

OSB Professional Liability Fund presents

Excellence, Perfectionism, and Well-Being

Friday, April 21st
11:00 am – 12:00 pm

MCLE ID 98792
.5 Practical Skills Credit
5. Mental Health & Substance Abuse Credit

Speakers: **Bryan Welch**
OAAP Attorney Counselor

Monica Logan
PLF Practice Management Attorney

CLE Materials

- PowerPoint Slides
- References
- Resources
- Self-Care Assessment Worksheet
- "Why Well-Being?" Article
- "Advance Planning Can Go a Long Way to Prevent Overload" Blog Article
- PLF and OAAP Flyers



Excellence, Perfectionism, and Well-being

Presented by:
Bryan Welch
OAAP Attorney Counselor
Monica Logan
PLF Practice Management Attorney

 OSB Professional Liability Fund

 oaap
Oregon Attorney Assistance Program

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Agenda

- Definitions
- Malpractice Concerns
- Your Ideal Environment
- Building Structure
- Preparing Yourself

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Excellence

Greek “Arete” means striving toward excellence of any kind

“To aim and strive toward very high yet attainable standards in an effortful, engaged, and determined yet flexible manner”

**What do lawyers consider the primary measure of firm success?
Ranked in order of importance**

1	Overall profits
2	Client satisfaction ratings
3	Repeat business
4	Work/life balance
5	Overall revenues

Source: Thomson Reuters 2021

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Perfection

- **Adaptive**

- **Perfectionistic striving**

- *Personal standards perfectionism*

- **Maladaptive**

- **Perfectionistic concerns**

- *Self-critical* (fear of what you think of yourself)

- *Socially-prescribed* (fear of what others think)

(Paul Hewitt, PhD., 2023)

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What Language Do We Use?

Very good, competent, accomplished, successful, great, and capable

OR

Disproportionate, extreme, needless, too much, unreasonable, flawlessness, faultlessness, and exactness

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You Might Be A “Perfectionist” If...

- Despite your search for perfection, you never feel perfect.
- You cannot accept and celebrate your success.
- You don't allow yourself any mistakes.
- You put up a front, insisting everything is perfect.
- You avoid taking on challenges that may cause you to fail.
- You believe that your likeability is linked to being perfect.
- Your life doesn't satisfy you.
- You struggle with getting things done on time.

(Paul Hewitt, PhD., 2023)

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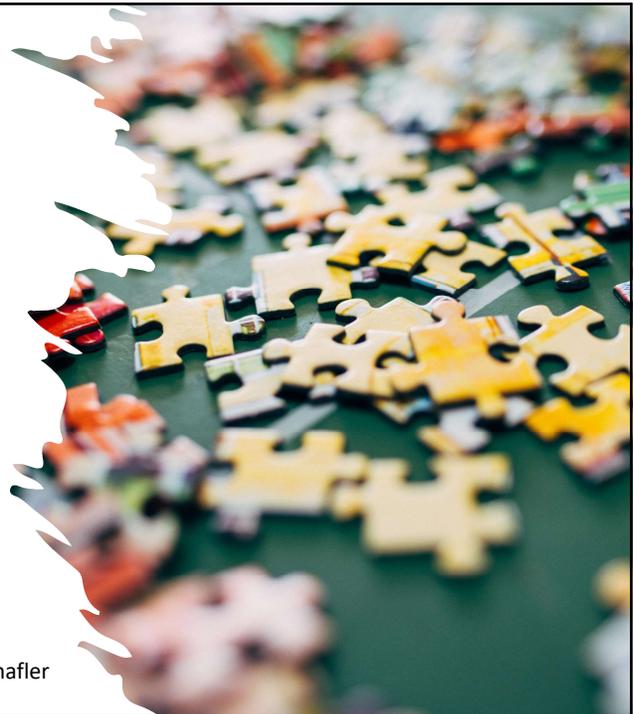
Why Are You Striving?

Is your motivation to bridge the gulf between and ideal and reality born from the desire to excel and grow (adaptive) or from the need to compensate for perceived inadequacies and avoid failure (maladaptive)?

How Are You Striving?

Are you hurting yourself or others in the process (maladaptive)? Or are you striving in a way that feels good for you?

