



LIBRARYCO INC.
BUSINESS PLAN 2012-2014



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I. Introduction

This business plan has been developed by the LibraryCo Inc. Board of Directors to guide LibraryCo through the years 2012 to 2014. The plan provides a framework for the Board of Directors to fulfil its mission to deliver high quality services in the 48 county courthouse law libraries and provide leadership in matters relating to law libraries. It also demonstrates the Board's strong commitment to the county and district law library system in Ontario. The plan is guided by key assumptions and trends in libraries of all types. LibraryCo will leverage its resources to build on past successes and enhance the delivery of information services by the county and district law libraries.¹

This business plan is the result of a strategic planning session that was held in Cobourg on September 23, 2011. The theme of the meeting was "Future Ready". The Board examined LibraryCo's current business model, successes and challenges, trends in libraries, vision concepts and issues and then worked to set priorities for the next three years. This plan is about LibraryCo and the county and district law libraries being prepared to meet the challenges of the next few years. It is about change and ensuring that LibraryCo focuses on the ways it must adapt to continue to be successful. While the Board of Directors is responsible for LibraryCo's stewardship and strategic decisions there are external issues, such as funding, staffing and the pricing and availability of legal resources, which are beyond its direct control.

This is the second business plan for LibraryCo since its reorganization in 2007. The first plan covered the years from 2009 to 2011 and can be found at <http://www.libraryco.ca/Publications/documents/LibraryCoBusinessPlanFinalVersion.pdf>

II. Overview of LibraryCo Inc.

Mandate and Governance

Established in 2001, LibraryCo Inc. is a not-for-profit share capital corporation mandated to undertake the central management of the Ontario county courthouse law library system in accordance with the objectives, policies and principles established and approved by the Law Society of Upper Canada (the Law Society) from time to time, in consultation with the County and District Law Presidents' Association (CDLPA) and the Toronto Lawyers' Association (TLA).²

Under the terms of the Unanimous Shareholder Agreement, the Law Society, CDLPA and TLA are LibraryCo's shareholders. Each shareholder is entitled to appoint representatives to the Board of Directors. The Law Society may appoint up to four directors, CDLPA may appoint up to three directors and TLA may appoint one director. Appendix 2 lists the current members of the LibraryCo Board of Directors.

¹ Currently, By-Law 13 of the Law Society of Upper Canada (made May 1, 2007 and amended June 28, 2007) provides for universal access to law libraries in Ontario for all lawyers as well as judges and other groups such as tribunal members. Access for members of the public is determined on a case by case basis. Lawyers are therefore the vast majority of current clients of the system and this business plan reflects that fact. Should By-Law 13 be amended to provide for expanded access to other groups, such as paralegals, this business plan can be read to include such groups as well as lawyers.

² Unanimous Shareholder Agreement, June 1, 2007, preamble.

LibraryCo also has stakeholders, which are organizations and associations with whom LibraryCo must work closely. These stakeholders currently include the Law Foundation of Ontario (LFO) and the Ontario Courthouse Librarians' Association (OCLA). The LFO has provided generous financial assistance to LibraryCo since its inception. OCLA's membership comprises the professional librarians and library staff in the association libraries.

As part of its mandate, LibraryCo establishes policies and priorities for the provision of law library services and programs by the county and district law libraries, provides funding to the associations to pay for the operation of the county and district law libraries, establishes guidelines and standards for the organization and operation of the county and district law libraries, and advises Convocation on all aspects of law library services and programs in the county and district law libraries.³

The issue of paralegal access to law libraries is currently under consideration. Permitting paralegals to access the county and district law libraries should not have a significant impact on law library operations.

Organization of Law Libraries

The present system of law libraries was developed by the Working Group on Long-Term Delivery of County and District Library Services, which was established by Convocation in 1998 to present options for redesigning the county and district law library system in Ontario. It is known as the "blended system" and provides for central management of library services while allowing for local input and management of individual libraries and establishing categories for law libraries. The law libraries are categorized as regional, area or local, in recognition that there are large, medium and small law libraries in the province.

