



FY 20

ANNUAL REPORT

September 1, 2019 - August 31, 2020

Lawyers Concerned for Lawyers, Massachusetts

Lawyer Assistance Program &
Law Office Management Assistance Program

Serving the Massachusetts legal community since 1978.



CONTENTS

President's Message	3
Executive and Historical Summary	4
Well-Being & Clinical Services	6
Practice Management Services	8
Addiction Recovery Peer Support	10
Support Groups & Regular Programs	12
Client Data Summary	14
Marketing, Outreach & Strategic Operations	16
Financial Summary	18
Officers, Directors, and Staff Acknowledgements	19

42 YEARS

WORKING FOR LAWYER WELL-BEING



President's Message

DEAR COMMUNITY,

The year 2020 was an historic challenge to well-being. As always, Lawyers Concerned for Lawyers contributed key support for the Massachusetts legal community. Each of us has been impacted, both personally and professionally, by the pandemic, ranging from the loss of loved ones, inequities in healthcare, to juggling childcare and the many unnamed factors that impact lawyer well-being.

With a new and agile strategic plan that guided staff through continued growth planning, as well as a number of initiatives improving operations, outreach, and overall efficiency, our work continued to move forward during FY20.

We have worked with the Supreme Judicial Court Standing Committee on Lawyer Well-Being (SJC Committee) on a number of initiatives, including well-being toolkits for bar associations and law schools, lawyer well-being network, programming, and continue to work on a profession-wide digital CLE. We mourn the loss of Chief Justice Gants, applaud

the SJC Committee's work, and look forward to continue working closely together to address important issues and support the mental health and well-being of the Massachusetts legal community.

We recognize the critical importance of antiracism work as individuals and institutions in the legal profession. Diversity, equity and inclusion are foundational to well-being and justice, and we pledge our commitment to prioritize this work as we develop our staff and our services.

We are grateful for our partners throughout the Massachusetts legal profession and look forward to the work ahead as our community rebuilds toward a better future.

Warm regards,

**Tracy J. Ottina, Esq.
President, LCL MA**



14,940 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 continues to participate on Mass SJC Standing Committee on Lawyer Well-Being, which formed at the Steering Committee's recommendation in 2019.

LCL leadership works with the Massachusetts Supreme Judicial Court to form the Steering Committee on Lawyer Well-Being 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 need for help with practical information and best practices on operating a firm.

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.

2020

2018

2007

1990

1987

1978

As our organization completes its 42nd year of serving the Massachusetts legal community, we are grateful for the opportunity to serve the profession. We are particularly grateful for partners in programming and other projects throughout the Massachusetts legal community who have continued to lead well-being and destigmatization efforts alongside us and have worked so diligently during these newly trying times to improve well-being against mounting odds related to the pandemic, racism, and other threatening forms of inequality.

FY20 challenged us all in new ways. Our organization is grateful to have been poised to assume remote operations with such little notice beginning on March 11th in response to Covid-19. We were able to implement our strategic plan for FY20 even as we focused on adapting to pandemic conditions, which helped us to improve our structure for growth planning, accelerate online offerings, improve our processes both for launching programs and leadership outreach, begin a volunteers training program, and start a soft rebranding. We also engaged consultants to help us identify initial steps to improve our inclusion efforts as we also work to build longer term strategies, ongoing attention, and action related to our internal development and the services we offer.

Our peer and professional support for LCL's original service area of alcohol and substance use disorders remains 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 community. Recovery support will always be a priority as we continue to innovate and grow to meet the evolving needs of our community. We 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.

Executive & Historical Summary

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 to practicing law with ADHD. We increased group support in response to the pandemic, both opening new groups and increasing the frequency of meetings for groups already running.

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 provided a number of programs and resources on topics related to pandemic challenges, both to well-being and practicing remotely.

We also continue to collaborate with other lawyer assistance programs and law office management assistance programs across the US and Canada, working toward shared goals. The ABA COLAP 2020 National Conference was scheduled to take place in Springfield, MA in late October and moved to a virtual format postponed

to early November. We connected with a larger than usual audience in the virtual format as we showcased our program and the related efforts of our strategic partners in the Massachusetts legal community, including the SJC Committee, the Boards of Bar Overseers and Bar Examiners, and bar associations across our state.