- Katherine Morgan Schafler

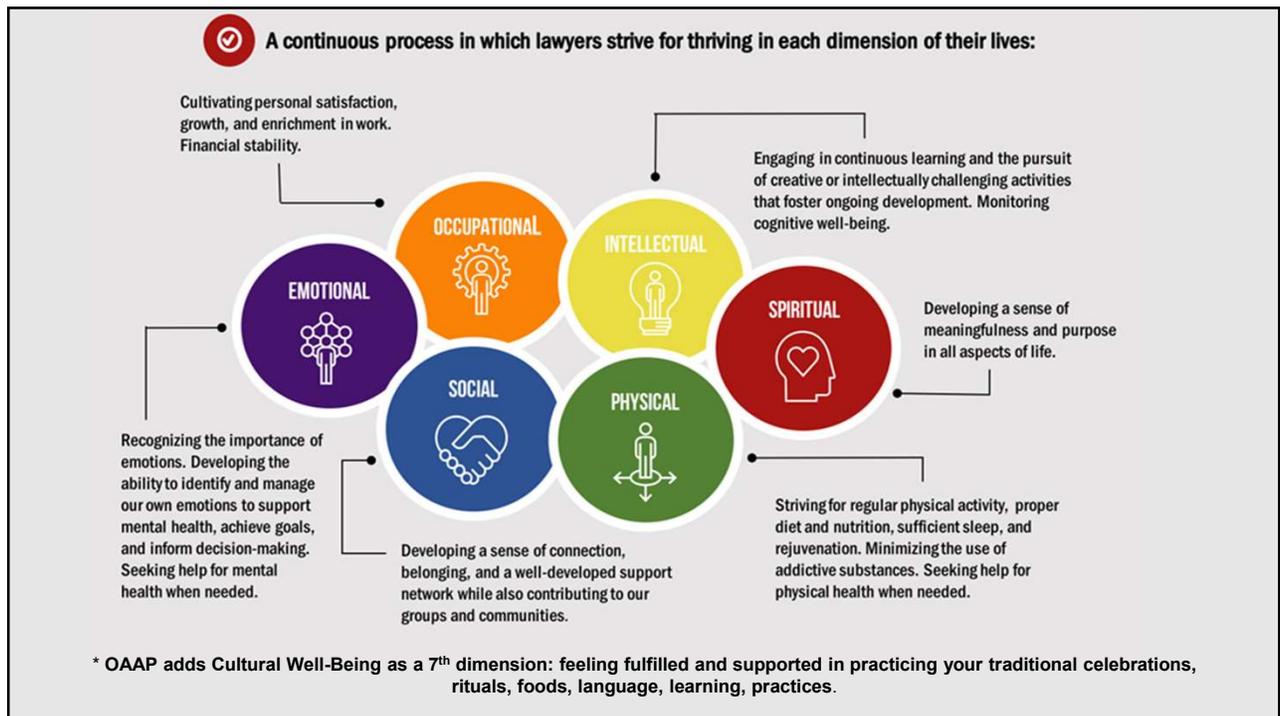


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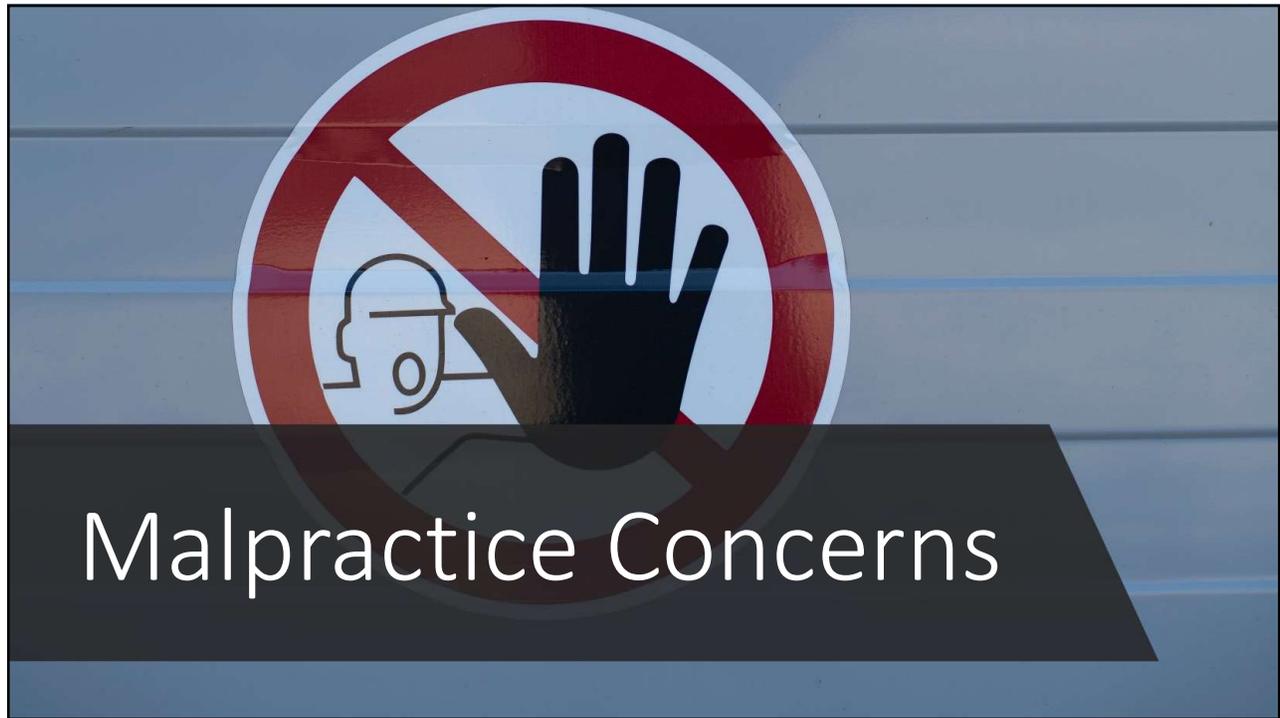


