008.

Live stream Law & Comics

This was the third year to live stream the annual Law & Comics event via Facebook Live to reach a broader audience.
GOAL 4:
Create a Culture of Continuous Improvement & Service Excellence by Building & Sustaining a Learning Environment

**STRATEGIC ACTIONS TOWARD CONTINUOUS IMPROVEMENT AND SERVICE EXCELLENCE**

**Koha Training and Law Library Summit**

Inventory of the Law Library collection continues. We received another upgrade in June 2019. January 2019 saw the Law Library hosting the first of its kind, nationwide Koha Law Library Summit with other law libraries. Attendees learned about the library software we utilize. Chris Pickford and Laurel Moran were among the speakers. Over 10 other library systems were represented from throughout California, Ohio and Texas.

**All Staff Meeting**

On April 5, 2019 there was an incredible All Staff Meeting with the primary focus being for staff to learn more about each other, to increase team building and camaraderie.

**ALT Retreat**

On April 22, 2019 Senior Managers met at the San Diego Public Library to discuss our goals of working as a team and the larger goal of the path of the San Diego Law Library. The meeting was facilitated by Danell Scarborough. Significant work included learning about each other’s communication styles.

**Star Hallway Project**

Law Library managers continued work on a visual plan to depict progress toward library strategic priorities. Each strategic priority (Military Law, Benefits, Advocacy, and Assessment) received a “tree” in our staff hallway. When a department makes progress toward one of the strategic priorities they are given some visual depiction of progress (butterflies and flowers that populate the trees).

**Star of the Month**

Law Library Managers continue the program to recognize staff for exceptional contributions to the Law Library. The honoree receives a certificate signed by the Director, a $100 gift card and a banner with co-worker’s well wishes.
Participation in Professional Organizations

Chris Pickford, Laurel Moran and John Adkins all attended the AALL Annual Meeting in Baltimore, Maryland (July 2018). John presented his innovation project to a packed conference hall of attendees. The project involves taking courthouse law libraries and making them incubator sites and potentially create a “pro per” court to assist in hearing these cases. He has been asked to write an article for AALL’s Spectrum Magazine about its progress.

Chris Pickford and Laurel Moran attended KohaCon in Portland, Oregon in October 2018. Chris Pickford was moderator of a panel on cataloging. Many contacts were made and the groundwork was laid to form law library users groups for Koha.

Chris Pickford and Laurel Moran were speakers at a Koha Law Library summit held at the SDLL on January 14th 2019.

Chris Pickford served as SANDALL Vice President-President Elect.

Debra Morse is serving on the North County Bar Association as a Director and is very active in fostering partnerships on behalf of the Law Library.

Staff attended a webinar on Enhancing the Digital Experience for Patrons with Disabilities on February 21, 2019. Staff also did a webinar on Federal Legislative History preparation offered by the GPO.

Laurel Moran works on the Government Law Libraries (AALL) web committee this year.

Gina Catalano serves on the Council of California County Law Librarians (CCCLL) Advocacy Committee and participates in the Self Represented Litigation Network Law Library Working Group.

John Adkins and Gina Catalano attended the Council of California Law Librarians Fall Meeting in Los Angeles where Mr. Adkins was given a plaque and gifts in recognition of his 4 years as CCCLL President. Then, in the Spring, they attended the CCCLL Spring Meeting and met with our State Representatives in Sacramento.

John Adkins serves as Past President to the CCCLL Board of Directors.
Our social media continued a steady climb during the 2018-19 fiscal year maintaining 17% growth overall.

As in prior years, we do social media advertising by boosting posts to promote specific SDLL events. We boosted posts on Facebook and Instagram for Law and Comics, the Law Library Foundation’s Annual Witkin Awards Dinner, the Law Library’s Annual Open House, and Law Week 2019. Our Law Week Facebook and Instagram boost informed an additional 18,775 users of clinics and classes being offered throughout the County during the week. Our Open House boosted post reached an additional 3,119 users and generated 72 event clicks.

**FACEBOOK**

SDLL Facebook provides information on our classes, clinics, special events and partnered events in addition to general legal and community news and events from San Diego and around the world.

2018-2019 - 1,411 Followers  
2017-2018 - 1,323 Followers  
2016-2017 - 1,242 Followers  
2015-2016 - 1,048 Followers  
2014-2015 - 858 Followers  
2013-2014 - 759 Followers  
2012-2013 - 641 Followers

2018-2019 saw a 6.7% increase in our Facebook following to 1,411. SDLL was included in the OH! San Diego Architectural Tour for a second year and we had several events cross-posted in partnership with other agencies which always helps promote our own social media presence.
FACEBOOK DEMOGRAPHICS (relatively unchanged from last year):

- **FEMALES** make up 64% of our fans:
  - 35-44 year-olds make up 21%
  - 45-54 year-olds make up 14%
  - 25-34 year-olds make up 13%.

- **MALES** make up a smaller portion of our demographic at 34%:
  - 35-44 year-olds make up 11%
  - 45-54 year-olds make up 7%
  - 25-34 year-olds make up 7%.

TWITTER

SDLL tweet content includes events offered by and news about SDLL and our community partners as well as news stories of interest to the San Diego legal and law library community with a special emphasis on military law issues in California for 2018 and 2019.

- 2018-19 showed an 8.3% increase in followers from the previous year climbing from 1,355 to 1,447 followers.
- The Library gained an average of 9 followers per month.
- We posted 353 tweets (27.3% decrease); an average of 30 tweets per month (26.8% decrease).

![New Followers Chart]
Staff time limitations prevented feeding Twitter the amount of content that we’ve posted the prior few years leading to a decrease in user statistics. While our tweet activity and engagement (profile visits, likes, retweets) decreased, our overall Twitter following shows continued improvement.

**LINKEDIN**

- LinkedIn is the largest professional social network online today. We use it to build relationships in the professional community and promote Library events and classes.
- This year saw an 8.6% increase in followers from the previous year.
  - 2018-2019 - 515 Followers
  - 2017-2018 - 474 Followers
  - 2016-2017 - 452 Followers
  - 2015-2016 - 435 Followers
  - 2014-2015 - 376 Followers
  - 2013-2014 - 272 Followers
  - 2012-2013 - 124 Followers
  - 2011-2012 - 87 Followers
- We rank 3rd when compared to other County and legal agencies in the San Diego area:
  - San Diego County Bar Association – 1,566 Followers
  - San Diego Superior Court – 689 Followers
  - San Diego Law Library – 515 Followers
  - San Diego Volunteer Lawyer Program, Inc. – 388 Followers

**INSTAGRAM**

Instagram is the largest and most popular photography-based social network in the world. We utilize this medium to visually showcase Library events and culture.
- We posted 36 pictures throughout the year highlighting our annual Bookmas Tree, Lawyers Without Rights Traveling Exhibit, Women’s History Month and The Case of Rose Bird program, our Annual Open House, Black History Month, Law & Comics,
and the announcement of our 2019 Executive Board. We continue to see great engagement with users and experienced a 39% increase in followers.

2018-2019 - 660 Followers
2017-2018 - 475 Followers
2016-2017 - 367 Followers
2015-2016 - 104 Followers

YOUTUBE

- The top three videos for the year were our DIY videos including “How to Obtain Pleading Paper with Microsoft Word” and “How to access Nolo Press Publications for FREE”. “How to Print a Document” continues to be our most viewed video accounting for 86% of our audience with 28,192 views.

