



2018

ANNUAL REPORT

Massachusetts Lawyer Assistance Program

Serving members of the Massachusetts Bar since 1978.


LCL
LAWYERS CONCERNED
FOR LAWYERS
LCL



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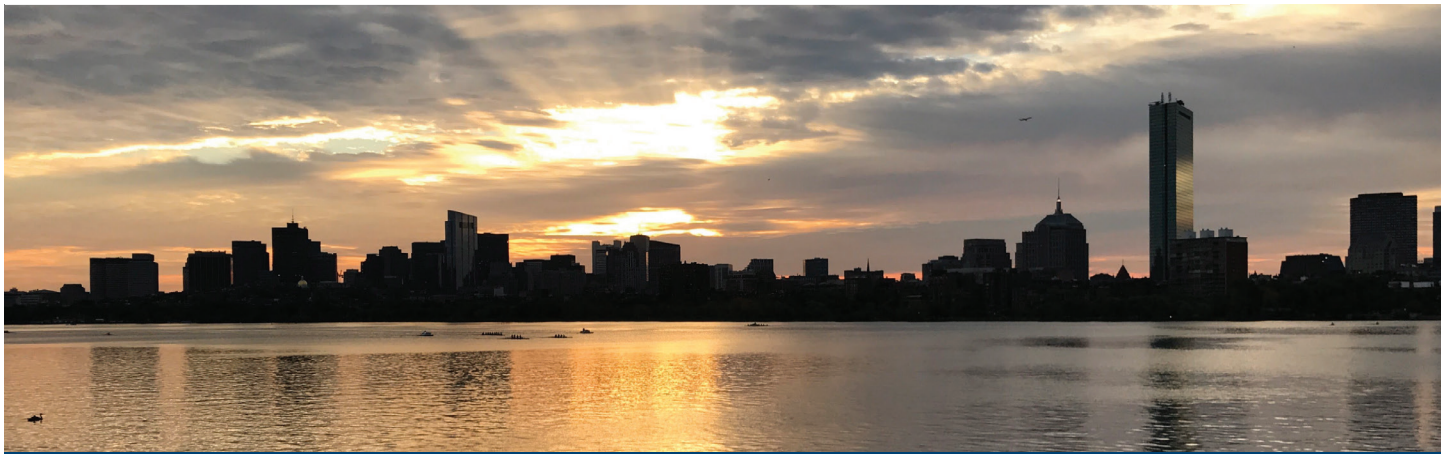
Lawyers Concerned

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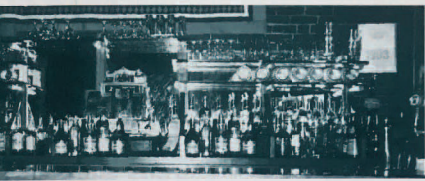
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- Independent of any c
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- Endorsed by the Massachu

Lawyers Concerned
lawyer in recovery

CELEBRATING 40 YEARS.



Means Passing the Bar but ...



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or Lawyers can help.

is:
- Confidential
ourt or bar organization
at no charge
sets Supreme Judicial Court

for Lawyers is one
helping another.

Not Every
Lawyer Can
Pass This Bar

Do you have a problem with
Alcohol or Drugs?

Take our brochure, or call
617-227-7070
1-800-LCL-0210

MASSACHUSETTS LAWYER ASSISTANCE PROGRAM

LCL

Lawyers Concerned for Lawyers, Inc. is a private, non-profit corporation. As the State's sole lawyer assistance program, LCL assists lawyers, judges and law students who are experiencing any level of impairment in their ability to function as a result of addiction, mental health, personal or medical problems.

briefings

LAWYERS CONCERNED FOR LAWYERS, INC.

FALL 2003

From the director...

DEALING WITH TRANSITION

This is not an easy time to be practicing law, with firms downsizing, merging or dissolving, or with the rumors flying that often precede such changes. Dealing with a job loss, questioning one's career, or having to assess your marketability can be very unset-

forward and to create as positive a personal and professional environment as possible for ourselves.