We value the opportunity to work with all these entities and their hard-working staff and volunteers, and are delighted to be working with the SJC Committee in implementing recommendations of the July 2019 Steering Committee Report, with our former deputy director, Heidi Alexander, having taken the position as director of the SJC Committee.

Although Heidi's departure coincided with the onset of Covid-19, it was essential that the SJC Committee begin its work when it did under Heidi's leadership. And we were extremely fortunate to welcome three new staff members to our team, all of whom bring key experience. We welcomed Laura Keeler and Emmanuel Okharedia, III, Esq. as LOMAP advisors in June and July, and welcomed Dr. Tracey Meyers, Psy.D. as a staff clinician in August.

Thank you to all our partners in this process! Together, we extend helpful and often life-changing and career-saving resources throughout the legal community.

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.

Well-Being & Clinical Services

LCL provides free and confidential well-being and mental health services to the Massachusetts legal profession through clinical evaluations, referrals, and consultations.

Our clinical staff meet with individuals presenting with a wide range of concerns, create educational resources, and provide presentations, often in collaboration with partners in the legal community.

Our clinicians help individuals clarify and address struggles with well-being and mental health and build resilience through clinical consultations as well as helpline calls. They work closely with our Mass LOMAP advisors and peer support staff to provide comprehensive support for practical challenges those in the legal profession face.

Our clinicians also facilitate regular support groups for solo practitioners, immigration practitioners, lawyers involved in the disciplinary process, mothers in the profession, and those in the profession with ADHD. They also provide in-house support groups for employers in the Massachusetts legal profession, and continue to host regular meetings of the deans of students from most Massachusetts law schools.

Clinical staff began offering a support group for first generation law students, a monthly group for immigration lawyers in October, as well as a second monthly group for solo practitioners, and provided a 3-hour workshop on strategies for ADHD at Western New England University (WNEU) School of Law in January.

In response to Covid-19, our clinicians immediately launched an “Open Connection” support group meeting weekly, increased the frequency of several groups, and provided programming on adapting, coping, and resilience.

In August, we welcomed Dr. Tracey Meyers, Psy.D. to our clinical staff, in a position based in western Massachusetts. This addition to staff also improves our clinical capacity to make increasingly difficult referrals for ongoing therapists and to offer extended consultation services in the interim. Dr. Meyers brings 15 years of experience at the Connecticut Department of Mental Health and Substance Abuse. With Tracey on staff, we were able to begin plans to launch several new initiatives with law schools for the upcoming fall semester, including more office hours and support groups, as well as other programming, including mindfulness and yoga.

Of those who replied to our feedback surveys, 65% reported that the problem that brought them to LCL either improved or resolved. This is compared to 80% last year, and is very likely related to two factors: (1) it has become extremely difficult to make referrals, i.e. to find therapists with openings and who are in HMO networks; (2) COVID has meant less of an in-person touch and also, along with concurrent sociopolitical issues, increased stress in almost everyone’s lives. Statistically, our ratings for overall clinical services has declined with the rise of the referral problem, as well.

418 individual sessions.
96 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 **31** peer mentoring cases.



Overall Quality Rating 7+

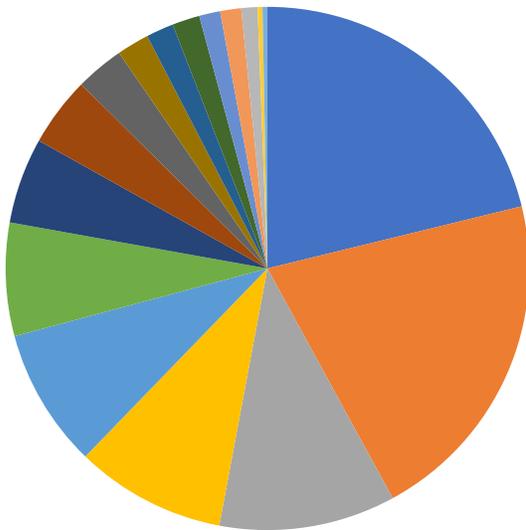
Percent of clients who responded to our satisfaction survey after using clinical services and rated our organization at 7+ on a 10-point scale.



