
DRIVING PATRON ENGAGEMENT



AGENDA

- What is engagement?
- Characteristics of Great Patron Engagement Strategy
- Importance of Patron Engagement in a Law Library Setting
- I'll Show You Mine, If You Show Me Yours
- Challenges and Solutions
- Resources?



OBJECTIVES

- Explore Key Engagement Strategies
- Discuss Practical Tips to Foster Relationships With Library Patrons





WHAT IS ENGAGEMENT?

“...it's a meaningful & ongoing relationship between an individual & an organization.”

Tom Lehman, Lehman Associates
www.LehmanReports.com

**“...ENGAGEMENT IS BEING
INSIDE, PART OF THE
FAMILY....NOT ON THE OUTSIDE
LOOKING IN, WONDERING
WHAT'S GOING ON.”**

Todd Von Deak, TVD Associates
www.tvdassociates.com



IMPORTANCE OF PATRON ENGAGEMENT?

Enhanced loyalty

Increase and enhance resource utilization and services

Builds trust and relationships

Supports professional success

Fosters a community of learning

Drives continuous improvement in library services

Encourage more involvement

Increase the library's value to our patrons

Adaptability to patron needs and preferences

Or something else?



CHARACTERISTICS OF A GREAT PATRON ENGAGEMENT STRATEGY

1. Patron-Centric
2. Year-Round
3. Automated (optional)
4. Adaptable and strategic
5. Constant reevaluation
6. Personalized services



UNDERSTANDING YOUR PATRONS

1

Get to know your library's patrons

2

Overview of patron demographics (ie. Lawyers, paralegals, law students, judges, public)

3

Understand patron needs:

- Common information needs
- Preferred formats and resources (digital vs. print)
- Identifying common research challenges

VALUE PROPOSITION

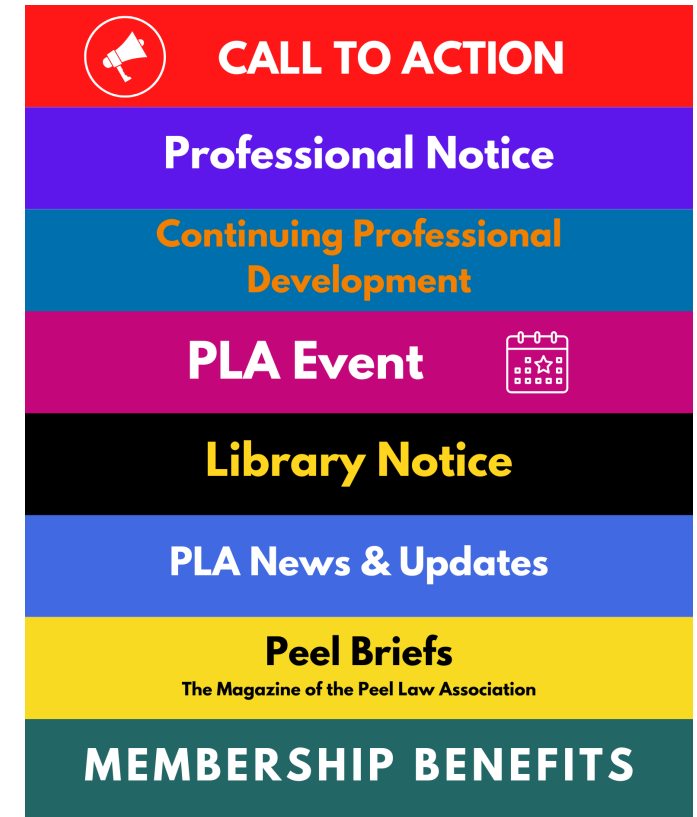
- Tell people what they get
- Ask them what they want
- Get rid of things that don't work