Well-Being And Perfectionism

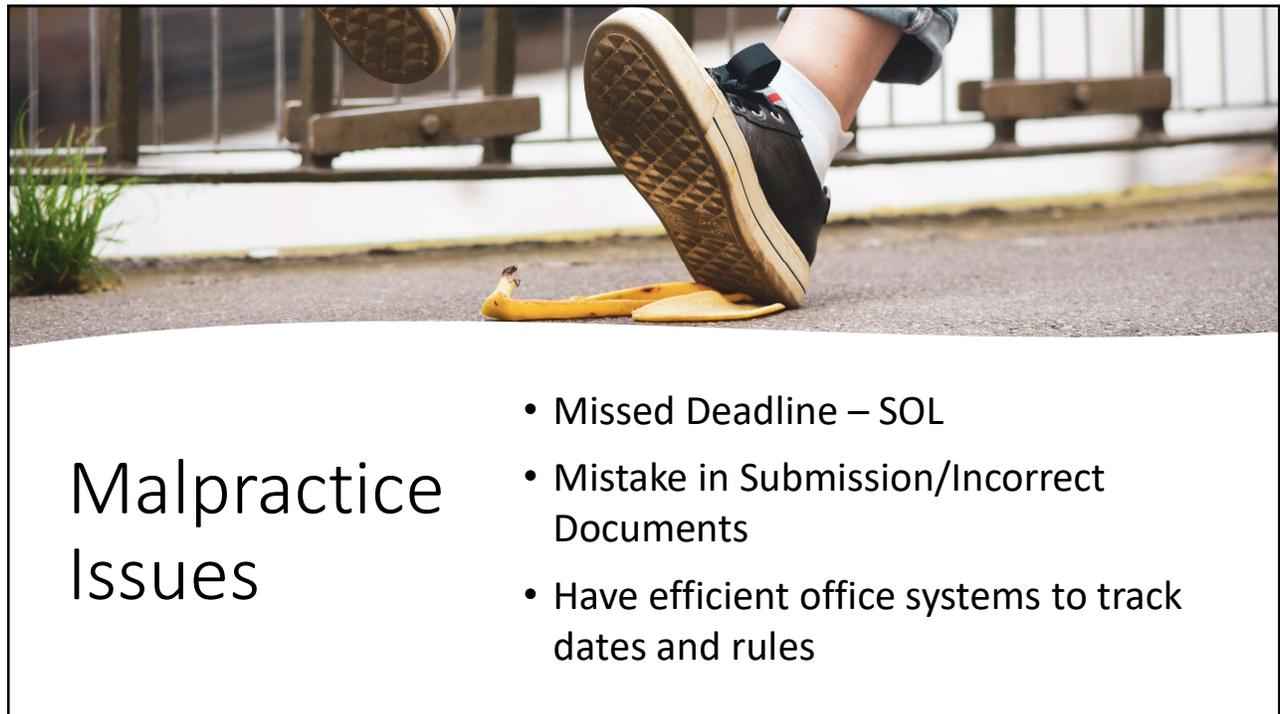
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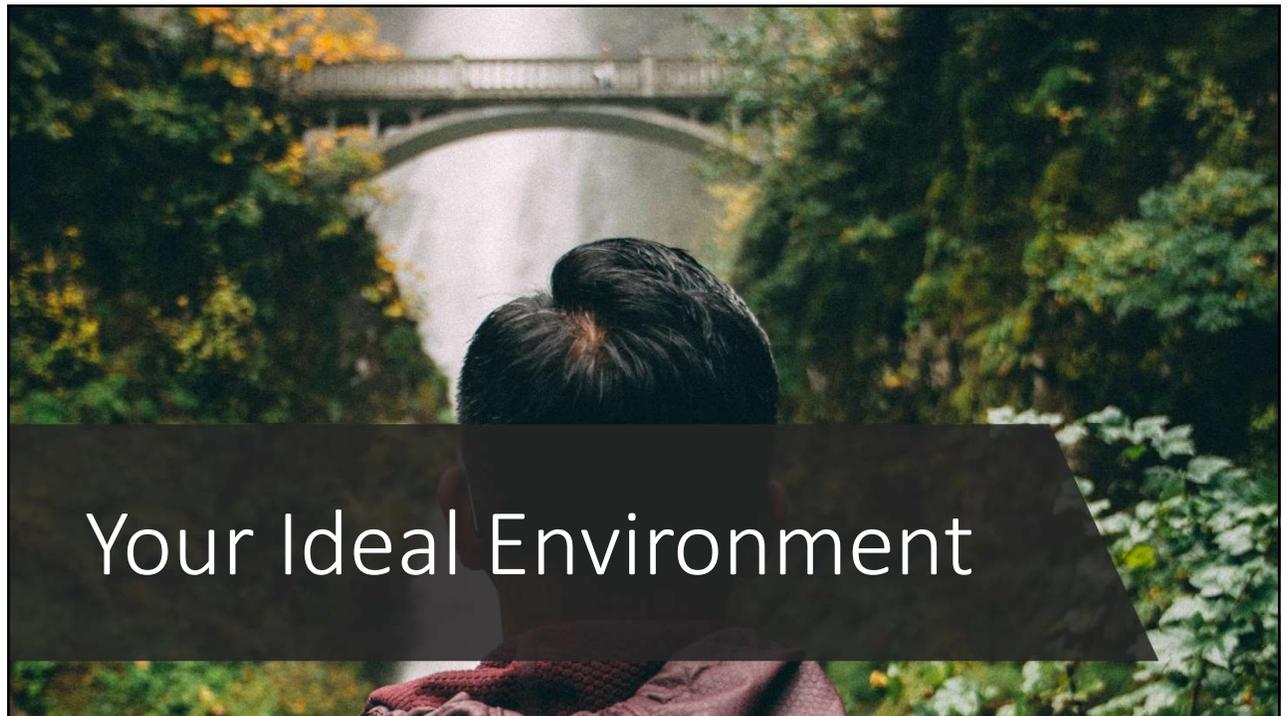
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Implementing Systems

