



SAN MATEO COUNTY LAW LIBRARY
710 Hamilton Street
Redwood City, CA 94063
650-363-4913
www.smclawlibrary.org

June 22, 2018

BOARD OF LAW LIBRARY TRUSTEES MEETING
CONFERENCE ROOM, SAN MATEO COUNTY LAW LIBRARY
710 HAMILTON STREET, REDWOOD CITY, CALIFORNIA 94063

Materials related to an item on this Agenda are available for public inspection at the Law Library during normal business hours.

Meetings are accessible to people with disabilities. Individuals who need special assistance or a disability-related modification or accommodation to participate in this meeting, or who have a disability and wish to request an alternative format for the agenda, meeting notice, agenda packet or other writings that may be distributed at the meeting, should contact the Law Library at least three (3) days prior to the meeting. Notification in advance of the meeting will enable the Law Library to make reasonable arrangements to ensure accessibility to this meeting and materials related to it.

Members of the public may be heard on any item on the Agenda. Persons addressing the Board will be limited to five minutes unless the President of the Board grants a longer period of time. The Board will only allow comments by members of the public on an item on the agenda during discussion of the item.

THURSDAY, June 28, 2018, 12:15 P.M.

AGENDA

1. **CLOSED SESSION**

- a. The Board will meet in closed session to discuss staffing issues. At the conclusion of the closed session the Board will report on any action taken for which a report is required by law.

2. **REGULAR SESSION**

- a. Approval of Minutes of the May 24, 2018 meeting.
- b. Acceptance of Report of Expenses for Period 11 (May) of FY 2017-2018 (pages 3-9)
- c. Discussion/Informational Updates and Policy Decisions:
 - New Xerox machine
 - New WestLaw Contract proposal (*Elect. p.10-16; Print p.17-23*)
 - Foundation report
 - Other matters of Interest
- d. Report of the San Mateo County Bar Association
- e. Public open comment.

3. **ADJOURNMENT**

NEXT MEETING: August 23, 2018

Mark Your Calendar!

2018 San Mateo County Law Library Board of Trustees Meeting Schedule:

- August 23, 2018
- September 27, 2018
- October 25, 2018
- December 6, 2018

SAN MATEO COUNTY LAW LIBRARY
MINUTES OF THE MEETING OF THE BOARD OF LAW LIBRARY TRUSTEES

Date: May 24, 2018

Meeting Location: San Mateo County Law Library
710 Hamilton St., Redwood City, CA 93063

Members in attendance:

Trustee:	STEVE SCHAIMAN
Trustee:	ROBERT D. FOILES
Trustee:	V. RAYMOND SWOPE
Trustee:	CAROLE GROOM
Trustee:	JOSEPH C. SCOTT
Trustee:	JACQUELYN BROWN
Trustee:	PAUL WILKINS

Secretary-Librarian, Ex-officio: CAROLINE BRACCO

1. CLOSED SESSION

2. REGULAR SESSION

The meeting convened at 12:25 pm in Regular Session.

- a. Approval of minutes for April 26, 2018 meeting. Wilkins made motion to approve. Groom seconded. Vote for unanimous approval. Minutes moved into record.
- b. Acceptance of report of expenses for period 10 (April) of FY 2017-2018. Costs and income balancing when accounting for cash transactions. Discussed photocopier costs vs. income. Schaiman made motion to approve. Seconded by Swope. Unanimous approval. Report of expenses moved into record.
- c. Discussion and information updates & policy decisions: Xerox contract up for renewal June 1st. Decision and vote. Groom made motion to take a vote to approve contract. Schaiman seconded. Unanimous approval. New Xerox contract approved. Discussion of WestLaw renewal up at the end of July.
- d. Bar Association report included discussion of Fee Arbitration workshop and the law library charging for use of the room.
- e. Public comments from Martin Fox including liking the changes to the location of collection and memorial day celebrations.

Swope made motion to adjourn. Seconded by Foiles. Unanimous vote. Meeting adjourned.

Respectfully submitted,
Caroline Bracco
Secretary-Librarian, Ex-officio

Filing Fee Income

Filing Fees	\$43,630.75
TOTAL:	\$43,630.75

Library Generated Income

Copy Machines	\$406.00	
Computer Printer	\$34.00	
Conference Room	\$542.00	
Circulation	\$67.00	
Deed Forms	\$169.00	
Lost Book Payment	\$0.00	
Extra Computer Time	\$10.00	
Vendor Credits/Refunds		
SVCF Withdraws		
Grants		
Other	\$75.00	
TOTAL:	\$1,303.00	(Deposited into Citibank Account)

Foundation Generated Income

Used Book Sales	\$94.00	
Donations/Foundation	\$112.03	
	\$206.03	Deposited into Foundation account)

Trial Balance Reported Income

Interest	
Lehman Bad Debt Recovery	\$0.00
Credits/Refunds	\$233.80
Other	\$323.80
TOTAL:	\$557.60

