



FY 19

ANNUAL REPORT

September 1, 2018 - August 31, 2019

Lawyers Concerned for Lawyers, Massachusetts

Lawyer Assistance Program &
Law Office Management Assistance Program

Serving the Massachusetts legal community since 1978.



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41 YEARS

WORKING FOR LAWYER WELL-BEING



President's Message

DEAR COMMUNITY,

As we enter our fifth decade working for lawyer well-being in Massachusetts, we continue to focus on expanding our engagement across the state, reaching more individuals and institutions in the legal profession to improve mental health, quality of life, and competence among lawyers.

We are grateful for the work of other organizations across the Massachusetts legal profession to address obstacles to well-being, normalize the need for mental health treatment, and share information about our services.

In 2019, LCL participated on the Massachusetts Supreme Judicial Court Steering Committee on Lawyer Well-Being. The Committee issued a report in July outlining recommendations, including the need to create a Standing Committee.

I look forward to serving on the SJC Standing Committee on Lawyer Well-Being and to LCL's Executive Director, Anna Levine's participation as a special advisor to the committee.

In the beginning of FY19, our full Board of Directors participated in its first comprehensive group training, and we continue to improve diversity and engagement.

In the following April, LCL's Board and staff participated in a strategic planning retreat where we synthesized data collected by Empower Success Corps and later created a three-year strategic plan that focuses on optimizing our ability to (1) deliver our services more effectively to all locations across Massachusetts, (2) develop the most helpful programs and resources, and (3) spread awareness about our services.

We are grateful to advance the mission of lawyer well-being in Massachusetts with such a supportive community, and look forward to another year of work together.

**Best regards,
Beth R. Myers, Esq. | President, LCL MA**



14,575 days.

LAWYERS CONCERNED FOR LAWYERS, MASSACHUSETTS has been pioneering lawyer well-being in Massachusetts since October 1978. Since then we've become a national model, expanding our free and confidential services as a Lawyer Assistance Program to include Law Office Management Assistance Program services as well. (Days above are approximate.)

LCL leadership participates on Mass SJC Lawyer Well-Being Steering Committee, which issues its report and is formalized as SJC Standing Committee on Lawyer Well-Being within the same year.

LCL leadership works with the Massachusetts Supreme Judicial Court to form the Lawyer Well-Being Steering Committee in response to The National Task Force on Lawyer Well-Being's 2017 report, *The Path to Lawyer Well-Being: Practical Recommendations for Positive Change*.

LCL creates the Massachusetts Law Office Management Assistance Program in response to the ongoing need for accessible help and practical information on operating a firm using best practices.

LCL volunteer lawyers begin serving as monitors for colleagues in recovery facing professional discipline.

LCL becomes a 501(c)(3) not-for-profit corporation and hires its first executive director, followed by clinical staff shortly thereafter.

A group of volunteer attorneys forms to help their peers whose lives and careers are jeopardized by addiction.

2019

2018

2007

1990

1987

1978

Our four decades working with lawyers, law students, judges and other legal professionals have provided us with very specialized insights and experiences. We have adapted and modified how we approach maximizing lawyer well-being as a result of these insights and experiences. In recent years we have come to appreciate the value of providing practical solutions alongside clinical services. This multi-faceted approach can help with both early identification of needed mental health supports or interventions and, the normalization of help-seeking behavior.

Our peer and professional supports for LCL's original service area of alcohol and substance use disorders remain strong. A core group of founding members of LCL and early supporters of our recovery networks continue to attend our events and carry the message and culture of peer support and service to newcomers to our organization.

While recovery supports and strong peer networks will always be an LCL priority, we continue to innovate and expand as the needs of our community become better defined. We have come to appreciate the interconnectivity of mental health, career-satisfaction, sound practice management skills and resources and, where applicable, maintaining a healthy program of recovery from alcohol or substance use disorders. Individual clinical and practice management consultations remain among our hallmark services and allow our staff to uncover hidden or unrealized concerns and offer comprehensive solutions to dynamic problems. At the same time, only peers can offer the mutual support found in our recovery meetings. Peer input and support are also central for other needs in our growing array of staff-facilitated support groups, covering topics from board discipline to parenting or practicing law with ADHD.