Improved or Resolved Problem

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

PRESENTING CONCERNS



- Anxiety (21.2%)
- Stress - Situation; no dx (20.9%)
- Depression (10.9%)
- Disciplinary Concerns (9.3%)
- Career Concerns (8.6%)
- Alcohol (7.0%)
- ADHD / LD (5.3%)
- Law School / Bar Exam (4.3%)
- Family Problems (3.0%)
- Other Mental Health (2.0%)
- Bipolar Disorder (1.7%)
- Other - Not Mental Health (1.7%)
- Grief (1.3%)
- Other Drugs (1.3%)
- Practice Management (1.0%)
- Concern for Peer (0.3%)
- Eating Disorder (0.3%)

“I appreciate Dr. Shawn more than I can explain. He helped me through such a difficult time and gave me tools to use in my every day life. I am so grateful for a program like LCL.”

“Thank you all so much for being here for us attorneys who need this. I feel guilty I couldn't stick with the routine but shortly after I started visiting, the things that distressed me the most improved some. And therefore I felt less inclined to go. But I cannot say enough great things about these services. I tell many of my fellow attorneys about these services and hopefully individuals who feel like I did seek much needed help.”

“Knowing that LCL is there to assist in the event I need help is an amazing support. Thank you for all you do.”

“I appreciate the variety and substance of LCL services, and the professionalism and care of clinicians.”

“The combination of my LCL counselor, Shawn, and the LCL Solo Group led by Jeff, was instrumental in stabilizing my personal and professional life. While I still continue to work on my action plan to help me fully resolve my issues, it is comforting and reassuring to know that I have the support of LCL. It is very much appreciated by me and my family.”

Practice Management Services

Through our Mass LOMAP services, our organization continues to provide free and confidential law practice management services to the Massachusetts legal profession with consultations, resources, and referrals.

Our Mass LOMAP staff meet with individuals presenting with a wide range of concerns (shown in a chart on the following page), create educational resources, and provide presentations, workshops and trainings, often in collaboration with partners in the legal community.

Our advisors help individuals clarify and address ethical and other practice management concerns, as well as other career challenges through individual and group consultations. They work closely with our clinical and peer support staff to provide comprehensive support for practical challenges faced by those in the legal profession.

Our advisors provided workshops on starting a practice at the Social Law Library in September, online in November, and at our offices in January; we moved one planned for Springfield in March online as Covid-19 emerged, and we began offering it on demand for the first time ever in May. LOMAP staff offered a workshop series on rainmaking skills virtually in September and in a newly condensed 2-part format in November. In January, LOMAP hosted our popular networking breakfast event, offering attendees an important and fun opportunity to make new connections, which are essential to developing one's career

and business.

In response to Covid-19, our Mass LOMAP staff increased the frequency of our Webinars for Busy Lawyers, offering extra topics on adapting with technology, as well as resilience and coping, including digital marketing topics to help lawyers shifting focus away from in-person activities, as well as building boundaries into client communication.

In June, Mass LOMAP was recognized as the winner in the Massachusetts Lawyers Weekly Reader Rankings for 2020 in the Legal Management Consulting Company category; the rankings surveyed 2,000 voters in the Massachusetts legal community.

In March, we bid farewell to Heidi Alexander, who served as director of Mass LOMAP services before becoming the director of the SJC Lawyer Well-Being Committee.

In June and July, we welcomed two new practice advisors to our Mass LOMAP staff. Laura Keeler joins us from the New Hampshire Bar Association's Member Services and Law Practice Management Coordinator, with previous experience in both the public and private legal sectors. Emmanuel Okharedia, III joins us from his own law practice, counseling small businesses and guiding families through estate planning, with previous experience in the nonprofit sector.

178 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.