There are five regional, 15 area and 28 local libraries. The regional libraries are the largest and consequently have larger budgets than the other libraries. They are staffed by at least one professional librarian and supported by library technicians and/or library assistants. In addition to serving their own constituents they also provide assistance to the smaller libraries. The area libraries were categorized based on their location, size and usage and are staffed by library technicians. One third are located in northern Ontario. The local libraries serve the smaller associations and all except one have part-time staff. Most local libraries are staffed by library assistants and are supported by the regional and larger area libraries.

The benefits of the blended system include a co-operative system of libraries that is province-wide rather than restricted to individual counties, and access by smaller associations to professional librarians and library technicians in the larger libraries. Appendix 7 lists each of the libraries by category.

Financial Information

LibraryCo is principally funded by fees which the Law Society of Upper Canada collects annually from lawyers in Ontario. A portion of these fees, known as the library levy, is allocated to LibraryCo. The monies are then distributed to the county and district law associations to

³ Law Society of Upper Canada By-Law 13, s. 6; Unanimous Shareholder Agreement, June 1, 2007, s. 4.1.

cover the costs of administering the law libraries and to LibraryCo to fund its operating expenses. LibraryCo also receives generous financial support from the Law Foundation of Ontario, in particular for the Toolkit of Legal Resources.⁴

III. Key Assumptions and Trends for LibraryCo

Key Assumptions

This strategic plan is guided by key assumptions about the county and district law library system in Ontario and its environment. These key assumptions include:

- Budgets for LibraryCo and the county and district law associations will remain relatively static
- Staffing for the county and district law libraries should be optimal for all lawyers throughout Ontario
- The number of legal publishers in Canada may decline in the near future, which may impact e-content licensing
- The current economic climate has negatively impacted funding from the Law Foundation of Ontario, resulting in less funding for the Toolkit of Legal Resources
- Demographics of Ontario's lawyers are shifting. Large segments of lawyers do not use physical libraries. Recent graduates are much more comfortable with technology and e-content than their predecessors and are being educated in very different research methods than those who attended law school 10 to 25 years ago.
- LibraryCo will continue its open lines of communication with shareholders, stakeholders and clients in order to provide an optimal level of service

Key Trends in Libraries

In developing this plan LibraryCo has identified key trends that are likely to affect libraries, including the county and district law library system in Ontario. These trends are:

- Need to balance electronic resources with paper collections
- Increasing reliance on technology to deliver information services
- Global financial challenges that are leading to fiscal restraint
- Fewer legal information vendors
- Libraries are shifting focus from a passive resources-based model to an active information services model where the real added value is what the professional librarian brings to the client. This shift is driven by the knowledge that libraries must adapt to the needs of their clientele. Likewise, library staff are refocusing their service orientation and skill sets to meet this shift.

⁴ The Toolkit of Legal Resources was developed by LibraryCo to provide access by all lawyers in Ontario to selected high-quality electronic legal resources. It is available in all 48 county and district law libraries. 31 associations are also eligible for the Desktop Delivery Initiative, which brings a select set of electronic legal resources to lawyers' desktops without the need to be physically present in the law library.

IV. LibraryCo's Key Strengths

Since its inception in 2001, LibraryCo has achieved notable success in the overall management of Ontario's county and district law libraries. Its key strengths include:

- Delivering standardized content and research materials to all lawyers, thereby providing a universal level of service throughout the province
- Recognized and respected brand
- Providing all associations with the best resources through centralized contract management which leverages money, resources and staffing
- Strong financial management
- Efficient governance structure, spirited commitment from the LibraryCo Board of Directors and firm ongoing support from its shareholders and stakeholders

V. Strategic Priorities for 2012-2014

LibraryCo's three pillars – core collections, cost management and communication – remain an integral part of the strategic planning process. In addition to these three pillars, the following issues and developments were considered in determining the strategic priorities for LibraryCo:

- The value LibraryCo brings by standardizing access to legal information, assisting the Law Society of Upper Canada to fulfill its mandate and equipping lawyers with the information tools they need to provide the best service to their clients
- The need to focus on the importance of the role for LibraryCo as the in-house library for all lawyers, with particular emphasis on sole practitioners and small law firms
- The opportunity for LibraryCo to work in conjunction with the county and district law libraries in facilitating access to Continuing Professional Development (CPD) programs in library facilities
- The need to base library services on expertise and value-added service. This service model highlights the importance of virtual reference services.