Collaborating with other organizations throughout the Massachusetts legal profession, our staff continue to provide education on lawyer well-being and law practice management and develop resources published on both our LCLMA.org and MassLOMAP.org websites. Our staff also collaborates with

Executive & Historical Summary

other lawyer assistance programs and law office management assistance programs across the United States and Canada, working toward shared goals.

Two of our staff clinicians, Dr. Jeff Fortgang and Dr. Shawn Healy presented at the ABA Commission on Lawyer Assistance Programs (ABA COLAP) National Conference at the start of FY19 in Charleston, South Carolina on depression in lawyers. I have had the honor of serving on the Advisory Committee of ABA COLAP since August 2018, and currently serve as Chair of its Communications Committee and Vice-Chair of the Conference Planning Committee.

The ABA COLAP 2020 National Conference is scheduled to take place in Springfield, Massachusetts from October 27-29 (fingers crossed that the COVID-19 pandemic will not force a cancellation) and we look forward to showcasing our program and the related efforts of our strategic partners in the Massachusetts legal community, including the SJC's Standing Committee on Lawyer Well-being (the WB Committee), the Boards of Bar Overseers and Bar Examiners and our amazing statewide and local bar associations on this important national stage. We appreciate the opportunity to work with all these entities and their tremendous staff and volunteers and are eager to assist the WB Committee in implementing the recommendations of the

July 2019 Steering Committee Report.

The strategic planning process we adopted and began implementing in FY19 has provided us a structure to coordinate efforts across our staff, more effectively respond to evolving needs and discover new ways to reach the population of lawyers, law students, and judges who most need our services, resources, and programming.

April 2019 was a momentous month for us as we had to bid farewell to Lottie Rutherford who served as our office manager for more than two decades. It was indeed an adjustment, but we adapted and will continue to focus on implementing the best tools and techniques for effective staff collaboration and administration.

I am extremely grateful for the hard work and dedication of our staff, Board and loyal peer support group volunteers. LCL is for everyone—for all of us. LCL business is everybody's business (even as our services themselves are confidential). Together, we extend helpful and often life and career-saving resources throughout the legal community. Thank you all for being partners in this process!

Warmly,
Anna Levine, Executive Director | LCL MA

THE MISSION

OF LAWYERS CONCERNED FOR LAWYERS

is to promote well-being and resilience in the legal community, improve lives, nurture competence, and elevate the standing of the legal profession. To fulfill this mission, LCL provides free and confidential mental health resources, addiction recovery support, and practice management services.

Addiction Recovery Services

LCL MA's original service area of addiction recovery continues to thrive, alongside the expansion of our clinical and practice management services. Attendance at our peer support recovery meetings across the Commonwealth remains strong. All of our recovery groups meet at least one a month and some meet as frequently as twice per week.

Our organization is grateful for the peer volunteers who run each of our Addiction Recovery Peer Support Meetings across Massachusetts. Since FY19 closed, we've finalized a new meeting in Concord, and we remain eager to support meetings in new locations across Massachusetts. We have made great strides forging connections with lawyers in recovery in Hampshire and Berkshire Counties and enthusiastic about the prospect of supporting new formal LCL groups in those regions. In the meantime, the monthly Springfield Group has become a hub the Western Massachusetts lawyer recover movement. Most months, every seat at the table in the Springfield Group is filled and participants represent a wide range of backgrounds (professional and personal) and include folks from the sober-curious and newly sober to seasoned attorneys with three to four decades of recovery.

Whether for alcohol, other drugs, or other ad-

ditions, the confidentiality we provide under exception to Rule 8.3 (the mandatory reporting requirement) is a vital element to the support lawyers offer one another.

Gathering individuals in the legal profession focused on fostering fellowship in addiction recovery throughout the year, we continue to host two annual events each Fall and Spring in addition to holiday season luncheons in Boston and Springfield.