95

Overall Satisfaction: Very Good/Excellent

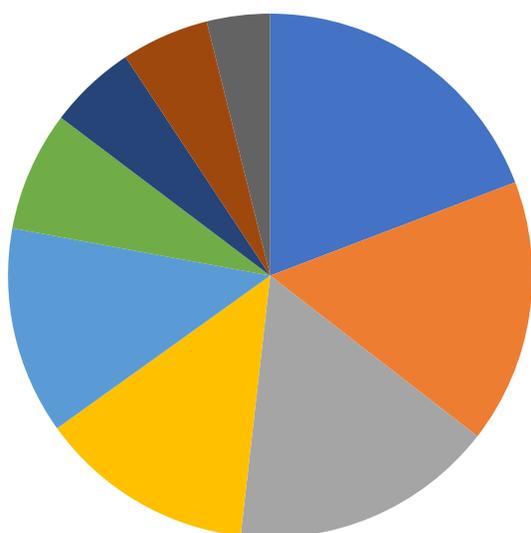
Percent of clients who responded to our satisfaction survey after using practice management services and rated our services Very Good/Excellent.

100

Would Use Mass LOMAP Services Again

Percent of clients who responded to our satisfaction survey after using practice management services and would use them again.

PRESENTING CONCERNS



- Ethics (19.2%)
- Career Advice (16.3%)
- Technology (16.3%)
- Starting a Practice (13.3%)
- Leadership & Management (12.8%)
- Finance (7.4%)
- Closing a Practice (5.4%)
- Well-Being (5.4%)
- Marketing & Bus Dev (3.9%)

“The support well exceeded my expectations! I am very grateful for this support, and hope to continue working together.”

“It really helps to be able to “talk it out” when I have an issue that reasonable minds may differ on, and I really appreciate this service.”

“Beyond helpful and the follow up was very detailed. I am extremely appreciative.”

“Excellent information and advice. I truly appreciate the time and consideration provided. LOMAP is an excellent resource.”

“This was absolutely excellent... helped a lot and was a breath of fresh air...”

Addiction Recovery Peer Services

We continue to provide critical peer support through our original service area of community for addiction recovery in the Massachusetts legal profession. Attendance at our peer support recovery meetings across the Commonwealth remains strong.

All of our recovery groups meet at least once a month and some meet as frequently as twice per week. Whether for alcohol, other drugs, or other addictions, the confidentiality we provide is a vital element to the support lawyers offer one another.

Our organization is grateful for the peer volunteers who run each of our Addiction Recovery Peer Support Meetings across Massachusetts. In FY20, we began offering a new meeting in Concord, and in March, moved all our meetings online in response to Covid-19.

As a silver lining to the lack of in-person support, we saw members who were no longer able to attend in person join our online meetings.

We gathered individuals in the legal profession to foster fellowship in addiction recovery at our annual Recovery Day in November and at our annual holiday lunches in December in Boston and Springfield.

Sadly, we did not host our annual James A. Brink Fellowship Dinner due to Covid-19 and look forward to the time when it will be safe to plan our next. Since learning how valuable the convenience of meeting online has been for many, we look forward to keeping virtual spaces open.

We continue to keep our community connected outside of meetings through our list-serve for Massachusetts lawyers, law students, and judges in recovery, and increased our subscribers by 79, or 31.5% from FY19.



CURRENT RECOVERY MEETING LOCATIONS

7TH ANNUAL

RECOVERY DAY

NOVEMBER 2, 2019 | BOSTON



“ This was the best Recovery Day yet.”
(A regular attendee)



228

TOTAL MEETINGS
ACROSS MA & ONLINE

+ 5.6% from FY19



330

TOTAL LIST-SERV
SUBSCRIBERS

+ 31.5% from FY19

Support Groups & Regular Programs

ONGOING **SUPPORT GROUP** SESSIONS



18 SOLO | STRESS CONNECTION

We began a second section of monthly meetings for our on-line discussion group offering peer support for lawyers in solo and small firms in December.