Based on these key assumptions and trends, together with the fundamentals of the county and district law library system in Ontario, LibraryCo has identified three strategic priorities for 2012-2014 which are:

1. Ensuring accessible, universal resources and services for all lawyers
2. Designing and delivering services, based on objective research, to all lawyers regardless of geographic location
3. Advancing recognition of LibraryCo's value among its shareholders and stakeholders

LibraryCo acknowledges that some of these priorities have been explored in the past under other circumstances and with different technologies. Exploring them again will present challenges but LibraryCo believes that this is the right direction for it to take and will help to strengthen relationships with shareholders and stakeholders.

1. Ensuring accessible, universal resources and services for all lawyers

The goal of accessible, universal resources and services underscores how the law libraries should become extensions of lawyers' office libraries in ways that will develop and enhance their professional competencies. It will be accomplished in three main ways by:

- i. Providing continuing access to content and resources that will be regularly reviewed and enhanced
- ii. Reconfiguring portions of physical library space to create resource commons that accommodate research, networking and education
- iii. Using existing and emerging technologies to enhance the delivery of reference service to all lawyers in the province

To achieve this goal LibraryCo will:

- enhance the Toolkit of Legal Resources to become an easy-to-use, intuitive dashboard of resources that lessen dependence on commercial publishers
- continue the core collections lists and collection standards⁵
- work with associations to ensure the relevancy of library space and transform portions of existing space into an information commons for research, mentoring, networking and education
- work with legal information providers to ensure the accessibility of legal content, publications and applications for lawyers throughout Ontario

Success measures will include:

- whether associations and their member lawyers are realizing tangible benefits from LibraryCo services (e.g. increased usage of the libraries and qualitative reports from lawyers)
- significant usage of electronic and available paper resources
- whether all services and resources are universally available to all lawyers throughout the province

2. Designing and delivering services, based on objective research, to all lawyers regardless of geographic location

LibraryCo's goal is to establish how information services and resources can best benefit lawyers' practices. To accomplish this, LibraryCo will research the information behaviours and preferences of lawyers and review past market research. The survey design will be outsourced. As part of the research process, LibraryCo will approach the law schools to learn how legal research is taught and how law students conduct legal research today as well as how new law schools are approaching reference service and collection development. The outcomes will provide LibraryCo with insights and evidence to design, develop and deliver services that will be unique and indispensable to the lawyers of Ontario.

⁵ The core lists are the standards for collection development in the area and local libraries. They were first developed in 2001 and are now revised annually.

To achieve this goal LibraryCo will:

- develop a province-wide virtual reference service using current technologies
- design, develop and pilot a service based on objective research
- standardize competence among library staff by developing core competencies for the county and district law libraries and providing ongoing training for staff

Success measures will include:

- acquiring information about lawyers' information behaviours and preferences
- piloting a new information service for members of the Law Society

3. Advancing recognition of LibraryCo's value among its shareholders and stakeholders

LibraryCo's goal is to develop and implement a communication and promotion strategy that will raise awareness of its value to lawyers and its alignment to the mandate of the Law Society of Upper Canada. It will also heighten awareness of the services and resources available through LibraryCo and the positive contribution that these services and resources make to the development of lawyers' professional competencies.

To achieve this goal LibraryCo will:

- increase awareness of the Toolkit of Legal Resources
- promote the associations as centres of education, mentoring and networking
- increase awareness of LibraryCo's role in the development and delivery of legal information services

Success measures will include:

- increased usage of the Toolkit of Legal Resources and the Desktop Delivery Initiative
- increased usage by lawyers of the physical law libraries

Ongoing dialogue with LibraryCo's shareholders and stakeholders will be integral to the success of this plan.

VI. Proposed Implementation Steps

1. Examine ways to expand library services beyond traditional reference work to include education and networking opportunities for lawyers. As part of this exercise LibraryCo will look to other institutions including the law schools and other provincial and state court library systems.

2. Initiate a province-wide reference service using existing technologies. This is a significant undertaking and includes these tactics:

- i. Research appropriate technologies and best practices
- ii. Conduct a survey of lawyers' research methods and preferences

- iii. Contact Ontario law school deans to learn how legal research is taught and student research preferences
- iv. Review the Toolkit of Legal Resources and the Desktop Delivery Initiative

3. Design a communication and promotion strategy for LibraryCo. This strategy will emphasize the Toolkit of Legal Resources, the transformation of libraries to information commons, the implementation of core competencies for library staff and the increased use of technology to deliver information services. This strategy will be implemented in a variety of ways that include visits by the Board General Manager to the associations, discussions with shareholders and the library sessions at the CDLPA plenaries.