MONTHLY TOTAL INCOME:	\$45,491.35
DEPOSIT TO COUNTY:	\$43,630.75

Voucher #	Vender	Amount
11471	CalPERS (100000015223681)	\$503.99
11472	CalPERS (100000015223694)	\$503.99
11473	CalPERS (100000015223709)	\$285.11
11474	CalPERS (100000015223728)	\$285.11
11475	CalPERS (100000015280439)	\$1,375.72
11476	California Security	\$26.25
11484	John Wiley & Sons, Inc.	\$375.07
11477	Lexis (Matthew Bender)	\$726.73
11478	Lexis (Advance)	\$3,650.00
11479	Office Depot	\$18.87
11480	Office Depot	\$11.72
11481	Office Depot	\$83.73
11483	Treat, Richard	\$1,250.00
11485	UC Regents (CEB)	\$3,802.86
11486	UBS	\$250.72
11487	West Group (Thomson Reuters)	\$2,721.60
11488	West Group (Westlaw Next)	\$5,213.72
11489	Xerox	\$412.56
<hr/>		
11490	Blake, Larry	\$285.00
11491	Bracco, Caroline	\$3,268.80
11492	Brill, Margaret	\$1,200.00
11493	Conventiti, Antonella	\$4,460.80
11494	Woods, Marcia	\$1,220.00
11495	Medicare	\$149.53
11496	Active Employee Benefits	\$816.36
11497	Retired Employee Benefits	\$1,487.94
<hr/>		
11498	County Charges	\$2,883.29

Total: \$37,269.47

Income for May, Period 11: \$45,491.35

Difference: **\$8,221.88**

\$8,221.88

April March February January October November December September

FILING FEE INCOME

Filing Fee Income	#	\$41,784.06	\$49,298.29	\$45,297.67	\$43,648.46	\$41,577.92	\$42,423.60	\$43,087.13	\$40,450.70
TOTAL:	#	\$41,784.06	\$49,298.29	\$45,297.67	\$43,648.46	\$41,577.92	\$42,423.60	\$43,087.13	\$40,450.70

LIBRARY GENERATED INCOME

Copy Machines	#	\$303.65	\$434.85	\$281.40	\$155.75	\$280.35	\$329.20	\$421.50	\$311.65
Computer Printer	#	\$48.75	\$111.50	\$47.50	\$121.25	\$115.25	\$78.75	\$108.00	\$86.00
Conference Room	#	\$122.00	\$225.00	\$25.00	\$200.00	\$70.00	\$35.00	\$220.00	\$0.00
Overdue Fines	#	\$2.00	\$0.00	\$15.00	\$0.00	\$0.00	\$3.00	\$11.00	\$0.00
CEB Audio Check Out Fee	#	\$5.00	\$4.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Deed Forms	#	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Reserve Book Fee	#	\$20.00	\$60.00	\$30.00	\$40.00	\$40.00	\$10.00	\$30.00	\$80.00
Used Book Sales	#	\$14.00	\$113.00	\$50.00	\$0.00	\$0.00	\$107.00	\$166.00	\$214.50
Lost Book Payment	#	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Donations	#	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$66.60
Extra Computer Time	#	\$15.00	\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Vendor Credits/Refunds	#	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
SVCF Withdrawals	#	\$0.00	\$7,300.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Grants	#	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$900.00	\$0.00
Other	#	\$10.00	\$43.00	\$40.00	\$50.00	\$25.00	\$35.00	\$22.00	\$50.00
TOTAL:	#	\$540.40	\$8,301.35	\$488.90	\$567.00	\$530.60	\$597.95	\$1,878.50	\$808.75

TRIAL BALANCE REPORTED INCOME

Interest	#	\$0.00	\$601.20	\$0.00	\$0.00	\$605.59	\$0.00	\$0.00	\$973.67
Lehman Bad Debt Recovery	#	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Credits/Refunds	#	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$510.65	\$0.00
Other	#	\$0.00	\$0.00	\$0.00	\$100,000.00	\$0.00	\$0.00	\$0.00	\$0.00
TOTAL:	#	\$0.00	\$601.20	\$0.00	\$100,000.00	\$605.59	\$0.00	\$510.65	\$973.67

EXPENSES Period 11, May	May	Actual Fiscal YTD	Budgeted Fiscal YTD	Annual Budget 2017-2018
SALARIES				
Full time	\$7,729.60	\$147,640.96	\$136,666.67	\$164,000.00
Part time	\$2,705.00	\$25,745.00	\$27,500.00	\$33,000.00
Medicare	\$149.53	\$2,374.11	\$2,333.33	\$2,800.00
	\$10,584.13	\$175,760.07	\$166,500.00	\$199,800.00
BENEFITS				
Retirement	\$1,578.20	\$20,056.50	\$21,333.33	\$25,600.00
Unfunded Accrued Liability	\$1,375.72	\$13,442.63	\$13,750.00	\$16,500.00
Active Employee Benefits	\$816.36	\$28,446.94	\$33,333.33	\$40,000.00
Retired Employee Benefits	\$1,487.94	\$21,330.26	\$20,833.33	\$25,000.00
	\$5,258.22	\$83,276.33	\$89,250.00	\$107,100.00
PRINT/ELECTRONIC RESOURCES				
New Books	\$0.00	\$0.00	\$0.00	\$0.00
Print Resources	\$7,626.26	\$84,162.23	\$79,583.33	\$95,500.00
Electronic Resources	\$8,863.72	\$86,399.17	\$94,583.33	\$113,500.00
	\$16,489.98	\$170,561.40	\$174,166.67	\$209,000.00
OPERATIONAL EXPENSES				
Binding	\$0.00	\$0.00	\$0.00	\$0.00
Insurance (Property, Casualty, WC)	\$0.00	\$6,676.00	\$5,000.00	\$6,000.00
Copy Machines	\$412.56	\$4,568.29	\$4,250.00	\$5,100.00
Capital Improvements	\$0.00	\$0.00	\$0.00	\$0.00
Office Supplies	\$114.32	\$917.66	\$1,250.00	\$1,500.00
Use Tax	\$0.00	\$0.00	\$0.00	\$0.00
Tech Support	\$1,250.00	\$11,250.00	\$10,000.00	\$12,000.00
Support Software	\$0.00	\$10,051.80	\$8,333.33	\$10,000.00
Building Maintenance	\$276.97	\$6,999.23	\$7,666.67	\$9,200.00
CitiBank Transfers	\$0.00	\$900.00	\$2,500.00	\$3,000.00
Services	\$0.00	\$5,950.00	\$7,750.00	\$9,300.00
Educational/Professional	\$0.00	\$740.00	\$375.00	\$450.00
Dues	\$0.00	\$0.00	\$625.00	\$750.00
Travel Expenses	\$0.00	\$0.00	\$1,833.33	\$2,200.00
Promotional	\$0.00	\$0.00	\$166.67	\$200.00
Miscellaneous	\$0.00	\$0.00	\$416.67	\$500.00
	\$2,053.85	\$48,052.98	\$50,166.67	\$60,200.00
TOTALS	\$34,386.18	\$477,650.78	\$480,083.33	\$576,100.00