28 PRACTICING LAW WITH ADHD

Normally a monthly support meeting, this group began meeting weekly during Covid-19. In January, we offered a 3-hour workshop at WNEU.



35 PROFESSIONAL CONDUCT

One of our longest-running groups, offering guidance and support for lawyers facing discipline. This group began meeting weekly during Covid-19.



11 IMMIGRATION LAWYERS

An online monthly discussion group for lawyers practicing immigration law launched toward the start of the fiscal year, in October.



12 SUPERMOM SUPPORT

Monthly meetings offering practical and peer support with the demands of balancing parenting and law practice, continuing through summer months during Covid-19.



49 INHOUSE & MORE

Our clinicians offered our ongoing roundtable for law school deans, as well as in-house support groups for legal organizations, with more planned for FY21.

On the pages below, we've listed the total sessions held for each of our support groups and regular programming. Our staff clinicians currently facilitate all our ongoing support groups, and created new groups and increased the frequency

of existing groups. Our LOMAP practice advisors facilitate our regular programs listed below. In addition to the lists below, our clinicians and advisors provided over 100 programs in collaboration with organizations in the legal community.

COVID-19 SUPPORT GROUPS



15 OPEN CONNECTION

We began a weekly meeting for general connection during the initial onset of Covid-19, which met through June.



5 LAW STUDENT CONNECTION

We also offered a weekly group specifically for law students across all Massachusetts schools to connect as the pandemic began.

REGULAR PROGRAMS



14 WEBINARS FOR BUSY LAWYERS

New webinars every month and recordings on demand, covering marketing, tech, and mindset, featured additional topics relevant to adapting to pandemic change.



4 STARTUP WORKSHOPS

Workshops teaching the basics of starting a practice, held in Boston, normally in Springfield as well, and online, made available on demand as a recording for the first time.



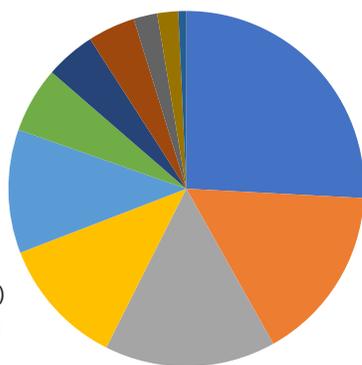
6 RAINMAKERS INCUBATOR

A workshop series teaching lawyers communication tactics to sell their services better, offered in experimental virtual and condensed 2-part formats prior to Covid-19.

Client Data Summary

WORK SETTING OUR CLIENTS

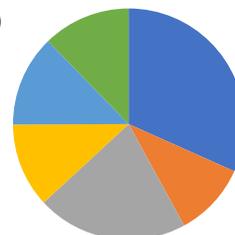
- Solo Practice (25.8%)
- Govt or Nonprofit (16.0%)
- Law Student (15.6%)
- Large Firm (30+) (11.7%)
- Small Firm (2-10) (11.2%)
- Unemployed (6.0%)
- Medium Firm (10-30) (4.6%)
- Non Legal Job (4.3%)
- Temporary or Contract (2.1%)
- Corporate or In-House (1.9%)
- Retired (0.2%)



COMPARISON DATA (WORK)

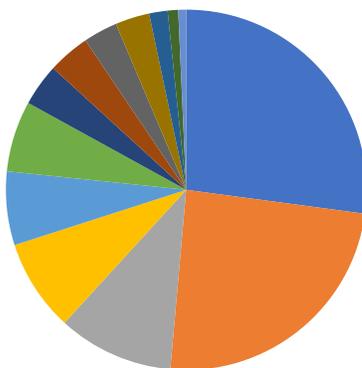
represents all US lawyers, ABA Profile of the Legal Profession, 2020 available at <https://www.americanbar.org/content/dam/aba/administrative/news/2020/07/potlp2020.pdf>

- Law Firm (2+) (31.7%)
- Government (21.2%)
- Corporate (12.8%)
- Other (12.3%)
- Nonprofit (11.8%)
- Solo (10.3%)



