

Diana Miles, CEO of the Law Society of Ontario

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# Update to FOLA

## November 2022



**Law Society**  
of Ontario

**Barreau**  
de l'Ontario

# The 2023 budget

## Vision & approach

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- Approved by Convocation on October 27
- Represents a return to regular business operations while facing challenging economic times
- Financial focus continues to ensure that we support our corporate objectives and public interest obligations
- Incorporates ongoing savings and process improvements implemented during the pandemic.

## Pressures & context

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We enter 2023 facing:

- a significant increase in claims activity in the lawyer pool of the Compensation Fund
- decreased value of investments and market volatility
- high inflation rates
- new policies and programs approved by Convocation in 2022 to implement in 2023
- required ongoing maintenance for Osgoode Hall and the grounds.

# The 2023 budget – overview

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The budget focuses on the Law Society's core operations and serving the public, licensees and candidates by:

- investing in business process improvements
- removing reliance on high-risk legacy information technology systems
- providing support for other organizations
- anticipating transition effects on revenues or expenses
  - 2023 brings us back to normalized business activity
- delivering on Convocation-approved programs and policies
  - creation of an online Practice Essentials Course - mandatory, effective January
  - implementation of Experiential Training Enhancements.

This budget also supports essential facilities infrastructure repairs to Osgoode Hall and the grounds while respecting and maintaining the building's heritage designation.

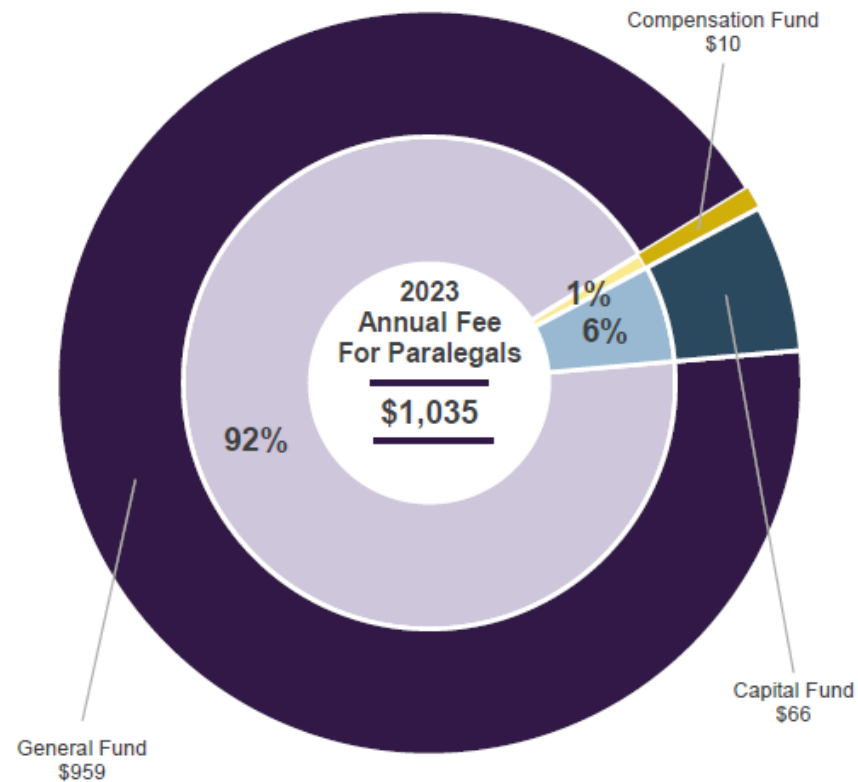
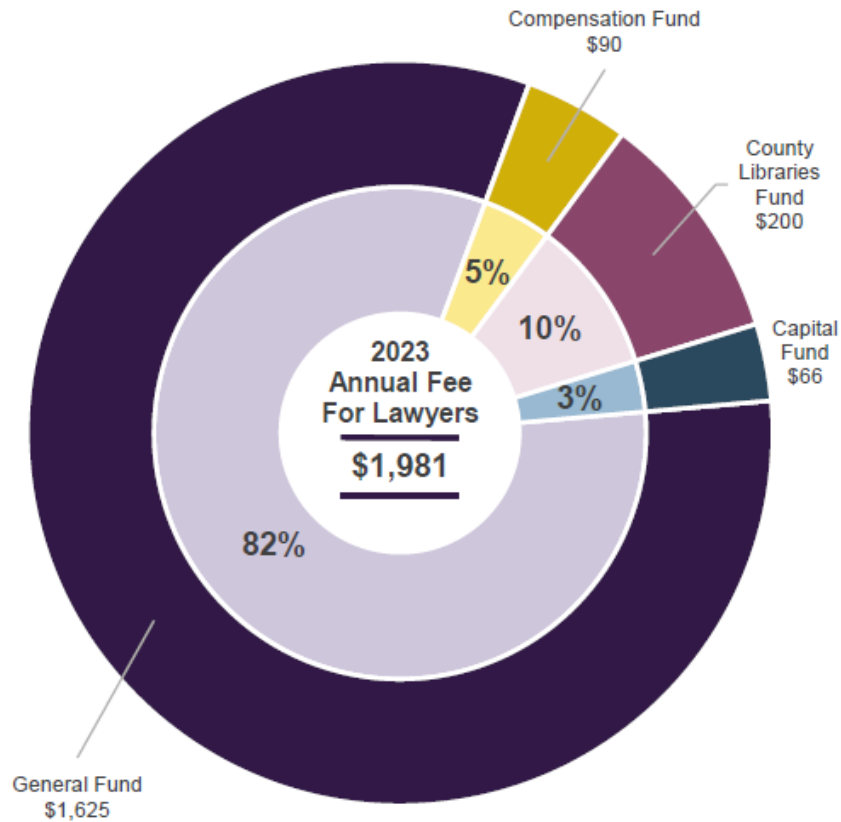
# The 2023 budget – licensee fees

