



# 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](#)

[The Other Bar](#): Recovery program for California law students, bar applicants, attorneys, and judges, hotline: 800-222-0767

[Lawyer Depression Project](#): 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
  - i. \_\_\_\_\_
  - ii. \_\_\_\_\_
  - iii. \_\_\_\_\_
  - iv. \_\_\_\_\_
- b. Action Steps
  - i. \_\_\_\_\_
  - ii. \_\_\_\_\_
  - iii. \_\_\_\_\_
  - iv. \_\_\_\_\_

### IV. Intellectual Wellness

- a. Goals
  - i. \_\_\_\_\_
  - ii. \_\_\_\_\_
  - iii. \_\_\_\_\_
  - iv. \_\_\_\_\_
- b. Action Steps
  - i. \_\_\_\_\_
  - ii. \_\_\_\_\_
  - iii. \_\_\_\_\_
  - iv. \_\_\_\_\_

### V. Occupational Wellness

a. Goals

- i. \_\_\_\_\_
- ii. \_\_\_\_\_
- iii. \_\_\_\_\_
- iv. \_\_\_\_\_
- v. \_\_\_\_\_

b. Action Steps

- i. \_\_\_\_\_
- 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.
- iii. 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 dinner 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.