VALUE OF PLA MEMBERSHIP		
SERVICES	PLA MEMBER	NON MEMBER
 Locker rental for one year	\$113 - \$226	\$1300
 Borrow 5 books	FREE	To purchase: ~\$500+
 Attend 5 CPDs	\$283 - \$424	\$424 - \$565
 DIVORCEMATE SOFTWARE	FREE	\$28.25 / day (PLA) \$141.25 / wk (PLA) \$150 / mo (sub)
 Print / Copy 100 pages	\$28.25	\$56.50
 Research requests	FREE	\$5.65 - \$100+
 Judges' Night	\$150	\$200
 Court Tabs	\$28.25	\$33.90
Dickies	\$84.75	\$101.70
Borrow Court Attire	FREE	\$20 / day
Post on the PLA Jobsite	FREE	\$56.50
Reserve a Happy Light	FREE	Not available
Reserve Soundproof Booth	FREE	Not available
Use the Behind the Stacks meeting space	FREE (up to two hours) \$25 per hour after	\$50.00 per hour
LSO CPD Group Registrations	Save up to 50%!	Not available
FIND-A-LAWYER Listing with the PLA	Priceless	Not available
Corporate Discounts available to Members		
Discounts through FOLA: Enterprise & National Car Rental, VIA Rail, Hilton Hotels, and much more		
GoodLife Fitness - 25% off all membership deals		
Did you know that PLA membership dues can be claimed as a CRA tax deduction? Per Line 21200 Annual Union, Professional or like Dues: "You can claim the total of the following amounts that you paid (or that were paid for you and reported as income) in the year related to your employment: • annual dues for membership in a trade union or an association of public servants"		
		 Scan for more info



YOU SHOW ME YOURS ...

- Patron Engagement at Peel – **Effective Communication Channels:**
 - *Peel Briefs*, quarterly magazine
 - Email Communications
 - Social media (LinkedIn and Twitter/X)



AND I'LL SHOW YOU MINE

- Patron Engagement at Waterloo - **Effective Communication Channels:**
 - Monthly e-newsletter
 - Current awareness service
 - Social media (LinkedIn, Facebook, Instagram)
 - Library website
 - Personalized communications based on practice area
 - Text notifications for events or urgent updates (starting in 2025)

April 2024



Your monthly news & updates

Upcoming CPD & WRLA Events

Lexis Advance Quicklaw Training. Tuesday, April 9, 2024 at 12:00 pm. (1.5 hours of Professionalism Content). [Register](#).

The Eight-Minute Employment Lawyer. Thursday, April 11, 2024 at 9:00 a.m. [LSO Group Registration] [Register](#)

WRLA AGM & Annual Coulter Osborne Award Dinner. Tuesday, April 16, 2024. Registration closed.

21st Real Estate Law Summit. April 16 & April 17 2024 at 9:00 a.m. [LSO Group Registration] [Register](#)

Therapy Dogs in the WRLA. Thursday, April 18, 2024, from 12:30-1:30 in the WRLA Lounge, 85 Frederick St, Kitchener. Drop-in

The Six-Minute Estates Lawyer 2024. Thursday, April 18, 2024 at 9:00 a.m. [LSO Group Registration] [Register](#)

Tips From the Bench for Trial Prep. Friday, April 19, 2024 at 9:00 a.m. [LSO Group Registration] [Register](#)



YOU SHOW ME YOURS ...

- Patron Engagement at Peel – **Leveraging Technology and Digital Resources:**
 - Remote tools – Rangefindr & host of member-only resources specific to Peel region, including paid CPD replays
 - E-resources – Rangefindr, Divorcemate, Adobe Pro + *QR codes coming soon for LSO CLE content*
 - New minimalist website with intuitive architecture, accessible design, and strategic uses of colour
 - Weekly book spotlights
 - Easy access to resource archives

LexisNexis
Newsletters

Peel Briefs
The Magazine of the Peel Law Association

 Federation of
Ontario Law
Associations
Newsletters

AND I'LL SHOW YOU MINE...