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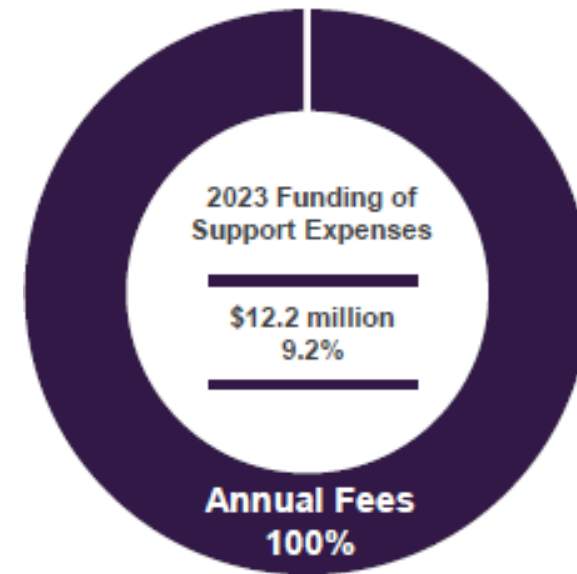
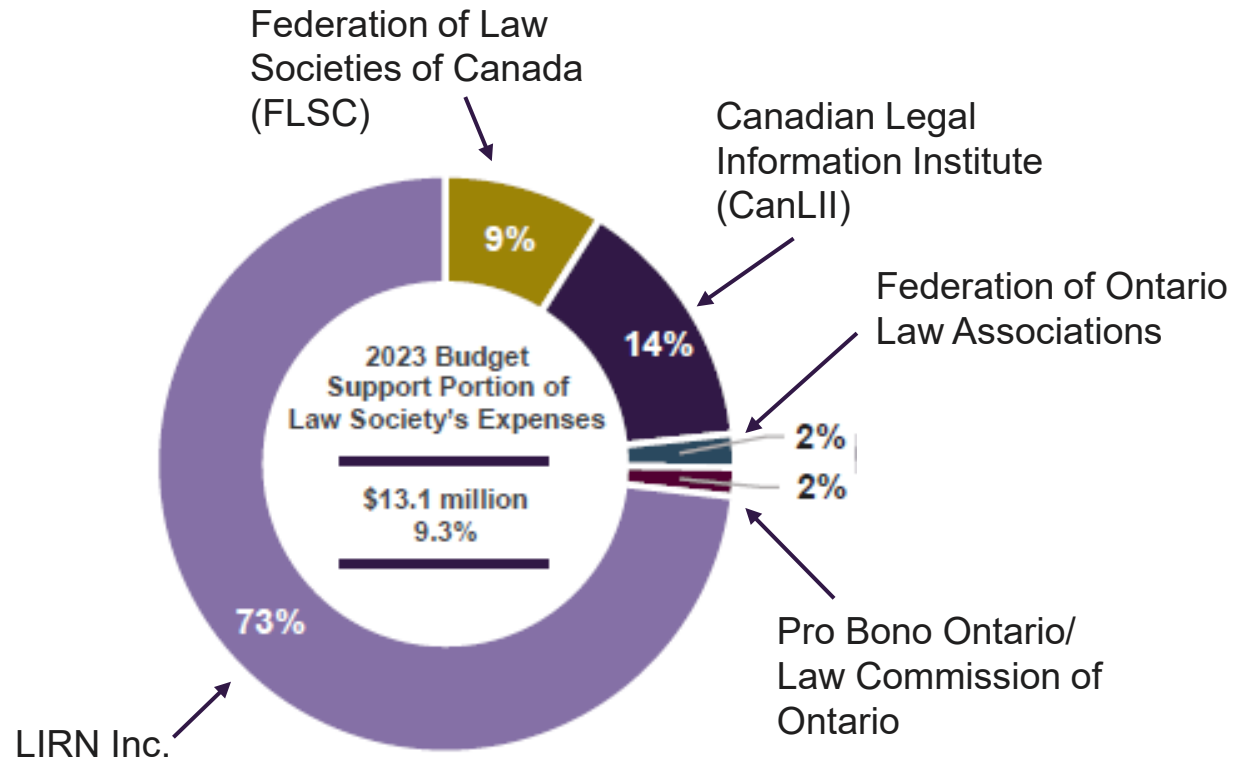
- Budget years 2020, 2021 and 2022 included substantial decreases in annual fees
- Fees will increase in 2023, but remain lower than 2018 despite inflation
- Majority of increase for lawyers is related to replenishing the Compensation Fund
- Fund balances resulting from pandemic savings have been used to mitigate fee increases while ensuring that Law Society operations are not compromised.