Percent	Amount Under/Over	Comments
108%	\$10,974.29	
94%	-\$1,755.00	
102%	\$40.78	
106%		
94%	-\$1,276.83	
	-\$307.37	
85%	-\$4,886.39	
102%	\$496.93	
93%		
#DIV/0!	\$0.00	
106%	\$4,578.90	
91%	-\$8,184.16	
98%		
0%	\$0.00	
134%	\$1,676.00	
107%	\$318.29	
0%	\$0.00	
73%	-\$332.34	
0%	\$0.00	
113%	\$1,250.00	
121%	\$1,718.47	
91%	-\$667.44	
36%	-\$1,600.00	
77%	-\$1,800.00	
197%	\$365.00	
0%	-\$625.00	
0%	-\$1,833.33	
0%	-\$166.67	
0%	-\$416.67	
96%		
99%	-\$2,432.55	

CASH ON HAND REPORT

FY 2017-2018

PERIOD	TOTAL INCOME	TOTAL EXPENSES	CASH ON HAND
July	\$45,166.47	\$16,286.98	\$201,871.50
August	\$48,827.55	\$69,785.41	\$180,913.64
September	\$42,324.46	\$56,804.95	\$166,433.15
October	\$58,200.84	\$43,397.08	\$181,236.91
November	\$45,786.57	\$44,290.29	\$182,733.19
December	\$144,215.46	\$47,583.01	\$279,365.64
January	\$42,714.11	\$49,016.78	\$273,062.97
February	\$42,423.60	\$43,770.98	\$271,715.59
March	\$43,597.78	\$46,483.98	\$269,384.99
April	\$41,424.37	\$42,404.04	\$268,173.52
May	\$44,188.35	\$37,269.47	\$274,768.60
June			
July Interest			
TOTALS	\$598,869.56	\$497,092.97	
Average/Month	\$54,442.69	\$45,190.27	
Difference/Month	\$9,252.42		

Electronic

Caroline Bracco

From: Vandenberg, Paul R. (Legal) <paul.vandenberg@thomsonreuters.com>
Sent: Tuesday, June 12, 2018 10:25 AM
To: cbracco@smclawlibrary.org
Cc: Dhall, Amy (Legal)
Subject: RE: Westlaw Patron for San Mateo Law Library #1004063291
Attachments: June 12 2018 San Mateo Law Library West Budget Patron Access Proposal.docx; June San Mateo LL StateCoreStateAnalytical 3 License Patron W4G_West Order Form_2018-06-12.pdf

Good morning Caroline,

I've attached a revised proposal that recognizes the Library's need to reduce costs while preserving the most essential Westlaw content for your patrons. You'll see a number of options that are close to or below your \$5,500 / month target below without sacrificing too much of your core content.

All options will include reduced annual increases, now down to just **1%** from a standard **5%**. This will help keep your costs down over time and will keep you within budget for our services. Each option will also include our **Non-Availability of Funds Clause** to protect you should your funding dramatically drop or disappear during the contract term.

We've attached preliminary for new option #3B for 3 licenses at \$5,422 / month. If you prefer one of the other options, please let us know and we will respond with the paperwork of your preference.

Are you OK with the latest revisions to your LMA, or are you still considering additional fine-tuning? Please let us know how we can help with either agreement.

Thanks again for your time this morning,

Sincerely,

Paul Vandenberg
Government Account Executive
Northern California

Thomson Reuters
the answer company

Phone: 510-995-8129 or 408-641-9378
Cell: 949-422-0358

Fax: 866-535-1585

Paul.Vandenberg@thomsonreuters.com



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Westlaw Proposal



June 12, 2018

Electronic

Thomson Reuters proposes to meet the online legal research needs of **San Mateo County Law Library** by providing the following content on Westlaw for Government Library Patron Access:

Account Number: #1004063291 Patron Licenses 3

Current Rate **\$5,213.72**

NATIONAL PRIMARY LAW CORE

- **Primary law** - All 50-State and Federal cases, statutes, regulations and other administrative materials
- **KeyCite** - Instantly verify whether a case, statute, regulation, or administrative decision is good law, and find citing references to expand your research
- **Graphical Statutes** - A graphical timeline to different statute versions and related legislative history
- **Bill & Regulation Tracking** - proposed and enacted legislation; proposed and adopted regulations
- **Jury Instructions** - Civil and Criminal
- **Law Reviews and Journals** - National collection
- **News** - Robust collection of newspapers, newsletters, journals, periodicals, radio and TV transcripts
- **Forms** - Text Forms, Official PDF Forms (e-forms) for all 50 states, Checklists and Clauses