In September 2018, our 6th Annual Recovery Day featured a series of discussions on the topic of identities in Marlborough. In May 2019 William John Kane, Esq., Director of the New Jersey Lawyer Assistance Program, and Laurie J. Besden, Esq., Executive Director of Pennsylvania Lawyers Concerned for Lawyers, both well known national speakers on lawyer recovery, joined an enthusiastic audience as Keynote and Recovery Speakers at our 15th Annual James A. Brink Fellowship Dinner at the Omni Parker House in Boston.

We continue to keep our community updated on new meetings, events, and resources supporting recovery through our list-serv dedicated to Massachusetts lawyers, law students, and judges in recovery, currently with 251 members.

251
LIST-SERV SUBSCRIBERS

216
MEETINGS ACROSS MA



CURRENT RECOVERY MEETING LOCATIONS

15TH ANNUAL JAMES A. BRINK DINNER

MAY 1, 2019 | OMNI PARKER HOUSE, BOSTON

WILLIAM JOHN KANE, ESQ.
Director, New Jersey LAP
KEYNOTE SPEAKER

LAURIE J. BESDEN, ESQ.
Executive Director, Pennsylvania LCL
RECOVERY SPEAKER



6TH ANNUAL RECOVERY DAY

SEPTEMBER 22, 2018 | MARLBOROUGH, MA

“ I felt welcomed immediately.”

“ I was impressed with the organization and the speakers.”



Well-Being & Clinical Services

LCL provides free and confidential well-being services through clinical evaluations, referrals, and consultations with lawyers and law students in Massachusetts.

Our clinical staff meet with individuals presenting with a wide range of concerns, create educational resources, and conduct workshops and trainings in-house and through partners. They help lawyers build resilience and address challenges to their mental health and well-being, while also working closely with our practice advisors to provide comprehensive support.

Our free and confidential groups have multiplied. During FY19, we created plans for a new Immigration Lawyers Support Group, which launched just after the fiscal year end. We offered one of our ADHD workshops online and made plans to offer it in Springfield again just after the fiscal year end. We also began to consider logistics to accommodate both our Solo | Stress and Professional Conduct groups at the brink of capacity.

Our clinicians also provide inhouse support groups for employers in the legal profession. We continued to host lunches inviting the Deans of

Students from each law school throughout Massachusetts for supportive talks as well.

This year, we offered our first ongoing on-campus support group (for first generation students) and on-campus office hours, both at New England Law | Boston. We also hosted our first program related to the bar exam in July, offering mindfulness practices.

Our clinicians were also able to offer support meetings following the tragedy at the Brooke Courthouse in April.

At the COLAP National Conference, clinicians Dr. Jeff Fortgang and Dr. Shawn Healy presented findings from an informal study on depression in lawyers and more from the topic of the book they coauthored published by the ABA in 2017.

And, at an annual meeting for the Council of Bar Admission Administrators, clinician Barbara Bowe made a presentation with Massachusetts Board of Bar Examiners Executive Director Marilyn Wellington on how our organizations have been able to collaborate effectively as a national model.



Overall Quality Rating 7+

Clients who responded to our satisfaction survey after using clinical services rated our organization at 7+ on a 10-point scale.



Improved or Resolved Problem

Clients who responded to our satisfaction survey after using clinical services indicated their problem had improved or resolved.

416 individual sessions.
73 helpline calls.

Our clinicians speak with lawyers and law students about any personal or professional concerns. In addition to our clinical staff's work, we added 18 peer mentoring cases.

“ I really appreciated working with my clinician, Shawn. I thought he was excellent and understood the complexities of my issues in a way that, frankly, my current clinician does not. He also helped me find other care and was easy to communicate with. The fact that I am not doing better is a testament to my abusive work environment, and not to a lack of care or help. I think the services at LCL are excellent and I recommend them to everyone.”

“ My sessions made a huge difference. It was also important that they were free and very easy to schedule. I recommend LCL to all colleagues.”

“ Barbara is excellent at listening, assessing needs, and making matches. I am so grateful to LCL for helping me through a horrible time.”