- Our channel consists of 34 videos, 360 subscribers (26% increase), and for the year we had 32,867 views, a 49% decrease from last fiscal year.

- The leading source for our YouTube traffic was direct YouTube searches resulting in 24,754 views (75%) followed by external website links which generated 4,314 views (13.1%).

- Our latest professionally produced outreach video, “San Diego Law Library: Law Made Public”, was added in May 2019 and has had 69 views.

EVENTBRITE

- We generated a revenue total of $3,865 in legal classes.
- We offered 56 classes and lectures. Eight hundred and sixty patrons attended these events.
- Our average number of attendees was 15 per event, the same as last year.
- Revenue was higher this year as we hosted 14 additional classes and lectures compared to last year. This is due to the hiring of a new reference librarian with a focus on education. The Library is still working to determine how to best meet the demand for on-demand web-based classes.
E-MAIL REFERENCE

Patrons are using our e-mail reference account more frequently. This is the second year with an increased total. They use the service for document delivery requests, conference room reservations, and basic reference questions.

2018-2019: 153
2017-2018: 126
2016-2017: 90
2015-2016: 74
2014-2015: 112
2013-2014: 139
2012-2013: 147

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 monitors the system two hours per week. This past year we answered 274 questions using this service. This is an increase of almost 200 questions.
Our visitor count continues to grow. We can see, based on our top content, that visits to our class calendar has jumped up several spots from previous years. This makes sense, as staff has added several new MCLE classes this year. Of course, our Self Help Center page, a page dedicated to providing free legal information by subject area, continues to be very popular.

Use of our self-help center page has doubled since it launched last fiscal year. Within each subject area you can find links to free information, including guides to the Law Library’s books and databases, legal websites, clinics in San Diego, access to free forms, and more. Our most frequently accessed subject areas are shown to the right.
It is no surprise to see our Electronic Resources at the top of our popular content list. We have a large selection of databases and extremely knowledgeable staff to help all users navigate and use this content. Access is free for public use. Our Pleading Paper Template is a nationwide favorite. With the increase in MCLE classes, we expect to see our calendar jump a few spots in the upcoming year.

Traffic from Social Media sources has grown 2% over this past year. Our in-house Social Media team has been doing a fantastic job promoting our classes, clinics and new content. Traffic represented by “Referring Sites” includes readers of our Newsletter.

Top 12 Referring Sources

- sdcourt.ca.gov
- facebook
- calcountylawlib.libguides.com
- twitter
- email
- duckduckgo.com
- linkedin
- courts.ca.gov
- SDLL newsletter
- fastcase.com
- library.ca.gov
- potguide.com
Readers & researchers across the nation visit our website and access our content.
Appendix A

California Business and Professions Code

CHAPTER 5. LAW LIBRARIES

Updated through July 1, 2018

Article 1. Boards of Law Library Trustees – 6300-6307
Article 2. Law Library Funds – 6320-6326
Article 3. Duties and Powers of Boards – 6340-6350

Article 1. Boards of Law Library Trustees – 6300-6307

6300 There is in each county of this State a board of law library trustees, which governs the law library established for the county under the provisions of this chapter.
(Added by Stats. 1941, Ch. 452.)

6301 (a) Except as otherwise provided by statute, a board of law library trustees is constituted as follows:

1. In a county where there are no more than three judges of the superior court, each of those judges is ex officio a trustee. The judges may at their option select only one of their number to serve as a trustee, and in that event they shall appoint two additional trustees who are residents of the county or members of the State Bar.
2. In a county where there are more than three judges of the superior court, the judges of that court shall elect either four or five of their number to serve as trustees.
3. Any judge of the superior court who is an ex officio or elected member may, at the judge’s option, designate a resident of the county or a member of the State Bar to act for the judge as trustee.
4. The chair of the board of supervisors is ex officio a trustee, but the board of supervisors at the request of the chair may appoint a member of the State Bar, any other member of the board of supervisors of the county, or a resident of the county to serve as trustee in place of the chair. The appointment of the person selected in place of the chair of the board of supervisors shall expire when a new chair of the board of supervisors is selected, and that appointment shall not be subject to the provisions of Section 6302.
5. The board of supervisors shall appoint as many additional trustees, who are members of the State Bar, as may be necessary to constitute a board of at least six and not more than seven members.
(b) No more than two law library trustees may be residents of the county who are not judges of the county, members of the State Bar, or members of the board of supervisors of the county. 
(Amended by Stats. 2001, Ch. 52, Sec. 1. Effective January 1, 2002.)

6301.1 Notwithstanding Section 6301, in San Diego County the board of law library trustees shall be constituted, as follows:

a) Up to five judges of the superior court, to be elected by and from the superior court judges of the county. Each superior court judge so elected shall serve a three-year term. In order to maintain overlapping terms, those judges holding office as of the date of unification of the municipal and superior courts of San Diego County shall remain in office until the expiration of their original terms.

b) The board of supervisors shall appoint up to four attorneys resident in the county to the board of law library trustees, to serve overlapping three-year terms. In order to stagger the appointments, the board of supervisors shall, in January of 1997, appoint one attorney to a one-year term, one attorney to a two-year term, and one attorney to a three-year term; and as each term expires, the new appointee shall thereafter serve three-year terms. At least one attorney appointed pursuant to this subdivision shall be a member of the San Diego County Bar Association.

c) In the event a trustee cannot serve a full term, the appointing authority for that individual shall appoint another qualified person to complete that term. Interim appointments may be made by the board of law library trustees in accordance with Section 6305.

(Amended by Stats. 2009, Ch. 332, Sec. 1.1. (SB 113) Effective January 1, 2010.)

6301.5 In any county where there are no more than three judges of the superior court, the board of supervisors, with the concurrence of the majority of the incumbent judges of the superior court, may reduce the number of law library trustees to not less than three members. 
(Amended by Stats. 2001, Ch. 52, Sec. 2. Effective January 1, 2002.)

6302 Appointments of trustees which are to be made by the board of supervisors of the county shall be made at the first meeting of the board of supervisors after the establishment of a law library in the county, the appointees to serve until the first meeting of the board of supervisors in the succeeding January. The board shall, at any such meeting in each succeeding January, appoint such trustees to serve for the term of one year.

(Added by Stats. 1941, Ch. 452.)

6302.5

a) Notwithstanding any other provision of law, in Los Angeles County appointments made by judges of the superior court shall be for a term of four years, and appointments made by the board of supervisors of the county shall be for a term of two years.

b) The terms of no more than three judge-appointed members shall expire in the same year.

c) The term of one member appointed by the board of supervisors shall expire each year.

(Amended by Stats. 2002, Ch. 784, Sec. 3. Effective January 1, 2003.)
6303 The office of trustee is honorary, without salary or other compensation.
(Added by Stats. 1941, Ch. 452.)

6304 Each board of law library trustees shall meet regularly each month on such day as it shall appoint, but if it appoint no day, it shall meet on the first Tuesday after the first Saturday of each month, and any board may meet at such other times as it may appoint, at a place to be designated for that purpose. The president of the board may call a special meeting at any time for the transaction of necessary business. A majority of the members constitutes a quorum for business, and an affirmative vote of a majority of the members is required to exercise the powers of the board.
(Amended by Stats. 1945, Ch. 1113.)