ALL ANALYTICAL COLLECTION

- **Topical Analytical Collections** - Thousands of practice-focused analysis, guidance, treatises, forms, + reporters including Municipal Counselor, Advanced Employment Practice, Civil Rights and Disabilities, etc...
- **California Analytical Library** - *The Rutter Guides, Witkins Treatises*, California Jurisprudence, Miller & Starr,
- **ALR** - American Law Reports
- **AmJur** - Access to the full collection of American Jurisprudence resources including Causes of Actions
- **CJS** - Corpus Jurisprudence
- **50 State Surveys** - Statutory & Regulatory surveys complete and up to date on a wide variety of topics
- **Restatements of the Law** - exclusive collection of the complete Restatements
- **CCH** - select publications includes Health Care, Labor, Employment, HR, Pension, Wage & Hour guides and reporters
- **Practitioner Insights** - emerging legal developments in insurance and other practice areas
- **Federal Treatise Collection** - Wright & Miller Federal Practice and Procedure, Federal Trial Handbook, etc...

RELATED DOCUMENTS ON WESTLAW

- **Expand your Results** - To thousands of sources not included in your subscription. Access to Related Documents brought in from multiple searched based on your Westlaw search query.

PRICING

3 LICENSES

#1 Minimum Content Conversion for San Mateo Law Library

- National Primary Core Collection **\$6,256**
- All Analytical Collection
- Related Documents on Westlaw

#1A Same as above, limited to 2 Licenses

- National Primary Core Collection **2 Licenses \$5,865**
- All Analytical Collection
- Related Documents on Westlaw



BETTER RESULTS FASTER

Westlaw

Electronic

3 LICENSES

OPTION #2

Sub-Minimum Content Conversion for San Mateo Law Library

- National Primary Core Collection \$5,996
- All Analytical Collection

2 Licenses	\$5,605
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✓

OPTION #2B (NOT RECOMMENDED!)

Sub-Minimum Content Conversion for San Mateo Law Library

- National Primary Core Collection
- NO Analytical Content
- NO Related Documents

2 Licenses	\$5,407
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\$ 391.28 more
 \$ 4695.36 annual
 \$5,788

3 LICENSES

OPTION #3

California Core / ALL Analytical for San Mateo Law Library

- California Primary Core Collection w. Related Federal \$5,511
- All Analytical Collection

2 License Option

\$5,370

✓ \$297.28 more
 ✓ 3567.36
 \$156.28 more
 \$1875.36

OPTION #3B

California Core / State Analytical for San Mateo Law Library

- California Primary Core Collection w. Related Federal \$5,422
- All State Analytical Collection

2 License Option	\$5,281
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Miscellaneous

- Figures listed above are the first year monthly rates, rounded to the nearest dollar
 - 1% annual increases apply in second and third years of 3-year agreement,
- Government Non-appropriation of Funds addendum to be included in any agreement

Pricing is for the exclusive use of San Mateo County Law Library and may not apply to any other Agency or Office.


All pricing subject to expiration 30 Days from proposal date, page 1



THOMSON REUTERS

BETTER RESULTS FASTER

Westlaw

 THOMSON REUTERS*	<h2 style="margin: 0;">Order Form</h2> <p style="margin: 0;">Contact your representative paul.vandenberg@thomsonreuters.com with any questions. Thank you.</p>	<h2 style="margin: 0;">Order ID: Q-00259104</h2>
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Account Address

Account #: 1004063291
 SAN MATEO COUNTY LAW LIBRARY
 PATRON ACCESS
 710 HAMILTON ST
 REDWOOD CITY
 CA, 94063-1648
 US

Shipping Address

Account #: 1004063291
 SAN MATEO COUNTY LAW LIBRARY
 PATRON ACCESS
 710 HAMILTON ST
 REDWOOD CITY
 CA, 94063-1648
 US

Billing Address

Account #: 1004063291
 SAN MATEO COUNTY LAW LIBRARY
 PATRON ACCESS
 710 HAMILTON ST
 REDWOOD CITY
 CA, 94063-1648
 US

This Order Form is a legal document between West Publishing Corporation and Subscriber. West Publishing Corporation also means "West", "we" or "our" and Subscriber means "you", or "I". Subscription terms, if any, follow the ordering grids below.

Service Material	Product	Monthly Charges	Minimum Term (Months)	Year Over Year Increase During Minimum Term
40757482	WEST PROFLEX	\$5,421.76	36	1%

Online/ Practice Solution/Software/ProFlex Products : Monthly Charges begin on the date we process your order and will be prorated for the number of days remaining in that calendar month, if any. Your Monthly Charges will continue for the number of complete calendar months listed in the Minimum Term column above. The percent increases for multi-year orders appear in the Term Increases column above. Subscriber ("you" or "I") is also responsible for all Excluded Charges. Excluded Charges are for accessing Westlaw data or a Practice Solutions service that is not included in your subscription. Excluded Charges may change after at least 30 days written or online notice.

For Window Products: Monthly Charges begin on the date we process your order and will continue for the number of complete calendar months in the Minimum Term column above. The percent increases for multi-year orders appear in the Term Increases column above. Monthly Charges are due regardless of the level of your usage. Transactional usage charges that exceed the Monthly Charges are waived up to the Monthly Window amount stated above. In addition to the Monthly Charges you are responsible for transactional usage charges in excess of the Monthly Window. Transactional charges are calculated based upon our then-current Schedule A rates. You are also responsible for all Excluded Charges. Excluded Charges are charges for accessing a service that is not included in your subscription. Excluded Charges may change after at least 30 days written or online notice.