“ I continue to be amazed that the Solo group exists. I'm relatively new to group therapy. I find it much more useful than one on one therapy. Meeting once a month lowers the impact of the group from an issue solving perspective but it always helps for me to simply be in the presence of other solo attorneys, to hear what their problems are and to gain perspective on how manageable and common any issues I face in practice are. I've used the group in many ways, like networking and problem-solving.”

“ I contacted LCL after being laid-off due to a small firm's business re-organization. It was a tough time for me. I googled and found LCL and I found that Jeff Fortgang was great in listening. He is very patient and truly cares about us. He reached out to other resources for me.”

GROUP MEETINGS



11 SOLO | STRESS CONNECTION

A growing monthly online discussion group offering peer support for lawyers in solo and small firms.



10 PRACTICING LAW WITH ADHD

A monthly support group meeting and periodic workshops for lawyers and law students with ADHD.



24 PROFESSIONAL CONDUCT

One of our longest-running groups, offering guidance and support for lawyers facing discipline.



NEW!

IMMIGRATION LAWYERS

An online monthly discussion group for lawyers practicing immigration law launched just after the FY19 end.

Practice Management Services

LCL offers free and confidential practice management services through our Massachusetts Law Office Management Assistance Program (Mass LOMAP), which helps lawyers and law students to take better control of their work and to understand and reduce the pressures of feeling overwhelmed and anxious.

Our advisors consult with individuals and small firms of all levels of experience and need, create educational resources, and conduct workshops and trainings in-house and through partners. They help lawyers implement best practices in marketing, technology, financial management, and operations, while also working closely with our clinical staff to provide comprehensive support.

Our free and confidential groups continued to grow. Each of our Rainmakers Incubator Workshop Series filled to capacity, and we created plans to offer the series online shortly after the close of FY19. Again, we increased the reach of our Webinars for Busy Lawyers, filling one (on procrastination) to capacity for the first time. We continued to collaborate with the Women's Bar Association's Parents' Forum for our ongoing SuperMom support group, and offer our Law Prac-

tice Startup Workshops - cosponsored by Starting Out Solo - in Boston, Springfield, and online throughout the year.

In January, we brought back our New Year Networking Breakfast, doubling registration. Attendees expressed appreciation for the event and, after receiving numerous requests, we intend to host the event on an annual basis.

Again, our advisors each presented on multiple tech and leadership topics at the 33rd annual ABA TECHSHOW in Chicago.

LCL's Deputy Director, Heidi Alexander, worked with the Women's Bar Association to develop a survey of accommodations needed by mothers who are nursing babies or pumping breastmilk in Massachusetts courts. This effort sought to help establish standards following the 2018 Massachusetts Federal Court Order for courts to provide accommodations.

Heidi Alexander also worked with the Massachusetts Bar Association and Massachusetts Office of Bar Counsel to develop a Best Practice Guide on Fee Agreements for Lawyers, offering templates, checklists, tips, and more.



Overall Satisfaction: Very Good/Excellent

Clients who responded to our satisfaction survey after using practice management services rated our services Very Good/Excellent.



Would Use LOMAP Services Again

Clients who responded to our satisfaction survey after using practice management services would use them again.

221 individual consultations.

Most clients use LOMAP services voluntarily to enhance their practice. We see others who are mandated to use our help through our professional disciplinary system or court order. We answer specific inquiries, conduct full-scale practice audits, and everything in between.

“The information provided and discussed was very informative and instructive. It was practical and useful information. It allowed me a direction to accomplish my task. The follow up email was very helpful with references to other sources providing additional support and assistance. I'm happy that there is such a resource available to lawyers. Thank you.”

“The ability to set up a meeting was easy and fast. Heidi did an amazing job helping me!”

“I found the followup email I received from Susan Letterman White very thorough.”

“Heidi was an excellent resource of information. As a sole practitioner for 35 years, there are times you feel isolated and being able to reach out to a caring organization really is helpful in dealing with challenges. Great resource!”

“The services and resources provided by LOMAP are excellent and my consultation was incredibly helpful!”

GROUP MEETINGS



9 SUPERMOM SUPPORT

Monthly meetings in Boston, online, or by phone, offering practical and peer support with parenting and law practice.