6305 A board of law library trustees may remove any trustee, except an ex officio trustee, who is absent from three consecutive meetings of the board, and may fill all vacancies that from any cause occur in the board.
(Amended by Stats. 2009, Ch. 332, Sec. 1.2. (SB 113) Effective January 1, 2010.)

6306 Each board shall appoint one of its number as president.
(Added by Stats. 1941, Ch. 452.)

6307 Each board shall elect a secretary, who shall keep a full statement and account of all property, money, receipts and expenditures, and shall keep a record and full minutes in writing, with the ayes and noes at length, of all proceedings of the board. Under the secretary’s hand, the proceedings may be verified by an official seal adopted and provided by the board for that purpose.
(Amended by Stats. 2009, Ch. 332, Sec. 1.3. (SB 113) Effective January 1, 2010.)

Article 2. Law Library Funds – 6320-6326

6320 All money collected for the law library in each county, must be deposited with the treasurer of the county, who must keep the same separate and apart in a trust fund or trust account, to be disbursed by the board of law library trustees. Money may be disbursed only as in this chapter provided, and only for the purposes herein authorized.

Whenever a law library and a board of trustees to govern the same, is in existence under the provisions of any law, other than the law superseded by this chapter, in any county, or city and county, in this State, money so collected shall be paid into the hands of those, and in the manner, provided by such law. (Amended by Stats. 1961, Ch. 396.)

6321 a. On and after January 1, 2006, as described in Section 68085.1 of the Government Code, the Administrative Office of the Courts shall make monthly distributions from superior court filing fees to the law library fund in each county in the amounts described in this
section and Section 6322.1. From each first paper filing fee as provided under Section 70611, 70612, 70613, 70614, or 70670 of the Government Code, each first paper or petition filing fee in a probate matter as provided under Section 70650, 70651, 70652, 70653, 70654, 70655, 70656, or 70658 of the Government Code, Section 103470 of the Health and Safety Code, or Section 7660 of the Probate Code, each filing fee for a small claim or limited civil case appeal as provided under Section 116.760 of the Code of Civil Procedure or Section 70621 of the Government Code, and each vehicle forfeiture petition fee as provided under subdivision (e) of Section 14607.6 of the Vehicle Code, that is collected in each of the following counties, the amount indicated in this subdivision shall be paid to the law library fund in that county:

<table>
<thead>
<tr>
<th>Jurisdiction</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alameda</td>
<td>$37.00</td>
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<td>Yolo</td>
<td>$35.00</td>
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<tr>
<td>Yuba</td>
<td>$10.00</td>
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</tbody>
</table>

b. If a board of supervisors in any county acted before January 1, 2006, to increase the law library fee in that county effective January 1, 2006, the amount distributed to the law library fund in that county under subdivision (a) shall be increased by the amount that the board of supervisors acted to increase the fee, up to three dollars ($3). Notwithstanding subdivision (b) of Section 6322.1, as it read on January 1, 2005, the
maximum increase permitted under this subdivision in Los Angeles County is three dollars ($3), rather than two dollars ($2).

c. The amounts of twenty-three dollars ($23) for Inyo County, twenty-nine dollars ($29) for Mendocino County, twenty-three dollars ($23) for Plumas County, and twenty-three dollars ($23) for San Benito County listed in subdivision (a) shall apply to distributions made under subdivision (a) beginning January 1, 2006.  

(Amended by Stats. 2009, Ch. 332, Sec. 1.4. Effective January 1, 2010.)

6322

a. It is the intent of the Legislature that the change in the method of distributing funds to law libraries from fees collected by the superior courts under the Uniform Civil Fees and Standard Fee Schedule Act of 2005 will not result in undue financial hardship for any law library. On and after January 1, 2006, any law library that experiences undue financial hardship from the change in the method of distributing funding to law libraries may request a one-time advance from the Administrative Office of the Courts. The Administrative Office of the Courts shall provide the advance within 15 days after the request is received, but no earlier than February 1, 2006, if all of the following conditions are met:

1. The law library board of trustees certifies that the law library is experiencing financial hardship caused by an increase in the time between collection of a fee by the court and the receipt of the money by the law library fund resulting from the implementation of the new distribution method for money received from superior court filing fees.

2. The law library board of trustees certifies that the law library is operating under this chapter.

3. The Administrative Office of the Courts receives the request on or before February 15, 2006.

b. The amount of the advance shall be equal to one-twelfth of the law library's total receipts from superior court fees for the 2003-04 fiscal year.

c. The funding for the advance shall be provided from amounts deposited into the bank account established by the Administrative Office of the Courts under subdivision (b) of Section 68085.1 of the Government Code. The advance shall be returned within 30 days if a law library ceases to operate or the responsibility for the law library is transferred from the law library board of trustees.  

(Repealed (in Sec. 8) and added by Stats. 2005, Ch. 75, Sec. 9. Effective July 19, 2005. Operative January 1, 2006, by Sec. 156 of Ch. 75.)

6322.1

a. Until the end of the moratorium described in Section 70601 of the Government Code, the board of supervisors of any county may increase, as provided in this section, the amount distributed to its county law library fund from the uniform filing fees listed in Section 6321 whenever it determines that the increase is necessary to defray the expenses of the law library.
Any increase in the amount distributed to the law library fund in any county under this subdivision shall not be effective until January 1 of the next year after the adoption by the board of supervisors of the increase. The amount of the increase in any calendar year shall be no greater than three dollars ($3) over the previous calendar year. A copy of the action of the board of supervisors that establishes the increase shall be provided to the Administrative Office of the Courts as soon as it becomes available but no later than December 15 of the year before the increased distribution goes into effect.

b. Distribution changes after January 1, 2008, shall be determined by the process described in Section 70601 of the Government Code.

c. 1. In an action or proceeding in which a claim for money damages falls within the monetary jurisdiction of the small claims court and is filed by an assignee who is prohibited from filing or maintaining a claim pursuant to Section 116.420 of the Code of Civil Procedure, the uniform filing fee shall be reduced by twenty-four dollars ($24) to one hundred eighty-one dollars ($181) if the complaint contains a declaration under penalty of perjury, executed by the party requesting the reduction in fees, that the case qualifies for the lower fee because the claim for money damages will not exceed the monetary jurisdiction of small claims court and is filed by an assignee of the claim.

2. When the uniform filing fee is reduced as provided under this subdivision, the amount distributed from each uniform filing fee to the law library fund in the county shall be as follows:

<table>
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<th>Jurisdiction</th>
<th>Amount</th>
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</tr>
<tr>
<td>Shasta</td>
<td>$8.50</td>
</tr>
<tr>
<td>Sierra</td>
<td>$9.00</td>
</tr>
<tr>
<td>Siskiyou</td>
<td>$8.00</td>
</tr>
<tr>
<td>Solano</td>
<td>$9.00</td>
</tr>
<tr>
<td>Sonoma</td>
<td>$12.00</td>
</tr>
<tr>
<td>Stanislaus</td>
<td>$6.50</td>
</tr>
<tr>
<td>Sutter</td>
<td>$1.00</td>
</tr>
<tr>
<td>Tehama</td>
<td>$9.00</td>
</tr>
</tbody>
</table>
Trinity  $6.00
Tulare  $12.00
Tuolumne  $2.00
Ventura  $12.00
Yolo  $10.00
Yuba  $7.00

3. The increases described in subdivision (a) do not apply to the law library distributions in this subdivision.

4. Notwithstanding subdivision (d) of Section 68085.4 of the Government Code, when the uniform filing fee is reduced as provided in this subdivision, the amounts distributed to dispute resolution programs, the State Court Facilities Construction Fund, the Judges' Retirement Fund, children's waiting rooms, and the Equal Access Fund shall remain as provided under subdivisions (b) and (c) of Section 68085.4 of the Government Code and shall not be changed. Only the amounts distributed to the Trial Court Trust Fund, the law libraries, and the Immediate and Critical Needs Account of the State Court Facilities Construction Fund shall be adjusted. The amount distributed from each uniform filing fee under this section to the Immediate and Critical Needs Account of the State Court Facilities Construction Fund, established in Section 70371.5 of the Government Code, shall be eleven dollars ($11). If the fee is further reduced below one hundred eighty-one dollars ($181), as with a partial waiver or partial payment, the proportional reductions described in subdivision (g) of Section 68085.1 of the Government Code shall apply.

d. Distributions under this section to the law library fund in each county shall be used only for the purposes authorized by this chapter.

e. As used in this section and Section 6321, "law library fund" includes a law library account described in the second paragraph of Section 6320.

f. This section shall become operative on July 1, 2013.