We hope that our article, and the interviews with 3 lawyers who have successfully negotiated career changes, will prove helpful



James A. Brink
1922-2003

LAWYERS CONCERNED
FOR LAWYERS, INC.

"Never doubt that a small group of thoughtful
committed citizens can change the world. Indeed,
it is the only thing that ever has."

~ Margaret Mead

LCL
Retrospective:
20 Years
of Service

MASSACHUSETTS
LAWYER
ASSISTANCE
PROGRAM

Inside

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HONORING OUR ORIGINS



LCL's 30th Anniversary Founders Luncheon
October 23, 2009

LCL
LAWYERS CONCERNED
FOR LAWYERS
LCL

FOR THE ISSUES
of
LIFE IN LAW

LCL MASSACHUSETTS

LCL
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FOR LAWYERS
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FOR LAWYERS
LCL

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Worcester (508) 753-0896
Springfield (413) 732-5640

18 Shawmut Street • Boston, Massachusetts 02116 • 617-332-8884
Lawyers helping lawyers with alcohol and drug addiction



Law Office Management
Assistance Program
Your law practice advisor.

You know the law.
Now learn the
business of law.

DEAR COMMUNITY,

Our organization has grown over the past 40 years since the first meeting under our name took place in 1978. Revolutionary milestones followed, as we incorporated as a nonprofit and secured funding of our operations through the Massachusetts Supreme Judicial Court. We now provide comprehensive services to promote well-being in the legal profession, and are working passionately with other key organizations to create opportunities to make positive change.

Since our beginning, awareness of a crisis in law student and lawyer well-being has grown. It is clear that much more work is still needed to help to destigmatize addiction and mental illness, and empower individuals in the legal profession to find help when they need it.

To that end, over the past year, LCL worked with the Massachusetts SJC to form a Lawyer Well-Being Steering Committee, which will issue findings not long after this report is published. We look forward to guidance from that effort and insights from our own simultaneous strategic planning work. Our team of staff, board members, and volunteers are eager to engage the community in our ongoing efforts to promote the health and professional competence of lawyers, judges, law students, and other legal professionals across the Commonwealth.

I look forward to another year working and collaborating with the community to further advance our mission.

Best regards,
Beth Myers, President | LCL

14,210 days.

LAWYERS CONCERNED FOR LAWYERS

has been helping lawyers in Massachusetts since October 1978. This year marks our organization's 40th anniversary, with multiple milestones to celebrate as we continue to grow. (Days above are approximated.)

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.

2018

Fiscal Year 2018, our 40th anniversary year, was one of remarkable growth for Lawyers Concerned for Lawyers (LCL). We have witnessed a slow evolution in perspectives about LCL's function. There is growing support and acceptance of the notion that that LCL is for everyone in the legal community—not just for alcoholics. We have put tremendous effort toward the formulation, adaptation and implementation of a plan to both expand and integrate our service offerings—always mindful, however, of the principles, values and activities that drove our founding members, have always been at our core and comprise our origin story: rendering aid and assistance to lawyers who may be impaired in their abilities to practice, often as a result of alcohol use.

2007

Lawyers have faced obstacles to obtaining and maintaining supports for their personal and professional well-being since long before our organization came into being 40 years ago. LCL has always prioritized breaking down barriers to asking for help in the community we serve. Since 1978, we have consistently set our minds to designing ways to make it easier for those who need us to engage our services. What has changed and evolved over these past 40 years, is the range of assistance we provide, categorized into three distinct prongs: recovery, mental health and practice management services. While we have ostensibly operated on these separate tracks, there is considerable overlap across our services. We understand that positive and stable mental health, recovery and practice management routines all share at their core an emphasis on prioritizing well-being and resilience. As a result of this growing understanding, we have placed concerted efforts into improving and clarifying how our service areas communicate and collaborate, eliminating or minimizing the distinctions across them where appropriate. No two indi-

1990

1987

1978

Executive & Historical Summary

PIONEERING LAWYER WELL-BEING IN MASSACHUSETTS SINCE 1978.

viduals in the legal profession are the same. Whether clients arrive with clear goals in mind or only limited understanding about their concerns, they might ultimately benefit an individually selected combination of our services.