	2023 fees	2022 fees
Lawyer	\$1,981	\$1,813
Paralegal	\$1,035	\$955

# The 2023 budget – allocation of annual fees



# The 2023 budget – support of other organizations



# Looking ahead to 2023

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# Bencher election

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- In April 2023, 45 licensees will be elected to serve as benchers until 2027
- Nominations are open until Feb. 24, 2023
- The nomination package is online at [LSO.ca/2023BencherElection](https://LSO.ca/2023BencherElection)
- A Bencher Candidate Orientation and Education course is required for those who have never previously been an elected bencher
- In March, Voting Guides will be available online
- Online voting from April 19 to April 28 – results announced on May 1, 2023
- The new term commences at the May 25 meeting of Convocation.

A graphic for the Bencher Election 2023. It features a blue silhouette of a person in profile, looking at a tablet. The background has yellow and white curved stripes. The text is in blue and white.

Law Society of Ontario | Barreau de l'Ontario

**Bencher Election** | **Élection du Conseil**

**Have your say.  
Make a difference.**

**Run as a candidate.  
Vote in the election.**

**[LSO.ca/BencherElection2023](https://LSO.ca/BencherElection2023)**



# Operational updates

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## **Mandatory compensation**

- Convocation approved a mandatory minimum compensation of \$620 per week
- This applies to lawyer licensing candidates during articling and the work placement component of the Law Practice Program.

## **Certified Specialist Program**

- In September, Convocation suspended the winding down of this program pending further consideration by Convocation
- The Professional Development and Competence Committee is to consult on the matter, reconsider and report back to Convocation before the end of 2023.



# Licensee resources

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## Technology Resources Centre

LSO.ca/TechResources

- Your one-stop access to technology resources, supports, training and CPD

## Practice Management Helpline LSO.ca/PMH

- Licensees with professional responsibility or practice management questions can call or email

## Coach and Advisor Network (CAN) LSO.ca/CAN

- CAN connects practicing/licensed lawyers and paralegals with those who seek to develop a specific skill or tackle a practice management best practice.

## Discrimination and Harassment Counsel

LSO.ca/DHC

- Safe and confidential space
- Intended for individuals who have experienced discrimination or harassment by a lawyer, paralegal or lawyer licensing candidate in Ontario
- There is no charge for using this service

## Well-being Resource Centre LSO.ca/well-being

- Site features articles, resources, research and initiatives to support the well-being of licensees

## 1<sup>st</sup> Supplement to the *Guide for Lawyers Working with Indigenous Peoples*

- Released in late September this publication covers significant advancements in the law involving Indigenous Peoples since 2018
- It is available on LSO.ca.