- Patron Engagement at Waterloo –Leveraging Technology and Digital Resources:
 - Tools for remote engagement:
 - Virtual reference services, text assistance
 - E-resources
 - Rangefindr.ca; Vlex, WRLA CPD On-Demand, WDD
 - Website optimization for easy resource discovery

WRLA CPD ON-DEMAND

As a member of the WRLA, you have exclusive access to free replays of accredited CPD programs. Be sure to log your time in your LSO Portal.

Have a suggestion for future CPD programs? Please let us know by filling in this [online form](#).

Date	Title	Sub.	Prof.	EDI.
June 4, 2024	Rainbow Diversity Training 201			1 hr 40 min
May 16, 2024	Understanding the Waterloo Region Mennonite Community		30 min	45 min
May 14, 2024	Understanding Why Emotional Intelligence is Critical to Success as A Legal Practitioner		1 hr 24 min	
February 22, 2024	Succession Planning and Law Practice Sales	30 min	30 min	



VLEX COLLECTION

Remote access to vLex is provided through a referral link from this webpage's URL. The URL will be different depending on your computer and browser. Please note your browser's URL and click the appropriate link below.

If your browser is displaying the URL <https://waterloolaw.wildapricot.org/remote-library-resources>, access vLex here

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CANADA CORE
Canada Core provides access to edited and raw case law and the Canadian Legal Bookshelf, which includes the full Maritime Law Book (MLB) collection and the full Irwin Law eBook collection, all using powerful search tools to deliver topical search, intelligent recommendations and a visual history graph.



IRWIN LAW
The Irwin Law eLibrary houses the complete collection of "Essentials of Canadian Law" from Irwin Law, as well as other legal texts and public documents. There are over 300 titles published from 1987 to date are currently included in the collection, and new titles and updated editions are added to the collection as they appear in print.



VINCENT AI
Vincent is a virtual legal assistant that uses artificial intelligence and machine learning technologies (coberg AI), finds legal citations, cited documents and the most relevant legal concepts in any legal document. Vincent will analyze the content, main topics and citations of the document to produce a list of relevant materials.

RANGEFINDER



Succesfindr is a tool to help lawyers and judges find criminal sentencing ranges in minutes instead of hours. Click a few tags that describe the kinds of cases you're looking for — such as assault cases where the accused is a first offender — and rangefindr.ca tells you what sentences were imposed in those cases. One more click and you can review the judgments themselves.

[Rangefindr: Guide to Credit for Pre-sentence Custody and Release](#)

YOU SHOW ME YOURS ...

■ Patron Engagement at Peel –**Personalized Services:**

- One-on-one research assistance and training
- Bespoke group or individual library orientation sessions
- Document delivery and retrieval
- Research - quick reference to deep dives
- Compassionate technology assistance
- Open Door policy
- Collaboration on research projects and CPD development
- Connect like-minded members to encourage knowledge sharing
- Share cool resources, cases and commentary with members through our *Peel Briefs* magazine
- Allow patrons to participate in collection development
- Make reading lists for patrons with niche interests



AND I'LL SHOW YOU MINE...

- Patron Engagement at Waterloo –**Personalized Services:**
 - Offer one-on-one research consultations and training
 - Tailored resource recommendations based on individual research needs
 - Legal research coaching – for law students and new licensees
 - Personalized database tutorials and training
 - Access to specialized resources and tools
 - WDD, rangefinder.ca, laptops, tablets
 - Follow-up and check-ins
 - Document delivery and retrieval services
 - Allow patrons to participate in collection development
 - Quick reference and complex research services
 - Law360 on iPad
 - Virtual reference services
 - Text a librarian, remote training



YOU SHOW ME YOURS ...