As we collaborate with other organizations in the legal community, we continue our ongoing efforts to integrate our range of services and communicate the gamut of resources available through LCL. With the objective of simultaneously simplifying our message while also communicating the array of ways we serve the Massachusetts legal community, we recently completed a website redesign, dramatically improving the navigability and appearance on LCLMA.ORG, and enabling more cross-traffic with MASSLOMAP.ORG.

It has been a whirlwind year, in the best sense of the term—and we have truly just begun. We will be finalizing a formal strategic plan for LCL in Fiscal Year 2019, setting clear and measurable objectives for the three years to come. We have formed action teams to expedite our objectives and hope to enhance our ability to reach and engage even more members of the legal community.

In the meantime, at the direction of Chief Justice Ralph D. Gants, the Supreme Judicial Court (SJC), has formed a Steering Committee on Lawyer Well-Being. Retired SJC Justice Margot Botsford has served as a visionary leader of this committee, pulling together a diverse group of representatives from a range of stakeholder groups. I expect we will be able to produce a written strategic plan for LCL and also, to see concrete recommendations emerge from the SJC Committee, before year's end. I look forward to reporting back to you on these ongoing projects in next year's annual report.

I remain 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 . . . and LCL business is everybody's business. We all play important parts in extending helpful and often life and career-saving resources throughout the legal community. Thank you all for being strategic partners in this process.

Warmly,
Anna Levine, Executive Director | LCL

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 Report

INDIVIDUAL & GROUP SUPPORT FOR RECOVERY FROM ADDICTION IN THE LEGAL PROFESSION.

Although we have expanded our services substantially since “Lawyers Concerned for Lawyers” first gathered in 1978, we have not lost focus on supporting individuals in the legal profession seeking recovery from addiction. Our comprehensive services help lawyers, law students, judges, and other legal professionals create healthy, sustainable careers, and we understand that substance addiction makes creating positive change uniquely challenging, and critical.

We host two annual events gathering individuals in the legal profession focused on fostering fellowship in addiction recovery. In September, Recovery Day featured a series of discussions

relevant to Growing the Movement for Lawyer Well-Being. In May, Justice Shannon Frison of the Massachusetts Superior Court spoke to an enthusiastic audience as the Keynote at our James A. Brink Annual Fellowship Dinner. Our listserv membership and attendance at peer support meetings continue to grow.

We assembled a team to join Shatterproof’s Rise Up Against Addiction 5k Walk/Run in October 2017, and were proud winners of their Team Recruitment Week Challenge. In August 2018, our entire staff received training on suicide prevention from a representative of the Samaritans.

14TH
ANNUAL

JAMES A. BRINK DINNER

MAY 21, 2018 | PALMER, MASS.

JUSTICE SHANNON FRISON
KEYNOTE SPEAKER

“LCL saved my life and career.”
RECOVERY SPEAKER



266 meetings.

FY18 brought our Addiction Recovery Peer Support Meetings to Wakefield, and we are eager to help form group meetings in new locations across Massachusetts. We are also building training for more LCL volunteers -- find more at LCLMA.ORG/VOLUNTEERS.



RECOVERY MEETING LOCATIONS



SHATTERPROOF **Rise Up Against Addiction 5K**
TEAM RECRUITMENT WEEK CHALLENGE **Winner**



2x REGISTRATION INCREASE FOR
**RECOVERY DAY: GROWING THE MOVEMENT
FOR LAWYER WELL-BEING IN MASSACHUSETTS**

2x MEMBERSHIP INCREASE FOR
**MASSACHUSETTS LAWYERS & LAW STUDENTS IN
ADDICTION RECOVERY LIST-SERV**

Well-Being & Clinical Services Report

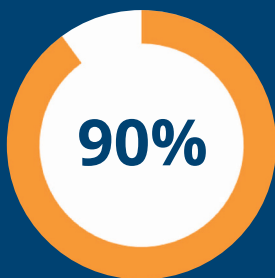
INDIVIDUAL & GROUP SUPPORT FOR PERSONAL CHALLENGES IN THE LEGAL PROFESSION.