COUNTY OUR CLIENTS

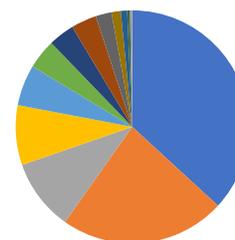
- Middlesex (27.1%)
- Suffolk (24.3%)
- Essex (10.4%)
- Out of State (8.2%)
- Hampden (6.6%)
- Norfolk (6.4%)
- Plymouth (3.8%)
- Worcester (3.8%)
- Bristol (3.1%)
- Hampshire (3.1%)
- Barnstable (1.7%)
- Franklin (0.9%)
- Berkshire (0.7%)



COMPARISON DATA (COUNTY)

represents lawyers in Massachusetts, data from 2020 provided by Lawyers Diary (available upon request).

- Suffolk (36.8%)
- Middlesex (22.9%)
- Norfolk (9.9%)
- Essex (8.3%)
- Worcester (5.7%)
- Plymouth (4.1%)
- Hampden (3.6%)
- Bristol (3.5%)
- Barnstable (2.2%)
- Hampshire (1.3%)
- Berkshire (0.9%)
- Franklin (0.4%)
- Dukes (0.2%)
- Nantucket (0.1%)



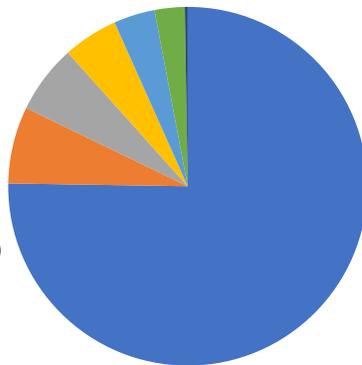
The data reported in this section is collected through optional questions on our intake forms. Each data set collected had roughly between 400 and 500 responses (between 125 and 250 skipped), and includes data from both clinical and practice management

services. Data on broader lawyer populations (both across the US and Massachusetts) for comparison is provided, as noted in each category. Future reports will reflect data collected specific to MA, as proposed by the SJC Lawyer Well-Being Committee.

ETHNICITY

OUR CLIENTS

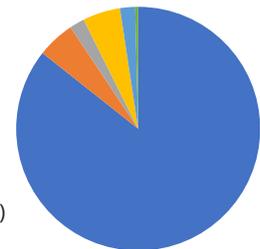
- White (75.2%)
- Black or African (6.9%)
- Asian (6.2%)
- Hispanic or Latinx (5.0%)
- Prefer Not to Answer (3.7%)
- Other (2.7%)
- Pacific Islander (0.3%)



COMPARISON DATA (ETHNICITY)

represents all US lawyers, ABA Profile 2020,

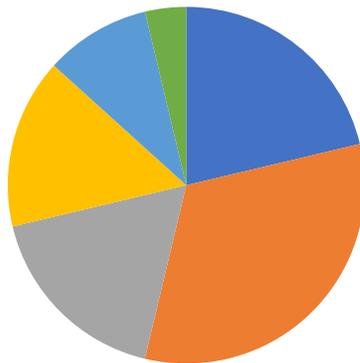
- White (86%)
- Black or African (5%)
- Asian (2%)
- Hispanic or Latinx (5%)
- Two or More Races (2%)
- Indigenous American (0.4%)



AGE

OUR CLIENTS

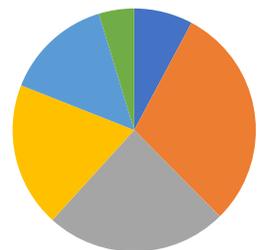
- 20 - 29 (21.3%)
- 30 - 39 (32.5%)
- 40 - 49 (17.6%)
- 50 - 59 (15.4%)
- 60 - 69 (9.6%)
- 70+ (3.7%)



COMPARISON DATA (AGE)

represents all US lawyers, 2019 data available at <https://datausa.io/profile/soc/lawyers-judges-magistrates-other-judicial-workers#demographics> (ABA Profile uses different age groups.)