To apply Window charges to a specific month, the request must be submitted at least five (5) business days prior to the end of the month.

For Online/Practice Solutions/Software /ProFlex Products: Your subscription will change to a month-to-month status at the end of the Minimum Term, and your Monthly Charges will increase by 7%. Thereafter, the Monthly Charges will increase 7% every 12 months unless we notify you of a different rate at least 60 days before the annual increase. You are also responsible for all Excluded Charges. Excluded Charges may change after at least 30 days written or online notice. Either of us may cancel the month-to-month subscription by sending at least 30 days written notice. Send your notice of cancellation to Customer Service, 610 Opperman Drive, P.O. Box 64833, Eagan, MN 55123-1803.

Automatic Renewal Term for Window Products. Your subscription will change to a month-to-month status at the end of the Minimum Term and your Monthly Charges will be billed at up to our then-current rate. Thereafter, we may modify the Monthly Charges after at least 30 days notice. The Monthly Window will remain unchanged. Monthly Charges are due regardless of the level of your usage. Transactional usage charges that exceed the Monthly Charges are waived up to the Monthly Window. In addition to the Monthly Charges, you are responsible for transactional usage charges in excess of the Monthly Window. Transaction charges are calculated based upon our then-current Schedule A rate. You are also responsible for all Excluded Charges. Excluded Charges may change after 30 days written or online notice. Either of us may cancel the month-to-month subscription by sending at least 30 days written notice. Send your notice of cancellation to Customer Service, 610 Opperman Drive, P.O. Box 64833, Eagan MN 55123-1803.

To apply Window charges to a specific month, the request must be submitted at least five (5) business days prior to the end of the month.

Federal Government Subscribers Optional Minimum Term. Federal government subscribers that chose a multi-year Minimum Term, those additional months will be implemented at your option pursuant to federal law.

Electronic

Charges, Payments & Taxes. You agree to pay all charges in full within 30 days of the date of invoice. You are responsible for any applicable sales, use, value added tax (VAT), etc. unless you are tax exempt. If you are a non-government subscriber and fail to pay your invoiced charges, you are responsible for collection costs including attorneys' fees.

Credit Verification. If you are applying for credit as an individual, we may request a consumer credit report to determine your creditworthiness. If we obtain a consumer credit report, you may request the name, address and telephone number of the agency that supplied the credit report. If you are applying for credit on behalf of a business, we may request a current business financial statement from you to consider your request.

Auto Charge Credit Card/Electronic Funds Transfer Election Payment Terms. You may authorize us to automatically charge a credit card, debit card or electronic fund transfer to pay charges due. Contact Customer Service at 1-800-328-4880 for authorization procedures. If you have previously authorized us to bill a credit card, debit card or make electronic fund transfers for West subscriptions on an ongoing basis, or authorizing the same as part of this order, no further action is needed.

Returns and Refunds. You may return a print product to us within 45 days of the original shipment date if you are not completely satisfied. Assured Print Pricing, Library Savings Plan, West Complete, Library Maintenance Agreements, ePack, WestPack, Westlaw, CLEAR, Monitor Suite, ProView eBook, Software, West LegalEdcenter, Practice Solutions, TREWS and Serengeti charges are not refundable. Please see <http://static.legalsolutions.thomsonreuters.com/static/returns-refunds.pdf> or contact Customer Service at 1-800-328-4880 for additional details regarding our policies on returns and refunds.

Applicable Law. This Order Form will be interpreted under Minnesota state law. Any claim by one of us may be brought in the state or federal courts in Minnesota. If you are a state or local governmental entity, your state's law will apply and any claim may be brought in the state or federal courts located in your state. If you are a United States Federal Government subscriber, United States federal law will apply and any claim may be brought in any federal court.

Excluded Charges. If you access services that are not included in your subscription you will be charged our then-current rate ("Excluded Charges"). Excluded Charges will be invoiced and due with your next payment. For your reference, the current Excluded Charges schedules are located at the links below. Excluded Charges may change after at least 30 days written or online notice.

<http://static.legalsolutions.thomsonreuters.com/static/agreement/plan-2-pro-govt-agencies.pdf>

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Contact your representative paul.vandenberg@thomsonreuters.com with any questions. Thank you.

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Order Confirmation Contact (#28)

Contact Name: Caroline Bracco
Email: cbracco@smclawlibrary.org

Shipping Information:

Shipping Method: Ground Shipping - U.S. Only

eBilling Contact

Contact Name
Email

Account Number	Account Name	Account Address	Action
1004063291	SAN MATEO COUNTY LAW LIBRARY	710 HAMILTON ST REDWOOD CITY CA, 94063-1648	New

Quantity	Unit	Service Material #	Description
3	Seats	42115616	Pat Acc State Analytical for Patron Access
3	Seats	42115735	California Core for Patron Access (Westlaw PRO™)

Contact	Email Address	Contact Description
Caroline Bracco	cbracco@smclawlibrary.org	EML PSWD CONTACT

From IP Address	To IP Address	From IP Address	To IP Address	From IP Address	To IP Address
111.111.111.111					

15

Electronic

Thanks for your call, this morning. To help you explain to the Board, I have attached a pie chart that you can use as a visual. Your current rate is **\$5213.72/month**. To get everything included in your current subscription, you will need to subscribe to National Core, Analytical Plus, and Related Documents for 3 seats. The cost for this would be **\$6,256.46/month**. New features of the plan will include graphical and legislative history for all jurisdictions available, and virtually all of our secondary sources.