- Efficient systems and practices to help guide yourself and your staff
- Finding what systems work takes time
- Utilize feedback and other resources



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Your Ideal Environment

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Best Environment for You

- What is your best environment to grow and flourish?
 - Flow State
 - Joy
 - Passion



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Evaluating Your Options

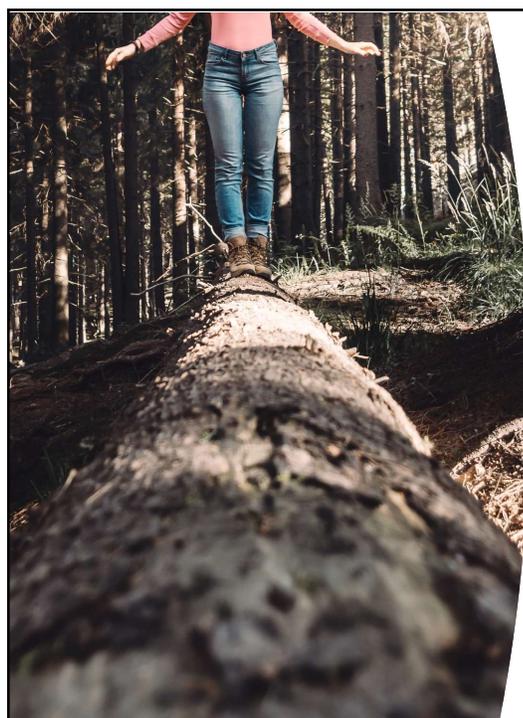
- Identify Values, Needs, and Skills
- Daily Structure
- Billable Hours
- Return to Base Camp