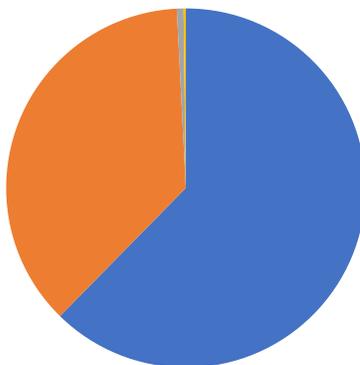
- 20 - 29 (7.8%)
- 30 - 39 (29.8%)
- 40 - 49 (24.2%)
- 50 - 59 (19.3%)
- 60 - 69 (14.3%)
- 70+ (4.7%)



GENDER

OUR CLIENTS

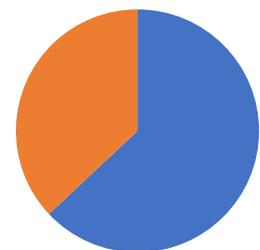
- Female (62.4%)
- Male (36.8%)
- Non-Binary / 3rd (0.6%)
- Self-Describe (0.2%)



COMPARISON DATA (GENDER)

represents all US lawyers, ABA Profile 2020; unfortunately does not report numbers for those of us who identify as non-binary or any other gender.

- Male (63%)
- Female (37%)



Marketing, Outreach & Strategic Operations

In FY20, our organization implemented its first year of a formal strategic planning process designed for a minimum of three years that also provides the structure for ongoing planning. We were able to improve our structure for planning growth and analyzing data for actionable insights as we accelerated online offerings in response to the pandemic, create a thorough and efficient process for launching new programs, plan a new volunteer training program, create a system for regular outreach to leadership of entities in the Massachusetts legal profession, and begin a soft rebranding process.

We began a strong relationship working with the new SJC Committee, under the direction of our former deputy director, on a range of projects, some still in development, including toolkits for bar organizations and law schools, a profession-wide CLE, and a resource-sharing network.

At the core of our marketing efforts is providing educational programming and other material, often in collaboration with organizations throughout the Massachusetts legal community, including presentations at each Practicing with Professionalism course mandated for all new attorneys in Massachusetts, currently in a virtual format. As the pandemic affected us all, we worked with bar organizations, legal employers, courts, and law schools to provide relevant programs and support, and centralized resources on our websites.

We also reach members of the Massachusetts legal profession (and beyond) directly online with

resources across both our websites for clinical services, where we continue to publish weekly to both blogs and share updated offerings from our organization and other entities in the legal community; both continue to receive considerable traffic and rank well in web search results. We share updated resources from our websites through our social media accounts.

We launched a refresh of MassLOMAP.org in FY20, aligning its design more closely with the new LCLMA.org launched last year, and continue to cross-post key topics across both blogs. We've taken a number of actions to improve both our websites' accessibility for individuals with disabilities, including monthly website audit reviews.

Our organization joined others in the national and local legal communities as we celebrated the first Lawyer Well-Being Week during the first week in May, which was adapted to virtual settings. Our staff made additional presentations throughout the community, including 'coffee breaks' with the SJC Committee, and shared new themed resources daily on our blog and by email.

In 2020, our organization joined the nation in a long overdue explicit commitment to fighting racism. We will continue to work with stakeholders in the profession, particularly the SJC Committee, to improve diversity, equity and inclusion among our staff and services. We will make every effort we can to work toward inclusive well-being in the legal profession.

OUR REACH IN BRIEF



12,848
PROGRAM
REACH

152 EDUCATIONAL
PRESENTATIONS
3 EXHIBITING
TABLES

127,357 WEBSITE
PAGEVIEWS
118 BLOG
POSTS

TOPICS

WELL-BEING & MENTAL HEALTH

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

PRACTICE MANAGEMENT & CAREER

Law Firm Startup, Time Management, Operations, Tech, Marketing & Business Development, Networking, Data Security, Organization, Policies & Procedures, & More

FOLLOW OUR UPDATES:

facebook.com/LCLMass

twitter.com/LCL_MassLawyers

linkedin.com/company/LCLMass

youtube.com/c/LCLMassLOMAP

facebook.com/MassLOMAP

twitter.com/MassLOMAP

linkedin.com/company/MassLOMAP

ENGAGING OUR EXPERTS



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

LCLMA.ORG/COLLABORATE

STRATEGIC PLAN

KEY RESULTS

Our strategic objectives for FY20 were developed at a retreat involving the full staff and board under the guidance of a two-person team from Empower Success Corps. A strategic planning working group comprised primarily of our staff developed project plans and completed component tasks.