To add Litigation or Practical Law, the total subscription would be **\$6,386.81/month**. To add both, the total cost would be **\$6517.15/month**.

To reduce to 2 seats and subscribe to National Core, Analytical Plus, and Related Documents, the cost would be **\$5865.44/month**.

For 2 seats, to add Litigation or Practical Law to the above, the total subscription would be **\$5995.78/month**. To add both, the total cost would be **\$6216.12/month**.

The new contract would be for a term of 3 years, with 2% yearly increases. Please note that your current contract includes 5% increases, so this will be a large savings to the Law Library.

Print

Caroline Bracco

From: Vandenberg, Paul R. (Legal) <paul.vandenberg@thomsonreuters.com>
Sent: Friday, June 01, 2018 3:51 PM
To: cbracco@smclawlibrary.org
Cc: Dhall, Amy (Legal)
Subject: RE: LMA Potential Changes
Attachments: Caroline's 1st_ San Mateo Proposal and final exhibit with ProView (003).xlsx

Good afternoon Caroline,

Please review the attached LMA proposal reflecting the ~~reduced rates we could~~ provide to you with your initial edits. Your cuts were modest, so the reduction is fairly slight... just \$177 / month.

\$2,124.⁰⁰ annual

When you have the chance, please let us know your thoughts and where you would like to go from here. I will also plan on calling you early next week to go over your options.

Have a wonderful weekend,

Paul Vandenberg
Government, Academic, and Law Enforcement Sales Consultant

WEST, a Thomson Reuters Company
paul.vandenberg@thomsonreuters.com

Tel. 510.995.8129 or 408.641.9378

Fax (866) 535-1585

Cell (949) 422-0358



From: Caroline Bracco [<mailto:cbracco@smclawlibrary.org>]
Sent: Tuesday, May 29, 2018 2:53 PM
To: Vandenberg, Paul R. (Legal) <paul.vandenberg@thomsonreuters.com>
Subject: LMA Potential Changes

Hi Paul,

Thanks again for walking me through the process with the spreadsheets on Friday. I have had a first pass at the LMA titles and have marked some sample titles that could potentially be removed, depending on cost-savings, of course. Please take a look at the attached and see if I have a) marked it in the correct manner and b) if any of these titles would affect pricing.

Thanks,

Caroline Bracco
Law Library Director
San Mateo County Law library
650-363-4913

Library Management Arrangement

San Mateo County Law Library

Proposed Renewal Offer:

Highlights:

Estimated Retail Cost (36 months)	\$425,895
Renewal Offer (36 months)	\$88,032
Projected Cumulative Savings:	\$337,863

	<u>Monthly LMA Price</u>	<u>Annual LMA Price</u>	<u>Estimated Retail Cost</u>
August 1, 2018 to July 31, 2019	\$2,327	\$27,924	\$125,851
August 1, 2019 to July 31, 2020	\$2,443	\$29,316	\$141,330
August 1, 2020 to July 31, 2021	\$2,566	\$30,792	\$158,714

Offer Terms:

- Contract Length: 3 Years	- Swap Percentage: 5%
- YOY Increases: 5% 5% 5%	- Swap Frequency: 1 - Annual

Offer Expiration: 7/27/2018

Action	Copies	Sub Material Desc
Exclude	1	ALR 1ST BLUE BOOK SUB
Exclude	1	ALR INDEX SUB
Exclude	1	ALR INDEX VOLUMES ONLY SUB
Exclude	1	ANTITRUST ADVISER SUB
None		ATTORNEY MALPRACTICE LAW AND PROCEDURE SUB
None		ATTORNEYS FEES SUB
Exclude	1	BUSINESS LAWS INC RECORDS RETENTION SUB
None		CA AFFIRMATIVE DEFENSES SUB
None		CA ANNO CODE SUB
None		CA CODE FORMS BUSINESS AND PROFESSIONS 3D SUB
None		CA CODE FORMS CIVIL PROCEDURE 7TH SUB
None		CA CODE FORMS CIVIL SUB
None		CA CODE FORMS COMMERCIAL 2D SUB
None		CA CODE FORMS CORPORATIONS 2D SUB
None		CA CODE FORMS EDUCATION SUB
None		CA CODE FORMS ELECTIONS 3D SUB
None		CA CODE FORMS FAMILY SUB
None		CA CODE FORMS GOVERNMENT CODE 3D SUB
None		CA CODE FORMS PROBATE SUB
None		CA CODE FORMS PUBLIC UTILITIES SUB
None		CA CODE FORMS REVENUE AND TAXATION SUB
None		CA COMMON INTEREST DEVELOPMENT SUB
Exclude	1	CA CONFESSIONS LAW SUB
None		CA CONSTRUCTION LAW MANUAL SUB
None		CA COURT BAY AREA AND CA BAY AREA KEYRULES SUB
None		CA COURT RULES STATE AND FEDERAL DISTRICT COURT AND FEDERAL BANKRUPTCY COURT S V.I TO IIA SUB
None		CA CRIMINAL FORMS AND INSTRUCTION WITH FORMS ON CD SUB
None		CA CRIMINAL JURY INSTRUCTIONS COMPANION HANDBOOK SUB
None		CA CRIMINAL LAW SUB
None		CA DESKTOP CIVIL CODE SUB
None		CA DESKTOP CIVIL PROCEDURE CODE SUB
None		CA DESKTOP EVIDENCE CODE ANNO SUB
None		CA DESKTOP FAMILY LAWS AND COURT RULES SUB
None		CA DESKTOP JUVENILE LAWS AND RULES SUB
None		CA DESKTOP PENAL CODE SUB
None		CA DESKTOP PROBATE CODE SUB
None		CA DESKTOP VEHICLE CODE SUB
Exclude	1	CA DIGEST 2D SUB GREEN
None		CA DRUNK DRIVING DEFENSE SUB
None		CA INSURANCE LAW HANDBOOK SUB
None		CA JUDICIAL COUNCIL FORMS SUB
None		CA JURISPRUDENCE SUB
None		CA JURY INSTRUCTIONS CA CRIMINAL AND CALJIC SUB
None		CA JURY INSTRUCTIONS CIVIL BAJI AND CACI SUB