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

Members of our clinical staff meet with individuals presenting with a wide range of concerns, create educational resources, and conduct workshops and trainings inhouse and through partners. They help lawyers improve resilience to stress and address challenges to their mental health and well-being, while also working closely

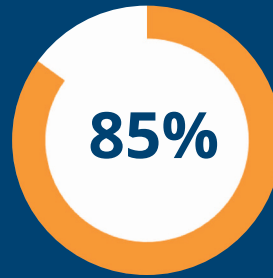
with our practice advisors to provide comprehensive support.

In FY18, we launched a workshop and support group for Practicing Law with ADHD, increased the reach of our online Solo|Stress support group, collaborated with LOMAP staff for our Professional Conduct group for attorneys facing discipline, and continued to host lunches inviting the Deans of Students from each law school throughout the Massachusetts for discussions.



Client Experience Rating 7+

Clients who responded to our satisfaction survey after using clinical services rated our services 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.

NARRATIVE NOTES from Clinical Staff

A number of lawyers reached out to LCL this year because they felt so stressed and mismatched in their work that they were largely stalled in keeping up with cases. I helped each client I met accept their impasse and address the dilemma. Each were relieved to find changes they could make to feel good about their work and to work with therapists for support in maintaining progress.

Law students come to LCL feeling anxious when anticipating questions about mental health issues and treatment at character and fitness hearings with the Board of Bar Examiners. We help these students get comfortable and speak confidently about their situations.

We routinely meet with individuals struggling to manage ADHD/ADD in their work as lawyers and law students. This year, I ran our first workshop on Techniques for Practicing Law with ADHD, and launched a monthly support group meeting. The first workshop was filled to capacity and participants reported positive results putting techniques into practice.

309 individual sessions.
65 helpline calls.

Our clinicians talk with lawyers and law students about any concerns they're facing in life or law practice. In addition to our clinical staff's work, we added 11 peer mentoring cases in Q4 alone.

GROUP MEETINGS HELD IN FY18



NEW! **PRACTICING LAW WITH ADHD**

In the last month of FY18, we launched our newest workshop and monthly support meetings.



11 **SOLO | STRESS CONNECTION**

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



24 **PROFESSIONAL CONDUCT**

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

“ LCL has an excellent team to support and help lawyers in need. The professionalism combined with that personal touch makes the difference in this type of service.”

“ Working with LCL has been a very big help. I thank you. It has made a huge improvement for me. ”

“ I was really struggling with severe anxiety/depression and overwhelmed with and paralyzed by my work. Dr. Fortgang immediately made me feel at ease, like I was not alone and that there was hope. He went above and beyond to counsel me and to find me appropriate outside counseling and I am sincerely grateful to him.”

“ LCL, particularly Barbara Bowe, was a key factor in my ability to not only make it through my second year of law school, when I was extremely challenged, but to thrive and see long term holistic improvements.”

“ Shawn has been a wonderful resource for me and my staff attorneys... He has deeply impacted the lives of attorneys who work with a high risk community, as a result he has been a crucial part of the success of our program. We are all grateful.”

“ LCL helped me through a difficult time. The members of the LCL team showed compassion and understanding that I am truly grateful for.”

Practice Management Services Report

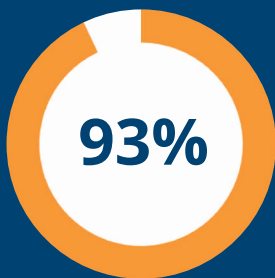
INDIVIDUAL & GROUP SOLUTIONS TO PRACTICAL CHALLENGES IN THE LEGAL PROFESSION.

