



Tab 4

**Report to Convocation
June 27, 2019**

Priority Planning Committee

Committee Members:
Malcolm Mercer (Chair)
Robert Burd
Dianne Corbiere
Teresa Donnelly
Jacqueline Horvat
Isfahan Merali

Purpose of Report: Information

**Prepared by the CEO's Office
(Jim Varro - 416-947-3434)**

FOR INFORMATION

**FINAL REPORT ON THE
LAW SOCIETY'S STRATEGIC PLAN 2015 - 2019**

Introduction

In December 2015, the Priority Planning Committee (the Committee) issued a report setting out details of the priorities identified in the 2015-2019 Strategic Plan adopted by Convocation in October 2015, which are also set out in this report.

The Committee's progress reports on work on the priorities were provided to Convocation in June 2016, 2017 and 2018. The Committee has prepared this final report for Convocation's information on the work completed since the June 2018 report.

Background to Convocation's Priority Planning

The strategic planning session held in October 2015, noted above, fulfilled a requirement Convocation established in March 2007 with respect to planning and prioritizing matters for Convocation's policy agenda and achieving strategic objectives in a bencher term.

At that time, Convocation agreed on a process that included the planning session and establishing and utilizing the Committee to centralize and co-ordinate achieving the strategic priorities for the Law Society for the bencher term. The structured approach to planning and prioritizing the Law Society's policy agenda, overseen by the Committee and its reporting obligations to Convocation, assists in advancing and fulfilling the Law Society's mandate.

In confirming the Strategic Plan at the October 2015 planning session, Convocation provided direction to the Law Society on priorities for the 2015-19 bencher term.

The Committee's Report

Based on information received from management and reports of progress on initiatives through other committees, the Committee reports that initiatives under the Plan have been completed, with ongoing implementation of some initiatives, as set out at [Tab 4.1.1](#).

LAW SOCIETY STRATEGIC PLAN 2015-2019

THE LAW SOCIETY WILL LEAD AS PROFESSIONAL REGULATOR

To enhance its regulatory effectiveness in the public interest, the Law Society will focus on improvements and adjustments to its regulatory process, with particular attention to developing mental health initiatives and equity-based principles in the regulatory process.

THE LAW SOCIETY WILL PRIORITIZE LIFE-LONG COMPETENCE FOR LAWYERS AND PARALEGALS

The Law Society will focus on enhancing licensing standards and requirements and their assessment, and ways to improve and increase practice supports for lawyers and paralegals and provide better mentoring.

THE LAW SOCIETY WILL WORK TO ENHANCE ACCESS TO JUSTICE ACROSS ONTARIO

In continuing efforts to fulfill its responsibility to act to facilitate access to justice for Ontarians, the Law Society will focus on improved planning and assignment of resources and establishing its leadership role for the Law Society with a concrete action plan to achieve access to justice goals.

THE LAW SOCIETY WILL ENHANCE ITS ENGAGEMENT WITH STAKEHOLDERS AND THE PUBLIC WITH RESPONSIVE COMMUNICATIONS

The Law Society will focus on:

- enhancing communication to the public through Law Society outreach and other efforts, and
- enhancing communication to lawyers and paralegals as a matter of accountability and transparency,

with the goals of building a better public understanding of and educate the public on the role of the Law Society, and better enabling input from and engagement with lawyers and paralegals.

THE LAW SOCIETY WILL INCREASE ITS ORGANIZATIONAL EFFECTIVENESS

The Law Society will:

- review and revise as appropriate the Law Society's policy development process, guided by the duty to protect the public interest;
- enhance measurement and assessment of current and proposed activities; and
- determine ways to improve the Law Society's governance structure, including better education for members of Convocation.

LAW SOCIETY STRATEGIC PLAN 2015-19 COMPLETED INITIATIVES

	INITIATIVE	TASK	RESULT
1	Evaluate and Enhance Current Admissions Standards and Licensing Requirements 1	<i>Explore expansion of areas of practice and delivery of services for paralegal licensees</i>	Bonkalo Report recommendations action plan approved by Convocation on December 1, 2017
2	Evaluate and Enhance Current Admissions Standards and Licensing Requirements 2	<i>Enhance entry level standards for lawyer licensees</i>	Two current transitional training pathways approved by Convocation December 2018; enhancements include paid articling and LPP/PPD work placements, measurements/audits/monitoring for greater oversight of articling and LPP/PPD work placements, and mandatory education/training for articling principals and LPP/PPD work placement supervisors
3	Evaluate and Enhance Current Admissions Standards and Licensing Requirements 3	<i>Assuring quality of instruction in pre-licensing institutions for paralegal licensing candidates</i>	Encompassed in Item 1 above and within the new task begun in 2018 for the comprehensive study of paralegal regulation through the Paralegal Standing Committee
4	Improve the Efficiency of the Law Society – Improve Our Measurement and Assessment of Current and Proposed Activities	<i>Undertake a program review, maximizing staff resources for information gathering, for each program and service, why it exists, what it costs and how it serves the public interest.</i>	Implementation underway with selected program reviews completed and others to be completed in 2019-20, across divisions.