12 RAINMAKERS INCUBATOR

A 4-Part Workshop Series designed to teach lawyers communication tactics to sell their services better.



5 STARTUP WORKSHOPS

Workshops in Boston, Springfield, and online covering all the basics of starting a law practice.



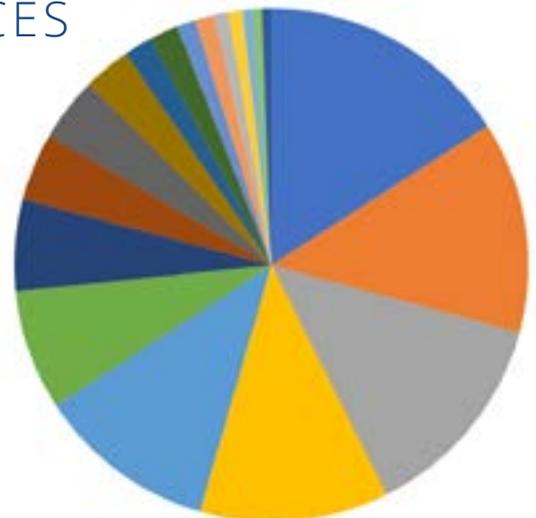
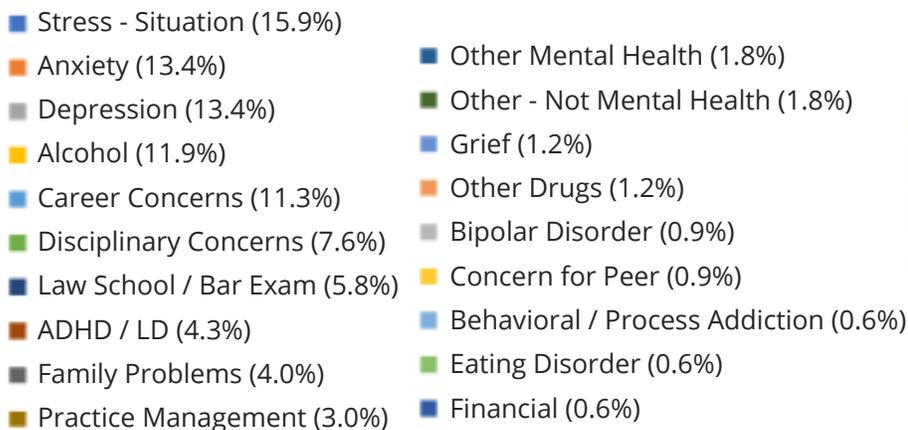
14 WEBINARS FOR BUSY LAWYERS

New webinars every month and recordings on demand, covering marketing, tech, and mindset.

Client Data Summary

PRESENTING CONCERNS

CLINICAL SERVICES



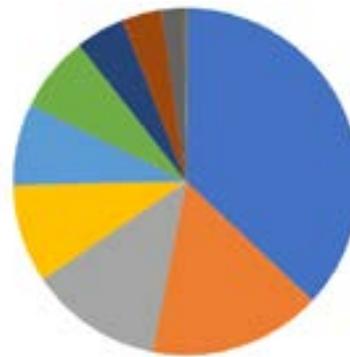
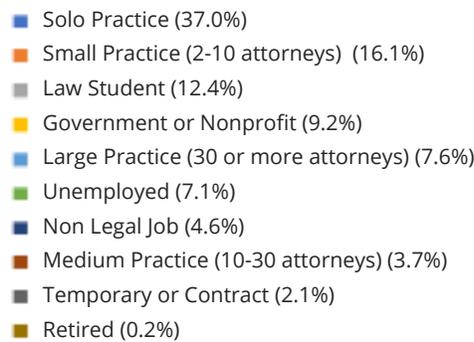
PRACTICE MANAGEMENT SERVICES



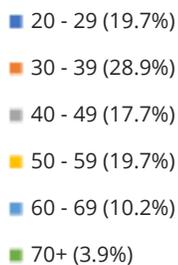
The data reported in this section is collected through our intake forms. We do not require our clients to provide any of the data below. Each data point collected had between 400 and 500 responses.