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 reduce feelings of overwhelm and anxiety.

Our advisors consult with individuals and small firms of all levels of experience and need, create educational resources, and conduct workshops and trainings inhouse 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.

In FY18, we launched a Rainmakers Incubator Workshop Series and support group, increased the reach of our Webinars for Busy Lawyers substantially, collaborated with clinical staff and the WBA Parents' Forum for our ongoing SuperMom support group, and continued to offer our Law Practice Startup Workshops in multiple locations.



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.

NARRATIVE NOTES from LOMAP Staff

Lawyers routinely come to us for help with practice management technology. This year, I met with a few judges to discuss how to effectively utilize technology in their courtrooms. I also met with a civil legal aid organization to present on practice management technology and to consult on updates to their own systems, discussing the steps to research, purchase, and implement a new product to work effectively with their current systems and workflows.

I met with a number of lawyers who came to LOMAP with what they understood to be a narrow, practical issue and learned there was more to unpack in their situations to find solutions. I helped each identify considerations they hadn't noticed, and was able to bring in the clinical support needed as a foundation for our practical advice.

Many lawyers come to us directly for guidance on succession planning as they start their practices or anticipate closing down their practices in retirement, and also seek our help when colleagues become impaired. I met with a lawyer concerned about another lawyer in her county who had become impaired and needed assistance closing her practice. I provided her with resources, advice, and referrals so she could provide effective assistance to her colleague.

220 individual consultations.

Most clients use LOMAP services voluntarily to enhance their practice. We see others who 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.

GROUP MEETINGS HELD IN FY18



12 RAINMAKERS INCUBATOR

A 4-Part Workshop Series and on-going monthly meetings, to help lawyers sell their services better.



12 WEBINARS FOR BUSY LAWYERS

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



11 SUPERMOM SUPPORT

Monthly meetings in Boston and by phone, offering practical and peer support in early motherhood.



5 STARTUP WORKSHOPS

3-hour workshops in Boston, in Springfield, and online covering all the basics of starting a practice.

“Extremely helpful advice and information for further review in an incredibly short amount of time. Very pleased and grateful!”

“Susan White was knowledgeable, helpful, and prompt to follow up with additional information. I believe I was well served and am most appreciative.”

“The phone call I had with Heidi was invaluable! She was very thorough and patient, answering all of my questions. Her followup email was extremely helpful with lots of links to relevant information to get my practice off the ground.”

“Susan White is just the person you want to go to for the short and long-term planning questions I’m facing. Experienced, thoughtful, sound judgment, communicates her points and perspective very well -- all the things that make for a hugely helpful and informative consult.”

“In addition to all of the great resources and insights you’ve shared with me thus far, I also feel reassured knowing that I have a real person like you that I can communicate with if/when I have questions or issues concerning my startup process. Honestly, it makes a big difference; especially when that person is kind, thoughtful, and takes the time to get to me and understand my needs as you have done.”

“Susan and Barbara are life changers!! Such positive and helpful individuals.”

Communications Report

FREE & CONFIDENTIAL SERVICES FOR LAWYERS & LAW STUDENTS IN MASSACHUSETTS.

As an independent nonprofit organization, we reach diverse audiences in the legal profession across Massachusetts by partnering with other organizations to provide educational presentations for their programming and to contribute educational articles for publication.

We publish educational content on our two blogs, covering mental well-being and practice management topics. We hosted “Ask LOMAP Day” for lawyers and law students in Western Mass, and we found it was popular enough to continue as an annual event in addition to our New Year Networking Breakfast in Boston.

Members of our staff were published locally and nationally, and presented for other organizations throughout the year, including at each Practicing with Professionalism course mandated for newly admitted attorneys. We worked with organizations like CPCS, MCLE, and the MBA to provide trainings and comprehensive program series.