(Amended (as added by Stats. 2010, Ch. 720, Sec. 2) by Stats. 2011, Ch. 296, Sec. 9. Effective January 1, 2012. Section operative July 1, 2013, by its own provisions.)

6324 The board of supervisors of any county may set apart from the fees collected by the county clerk, sums not exceeding one thousand two hundred dollars ($1,200) in any one fiscal year, to be paid by the county clerk into the law library fund in addition to the moneys otherwise provided to be deposited in that fund by law. The board of supervisors may also appropriate from the county treasury for law library purposes such additional sums as may in their discretion appear proper. When so paid into the law library fund, such sums shall constitute a part of the fund and be used for the same purposes. (Amended by Stats. 2005, Ch. 75, Sec. 12. Effective July 19, 2005. Operative January 1, 2006, by Sec. 156 of Ch. 75.)
The orders and demands of the trustees of the law library, when duly made and authenticated as hereinafter provided, shall be verified and audited by the auditing officer, and paid by the treasurer of the county out of the law library fund. Full entry and record shall be kept as in other cases.

(Amended by Stats. 2005, Ch. 75, Sec. 13. Effective July 19, 2005. Operative January 1, 2006, by Sec. 156 of Ch. 75.)

A revolving fund of not more than fifty thousand dollars ($50,000) may be established from money in the law library fund, by resolution of the board of law library trustees, for expenditures of not exceeding ten thousand dollars ($10,000) each for purposes for which the law library fund may lawfully be expended. The board shall prescribe the procedure by which money may be drawn from the revolving fund, the records to be kept, and the manner in which reimbursements shall be made to the revolving fund by demand and order from the law library fund. All or any part of the money in the revolving fund may be deposited in a commercial account in a bank, subject to payments of not exceeding ten thousand dollars ($10,000) each by check on the signature of the secretary or any other person or persons designated by the board.

(Amended by Stats. 2009, Ch. 332, Sec. 1.5. (SB 113) Effective January 1, 2010.)

Article 3. Duties and Powers of Boards – 6340-6350

Each board of law library trustees shall establish and maintain a law library at the county seat of the county in which it is appointed and may lease suitable quarters therefor or construct quarters pursuant to the provisions of this chapter, and may provide leased or constructed quarters with suitable furniture and utility services.

(Amended by Stats. 1959, Ch. 1076.)

Any board of law library trustees may establish and maintain a branch of the law library in any city in the county, other than the county seat, in which a session of the superior court is held. In any city constituting the county seat, any board of law library trustees may establish and maintain a branch of the law library at any location therein where four or more judges of the superior court are designated to hold sessions more than 10 miles distant from the principal office of the court. In any city and county any board of law library trustees may establish and maintain branches of the law library. A branch is in all respects a part of the law library and is governed accordingly.

(Amended by Stats. 2002, Ch. 784, Sec. 5. Effective January 1, 2003.)

A board of law library trustees may order the drawing and payment, upon properly authenticated vouchers, of money from out of the law library fund, for any liability or expenditure herein authorized, and generally do all that may be necessary to carry into effect the provisions of this chapter.

(Amended by Stats. 2009, Ch. 332, Sec. 1.6. (SB 113) Effective January 1, 2010.)
6343 A board may make and enforce all rules, regulations, and by-laws necessary for the administration, government, and protection of the law library, and of all property belonging thereto, or that may be loaned, devised, bequeathed, or donated to it. A board may make expenditures for the suitable maintenance, repair, protection and insurance against loss of such property, both real and personal.
(Amended by Stats. 1941, Ch. 453.)

6344 A board may purchase books, journals, other publications, and other personal property. It may dispose of obsolete or duplicate books, and other unneeded or unusable property.
(Amended by Stats. 1945, Ch. 1113.)

6345 A board may appoint a law librarian and define the powers and prescribe the duties of any law library employees, determine the number, and elect all necessary subordinate law librarians and law library employees, and at its pleasure remove any law librarian or law library employees.

For the purpose of facilitating the recruitment of professional and technically trained persons to fill positions for which there is a shortage of qualified applicants, a board may authorize payment of all or a part of the reasonable travel expense of applicants who are called for interview and all or part of the reasonable travel and moving expense of persons who change their place of residence to accept employment with the law library.
(Amended by Stats. 2009, Ch. 332, Sec. 1.7. (SB 113) Effective January 1, 2010.)

6346 A board shall fix the salaries of the law librarian and law library employees, and may require a bond of any law librarian or law library employee, in such sum as it may fix. The premium on a bond given by an authorized surety company may be paid from the law library fund.
(Amended by Stats. 2009, Ch. 332, Sec. 1.8. (SB 113) Effective January 1, 2010.)

6346.5 A board of law library trustees may contract with the California Public Employees’ Retirement System, to make all or any of the employees of the law library members of the system.
(Amended by Stats. 2009, Ch. 332, Sec. 1.9. (SB 113) Effective January 1, 2010.)

6346.6 As an alternative to Section 6346.5, a board of law library trustees may, with the consent of the board of administration of the applicable retirement system, elect to make all or any of the officers or employees of the law library members of the retirement system which covers the officers and employees of the county in which the law library is established and to have the law library officers and employees deemed to be county employees for purposes of that retirement system. In the event of such an election, the employer contributions on behalf of the covered law library officers and employees shall be made from law library funds.
(Added by Stats. 1981, Ch. 156, Sec. 1.)
A board may contract with any other law library board, law library association, superior court, or legal-related entity, including a self-help group or other organization that provides a similar service, to provide public law library services as may best carry into effect the purposes of this chapter.

(Amended by Stats. 2009, Ch. 332, Sec. 1.10. (SB 113) Effective January 1, 2010.)

A board may expend surplus funds under its control, not necessary for use to maintain the law library, to acquire or lease real property and erect thereon a library building to house the law library. In the alternative, a board of law library trustees may appropriate from the surplus funds so much as in the discretion of the board may be necessary to obtain adequate quarters for the law library in any building hereafter erected by the board of supervisors of the county in which the law library is maintained. The moneys so appropriated shall not be more than the proportion of the total cost of the building which the space allotted to the law library bears to the total usable space in the building. The moneys so appropriated may be transferred to the board of supervisors of the county for use in erecting the building, or may be paid directly on contracts for the erection thereof made by the board of supervisors.