The graphs on page 13 (below) include data from both clinical and practice management services. The graphs on page 12 (left) depict data from each service area separately.

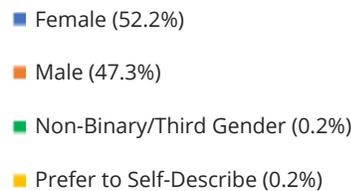
WORK SETTING



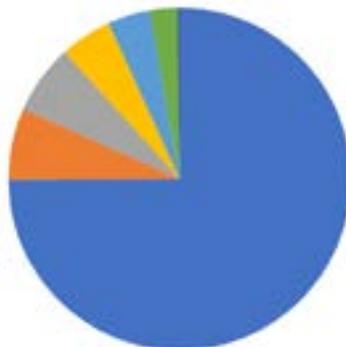
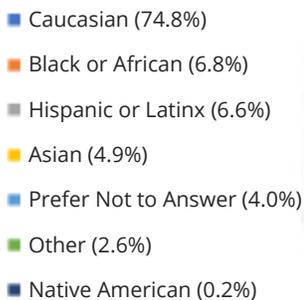
AGE



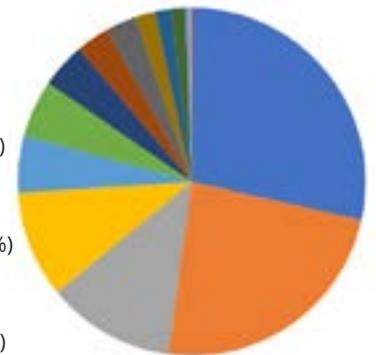
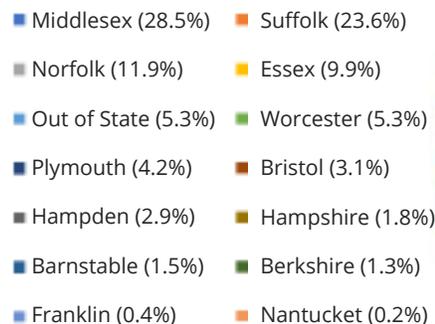
GENDER



ETHNICITY



COUNTY



Marketing & Outreach

As an independent nonprofit organization, we reach diverse audiences in the legal profession across Massachusetts by partnering with other entities, providing educational presentations, contributing articles and tips for external publication, and publishing resources to our websites.

Our clinicians, advisors, and other leadership staff made presentations throughout the year for bar associations, firms, nonprofits, state agencies, courts, law schools, and other entities in the Massachusetts legal profession and nationwide, accommodating a range of settings -- online and in-person -- from regular and special programming to annual events for various practice areas and organizations. Our staff served on committees for and contributed articles for publication by the BBA, WBA, MBA, ABA, and other organizations.

Our full staff collaborated to improve our presence at each Practicing with Professionalism course mandated for newly admitted attorneys, redesigning what had been separate clinical and LOMAP presentations. We now offer a single session with practical guidance for well-being, providing an overview of both our clinical and practice management services, helping to more clearly communicate the range of support we offer.

We continue to focus on consistency from early impressions with our branding and messages so that lawyers, law students, and judges understand the wide range of free and confidential services and solutions we offer, and remember

them as their needs evolve over the course of their careers.

We staff informational tables at events in the legal profession, including law school orientations and wellness fairs, to reinforce awareness of our range of services. We also continued transitioning promotional materials, including brochures, to highlight our full range of services and that they are exclusive to Massachusetts.

We launched a new LCLMA.org website in FwwY19 and began work on a new MASSLOMAP.org website, improving site navigability and search optimization. We continued to publish more timely, helpful resources on both our blogs, and created new landing pages for distinct audiences, including law students and new lawyers.

We worked with Mass Lawyers Weekly (MLW) to have our flyers delivered to new lawyers at bar admission ceremonies in packets with complimentary copies of their paper. We continued to publish articles and advertise more timely resources in MLW, and advertise in various bar associations' annual dinner and gala programs, many of which are staff attended.