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Individual Level

- Building resilience
- Attend to your basic needs
- Finding time for what you value
- Understand if your workplace is not a positive influence

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ProQOL

- ProQOL is free, in your materials.
 - 30 item self-report measure
 - Compassion Satisfaction/Compassion Fatigue.
 - Compassion Fatigue has two subscales:
 - Burnout;
 - Secondary Trauma.
 - Can be used by individuals and organizations.

www.proqol.org

PROFESSIONAL QUALITY OF LIFE SCALE (PROQOL)

COMPASSION SATISFACTION AND COMPASSION FATIGUE (PROQOL) VERSION 5 (2009)

When you [help] people you have direct contact with their lives. As you may have found, your compassion for those you [help] can affect you in positive and negative ways. Below are some questions about your experiences, both positive and negative as a [helper]. Consider each of the following questions about you and your current work situation. Select the number that honestly reflects how frequently you experienced these things in the last 30 days.

1=Never 2=Rarely 3=Sometimes 4=Often 5=Very Often

1. I am happy.
2. I am preoccupied with more than one person I [help].
3. I get satisfaction from being able to [help] people.
4. I feel connected to others.
5. I jump or am startled by unexpected sounds.
6. I feel invigorated after working with those I [help].
7. I find it difficult to separate my personal life from my life as a [helper].
8. I am not as productive at work because I am losing sleep over traumatic experiences of a person I [help].
9. I think that I might have been affected by the traumatic stress of those I [help].
10. I feel trapped by my job as a [helper].
11. Because of my [helping], I have felt "on edge" about various things.
12. I like my work as a [helper].
13. I feel depressed because of the traumatic experiences of the people I [help].
14. I feel as though I am experiencing the trauma of someone I have [helped].
15. I have beliefs that sustain me.
16. I am pleased with how I am able to keep up with [helping] techniques and protocols.
17. I am the person I always wanted to be.
18. My work makes me feel satisfied.
19. I feel worn out because of my work as a [helper].
20. I have happy thoughts and feelings about those I [help] and how I could help them.
21. I feel overwhelmed because my case [work] load seems endless.
22. I believe I can make a difference through my work.
23. I avoid certain activities or situations because they remind me of frightening experiences of the people I [help].
24. I am proud of what I can do to [help].
25. As a result of my [helping], I have intrusive, frightening thoughts.
26. I feel "bogged down" by the system.
27. I have thoughts that I am a "success" as a [helper].
28. I can't recall important parts of my work with trauma victims.
29. I am a very caring person.
30. I am happy that I chose to do this work.

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Organizational Level

- Management Commitment to Well-being
 - Policies and Procedures
 - Meaningful Vacations
 - Safe Psychological Space
- Engaged, Productive, and Healthy Employees



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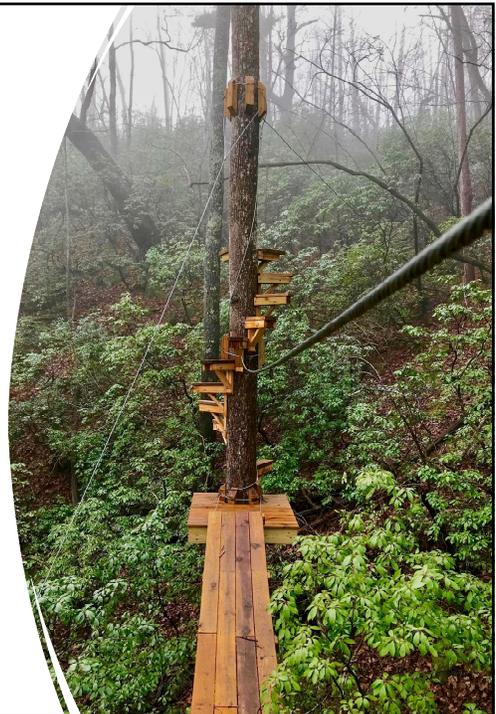
Key Factors for Healthy Employees

- Fairness
- Manageable workload
- Autonomy
- Communication
- Recognition
- Meaningful Work

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Assessing Your Systems

- Checklists: procedural and substantive
- Calendar policies and review
- Office Systems
 - Office Systems Review Checklist
 - Workflows
 - Process mapping



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Process Mapping

- Visually describes the flow of work
- Current process vs. ideal process
- Highlights pain points and provides guidance