(Amended by Stats. 2009, Ch. 332, Sec. 1.11. (SB 113) Effective January 1, 2010.)

An appropriation to obtain quarters for the law library in a building to be erected by the board of supervisors of the county, may be made subject to such terms and conditions, including approval of plans and specifications, and regarding maintenance and use of the quarters, as may be mutually agreed upon by the board of law library trustees and the board of supervisors.

Where a board of law library trustees determines to erect a library building to house the law library, the State of California or the county or the city in which the building is to be located, may set apart and dedicate or lease land owned by any of them for the permanent use of the building and access thereto.

(Amended by Stats. 1965, Ch. 1069.)

When a board of law library trustees in any county determines to erect a library building to house the law library, it may borrow money for that purpose and repay the loan from its future income. The board may borrow the money from any person, or private or public agency, or corporation, in an amount not exceeding half of the funds of the board allocated to the construction of the building, upon such terms as may be agreed upon by the board and the lender and approved by resolution of the board of supervisors of the county.

(Amended by Stats. 1987, Ch. 1299, Sec. 1.)

A library building erected to house the law library may include courtrooms with offices in connection therewith, offices for use of a county bar association, and an office for a notary public and public stenographer, which courtrooms and offices the board of law library trustees may lease, the income to be deposited in the law library fund.

(Amended by Stats. 2009, Ch. 332, Sec. 1.12. (SB 113) Effective January 1, 2010.)
6348.4 Real property acquired by a board may be sold, leased, rented, or licensed with the proceeds to be deposited in the law library fund.
(Amended by Stats. 2014, Ch. 201, Sec. 2. (SB 1462) Effective January 1, 2015.)

6348.5 A board of law library trustees may invest surplus funds in excess of one hundred thousand dollars ($100,000) or of the average annual expenditures of the library for the four fiscal years immediately preceding the investment, whichever is lesser, in the Local Agency Investment Fund pursuant to Article 11 (commencing with Section 16429.1) of Chapter 2 of Part 2 of Division 4 of Title 2 of the Government Code or bonds of the government of the United States or of this state. Bonds so purchased may be sold at any time in the discretion of the board. In computing average annual expenditures for the purposes of this section, capital expenditures for the purchase of real property and construction of a library building shall not be included.
(Amended by Stats. 2009, Ch. 332, Sec. 1.14. (SB 113) Effective January 1, 2010.)

6348.6 A board of law library trustees may contract with the board of supervisors of the county upon such terms as may be mutually agreeable for the construction by the board of supervisors of a law library building or any part thereof or for quarters in a building to be erected by the board of supervisors. The agreement may be made subject to such terms and conditions including approval of plans and specifications, regarding the furnishing and equipping of the building or quarters, and regarding maintenance and use of the quarters, as may be mutually agreed upon by the board of law library trustees and the board of supervisors. The contract may provide that the board of law library trustees shall make payments to the board of supervisors out of future income in payment for constructing or furnishing or equipping the law library building or part thereof or those quarters in a building. Any contract executed by a board of law library trustees and a board of supervisors, which, if executed subsequent to the effective date of this section would be valid, is hereby ratified and validated.
(Amended by Stats. 2009, Ch. 332, Sec. 1.15. (SB 113) Effective January 1, 2010.)

6348.7 A board of law library trustees may enter into an agreement with a county for the joint exercise of powers pursuant to Chapter 5 (commencing with Section 6500) of Division 7 of Title 1 of the Government Code for the purpose of constructing a building or buildings to house the law library and court or county facilities, without limitation as to the number of courtrooms such building or buildings may contain, and may lease from any authority created pursuant to such agreement the space required for law library purposes.
(Added by Stats. 1983, Ch. 31, Sec. 1. Effective May 11, 1983.)

6349 Each board of law library trustees, on or before the 15th day of October of each year, shall make an annual report to the board of supervisors of the county in which the law library is maintained, for the preceding fiscal year ending on the 30th day of June. A copy of the report shall be filed with the auditor of the county. The report shall give the condition of their trust, with full statements of all their property and money received, whence derived, how used and expended, the number of books, periodicals
and other publications on hand, the number added by purchase, gift, or otherwise during the
year, the number lost or missing, and other information as might be of interest.
(Amended by Stats. 2009, Ch. 332, Sec. 1.16. (SB 113) Effective January 1, 2010.)

6350 A financial report, showing all receipts and disbursements of money, shall be made by the
secretary, duly verified by oath, at the same time that the report of the board is made.
(Amended by Stats. 2009, Ch. 332, Sec. 1.17. (SB 113) Effective January 1, 2010.)


6360
   a) A law library established under this chapter shall be free to the judiciary, to state and
county officials, to members of the State Bar of California, and to all residents of the
county, for the examination of books and other publications at the library or its
branches.
   b) The board of law library trustees may permit the removal of the books and other
publications from the library and its branches as it considers proper, subject to those
rules, and, in its discretion, the giving of security, as it may provide to ensure the
safekeeping and prompt return thereof, but security shall not be required of members
of the judiciary or county officials. The board may provide for the levying of fines and
charges for violation of the rules, and may make charges for special services, such as the
making of photocopies of pages of library books, electronic delivery, messenger and
other delivery services, educational programs, special events, and provision of supplies
or food services.
   c) The board of law library trustees may require persons other than members of the
judiciary, county officials, and members of the bar resident in the county, to pay dues as
the board may fix for the privilege of removing books and other publications from the
library. With the approval of the board of supervisors, the board of law library trustees
may charge individual members of the bar resident in the county fees for the removal of
books and other publications from the library. These fees shall not exceed the cost of
providing the service.
(Amended by Stats. 2016, Ch. 86, Sec. 10. (SB 1171) Effective January 1, 2017.)

6361 The board of supervisors of the county in which the law library is established shall provide
sufficient quarters for the use of the library upon request of the board of law library trustees,
except that the board of supervisors need not provide such quarters when the board of law
library trustees determines it has sufficient funds, over and above those necessary for
operation and maintenance expenses, to provide its own quarters. Such provision may include,
with the room or rooms provided, suitable furniture, window shades, floor coverings, lighting,
heat and telephone and janitor service.
(Amended by Stats. 1959, Ch. 1076.)
6362.5 The State Librarian shall periodically supply to each law library established under the provisions of this chapter, and requesting the same, information regarding newly published materials to aid such libraries in their selection of new materials.  
(Added by Stats. 1965, Ch. 1385.)

6363 Whenever a law library, and a board of trustees to govern the same, is in existence under the provisions of any law, other than the law superseded by this chapter, in any county, or city and county, in this State, this chapter shall not be considered a repeal of any legislation under which such library was established and is now governed, but shall be deemed to confer upon such library the benefits of Sections 6321, 6322, 6322.1, 6326, 6341, 6345, 6346, 6346.5, and 6347.  
(Amended by Stats. 1955, Ch. 1786.)
INDEPENDENT AUDITOR'S REPORT ON THE FINANCIAL STATEMENTS

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, 2019, 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 an opinion 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 opinion.

Opinion
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, 2019 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.
Report on Summarized Comparative Information
We have previously audited San Diego County Public Law Library’s June 30, 2018 financial statements, and we expressed an unmodified opinion on those financial statements in our report dated September 13, 2018. In our opinion, the summarized comparative information presented herein as of and for the year ended June 30, 2018, 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 and Required Supplementary Information - Pensions 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.