None		CA JURY INSTRUCTIONS COMPANION HANDBOOK SUB
None		CA PROPERTY TAXING SUB
None		CA SMALL CLAIMS COURT BENCHBOOK SUB
Exclude	1	CA STYLE MANUAL SUB
None		CIVIL ACTIONS AGAINST STATE AND LOCAL GOVERNMENT: DIVISION, AGENCIES, OFFICERS SUB
None		CIVIL RIGHTS AND CIVIL LIBERTIES LITIGATION LAW OF SECTION 1983 SUB
None		CJER CA CIVIL PROCEEDINGS BEFORE TRIAL BENCHBOOK SUB
None		CJER CA CIVIL PROCEEDINGS TRIAL BENCHBOOK SUB
None		COMMERCIAL REAL ESTATE FORMS WITH FORMS ON CD SUB
None		COPYRIGHT REGISTRATION PRACTICE SUB
None		CREDITORS RIGHTS IN BANKRUPTCY SUB
Exclude	1	DECENNIAL DIGEST SUB
None		DISABILITIES AND THE LAW SUB
None		DOMESTIC TORTS FAMILY VIOLENCE, CONFLICT, AND SEXUAL ABUSE SUB
None		DOMKE ON COMMERCIAL ARBITRATION SUB
None		EDUCATION LAW 1ST AMENDMENT DUE PROCESS AND DISCRIMINATION LITIGATION SUB
None		EMPLOYMENT DISCRIMINATION LAW SUB
None		ERISA PRACTICE AND PROCEDURE SUB
None		EXPERT WITNESS CHECKLISTS SUB
None		FAMILY ESTATE PLANNING GUIDE SUB
None		FEDERAL CIVIL JUDICIAL PROCEDURE AND RULES SUB
None		FEDERAL CIVIL RIGHTS ACTS SUB
None		FEDERAL CIVIL RULES HANDBOOK SUB
None		FEDERAL CRIMINAL APPEALS SUB
None		FEDERAL CRIMINAL CODE AND RULES SUB
None		FEDERAL INFORMATION DISCLOSURE SUB
None		FEDERAL JURY PRACTICE AND INSTRUCTIONS CIVIL COMPANION SUB
None		FEDERAL JURY PRACTICE AND INSTRUCTIONS CRIMINAL COMPANION SUB
None		FEDERAL JURY PRACTICE AND INSTRUCTIONS SUB
None		FEDERAL PROCEDURE RULES SERVICE 9TH CIRCUIT SUB
None		FEDERAL PROCEDURE RULES SERVICE NATIONAL CIRCUIT SUB
None		FEDERAL SENTENCING GUIDELINES MANUAL SUB
None		FEDERAL SOCIAL SECURITY LAWS SUB
None		FEDERAL TRIAL HANDBOOK CRIMINAL SUB
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Exclude	1	FREDERICK SUPREME COURT AND APPELLATE ADVOCACY SUB
Exclude	1	FUNDAMENTALS OF SPORTS LAW SUB
None		GENERAL DIGEST 11TH SUB
None		GENERAL DIGEST 12TH SUB
None		HANDLING CONSUMER CREDIT CASES SUB
None		HOUSING DISCRIMINATION LAW AND LITIGATION SUB

