

The State Bar of California

Resources for Wellness in Law: Finding Harmony Between Personal and Professional Performance

Attorney Wellness Plan Template and Sample Wellness Plan

Lawyer Assistance Program brochure

Lawyer Assistance Program flyer

Rule of Professional Conduct Rule 1.1 Duty of Competence

<u>The Other Bar</u>: Recovery program for California law students, bar applicants, attorneys, and judges, hotline: 800-222-0767

<u>Lawyer Depression Project</u>: Free resource for attorneys, law students, paralegals, and administrative professionals

988 Suicide and Crisis Prevention Hotline-call or text 988

ABA Commission on Lawyer Assistance Programs

Resources Cited

The Survey of Law Student Well-Being

Fortune's 100 Best Companies to Work for 2023

The Path to Lawyer Well-Being: Practical Recommendations for Positive Change

State Bar of Wisconsin, Meditation for Lawyers-Lesson from a Military Study

Michigan Task Force on Well-Being in the Law

TEMPLATE WELLNESS PLAN FOR ATTORNEYS

I. Personal Information

- a. Name
- b. Date

II. Vision Statement

- a. Describe your overall vision for your well-being. What does a healthy and balanced life look like for you?
- b. _____

III. Emotional Wellness

- a. Goals

b. Action Steps

i.	
ii.	
iii.	
iv.	

IV. Intellectual Wellness

a. Goals

i.	
ii.	
iii.	
iv.	

b. Action Steps

V. Occupational Wellness

a. Goals

i.	
ii.	
iii.	
iv.	
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b. Action Steps

ii	
iii.	
iv.	
V.	

VI. Physical Wellness

a. Goals

i.	
ii.	
iii.	
iv.	
v.	

b. Action Steps

i.	
ii.	
iii.	
iv.	

VII. Spiritual Wellness

a. Goals

i.	
ii.	
iii.	
iv.	

b. Action Steps

i.	
ii.	

iii. _____iv. _____

VIII. Social Wellness

a. Goals

i.	
ii.	
iii.	
iv.	

b. Action Steps

i.	
ii.	
iii.	
iv.	

IX. Update the plan quarterly (or as needed).

SAMPLE WELLNESS PLAN FOR ATTORNEYS

I. Personal Information

- a. Name
- b. Date

II. Vision Statement

- a. Describe your overall vision for your well-being. What does a healthy and balanced life look like for you?
 - i. Ensure that I will make the time to exercise at least 5 days a week, get at least 7 hours of sleep nightly, eat healthy food, and avoid work-related issues after 8 pm, on the weekends, and holidays.

III. Emotional Wellness

- a. Goals
 - i. Take breaks during the workday to recharge and refocus.
 - ii. Set realistic goals and prioritize tasks to avoid feeling overwhelmed.
 - iii. Set boundaries to avoid burnout.
 - iv. Seek support from colleagues, friends, or a mental health professional if needed.

b. Action Steps

- i. Each hour stop working for a few minutes to rest my eyes, stretch my body, and drink water to rehydrate.
- ii. Complete a prioritized "to do" list each night for my personal and professional life.
- iii. Do not work past 8 pm.
- iv. Talk to colleagues on my team to discuss how to handle the large caseload.

IV. Intellectual Wellness

- a. Goals
 - i. Schedule specific time slots in your calendar to pursue your intellectual interests.
 - ii. Engage in continuing education and professional development opportunities to stay up-to-date in your area of practice.
 - iii. Read books, articles, or other materials outside of work to stimulate the mind.

- iv. Take advantage of technology by using apps or online platforms to learn new skills.
- b. Action Steps
 - i. Block out 9 pm to 10 pm on calendar.
 - ii. Weekly review my local bar association website and register for CLE.
 - iii. Nightly review a legal publication for 30 minutes.
 - iv. Nightly review local/national news on phone app/TV for 30 minutes.

V. Occupational Wellness

- a. Goals
 - i. Working for the right employer or being self-employed can help you achieve a work-life balance.
 - ii. Alternative work schedules such as working remotely, hybrid schedule, flex time, or part time can help you achieve a work-life balance.
 - Delegate tasks to other team members such as paralegals, investigators, law clerks or outsource work to freelancer or contractors, such as appearance attorneys.
 - iv. Seek out opportunities for professional growth and development.
 - v. Establish a mentor-mentee relationship with an experienced attorney within the specific area of practice or who has experience with the issues you are dealing with.
- b. Action Steps
 - i. Look into starting my own practice as a solo practitioner due to overwhelming caseload.
 - ii. Discuss with team leader working remotely four days and in the office one day a week.
 - iii. Ask team leader if our team can hire an investigator to assist with investigative duties such as interviewing witnesses, background investigations, and gathering evidence.
 - iv. Look for webinars on my area of practice to gain additional expertise.
 - v. Ask "John/Jane" if we can meet and see if they are interested in becoming my mentor.

VI. Physical Wellness

- a. Goals
 - i. Exercise at least 150 minutes of moderate activity per week to maintain physical health and well-being.

- ii. Practice good sleep hygiene by sleeping at least 7 hours to ensure adequate rest and recovery.
- iii. Eat a balanced and nutritious diet based on your personal needs to fuel the body and mind.
- iv. Take breaks throughout the workday to stretch and move the body.
- b. Action Steps
 - i. Attend yoga classes every Wednesday, Thursday, and Sunday, cycling on Tuesday, and weightlifting on Monday and Friday. Let muscles recover on Saturday.
 - ii. Set alarm to get sleep by 10 pm and wake at 6 am.
 - iii. Prepare healthy meals on Sunday night to make for lunch and dinning for the week.
 - iv. Utilize my adjustable stand-up desk more frequently to ensure that I am moving throughout the day and not sitting all day long.

VII. Spiritual Wellness

- a. Goals
 - i. Engage in activities that promote a sense of purpose or meaning outside of work.
 - ii. Practice gratitude to cultivate a positive mindset.
 - iii. Connect with nature or engage in other activities that promote a sense of connection to something larger than oneself.
 - iv. Practice mindfulness and meditation by using apps to remind and guide you to manage stress and anxiety.
- b. Action Steps
 - i. At least once a quarter, volunteer for a community event in my neighborhood that helps others.
 - ii. Every night before bedtime, spend 10 minutes to reflect on all the things I am thankful for.
 - iii. Attend the monthly meetings for the volunteer committee I am on.
 - iv. Use the Headspace app to for guided meditation each night for three minutes.

VIII. Social Wellness

- a. Goals
 - i. Cultivate positive relationships with colleagues, friends, and family.

- ii. Join professional organizations to network, meet other professionals, and stay updated on the legal profession.
- iii. Engage in activities outside of work that promote social connection and community.
- iv. Join an affinity group, mentoring group, or support group to help build relationships and advice from experienced professionals.
- b. Action Steps
 - i. Once a week, check in on different family, friends, or colleagues.
 - ii. Once a month, attend an in-person event, mixer, or CLE of one of my professional groups to network with my colleagues.
 - iii. Once a month, attend one of my kids/family/friends' event.
 - iv. Join a women's bar association group to network with other women in my field of expertise.
- IX. Update the plan quarterly (or as needed) and post it where I will see it daily such as my office bulletin board.