- Patron Engagement at Peel –**Events and Programming:**
 - Black History Month
 - Young Lawyers' Mixers
 - Judges' Night
 - Diwali Open House
 - Breakout with the Bench
 - High Tea / Strawberry Social
 - Take Our Kids to Work Day
 - Seasonal Socials
 - Drag Karaoke



AND I'LL SHOW YOU MINE

- Patron Engagement at Waterloo - **Events and Programming:**
 - AGM and awards dinner
 - Monthly Thirsty Thursdays – free
 - Golf Tournament
 - Opening of the Court – free
 - Library and Courthouse orientation - free
 - Summer social – free
 - Holiday Open House – free
 - Mentorship Social – free
 - Judges Dinner (new in 2025)



YOU SHOW ME YOURS ...

- Patron Engagement at Peel – **Member Discounts:**

- FOLA Discounts
- Goodlife Patrons
- **Freebies**
 - Meeting Space rentals
 - Booth reservations
 - Research
 - Robe Rentals
 - Jobsite postings
 - Divorcemate and Rangefindr
- Discounts on:
 - Services
 - Products & Merchandise
 - Tabs and Dickies
 - Locker Rentals
 - Events
 - CPD programs
 - Group LSO registrations



AND I'LL SHOW YOU MINE

- Patron Engagement at Waterloo - **Member Discounts:**
 - LSO CPD – 50% off through group registration
 - FOLA Discounts
 - Services
- **Freebies:**
 - WRLA original content (in house) CPD
 - Robe rentals
 - Equipment rentals
 - Research
 - Locker rentals
 - Remote library resources (Rangefindr, Vlex and Irwin Law eBook Collection)
 - Wrongful Dismissal Notice Searcher
 - On demand CPD replays
 - Job Board
 - Kube Booth reservations
- Perkopolis



YOU SHOW ME YOURS ...

- Patron Engagement at Peel – **Innovative spaces:**
 - Behind the Stacks Meeting Space
 - Soundproof Booths
 - Slow Zone
 - Book Nook
 - Coming soon: new (after-hours) workspace with possible sleeping option



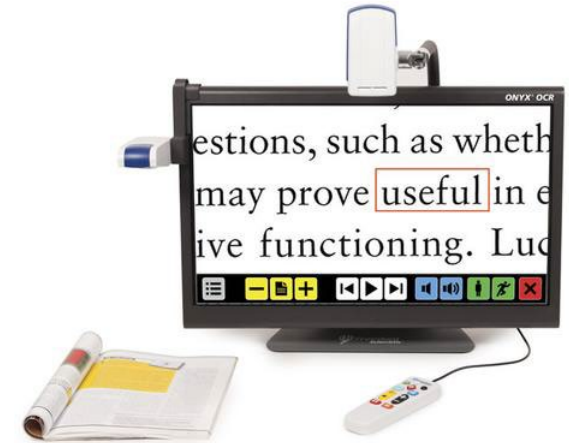
AND I'LL SHOW YOU MINE

- Patron Engagement at Waterloo - **Innovative spaces:**
 - 2 Kube Booths
 - Self-Checkout
 - Vegetable and herb garden – Patrons can take what they would like
 - Member pet photo display
 - Full kitchen in the lounge with free coffee, tea, and granola bars
 - Free Little Library



YOU SHOW ME YOURS ...

- Patron Engagement at Peel – **Innovative Tools:**
 - Assistive Listening Devices
 - Assistive Viewing Tools
 - Adobe Acrobat Pro
 - Charging devices for all phones and laptops
 - Neat Bar videoconferencing
 - Square and Affinipay
 - Roku
 - HappyLight
 - Sound machine



AND I'LL SHOW YOU MINE

- Patron Engagement at Waterloo - **Innovative Tools:**
 - Assistive listening devices
 - Assistive visual devices
 - Cell phone and laptop charging stations and devices
 - Laptops, external CD ROM drives, projector, screen, and various cords available for Patrons to borrow
 - Digital display
 - Text a librarian
 - AffiniPay – online payments

TEXT A LIBRARIAN
FOR WRLA MEMBERS

CAN YOU SEND ME A...?
CASE
NOTE-UP
CHAPTER OF A TEXT

HOW DO I...?
GET AN ACCESS CARD
RENT A LOCKER
REGISTER FOR AN EVENT

CAN YOU...FOR ME?
RENEW A BOOK
RESERVE A KUBE BOOTH
PUT A BOOK ON HOLD

**DOES THE LIBRARY
HAVE...?**
BOOKS ABOUT...
ROBES TO BORROW

1-807-788-5155
MONITORED MON-FRI 8:30 AM-4:00 PM



YOU SHOW ME YOURS ...