Download our resource sheet at: [LSO.ca/supports-and-resources-sheet](https://www.lso.ca/supports-and-resources-sheet)

# 2023 Awards

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## **2023 Law Society Awards: Nominations open until December 16**

- Each year, members of Ontario's legal professions are recognized for their outstanding career achievements and contributions to their communities
- Paralegals are eligible for the William J. Simpson Distinguished Paralegal Award
- Awards for lawyers include the Law Society Medal and the Laura Legge Award
- Both lawyers and paralegals are eligible for the J. Shirley Denison Award and the Lincoln Alexander Award
- Nominations are encouraged for members from all communities, practice areas, firm sizes and regions across the province. Visit: [LSO.ca/awards-nominations](https://www.lso.ca/awards-nominations).

## **Human Rights Award: Nominations open until December 31**

- The Human Rights Award recognizes outstanding contributions to the advancement of human rights and/or the promotion of the rule of law provincially, nationally or internationally
- The award is granted for devotion to the advancement of human rights and the rule of law over a long term or for a single outstanding act of service. Visit: [LSO.ca/human-rights-award](https://www.lso.ca/human-rights-award).

# Mandatory succession planning

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# The recommendation:

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Made to the Professional Regulation Committee by the Trustee Services Working Group, which was established in 2021, to consider a number of proposed changes to Trustee Services and supports.

That the Law Society establish a mandatory requirement for licensees in private practice to maintain a succession plan (or business continuity plan) for their professional business.

# How we got here

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## The issue

- Trustee Services steps in where there are not appropriate arrangements for a licensee's professional business
- The number of practices that require intervention and licensees at risk of needing assistance from Trustee Services is increasing
- By the time Trustee Services gets involved, it is often too late
- Costs are rarely recouped
- That means all licensees are paying for this through annual fees.

## The rationale

The Working Group identified four primary reasons for the recommendation:

1. protect client interests
2. comply with professional obligations
3. preserve licensee professional businesses and reputations
4. reduce Law Society administration and expenses.

# An aging population of sole practitioners

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There are approximately 9,500 lawyer and 1,600 paralegal sole practitioners.

Risen significantly in the last two decades.

Between 2005 and 2020, there was an increase of almost 240% in the number of sole practitioner lawyers over the age of 65.

Between 2010 and 2020 there was a similar increase in the number of paralegal sole practitioners (from 60 to 204) over 65.

# The proposed requirement

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The requirement would be supported by a full-suite of resources, such as:

- succession planning template – downloadable and fillable
- increased and improved CPD offerings about succession planning and end-of-practice issues
- individualized guidance and resources.

Maintain a succession plan that includes information and adequate arrangements to allow for the handling of client property and management of the professional business including:

- appointment of a successor licensee
- passwords and means to access computers, emails and practice records
- details of, and access to trust accounts, trust funds, and other business accounts
- location of open and closed files, and client property.



# We need your feedback

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- Visit [LSO.ca/succession-planning](https://LSO.ca/succession-planning)
- Read the report
- Fill out the online form or email comments to [PolicyConsultation@LSO.ca](mailto:PolicyConsultation@LSO.ca)

The Committee has requested feedback by November 30.



# Stay connected



- Portal
- Licensee Update
- Social media
- Twitter: @LawSocietyLSO  
@LSOTreasurer
- Facebook: Law Society of Ontario
- LinkedIn: Law Society of Ontario
- Instagram: Lawsocietylso
- YouTube: Law Society of Ontario

## Licensee Update

October 28, 2021

### Meeting of Convocation

Convocation met virtually today. You can view the meeting agenda [here](#). A link to the video webcast and a transcript of the meeting will be posted as soon as available.

Highlights of the meeting include the following:

#### LSO Portal

##### Register

In order to register for the LSO Portal, the Law Society needs the following information to confirm your identity.