Current Process:

```

graph LR
    A[Email of Hearing Notice] --> B((Attorney sends))
    B --> C[/Paralegal inputs Hearing Date/]
    B --> D[Attorney adds External Deadline]
    C --> E[Calendar]
    D --> E
          
```

Ideal Process:

```

graph LR
    A[Email of Hearing Notice] --> B{{Pre-set Outlook Rule sends hearing emails to Paralegal}}
    A --> C{{Pre-set Outlook Rule sends hearing emails to Hearings-Folder}}
    B --> D[/Paralegal inputs Hearing Date and External Deadlines to Calendar/]
    C --> E((Attorney reviews and compares to Calendar))
    D --> F[Calendar]
    E --> F
          
```

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Preparing Yourself

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Building Community

- Build positive relationships with co-workers
- Connecting with other attorneys
- Be intentional to create a reliable community
- Lawyers struggle with this

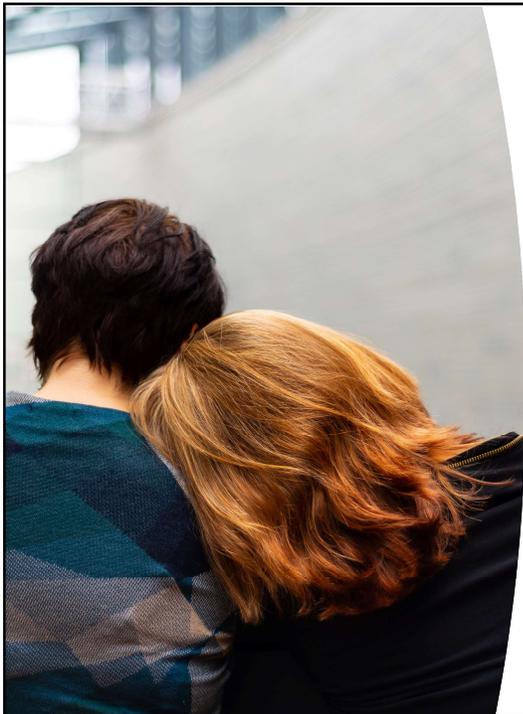


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Planning For Challenges

- Procrastination
- Coping with overwhelm
- Not getting everything done
- Reprioritize

You can do anything, but you can't do everything.



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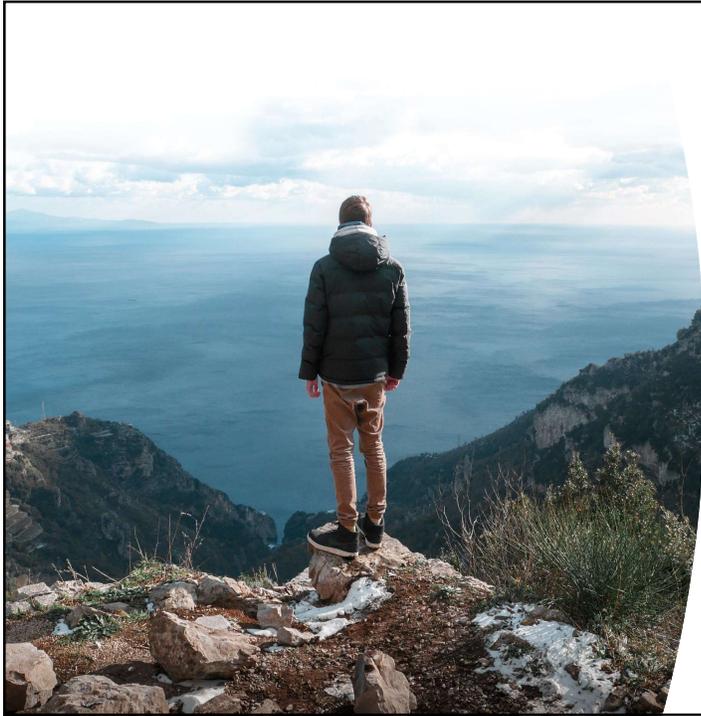


- Practicing imperfection
- Take a moment for true rest
- Mindful self-compassion

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Define Your
Success and
How You Would
Like to Be On
That Path

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Why Are You Striving?

- Bridge the gulf between an ideal and reality born from the desire to excel and grow (adaptive)

OR

- Need to compensate for perceived inadequacies and avoid failure (maladaptive)?

How Are You Striving?