Other Reporting Required by Government Auditing Standards
In accordance with Government Auditing Standards, we have also issued our report dated September 10, 2019, on our consideration of San Diego County Public Law Library’s internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with Government Auditing Standards in considering the Library’s internal control over financial reporting and compliance.

September 10, 2019
Sonnenberg & Company, CPAs
# SAN DIEGO COUNTY PUBLIC LAW LIBRARY

## STATEMENT OF NET POSITION

June 30, 2019

(With Comparative Totals for June 30, 2018)

<table>
<thead>
<tr>
<th>Assets</th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and Investments - Unrestricted Cash</td>
<td>$3,812,401</td>
<td>$3,447,483</td>
</tr>
<tr>
<td>Cash and Investments - Restricted Cash</td>
<td>76,683</td>
<td>93,293</td>
</tr>
<tr>
<td>Accounts Receivable</td>
<td>508,343</td>
<td>535,793</td>
</tr>
<tr>
<td>Prepaid Subscriptions</td>
<td>33,434</td>
<td>36,586</td>
</tr>
<tr>
<td>Prepaid Insurance</td>
<td>18,068</td>
<td>17,740</td>
</tr>
<tr>
<td>Capital Assets, net</td>
<td>3,173,694</td>
<td>3,471,011</td>
</tr>
<tr>
<td><strong>Total Assets</strong></td>
<td>7,622,623</td>
<td>7,601,906</td>
</tr>
</tbody>
</table>

### Deferred Outflows of Resources

| Deferred Pensions                          | 2,351,258  | 712,178    |

| **Total Assets and Deferred Outflows of Resources** | $9,973,881 | $8,314,084 |

<table>
<thead>
<tr>
<th>Liabilities</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts Payable</td>
<td>$3,019</td>
<td>$6,587</td>
</tr>
<tr>
<td>Accrued Wages and Salaries</td>
<td>24,407</td>
<td>23,856</td>
</tr>
<tr>
<td>Compensated Absences</td>
<td>155,000</td>
<td>144,589</td>
</tr>
<tr>
<td>Borrower's Deposits</td>
<td>47,769</td>
<td>53,103</td>
</tr>
<tr>
<td>Net Pension Liability</td>
<td>2,474,619</td>
<td>2,504,249</td>
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<tr>
<td><strong>Total Liabilities</strong></td>
<td>2,704,814</td>
<td>2,732,384</td>
</tr>
</tbody>
</table>

### Deferred Inflows of Resources

| Deferred Pensions                          | 200,532   | 195,364    |
| Advanced Payment of Filing Fees            | 223,022   | 223,022    |

| **Total Deferred Inflows of Resources**     | 423,554   | 418,386    |

### Net Position

| Restricted for IT Projects and Others      | 76,683    | 93,293     |
| Unrestricted                               | 3,595,136 | 1,599,010  |

| **Total Net Position**                      | $6,845,513 | $5,163,314 |

| **Total Liabilities, Deferred Inflows of Resources, and Net Position** | $9,973,881 | $8,314,084 |

The accompanying notes are an integral part of these financial statements.
SAN DIEGO COUNTY PUBLIC LAW LIBRARY  
STATEMENTS OF ACTIVITIES  
For the Year Ended June 30, 2019  
(With Comparative Totals for the Year Ended June 30, 2018)

<table>
<thead>
<tr>
<th></th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenues:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General Revenues</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Filing Fees - Superior Court</td>
<td>$2,957,371</td>
<td>$2,801,526</td>
</tr>
<tr>
<td>Interest</td>
<td>61,707</td>
<td>43,419</td>
</tr>
<tr>
<td>Grants</td>
<td>1,675,372</td>
<td>32,072</td>
</tr>
<tr>
<td>Donations</td>
<td>3,243</td>
<td>1,673</td>
</tr>
<tr>
<td><strong>Subtotal General Revenues</strong></td>
<td>$4,697,693</td>
<td>$2,878,690</td>
</tr>
<tr>
<td>Program Revenues</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Charges for Services</td>
<td>68,551</td>
<td>74,204</td>
</tr>
<tr>
<td><strong>Total Revenues</strong></td>
<td>$4,766,244</td>
<td>$2,952,894</td>
</tr>
</tbody>
</table>

| **Program Expenses:** |            |            |
| Personnel             |            |            |
| Salaries and Wages    | 1,289,146  | 1,154,297  |
| Employee Benefits     | 729,046    | 611,200    |
| **Total Personnel**   | $2,018,192 | $1,765,497 |
| Non-personnel         |            |            |
| Books and Other Media | 233,784    | 210,614    |
| Computer Equipment and Software | 136,024 | 112,976 |
| Conferences and Travel| 13,458     | 19,097     |
| Data Searches         | 128,237    | 121,947    |
| Depreciation          | 314,005    | 332,041    |
| Insurance             | 26,776     | 25,500     |
| Membership and Public Relations | 26,152 | 11,567 |
| Miscellaneous         | 38,305     | 18,766     |
| Mileage and Parking   | 12,761     | 12,260     |
| Professional and Special Services | 92,796 | 140,687 |
| Supplies              | 43,555     | 48,115     |
| **Total Non-personnel** | $1,065,853 | $1,053,570 |

| **Total Program Expenses** | $3,084,045 | $2,819,067 |

| **Increase (Decrease) in Net Position** | $1,682,199 |

| **Net Position, Beginning of Year** | $5,163,314  | $5,029,487  |
| **Net Position, End of Year**       | $6,845,513  | $5,163,314  |

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, 2019

#### Revenues:

<table>
<thead>
<tr>
<th>Item</th>
<th>Budget</th>
<th>Actual</th>
<th>Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filing Fees</td>
<td>$2,600,000</td>
<td>$2,957,371</td>
<td>$357,371</td>
</tr>
<tr>
<td>Donations</td>
<td>2,000</td>
<td>3,243</td>
<td>1,243</td>
</tr>
<tr>
<td>Grants</td>
<td>10,000</td>
<td>1,675,372</td>
<td>1,665,372</td>
</tr>
<tr>
<td>Interest</td>
<td>35,000</td>
<td>61,707</td>
<td>26,707</td>
</tr>
<tr>
<td>Charges for Services</td>
<td>62,200</td>
<td>68,551</td>
<td>6,351</td>
</tr>
<tr>
<td><strong>Total Revenues</strong></td>
<td>$2,709,200</td>
<td>$4,766,244</td>
<td>$2,057,044</td>
</tr>
</tbody>
</table>

#### Expenditures:

**Personnel**

<table>
<thead>
<tr>
<th>Item</th>
<th>Budget</th>
<th>Actual</th>
<th>Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries and Wages</td>
<td>$1,295,000</td>
<td>$1,289,146</td>
<td>$5,854</td>
</tr>
<tr>
<td>Employee Benefits</td>
<td>489,250</td>
<td>729,046</td>
<td>(239,796)</td>
</tr>
<tr>
<td><strong>Total Personnel</strong></td>
<td>1,784,250</td>
<td>2,018,192</td>
<td>(233,942)</td>
</tr>
</tbody>
</table>

**Information Services**

<table>
<thead>
<tr>
<th>Item</th>
<th>Budget</th>
<th>Actual</th>
<th>Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Books and Other Media</td>
<td>297,300</td>
<td>233,784</td>
<td>63,516</td>
</tr>
<tr>
<td>Data Searches</td>
<td>200,000</td>
<td>128,237</td>
<td>71,763</td>
</tr>
<tr>
<td><strong>Total Information Services</strong></td>
<td>497,300</td>
<td>362,021</td>
<td>135,279</td>
</tr>
</tbody>
</table>