Insights from our strategic planning outreach efforts and the SJC’s Lawyer Well-Being Steering Committee will inform our marketing planning with goals to engage our diverse audiences and continue to design the most effective services possible to help them.

83 LCL BLOG PUBLICATIONS
32 WELL-BEING & 51 PRACTICE MANAGEMENT

37 LCL ARTICLES PUBLISHED BY PARTNERS
MBA LAWYERS JOURNAL; MASSACHUSETTS LAWYERS WEEKLY; ABA GP SOLO,
LAW PRACTICE TODAY & STUDENT LAWYER; ATTORNEY AT WORK

67 LCL TIPS PUBLISHED BY PARTNERS
WOMEN’S BAR ASSOC.; MASSACHUSETTS BLACK LAWYERS ASSOC.;
HAMPDEN COUNTY BAR ASSOC.; HAMPSHIRE COUNTY BAR ASSOC.

Expanding our reach with more ways to help.

We continued to improve communication about the growth of our services to the legal community in FY18 with increased outreach, better tools for coordination, and better branding consistency.



2x

NETWORKING BREAKFAST
REGISTRATION INCREASE (2017 v 2019)

| TOPICS |



WELL-BEING & MENTAL HEALTH

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

PRACTICE MANAGEMENT & CAREER

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

ENGAGING OUR EXPERTS

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

LCLMA.ORG/COLLABORATE

143

EDUCATIONAL PRESENTATIONS

BY LCL | MASS LOMAP STAFF IN FY18

10

EXHIBITING TABLES STAFFED

BY LCL | MASS LOMAP STAFF IN FY18

9,620

PARTIAL-YEAR PROGRAM REACH

TRACKING BEGAN FY18 Q3

#TIMESUP: LAW FIRM POLICY GUIDELINES



Heidi Alexander worked with coauthors Melissa Levine-Piro & Justin Kelsey to create policy guidelines for solo & small firms in an article published by the MBA Lawyers Journal.

THE FULL WEIGHT OF THE LAW, AND SCHOOL



Drs. Jeff Fortgang & Shawn Healy coauthored *The Full Weight of the Law*, published the ABA, and presented a webinar for the ABA Law Student Division on The Full Weight of Law School.

SELF-CARE FOR LAW STUDENTS & LAWYERS



Our staff highlighted the importance of self-care at each Practicing With Professionalism, in posts across both our blogs, and through increased outreach during law school orientations.

LEGAL CAREER DEVELOPMENT



Susan White created a 5-part workbook series to help lawyers & law students take control of career development, which we published on our blog, and she later presented in part for the BBA.

Financial Report

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 2018 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 2018 as shown in the following table:

Office Expenses, Dues, Meetings, Postage	\$94,016
Office Equipment / Supplies	\$37,406
Marketing / Advertising	\$36,361
Professional Services / Insurance	\$53,549
Rent / Utilities	\$182,931
Travel	\$29,627
Payroll / Salaries / Benefits	\$1,015,994
TOTAL EXPENDITURES	\$1,449,884

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 FY18, LAF requests totaling \$2,013 were approved. The LAF balance at FY18 year-end was \$286,321. The James A. Brink Endowment Fund exists solely for the purpose of assisting lawyers with recovery and rehabilitation related treatment and services. In FY18, there were no requests for assistance from that fund, and the balance at year-end was \$143,658.

Acknowledgments

OFFICERS, DIRECTORS, AND STAFF

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Laura Ferrari, Esq.
Vice President

Eric Gouvin, Esq.
Clerk

James H. Toms, Esq.
Treasurer

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Rachel Casper, Marketing Director

Jamice Edge, Administrative Professional

Jeffrey Fortgang, PhD, LADC-I, Clinician

Shawn Healy, PhD, Clinician

Michael Fredrickson, Outreach Coordinator

Anna Levine, Esq., Executive Director

Lottie Rutherford, Office Manager
(not pictured)

Susan White, JD, MSOD, Practice Advisor

LCL | Mass LOMAP

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Well-Being & Clinical Services

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