- Hurting yourself or others in the process (maladaptive)

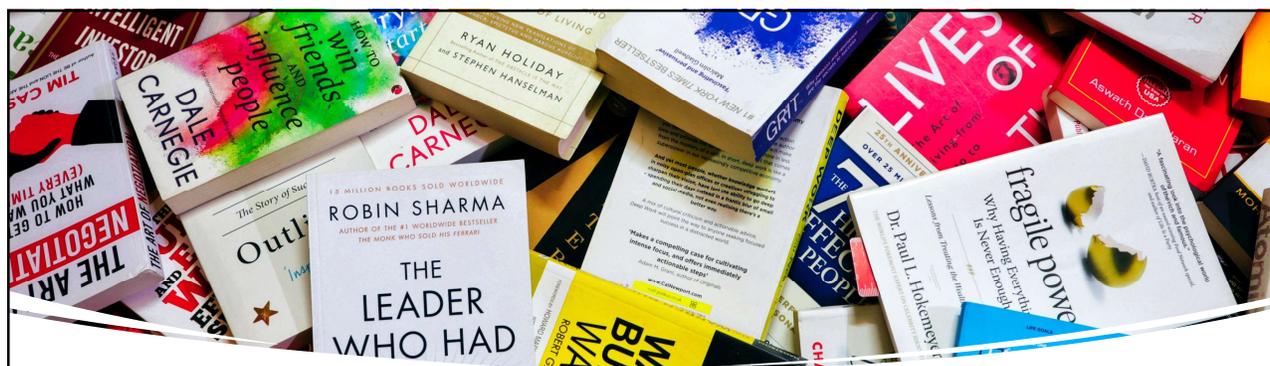
OR

- Striving in a way that feels good for you?

- Katherine Morgan Schafner



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Resources

- 4,000 Weeks: Time Management for Mortals
- Free Yourself from Productivity
- The Gifts of Imperfection
- Start Now. Get Perfect Later
- The Perfectionist's Guide To Losing Control

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PLF Blogs

inPractice
Practical Advice for Oregon Lawyers

Thriving Today
an OANP blog

at:

<https://www.osbplf.org/blog/>

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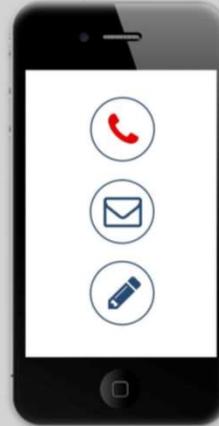
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- ▲ Well-being and stress
- ▲ Anxiety or depression
- ▲ Problem substance use
- ▲ Compulsive & challenging behaviors
- ▲ Career and lifestyle
- ▲ Relationships
- ▲ Challenging times
- ▲ Planning for retirement

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Resources

Books and Articles

- [4,000 Weeks: Time Management for Mortals](#), by Oliver Burkman
- [The Gifts of Imperfection](#), by Brené Brown
- [Start Now. Get Perfect Later](#) by Rob Moore and John Murray
- [What Can You Do with a Law Degree?](#) by Larry Richard and Tanya Hanson
- [When Perfect Isn't Enough](#) by Martin M. Antony and Richard P. Swinson
- [No One Else But You Is Going To Advocate For Your Career](#), Above the Law Article
- [The Billable Hour Today](#) by Jim Calloway
- [Death by Bad Management: Leadership as an Antidote to Terrible Bosses](#), Law Practice Today article by Hong Dao

Webinars and Podcasts

- [Lawyer Well-being: How to Have it All, but Possibly not at the Same Time](#), ABA Webinar, May 1st at 1 pm (ET)
- [Free Yourself from Productivity](#), Podcast by Lawyerist

PLF CLEs

- [Supervising Attorneys & Law Professors: Enhancing the Well-Being and Performance of Law Students & Newer Lawyers](#)
- [Avoiding Malpractice Claims When Filing and Serving a Complaint](#)
- [Extinguishing Burnout: How to Foster Engagement in the Legal Profession](#)

Written PLF Resources

- [Creating an Office Procedures Manual](#), PLF Practice Aid
- [Office Systems Review Checklist](#), PLF Practice Aid
- [State Court Rules: UTCRs and SLRs](#), PLF Practice Aid
- [Vision and Mission Statements for Your Law Practice](#), InPractice Blog
- [Building a Good Workplace Culture](#), InPractice Blog
- [The Case for Mindfulness](#), OAAP Blog
- [Design 2023 to be a Success](#), InPractice Blog
- [Lawyers as Supervisors](#), InPractice Blog
- [Plugging the "Knowledge Drain": Hot to Retain Knowledge to Ensure Your Firm's Continued Success](#), InPractice Blog
- [Supervising Associate Lawyers to Reduce Malpractice Exposure](#), InPractice Blog
- [What Can Yard Work Teach Lawyers about Project Management](#), InPractice Blog
- [What's On Your List? Developing Healthy Ways to Calm and Soothe](#), OAAP Blog

Quiz

- [Perfectionist Guide Quiz](#)
- [Professional Quality of Life Measure](#)

Self-Care Assessment Worksheet

This assessment tool provides an overview of effective strategies to maintain self-care. After completing the full assessment, choose one item from each area that you will actively work to improve.