LOGISTICS



Created systems for planning growth of online and in-person services, made initial new hires.



Accelerated online offerings due to Covid-19; created feedback systems to monitor evolving client needs & preferences.



Created a leadership outreach system to send updates and key communications, categorized by entity type.

PROGRAMMING



Developed two sets of best practices for launching programs and groups, both for ideal timing and urgent response needs.



Designed an outline for a pilot annual volunteers training program; plans to launch delayed due to Covid.



Implemented systems to capture and review data insights to inform programming and resource development.

MARKETING



Evaluated options for rebranding our organization, decided to revisit changing our name in 2-3 years; began soft rebranding.



Designed key website navigation improvements for better engagement; merged key internal operations & marketing functions.



Created objectives for FY21 strategic plans in revised categories: services delivery, operations, & organizational learning/growth.

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 2020 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 2020 as shown in the following table:

Office Expenses, Dues, Meetings, Postage	\$68,927.08
Office Equipment / Supplies	\$32,337.84
Marketing / Advertising	\$55,792.88
Professional Services / Insurance	\$111,707.66
Rent / Utilities	\$197,163.48
Travel	\$18,938.82
Payroll / Salaries / Benefits	\$1,016,713.10
TOTAL EXPENDITURES	\$1,501,580.86

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 subjective criteria consistent with the wishes of the donors.

The requests are subject to approval by clinicians, the Executive Director, and the LAF Investment Committee. All LAF recipients are asked to repay any assistance received if their financial circumstances improve sufficiently to do so. In FY20, LAF requests totaling \$1,246.64 were approved. The LAF balance at FY20 year-end was \$313,793.92. The James A. Brink Endowment Fund exists solely for the purpose of assisting lawyers with recovery and rehabilitation related treatment and services. In FY20, there were no requests for assistance from that fund, and the balance at year-end was \$164,196.37.

Acknowledgements

OFFICERS, DIRECTORS, AND STAFF

OFFICERS

Tracy Ottina, Esq.
President

Kevin Maynard, Esq.
Vice President

Tierra Jenkins, Esq.
Clerk

Lucy Reyes, Esq.
Treasurer

BOARD OF DIRECTORS

Dorothy Anderson, Esq.

Robert Antonioni, Esq.

Joseph Berman, Esq.

Timothy Casey, Esq.

Mary Connelly, Esq.

Jeanne Demers, Esq.

Rodney Dowell, Esq.

Eric Gouvin, Esq.

Tierra Jenkins, Esq.

Kevin Maynard, Esq.

Beth Myers, Esq.

Tracy Ottina, Esq.

Lucy Reyes, Esq.

David Rosenblatt, Esq.

STAFF



Barbara Bowe, LICSW
Staff Clinician



Rachel Casper
Director of Strategic
Operations & Marketing



Jamice Edge
Administrative
Professional



Jeffrey Fortgang, Ph.D. LADC-I
Staff Clinician



Shawn Healy, Ph.D.
Staff Clinician



Laura Keeler
Law Practice Advisor



Tracey Meyers, Psy.D.
Staff Clinician



Emmanuel Okharedia III, Esq.
Law Practice Advisor

We also wish to acknowledge individuals who were on staff during FY20 but not at the time of this report's publication: Heidi Alexander (Deputy Director), Anna Levine, Esq. (Executive Director), and Susan Letterman White (LOMAP Advisor).

LCL | Mass LOMAP

31 Milk Street, Suite 810
Boston, MA 02109

Well-Being & Clinical Services

(617) 482 9600
WWW.LCLMA.ORG

Practice Management Services

(857) 383 3250
WWW.MASSLOMAP.ORG