The strategic planning goals developed in FY19 for FY20 will help us create systems that coordinate staff more effectively to ensure we grow as quickly as possible to expand assistance to lawyers, law students, and judges across Massachusetts, providing the most helpful, timely services for individuals and institutions in the legal profession.

QUICK
LOOK



12,637
PROGRAM
REACH

167 EDUCATIONAL
PRESENTATIONS
12 EXHIBITING
TABLES

46,607 WEBSITE
VIEWERS
96 BLOG
POSTS

TOPICS

WELL-BEING & MENTAL HEALTH

Stress, Balance & Resilience, Addiction Recovery, Burnout, Anxiety, Depression, ADHD, Personal and Professional Relationships, Grief

PRACTICE MANAGEMENT & CAREER

Time Management, Tech, Marketing & Business Development, Networking, Career Development, Data Security, Organization, Policies & Procedures

PROJECT
SNAPSHOTS



FEE AGREEMENTS GUIDE



Heidi Alexander worked with the MBA and OBC to create a Fee Agreements Best Practices Guide for lawyers in Massachusetts, offering tips, templates, checklists and more.

LAW STUDENT RESOURCES



Barbara Bowe presented with the Executive Director of the BBE on model collaborations at an annual meeting for the NCBE/CBAA, and ran two on-campus groups with New England Law | Boston.

DEPRESSION FINDINGS



Dr. Jeff Fortgang led an informal study of depression in lawyers, receiving 259 responses, findings of which he and staff colleague Dr. Shawn Healy presented at the annual COLAP national conference.

COURT NURSING ACCOMMODATIONS



Heidi Alexander worked with the WBA to conduct a survey of accommodations provided by Massachusetts courts for who are nursing or pumping, in order to create better standards.

MINDFULNESS



LCL leadership joined the Mindfulness in Law Society for its launch event, collaborated to share resources, and hosted our first Bar Exam Mindfulness Prep Session featuring Nina Farber.



ENGAGING OUR EXPERTS

Our staff is eager to work with organizations in the legal community. Find out more:

LCLMA.ORG/COLLABORATE

Financial Summary

BUDGET AND ENDOWMENT

LCL is able to remain a free service because the organization receives funding pursuant to Supreme Judicial Court Rule 4:07, administered by the Board of Bar Overseers. These funds represent a small percentage of Massachusetts attorney registration fees set by the Supreme Judicial Court. LCL's Fiscal Year 2019 financial

statements were reviewed by independent auditor Whittlesey, P.C., which reported that the financial statements represented a materially accurate accounting of the organization's financial position. LCL operated with expenditures for Fiscal Year 2019 as shown in the following table:

Office Expenses, Dues, Meetings, Postage	\$124,092
Office Equipment / Supplies	\$33,483
Marketing / Advertising	\$34,640
Professional Services / Insurance	\$66,996
Rent / Utilities	\$189,250
Travel	\$22,505
Payroll / Salaries / Benefits	\$1,047,446
TOTAL EXPENDITURES	\$1,518,412

LCL has two endowment funds, the Lawyer Assistance Fund (LAF), started in 1993, and the James A. Brink Endowment Fund, in operation since 1998. All monies in both funds represent donations by individuals and law firms to support LCL's efforts and/or the interest thereupon. The purpose of the LAF is to help pay for general services that will assist LCL clients in need. Such LAF funds are available for a wide range of purposes, from help with fees for additional counseling, to CLE tuition, MPRE registration fees, and similar others. Clients may apply to receive LAF assistance, which is based upon financial need and

other criteria. The requests are subject to approval by clinicians, the Executive Director, and the LAF trustees. All LAF recipients are asked to repay any assistance received if their financial circumstances improve sufficiently to do so. In FY19, LAF requests totaling \$1,793 were approved. The LAF balance at FY19 year-end was \$288,553. The James A. Brink Endowment Fund exists solely for the purpose of assisting lawyers with recovery and rehabilitation related treatment and services. In FY19, there were no requests for assistance from that fund, and the balance at year-end was \$145,929.

Acknowledgements

OFFICERS, DIRECTORS, AND STAFF

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Lucy Reyes, Esq.
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LCL | Mass LOMAP

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