

# **Call to Action: Attorney Well-Being in the Large Firm**

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**MINNESOTA  
JUDICIAL BRANCH**

# 5 Goals for Today

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- Understand why large firms should emphasize well-being
- Consider a large firm case study
- Introduce the ABA Well-Being Toolkit
- Introduce the ABA Well-Being Pledge
- Convince you to be a firm leader on well-being



# Why Focus on Well-Being?

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- Good for the firm
- Good for clients
- Good for the profession
- The right thing to do



# A Moment of Personal Reflection

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- What is your personal connection to well-being in the workplace?



# Prepare to Take Action

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- One size does not fit all; each firm's approach will look different
- Different sizes and resources
- Different cultures
- Different perspectives



# Prepare to Take Action

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- Scope of the problem is large -- there is no simple fix
- Comprehensive approach is best – but some initial steps are better than doing nothing



# ReedSmith

## Case Study - *Wellness Works*



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# Reed Smith's Program

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- Committee met for 6-8 weeks to brainstorm initiatives
- Emphasis on optimism, even fun – make it good for morale. Example: “biggest loser” competition

# Reed Smith's Four Pillars

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Stress  
reduction

Mindfulness

Work-life  
balance

Wellness



# Reed Smith's Program

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- Quarterly firm-wide talks by experts on one of the “four pillars”
- Stress Resilience Toolkit - Moving from Surviving to Thriving
- “Wellness Champions” in each office



# Reed Smith's Program

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- Intranet page with wellness resources and links
- Mediation and yoga classes
- Weekly hour-long walks and firm-wide “walking challenge”



# Sandy Thomas, Global Managing Partner:

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“The firm’s most valuable resource is its people, which makes their health and well-being critical to our firm, our clients and our success. The legal profession is inherently high pressure, and there can be a tendency for personnel in all roles to minimize or ignore their own well-being to focus on the demands of work. I have high hopes that *Wellness Works* will help all of us achieve the level of work-life balance we each desire and so richly deserve.”

# Reed Smith's Keys to Large Firm Wellness

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- Clear statement and genuine support from top firm leadership
- Grounded in both economics and morality
- Genuine recognition that the firm's people are its most important resource



# Reed Smith's Keys to Large Firm Wellness

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- Genuine acknowledgment that law is a high-pressure profession
- Understanding that wellness is important for recruitment, retention, and performance



# Reed Smith's Keys to Large Firm Wellness

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Changing the culture so that everyone understands that well-being is linked to recruitment, retention, performance, and client success

“If you have your lawyers operating at their best, at their highest potential, it’s better for them, it’s better for the client, it’s better for the firm.”

*-- Casey Rein, Global Head of Legal Personnel*



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# Reed Smith's Keys to Large Firm Wellness

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Culture change must include all personnel, not just lawyers:

- Not merely politically necessary, but culture includes everyone in the firm
- Often staff members are more attuned to how the firm functions
- Some offerings may be geared specifically to attorneys



# The ABA Well-Being Toolkit



# ABA Well-Being Toolkit

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- Comprehensive road map for legal employers on the promotion of well-being in the legal workplace
- Excellent tool for beginning—or expanding—your firm’s well-being initiatives



# The ABA Well-Being Toolkit

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- Well-being definitions
- 8-step Action Plan
- Policies & practices audit
- Activities and events

# ABA Well-Being Toolkit

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- Education and development
- Assessments
- Online resources and technology



# The Toolkit: Key Action Steps

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- **WARNING** - Toolkit's breadth and depth may appear daunting.
- **RECOMMENDATION** - Treat the Toolkit as a buffet. Pick some action steps that fit your firm.

# The Toolkit

## Key Action Steps

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- Enlist leaders
- Create a Well-Being Committee
- Create a Well-Being Policy (including impairment)



# ABA Model Impairment Policy (Proposed)

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Impairment defined: Inability to render services with reasonable skill and safety, caused by, but not limited to:

- Use of alcohol/drugs, mental health disorder, or physical illness/condition that adversely affects cognitive, motor or perceptive skills.

# ABA Model Impairment Policy (Proposed)

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Policy covers:

- Duty to report
- Confidentiality
- Prohibition against retaliation



# Options Upon Determination of Impairment

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- Leave of absence
- Referral and treatment
- Restriction of work duties
- Review of lawyer's activity
- Remedial action on client matters
- Reporting to disciplinary authorities
- Conditional employment
- Termination



# Impairment Support

## Lawyers Concerned for Lawyers

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- Since 1976 LCL serves lawyers, judges, law students and their families
- Up to 4 free counseling sessions on any issue causing stress or distress
- Statewide peer support
- Free and confidential; help available 24/7
- Provides guidance, coaching resources and training to law firms.
- 651-646-5590 • [www.mnlcl.org](http://www.mnlcl.org) • [help@mnlcl.org](mailto:help@mnlcl.org)



# LCL Recommendations

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- Accommodate chemical dependency and mental illness like any other disabling condition.
- Provide a clear path to ask for and receive help early, reducing the odds of malpractice and professional responsibility issues.
- A punitive policy leads to shattered careers and reputations.

# Key Action Steps from The Toolkit

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- Conduct a needs assessment (surveys, audits)
- Consider the range of firm practices that impact well-being:
  - Orientation
  - Billing policies and practices
  - Vacation policies
  - 24/7 availability expectations
  - Diversity

# Key Action Steps from The Toolkit

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- Announce well-being as a cultural theme and core value
- Create and execute an action plan, with activities and events
- Accumulate quick, small “wins”



# Key Action Steps from The Toolkit

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Promote education and development:

- Stress/resilience & optimism
- Mindfulness meditation
- Work/life balance
- Meaning and purpose



# Key Action Steps from The Toolkit

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Promote tech resources, such as smart phone or online apps for:

- Meditation
- Mental/emotional health
- Work breaks
- Cognitive reframing





ABA

WELL-BEING

★ PLEDGE ★

# The ABA Well-Being Pledge

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- Provide robust education on well-being, mental health, and substance use disorders
- Reduce expectation of alcohol at firm events and provide alternative beverages
- Partner with outside providers committed to reducing substance use disorders and mental health distress

# The ABA Well-Being Pledge

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- Provide confidential access to addiction and mental health experts and resources
- Develop proactive policies and protocols on assessment and treatment of substance use and mental health problems

# The ABA Well-Being Pledge

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- Show that the firm's core values include self-care and getting help when needed: programs for physical, mental and emotional well-being
- Use the pledge and the firm's commitment to attract and retain the best lawyers and staff

# The ABA Well-Being Pledge

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- Local signers: 3M, Dorsey & Whitney, Faegre Baker Daniels, Greene Espel, UST School of Law
- National signers: Barnes & Thornburg, Cozen O'Connor, Hogan Lovells, Ogletree Deakins

# The Very Next Thing . . .

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Please put attorney well-being on the agenda for the next meeting of your firm's governing body!



**Thank you, and be well!**