**Operations**

<table>
<thead>
<tr>
<th>Item</th>
<th>Budget</th>
<th>Actual</th>
<th>Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Library Insurance</td>
<td>27,000</td>
<td>26,776</td>
<td>224</td>
</tr>
<tr>
<td>Supplies/Office</td>
<td>43,500</td>
<td>43,555</td>
<td>(55)</td>
</tr>
<tr>
<td>Professional and Special Services</td>
<td>109,200</td>
<td>92,796</td>
<td>16,404</td>
</tr>
<tr>
<td>Mileage and Parking</td>
<td>13,000</td>
<td>12,761</td>
<td>239</td>
</tr>
<tr>
<td>Conferences and Travel</td>
<td>17,100</td>
<td>13,458</td>
<td>3,642</td>
</tr>
<tr>
<td>Equipment and Software</td>
<td>230,750</td>
<td>136,024</td>
<td>94,726</td>
</tr>
<tr>
<td>Membership and Public Relations</td>
<td>11,600</td>
<td>26,152</td>
<td>(14,552)</td>
</tr>
<tr>
<td>Depreciation</td>
<td>-</td>
<td>314,005</td>
<td>(314,005)</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>5,000</td>
<td>38,305</td>
<td>(33,305)</td>
</tr>
<tr>
<td><strong>Total Operations</strong></td>
<td>457,150</td>
<td>703,832</td>
<td>(246,682)</td>
</tr>
</tbody>
</table>

**Total Expenditures**

<table>
<thead>
<tr>
<th></th>
<th>Budget</th>
<th>Actual</th>
<th>Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2,738,700</td>
<td>3,084,045</td>
<td>(345,345)</td>
</tr>
</tbody>
</table>

**Excess of Revenues over Expenditures**

<table>
<thead>
<tr>
<th></th>
<th>Budget</th>
<th>Actual</th>
<th>Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(29,500)</td>
<td>1,682,199</td>
<td>(1,711,699)</td>
</tr>
</tbody>
</table>

Note: The Budget Schedule above excludes Depreciation.

See Independent Auditor's Report

26
Matthews Summary Report

Consultant Joseph Matthews was hired to provide a comprehensive overview of the state of the San Diego Law Library’s services, collection, and operations. In his report he proposed a method for measuring our effectiveness in these three areas, and assessing strengths and weaknesses in current operations. Mr. Matthews offers guidance in how to improve and progress in the new world of public library expectations.

Based on solid management theory, the report reviews the current state of San Diego Law Library operations, provides comparisons to other similar county law libraries, and creates a useful tool for measuring outputs and outcomes for improving the quality of customer satisfaction in library services and programs, technology, facilities, and finances. This tool is a measurement system called the Balanced Score Card (BSC).

The report gives guidance on how to work toward the goals and objectives in the law library’s 20/20 Strategic Plan. The report provides suggestions for future progress, but the formulation of the library’s next strategic plan should spring organically from its mission and vision. Ideally, the library will never stop reaching for a better way to provide access to justice.

The full text of the Matthews Report, with its appendices, tables and graphs, is available from the Administration Department at the San Diego Law Library, 1105 Front Street, San Diego, CA 92101.

Summary of Report

The report began with a brief history of the Law Library and its financial crisis in the mid-late 2000s. Despite losing up to 40% of its funding, the Law Library continued to operate and provide solid access to the legal resources needed by its patrons. The Law Library retained its value as a community provider of access to justice and maintained visibility as a trusted intermediary to those who used its services, collections and attended its educational programs.

Next, the report provided a broad overview of the state of public libraries in the 21st century: how a tidal wave of change in the form of increasingly sophisticated technology to access resources, while acknowledging the fact that funding is increasingly scarce.

Mr. Matthews introduced the Balanced Score Card as a method for measuring the Law Library’s work and progress.
The Balanced Score Card reinforces good behaviors in an organization by isolating five separate areas for analysis. These five areas, also called perspectives, involve learning and growth, internal business processes, resources, customers, and finance. The Balanced Score Card helps attain objectives, measurements, initiatives and goals that result from these five primary functions of an organization.

The two key components of the Balanced Score Card are the Score Card and a graphic representation called a Strategy Map. The Strategy Map is shown in Figure 1, and the Strategy Score Card is in an Appendix to the report. [Available upon request at the Administration Department of the San Diego Law Library, 1105 Front Street, San Diego, CA 92101.]

The San Diego Law Library Strategy Map – 2019

A Report for the San Diego Law Library
Analyzing the Law Library Using the Five Perspectives of the Balanced Score Card

The consultant worked with the Library’s Advancement Leadership Team (ALT) to develop a Score Card that best reflects the Library’s goals and objectives.

First Perspective: Financial

The fiscal objective for the San Diego Law Library is that it should receive revenues that are both predictable and sustainable. In order to achieve this objective, it is pursuing several initiatives. First, however, is a brief recital of the reasons behind the Law Library’s current financial situation.

Filing Fee Revenues: A Ten Year Downhill Slide, and Corresponding Expenditures

Superior Court filing fees account for more than 95% of the revenues received by the Law Library each year. Effective January 1, 2006, the State Legislature imposed a moratorium on the increase in such filing fees – see Figure 2.

In addition, the number of court cases filed each year has fallen dramatically (and fee waivers increased) over the past decade, both of which contributed to an overall 40% drop in revenues from 2009-2016.

From a high of nearly $4.2 million in annual filing fee revenue, the Law Library bottomed out in 2016 at $2.5 million, a 40% reduction. The net effect of this income freeze and the falling court filing fees is that the San Diego Law Library drastically reduced its expenses and the services it provides by 27% over the last ten years, as shown in Figure 3. Cutting both print and digital resources where possible, while balancing the loss in funding and providing the best services possible for the legal community, kept the Law Library afloat.

Second Perspective: Organizational Readiness

The San Diego Law Library will be ready to serve its customers by focusing on three objectives:

Staff Readiness. Clearly, it is important that staff members possess the necessary skills and experience in order to interact with and assist a customer. As the world around us is rapidly changing, it is necessary to provide staff the opportunity to participate in classes and attend professional conferences in order to improve and sharpen their skills and competencies. This also supposes the staff is sufficient in numbers to accomplish its work and tackle new endeavors.
Relevant Collections. Historically, law libraries have provided access to information by buying, organizing, storing and providing access to print (and other information media) legal materials (the library as a warehouse of books). Yet, use of this physical collection has been declining steadily over the past decade. Thus, the Law Library has the opportunity to “right size” its physical collection. By doing so, it can free up space devoted to the shelving of this collection for other purposes. This would work especially well in the North County branch given the small size of that collection. However, because the downtown Law Library’s shelving serves as structural support for the floors above, it may be cost prohibitive. Possible use of the fifth floor would depend on creating better ambient lighting and a more pleasing setting for meetings and gatherings.

The advent of the Internet age means that an increasing amount of information is accessible online. Note however, that while a great deal of information is free (the quality of this “free” information ranges from terrible to quite good) a majority of high-quality legal information is positioned behind a “pay-wall.” The vendors that own this information will, for an annual fee, provide a license to access this information online. Within the broad legal community, a great deal of tension exists between the vendors that provide access to online information and law libraries. Increasingly, the online vendor is marketing directly to lawyers in an effort to get each lawyer (or law firm) to license their electronic content and bypass the library.