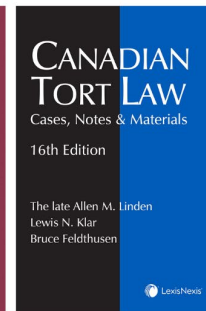
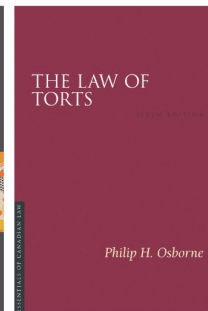
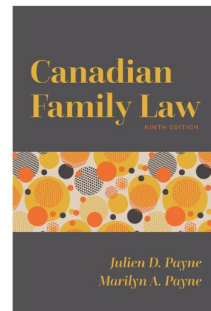
- Patron Engagement at Peel – **Programming and Professional Development:**
 - We try to create Peel-centric programming featuring Peel talent
 - Engagement with local judges, crown, prosecutors, courthouse stakeholders, and justice community
 - The library gets the last word!

Now What?
Life after
Ahluwalia



PEEL LAW ASSOCIATION
CONTINUING PROFESSIONAL DEVELOPMENT

Check out these resources in the library



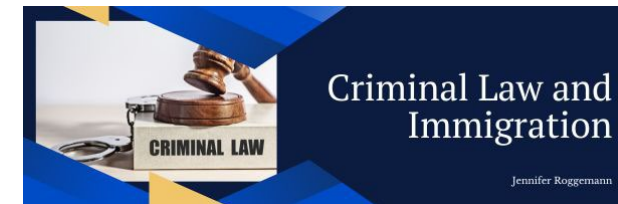
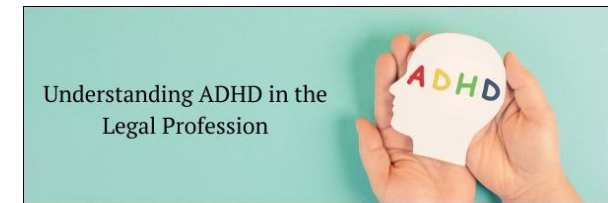
 Law Society of Ontario **CPD Resources**

- **Torts and Family Law**, *The Six-Minute Family Law Lawyer 2020*.
- **Torts and Family Law**, *17th annual Family Law Summit*



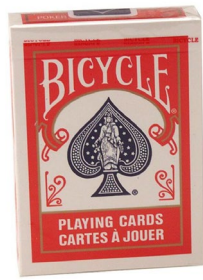
AND I'LL SHOW YOU MINE

- Patron Engagement at Waterloo - **Programming and Professional Development:**
 - We try to create Waterloo-centric programming featuring our local bar
 - Engagement with local judges, crown, courthouse stakeholders, justice community, and community organizations
 - One-on-one research consultations