4. Review existing core competencies for legal and special librarians and use that as a starting point to develop core competencies that are specific to the county and district law library staff.

5. Review and modify as needed the core collections lists and the content of the Toolkit of Legal Resources and the Desktop Delivery Initiative.

Appendix 1 – LibraryCo Inc. Financial Statements

LibraryCo Inc's most recent audited financial statements can be found at http://www.libraryco.ca/Publications/documents/libraryCo_AR10_eng.pdf beginning at page 3.

Appendix 2 – LibraryCo Inc. Board of Directors

Bruce Hutchison, Chair TLA appointment	Alan Silverstein, Vice Chair Law Society appointment	Cathy Corsetti Law Society appointment
Michael Drake CDLPA appointment	Jacqueline Horvat Law Society appointment	Romuald Kwolek CDLPA appointment
James Scarfone Law Society appointment		Frances Wood CDLPA appointment

Appendix 3 – LibraryCo Staff

Martha Foote, MLIS Board General Manager	Raluca Serban, B.Sc., L.I.T. Assistant to the Board General Manager
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Appendix 4 – LibraryCo Inc. Shareholders and Stakeholders

Shareholders

Law Society of Upper Canada	County and District Law Presidents' Association	Toronto Lawyers' Association
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Stakeholders

Law Foundation of Ontario	Ontario Courthouse Librarians' Association
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Appendix 5 – CDLPA Library Committee Members

Michael Johnston CDLPA Chair	Dan Rosenkrantz Chair, CDLPA Library Committee	Jane Murray East Region
Jennifer Kelly Northeast Region	Mauro DiCarlo Central East Region	Ruby Van Bendegem Northwest Region
Rebecca Bentham Central South Region	Thomas Chalmers Southwest Region	Bryan Hicks Central West Region
Joan Rataic-Lang Toronto Lawyers' Association	Brenda Carbone OCLA – Area Library	Mary-Jo Mustoe OCLA – Local Library

Jennifer Walker
OCLA – Regional Library

Alfred Schorr
At Large appointment

Jason Leung
At Large appointment

Appendix 6 – Key Law Society of Upper Canada Personnel

Wendy Tysall
Chief Financial Officer
LibraryCo Inc. and Law
Society of Upper Canada

Diana Miles
Director, Professional Development
and Competence

David Whelan
Manager, Legal Information

Gary Cheong
Senior Financial Analyst

Marilyn Elkin
Roving Law Librarian

Laura Cohen
Human Resources Director,
and members of the Human
Resources Department

Appendix 7 – List of County and District Law Libraries

LOCAL – 28	AREA – 15	REGIONAL - 5
Brant Law Association	Algoma District Law Association	County of Carleton Law Association
Bruce Law Association	Durham Region Law Association	The Essex Law Association
The Law Association of the District of Cochrane	Frontenac Law Association	The Hamilton Law Association
Dufferin County Law Association	The Halton County Law Association	Middlesex Law Association
The Elgin Law Association	District of Kenora Law Association	Toronto Lawyers' Association
Grey County Law Association	The Lincoln County Law Association	
The Haldimand Law Association	The Nipissing Law Association Library	
Hastings County Law Association	Peel Law Association	
Huron Law Association Inc.	The Peterborough Law Association	
The Kent Law Association	The County of Renfrew Law Library Association	
Lambton Law Association	Simcoe County Law Association	
The County of Lanark Law Association	Sudbury District Law Association	
The Leeds & Grenville Law Association	Thunder Bay Law Association	
The Lennox & Addington Law Association	Waterloo Law Association	
Manitoulin District Law Association	York Region Law Association	
The Muskoka Law Association		
Norfolk Law Association		
The Northumberland County Law Association		
Oxford County Law Association		
The Parry Sound Law Association		
County of Perth Law Association		
Prescott & Russell Law Association		
The District of Rainy River Law Library Association		
Stormont, Dundas & Glengarry Law Association		
The Temiskaming Law Association		
Victoria-Haliburton Law Association		
The Welland County Law Association		
Wellington Law Association		



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