Every public library, including public law libraries, must balance the increasing demand (and costs) for online, electronic resources (sometimes called eResources) with the need to purchase physical books and other materials (and at the same time, acknowledging the demand for physical materials is declining). Due to its severe revenue decline, the Law Library logically reduced its spending for new books over the last ten years as seen in Figure 5 while also reducing its spending for eResources. Expenditures for eResources increased in FY 2017 and FY2018 as the Law Library worked to rebalance its collection and filing fees began to somewhat stabilize.

Up-To-Date Technology. Providing staff and patrons with access to the latest information technology is a requirement rather than an optional service. The San Diego Law Library is doing a commendable job in some areas and needs improvement in others. The areas in which the Library is doing well includes: getting discounted access to high speed fiber-optic connection to the Internet through the E-Rate Program (thus ensuring that document downloads and the streaming of data happens rapidly); desktop computers and software (for both staff and the patrons) that are current; and migrating to an open source integrated library system (Koha). In addition, the servers are being refreshed and upgraded.

The Law Library needs improvement in the following areas and has initiatives to address these concerns:

1) increased technology demands increased staffing – the Law Library is woefully understaffed for its current operations much less any growth;

2) the regular investment of money and resources for refreshing and replacing hardware and software to stay current and be able to support new eResources;
3) upgrading or improvement of its smartphone compatible Website so that people can access the Library’s content anytime, anywhere, from any device. While currently possible, improvements to the existing interface are needed.

Third Perspective: Internal Processes

Comparison with County Law Library Peer Institutions

The San Diego Law Library’s objective in this perspective is to operate in an efficient manner to spend wisely its limited fiscal resources. To this end, the Library conducted a brief survey of selected California County Law Libraries of similar size to determine how efficiently it operates compared to its peers.

The San Diego Law Library’s budget is just slightly larger (approximately $100,000) than its closest peer library even though it has operated up to three branch libraries (currently one that is completely operational) while the peer libraries have none. The San Diego Law Library spends less on its staff than some of its peers (as a percent of its total budget). The peer libraries seem to be moving more into eResources, similar to the San Diego Law Library.

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Fourth Perspective: Resources & Services

Decline in Funding Leads to Loss of Library Support

Falling attendance numbers and fewer library interactions are phenomena affecting many public libraries. The Institute of Museum and Library Services (IMLS), an independent federal agency that reports on the health and well-being of all public libraries, found a long downward trend in revenues (mostly declines in local government funding) for libraries that began amid the Great Recession.

In short:

“We found that as investments, such as revenue, staffing, and programs, increased, so did critical use measures, such as visitation and circulation. In the same way, as investments were reduced, mostly in reaction to post-recessionary budgetary reductions, we saw decreases in library use.”
Researchers concluded that “[i]f libraries receive more public funds, more people use them. And if governments invest less in its libraries (as they have since 2009), fewer people visit.”

It is clear that the financial crisis forced the San Diego Law Library to cut staffing, resources, and services; it could not provide the same level of programs and assistance. This resulted in a steep decline in law library users.

All this shows the County Law Library must systematically address how to scale-up its staffing, resources and services to the best of its ability after a long period of decline and constriction. There will always be cyclical revenue downturns, but at a present level of stability, the San Diego Law Library must act in its own best interest by spending as much money it can for the good of the people it serves. Based on the foregoing research, increased spending for growing staff and services will also grow the Law Library’s user-base, allowing it to be recognized as the community treasure it is.

**Five Primary Objectives for Improvement**

The San Diego Law Library has determined that it has five primary objectives in this perspective. These include:

1. **24/7 Access to eResources.** One consistent theme emerging from the focus group discussions was that lawyers would value and appreciate anywhere, anytime, any device access to electronic content. Such timely access would allow these attorneys to be more productive and save them time. Should the Library be able to provide such access then the lawyers would see real value in buying a benefit package at the San Diego Law Library.

2. **Lawyer Education.** The focus group participants suggested they were unaware of a number of software tools and other services that would make their lives easier and more productive. The lawyers indicated that their research skills had become rusty and that short classes and videos that focused on efficiently searching various databases would be helpful.

3. **Self-Represented Litigant Education.** These focus group participants were similarly unaware of the many resources available to assist them in doing their legal research and filing claims. An in-library legal clinic has been proposed, similar to one now running with great success in the Sacramento County Public Law Library and many other law libraries nationwide.

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A Report for the San Diego Law Library
4. **DIY Research Guides.** The San Diego Law Library currently provides a number of research guides of interest to the DIY patron such as appeals, domestic violence, family law, immigration, landlord/tenant, and so forth. These resources are located online and at the Law Library’s Self-Help Center. Yet these research guides, forms and other resources need to be improved by considering each resource from the patron’s point-of-view. For example, a map with detailed instructions about where to find a specific court building, the clerk’s business offices, or a specific court to file a specific document and/or form would be very helpful to these users.

5. **DIY Support Programs.** The San Diego Law Library will seek to partner with more branches in the County Library System to ensure their reference librarians are aware of all the services the Law Library provides. Additionally, the Law Library will provide programs for other community organizations to make sure their staff members are aware of the Law Library’s resources and services.

**Fifth Perspective: Customer Value**

The theory behind the Balanced Score Card customer perspective is that one must make customers happy — and in order to make customers happy, one must understand them. To help achieve this, you need three things:

1. **Finding out what your particular customers are looking for.**

   The first major challenge is in defining who your customers are. The Law Library has a good handle on that (see below). The next major challenge is in knowing what the customer actually wants. Libraries and patrons have different, though similar, desires. The Law Library’s goal to “increase the number of library patrons” is insufficient because it does not bring the patron into the equation. Instead, describe what differentiates your products or services and identify why customers are choosing you. All libraries hope for increased use, but striving to provide unique services, products, and programs describe the value you bring. Focusing on the patron’s desires will bring the sought-after results.

2. **Describing your objectives from your customer’s point of view.**

   It helps to place yourself in the library customer’s shoes. For example, the Law Library’s objective might be, “The San Diego Law Library’s commitment to service excellence fits with how I want to be treated,” or “The Law Library gives me quick and honest results,” or “The Law Library makes my job easier.” By articulating what your patrons want, need, or enjoy about the Law Library, you will better understand their point of view and be better able to give them what they want.
Growing Community, Collaborations & Outreach Systems
There is a great disparity of knowledge and experience between the Law Library’s patron groups. It will require a sophisticated approach for measuring the satisfaction levels of these various users to grow a community of library users, supporters, and champions. A cookie-cutter program will not suffice. Specifically tailored outreach systems for small firms, large firms, the DIY patron, and the public must be developed and strategically rolled out for maximum impact. Special attention should focus on teaching practical tools for attorneys, such as improving productivity, saving time, and increasing knowledge of law practice technology. There is enormous opportunity for the Law Library to expand its current collaborations with bar associations, the court, nonprofit legal assistance providers, and especially public libraries. All these collaborations will help the community recognize the Law Library not only by name but also by its value as a trusted intermediary in learning legal research.

The Importance of Improving Services & Tracking Progress
Customers consistently value libraries based on service excellence. The Law Library can improve services for its patrons by providing access to legal information while reducing frustrations they experience. This requires creativity and the willingness to try new methods of service. The Law Library will launch itself forward into a new level of service excellence for each patron group by tracking the usage of and, patron satisfaction with, these new methods.