LAW SOCIETY STRATEGIC PLAN 2015-19 COMPLETED INITIATIVES

	INITIATIVE	TASK	RESULT
5	Develop Mental Health and Equity Initiatives in the Regulatory Process 1	<i>Provide access to duty counsel at an early stage in the regulatory process in a one year pilot project</i>	Duty Counsel are available to provide general advice to licensees if they are facing a referral to the Proceedings Authorization Committee.
6	Develop Mental Health and Equity Initiatives in the Regulatory Process 2	<i>Provide clear authority for a hearing panel to convert a conduct application to a capacity application.</i>	Included in proposed Rules under "Adjust and improve the Regulatory Process 5" below, permitting a panel in a conduct application, on consent of the parties, to deal with matters that would otherwise be the subject of a capacity application.
7	Improve and Increase Practice Supports for Practitioners 1	<i>Improve education supports</i>	CPD curriculum of learning aligned with stages of practice and updated to reflect those concepts. New training modules have been developed. Integration of competencies-based training will continue to evolve, including new modalities of learning such as expanding online "just in time" learning and other offerings.
8	Improve and Increase Practice Supports for Practitioners 2	<i>Analysis to direct development of practice supports including possible enhanced practice management programs, including practice advisory</i>	Enhancements to Practice Management Helpline approved by Convocation October 2018, including streamlined telephone access to the Helpline, broadened scope of service, proactive development of additional, innovative, practical resources and promotion of the Helpline.

LAW SOCIETY STRATEGIC PLAN 2015-19 COMPLETED INITIATIVES

	INITIATIVE	TASK	RESULT
9	Increase Collaboration outside the Law Society with Stakeholders to Promote Better Access to Justice 1	<i>New task:</i> <i>Develop Indigenous Strategy (renamed Indigenous Framework)</i>	Indigenous Framework approved by Convocation June 2017. Implementation underway.
10	Increase Collaboration outside the Law Society with Stakeholders to Promote Better Access to Justice 2	<i>New task:</i> <i>Support and enhance the delivery of robust and sustainable legal aid services for Ontarians</i>	Recommendations in Legal Aid Working Group report approved at January 2018 Convocation. Access to Justice Committee engaged in oversight of implementation.
11	Increase Collaboration outside the Law Society with Stakeholders to Promote Better Access to Justice 3	<i>Collaborate with stakeholders to promote better access to justice</i>	Ongoing facilitation of work through The Action Group on Access to Justice.
12	Provide better communication outside of Profession – outreach, enhance public perception and education, focus on key messages	<i>Recommend enhancements for increased public and licensee awareness</i>	Final report to Convocation in February 2018; implementation of the public awareness and licensee engagement campaigns approved. LSO name change approved November 2, 2017, effective January 1, 2018 ; Legislative amendments effective May 8, 2018.

LAW SOCIETY STRATEGIC PLAN 2015-19 COMPLETED INITIATIVES

	INITIATIVE	TASK	RESULT
13	Provide better Communication with Practitioners – Accountability, Transparency and Input from the Professions	<i>Redesign the Law Society website</i>	Redesigned website launched September 2018
14	Adjust and improve the Regulatory Process 1	Alternative Business Structures Working Group – Civil Society Organizations	In September 2017, Convocation approved licensees’ delivery of legal services through civil society organizations to clients of such organizations in order to facilitate access to justice; framework in development for implementation in 2019
15	Adjust and improve the Regulatory Process 2	<i>New Task:</i> <i>Review Panel on Regulatory and Hearing Processes Affecting Indigenous Peoples</i>	Review Panel recommendations approved by Convocation May 2018; operational implementation underway
16	Adjust and Improve the Regulatory Process 3	<i>Compliance-Based Entity Regulation</i>	Task Force work continues on an implementation plan including regulation of entities, following Convocation’s approvals in 2016
17	Adjust and improve the Regulatory Process 4	<i>Advertising and Fee Arrangements Issues Working Group – Contingency Fee agreement, rules and guide</i>	Working Group work continues on implementation of reforms to regulation of contingency fees, based on Convocation’s approvals in 2017 and 2018

LAW SOCIETY STRATEGIC PLAN 2015-19 COMPLETED INITIATIVES

	INITIATIVE	TASK	RESULT
18	Adjust and improve the Regulatory Process 5	<i>New Law Society Tribunal Rules of Practice and Procedure and Practice Directions</i>	New Rules completed and reported to Convocation February 2019; following modifications, Rules to be returned to Convocation later in 2019
19	Improve the Governance of the Law Society Including Better Education for the Board	<i>Review the Law Society's governance structure including achieving the goals of transparency, inclusiveness, effectiveness, efficiency, and costs and, where appropriate, obtain the opinions of experts.</i>	Reforms approved by Convocation November 2018 and February 2019 to end Convocation participatory rights of life benchers and former Attorneys General, to end the office of emeritus bencher, to remove the voting rights of <i>ex officio</i> Treasurers in Convocation and to adopt Governance Policies and Practices, including a Bencher Code of Conduct