None		IMMIGRATION LAW AND CRIMES SUB
None		IMMIGRATION LAW AND DEFENSE SUB
None		INTERNAL REVENUE ACTS SUB
None		INTERNAL REVENUE MANUAL SUB
None		INTERNATIONAL INCOME TAX AND ESTATE PLANNING SUB
None		LAW OF PROBATION AND PAROLE SUB
None		LEGAL RIGHTS OF CHILDREN SUB
None		MALLEN LEGAL MALPRACTICE SUB
None		MALLEN LEGAL MALPRACTICE THE LAW OFFICE GUIDE TO PURCHASING LEGAL MALPRACTICE INSURANCE SUB
None		MANUAL COMPLEX LITIGATION SUB
None		MCCORMICK EVIDENCE PRACTITIONERS EDITION SUB
None		MCCORMICK MEDICARE AND MEDICAID SUB
None		MCCORMICK SOCIAL SECURITY CLAIMS SUB
None		MENTAL CAPACITY: LEGAL AND MEDICAL ASPECTS OF ASSESSMENT AND TREATMENT SUB
None		MILLER AND STARR CA REAL ESTATE SUB
None		MILLERS STANDARD INSURANCE POLICY LOOSELEAF SUB
None		MODERN CONSTITUTIONAL LAW SUB
None		NEWBERG ON CLASS ACTIONS SUB
None		NONPROFIT ORGANIZATIONS LAW AND TAXATION SUB
None		ONEAL CLOSE CORPORATION LAW AND PRACTICE SUB
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None		PATTERN DEPOSITION CHECKLISTS SUB
None		PIERCING THE CORPORATE VEIL SUB
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Exclude	1	PSYCHIATRY IN THE EVERYDAY PRACTICE OF LAW SUB
None		QUALIFIED DOMESTIC RELATIONS ORDERS SUB
None		RECOVERY FOR WRONGFUL DEATH AND INJURY SUB
None		REPRESENTATION OF WITNESSES BEFORE FEDERAL GRAND JURIES SUB
None		RESTATEMENT INTERIM CASE CITATIONS SUB
None		RIBSTEIN AND KEATINGE ON LIMITED LIABILITY COMPANIES WITH FORMS ON CD SUB
None		RIGHTS OF PRISONERS SUB
None		SEARCH AND SEIZURE A TREATISE ON THE 4TH AMENDMENT (LAFAVE) SUB
None		SEARCHES AND SEIZURES ARRESTS AND CONFESSIONS SUB
Exclude	1	SECURITIES LITIGATION FORMS AND ANALYSIS SUB
None		SEX-BASED EMPLOYMENT DISCRIMINATION SUB
Exclude	1	SIMES AND SMITH FUTURE INTERESTS SUB
None		SMOLLA AND NIMMER ON FREEDOM OF SPEECH SUB
None		STATE AND LOCAL GOVERNMENT CIVIL RIGHTS LIABILITY SUB
None		SUPREME COURT REPORTER INTERIM BOUND VOL SUB
None		SUPREME COURT REPORTER SUB

None	TRADEMARK REGISTRATION PRACTICE SUB
None	TRG BUSINESS AND PROFESSIONAL C. PRACTICE SUB
None	TRG CA CRIMINAL PROCEDURE LAW SUB
None	TRG CA MOTIONS IN LIMINE SUB
None	TRG CA PRACTICE EMPLOYMENT LITIGATION SUB
None	TRG CA PRACTICE GUIDE ALTERNATIVE DISPUTE RESOLUTION SUB
None	TRG CA PRACTICE GUIDE BANKRUPTCY SUB
None	TRG CA PRACTICE GUIDE CIVIL APPEALS AND WRITS CH 1-16 TABLES AND INDEX SUB
None	TRG CA PRACTICE GUIDE CIVIL PROCEDURE BEFORE TRIAL CH 1-14 TABLES AND INDEX SUB
None	TRG CA PRACTICE GUIDE CIVIL PROCEDURE BEFORE TRIAL STATUTES OF LIMITATION SUB
None	TRG CA PRACTICE GUIDE CIVIL PROCEDURE TRIAL FORMS SUB
None	TRG CA PRACTICE GUIDE CIVIL TRIALS AND EVIDENCE CH 1-18 TABLES AND INDEX SUB
None	TRG CA PRACTICE GUIDE CORPORATIONS CH 1-8 TABLES AND INDEX SUB
None	TRG CA PRACTICE GUIDE ENFORCING JUDGMENTS AND DEBTS CH 1-6 TABLES AND INDEX SUB
None	TRG CA PRACTICE GUIDE FAMILY LAW CH 1 TO 20 TABLES AND INDEX SUB
None	TRG CA PRACTICE GUIDE FAMILY LAW FORMS SUB
None	TRG CA PRACTICE GUIDE LANDLORD-TENANT CH 1-12 TABLES AND INDEX SUB
None	TRG CA PRACTICE GUIDE PERSONAL INJURY CH 1-10 TABLES AND INDEX SUB
None	TRG CA PRACTICE GUIDE PROBATE CH 1-16 TABLES AND INDEX SUB
None	TRG CA PRACTICE GUIDE PROFESSIONAL RESPONSIBILITY SUB
None	TRG CA PRACTICE GUIDE REAL PROPERTY TRANSACTIONS SUB
None	TRG CA PRACTICE INSURANCE LITIGATION SUB
None	TRG CA SUMMARY JUDGEMENT AND RELATED TERMINATION MOTIONS SUB
None	TRG CA THREE STRIKES SENTENCING SUB
None	TRG ELDER ABUSE LITIGATION SUB
None	TRG FEDERAL 9TH CIRCUIT APPELLATE PRACTICE LOOSELEAF CHAPTERS 1-7 AND CHAPTERS 8-14 TABLES AND INDEX SUB
None	TRG FEDERAL CIVIL PROCEDURE TRIAL SUB
None	TRG FEDERAL CIVIL TRIALS AND EVIDENCE SUB
None	TRG FEDERAL EMPLOYMENT LITIGATION SUB
None	TRG FORENSIC DNA EVIDENCE SCIENCE AND THE LAW SUB
None	TRG LEGAL SECRETARIES INCORPORATED LAW OFFICE PROCEDURES MANUAL SUB
None	TRG LSI LEGAL PROFESSIONALS HANDBOOK CHAPTERS 1-23 TABLES AND INDEX SUB

None		TRG SEX CRIMES:CALIFORNIA LAW AND PROCEDURE SUB
None		USCA INTERNAL REVENUE CODE UNANNO HARDBOUND VOL SUB
None		WESTS ALR DIGEST SUB
None		WILL CONTESTS SUB
None		WITKIN CA CRIMINAL LAW SUB
None		WITKIN CA EVIDENCE SUB
None		WITKIN CA PROCEDURE SUB
None		WITKIN SUMMARY CA LAW SUB
None		WORDS AND PHRASES SUB
None		FEDERAL LOCAL COURT FORMS SUB
None		
None		