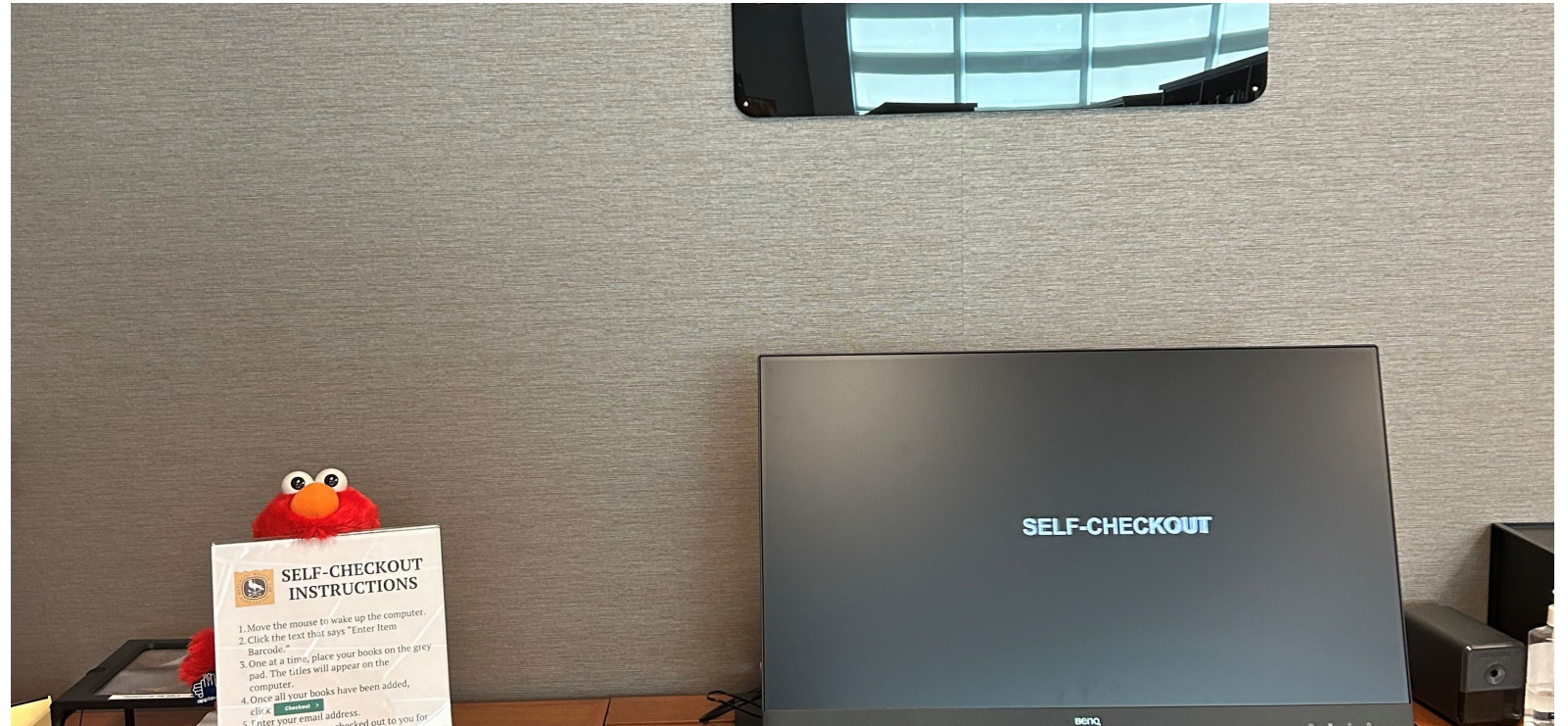
YOU SHOW ME YOURS ...

- Patron Engagement at Peel - **Building a Welcoming Environment** :
 - Candy!
 - Pens
 - Secret treats
 - Waiting for Jury? Special Perks
 - Personal amenities in robing rooms
 - Freebies in lounge



AND I'LL SHOW YOU MINE

- Patron Engagement at Waterloo - **Building a Welcoming Environment:**
 - Candy in the library
 - 24/7 access to the library and lounge
 - Friday movie day in the Lounge
 - Monthly therapy dog visits
 - Find Elmo
 - Professional headshots twice a year
 - Legal robing fitting in Lounge every year
 - Freebies in the Lounge
 - Games, puzzles and cards
 - Signage
 - Comfortable seating
 - Seamless payment methods



WHO CAN ASSIST WITH PATRON ENGAGEMENT?