Law Society Number:

**Legal First Name:**

Legal Last Name:

Date of Birth: Day Month Year

Year Licence Obtained:

Email address on file with the Law Society:

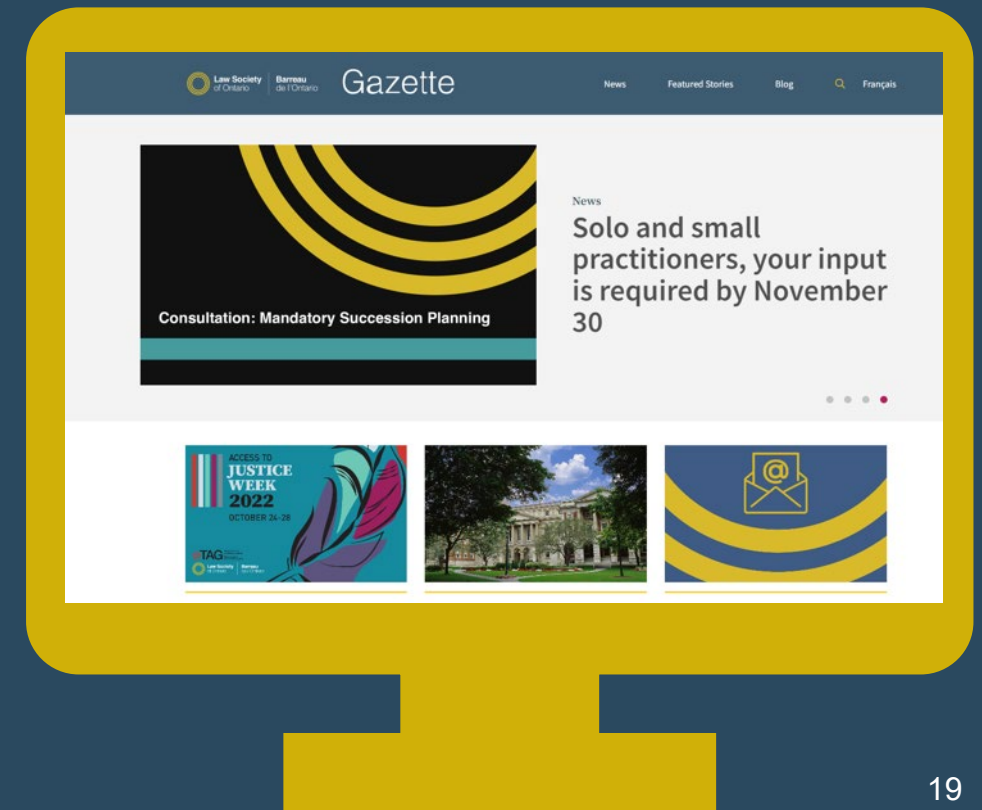
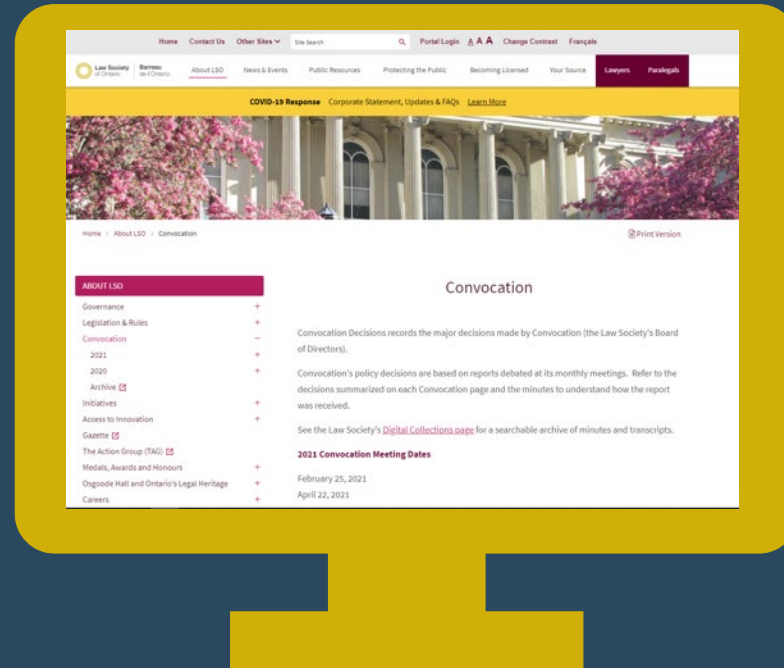
Where did you receive your LL.B./J.D. or equivalent? (Lawyers only):

# Stay connected



## Website:

- Convocation materials
- Gazette



# Questions?

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