Superusers, Brand Ambassadors and Amplifiers

- Patrons, Directors, Association staff, Library staff
- Judges, crown

Ground level engagement

- Library staff, Board of Directors, Association staff (if you have association staff)



CHALLENGES



Limited time



Limited budget



Maintaining regular contact



Meeting diverse needs

SOLUTIONS

- Soliciting feedback and continuous improvement:
 - Important to get regular feedback from library users
 - Suggestion boxes, surveys, informal check-ins
 - Use the feedback to adjust resources and services
 - If it's not working, get rid of it

AWARENESS

- **Situational awareness** - Observe how events, meetings and programs transpire - what do you notice? How do people behave? Who is magnetic? Who is a catalyst?
- **Spatial awareness** - How do patrons use your space? Are they avoiding certain zones? Are they using zones in innovative ways? Are they asking about spaces you don't have?
- **Cohort awareness** - Librarians can engage information-seeking behaviour analysis skills to assess seasoned lawyers vs newer calls, ITLs vs NA trained, differing practice areas, etc.
- **Interpersonal awareness (aka Emotional Intelligence)** - Treat each patron like they are beloved; Don't hold grudges - every interaction is brand new; Find out what matters to them; Find special points of connection; Learn to adapt to different personalities - all are valid; Connect them to peers, mentors

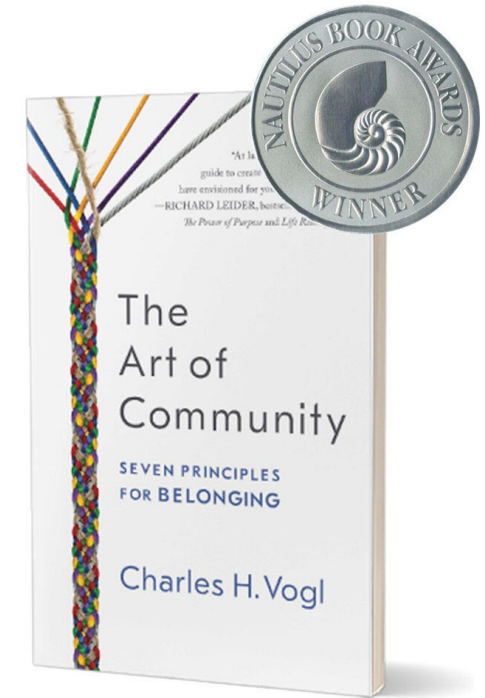
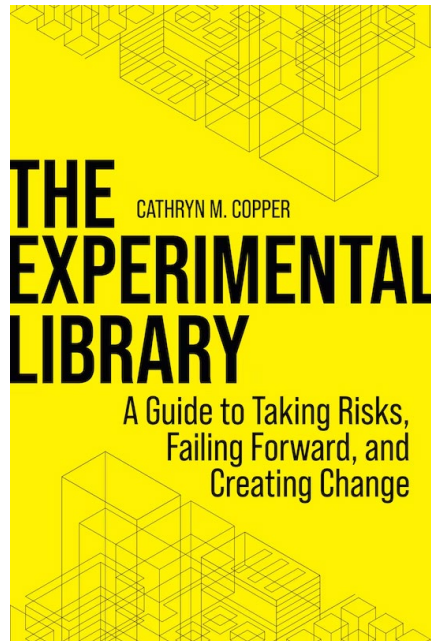


TIPS FOR PATRON ENGAGEMENT

- Try lots things to see what works
- Get rid of what no longer works
- R&D - Rob and Duplicate
- See what works in completely different places (hospitals, schools, nursing homes, etc.)
- Observe, Ask and Act
- Have fun - licensees don't have enough!
- Communications - preferred channels
- Multiple options for multiple preferences
- Lead with Love



RECOMMENDED RESOURCES





KEY TAKEAWAYS

Know

Know your patrons

Offer

Offer a welcoming environment

Use

Use diverse communication channels

Provide

Provide personalized services

THANK YOU

Jo-Ann McQuillan, MSt

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