Using the scale below, rate the following areas in terms of frequency:

5 = Frequently

4 = Occasionally

3 = Rarely

2 = Never

1 = It never occurred to me

Physical Self-Care

___ Eat regularly (e.g. breakfast, lunch and dinner)

___ Eat healthy

___ Exercise

___ Get regular medical care for prevention

___ Get medical care when needed

___ Take time off when needed

___ Get massages

___ Dance, swim, walk, run, play sports, sing, or do some other physical activity that is fun

___ Take time to be sexual—with yourself, with a partner

___ Get enough sleep

___ Wear clothes you like

___ Take vacations

___ Take day trips or mini-vacations

___ Make time away from telephones

___ Other:

Psychological Self-Care

___ Make time for self-reflection

___ Have your own personal psychotherapy

___ Write in a journal

___ Read literature that is unrelated to work

___ Do something at which you are not expert or in charge

___ Decrease stress in your life

- ___ Let others know different aspects of you
- ___ Notice your inner experience—listen to your thoughts, judgments, beliefs, attitudes, and feelings
- ___ Engage your intelligence in a new area, e.g. go to an art museum, history exhibit, sports event, auction, theater performance
- ___ Practice receiving from others
- ___ Be curious
- ___ Say “no” to extra responsibilities sometimes
- ___ Other:

Emotional Self-Care

- ___ Spend time with others whose company you enjoy
- ___ Stay in contact with important people in your life
- ___ Give yourself affirmations, praise yourself
- ___ Love yourself
- ___ Re-read favorite books, re-view favorite movies
- ___ Identify comforting activities, objects, people, relationships, places and seek them out
- ___ Allow yourself to cry
- ___ Find things that make you laugh
- ___ Express your outrage in social action, letters and donations, marches, protests
- ___ Play with children
- ___ Other:

Spiritual Self-Care

- ___ Make time for reflection
- ___ Spend time with nature
- ___ Find a spiritual connection or community
- ___ Be open to inspiration
- ___ Cherish your optimism and hope
- ___ Be aware of nonmaterial aspects of life
- ___ Try at times not to be in charge or the expert
- ___ Be open to not knowing

- ___ Identify what is meaningful to you and notice its place in your life
- ___ Meditate
- ___ Pray
- ___ Sing
- ___ Spend time with children
- ___ Have experiences of awe
- ___ Contribute to causes in which you believe
- ___ Read inspirational literature (talks, music, etc.)
- ___ Other:

Workplace or Professional Self-Care

- ___ Take a break during the workday (e.g. lunch)
- ___ Take time to chat with co-workers
- ___ Make quiet time to complete tasks
- ___ Identify projects or tasks that are exciting and rewarding
- ___ Set limits with your clients and colleagues
- ___ Balance your caseload so that no one day or part of a day is “too much”
- ___ Arrange your work space so it is comfortable and comforting
- ___ Get regular supervision or consultation
- ___ Negotiate for your needs (benefits, pay raise)
- ___ Have a peer support group
- ___ Develop a non-trauma area of professional interest
- ___ Other:

Balance

- ___ Strive for balance within your work-life and workday
- ___ Strive for balance among work, family, relationships, play and rest

Why Well-Being?

By The Center for Healthy Minds at University of Wisconsin-Madison, July 21, 2021

We get this question a lot. So why does well-being matter and how are we measuring it?

Researchers, including those at our Center, continue to investigate the factors that shape well-being. Rather than pitching a fixed scientific definition of well-being, we're constantly unearthing clues and evidence about how well-being manifests itself in the mind and body. It's not a static "thing" – but a set of skills that can be learned and cultivated over time, just like learning to play a musical instrument or riding a bike.

Center for Healthy Minds researchers explored the “how” of emotional well-being in a new paper in the journal *The Proceedings of the National Academy of Sciences (PNAS)*. **Read more about this study here.**

(<https://centerhealthyminds.org/news/research-clues-in-on-the-how-of-emotional-health-in-daily-life>)

Based on decades of research, we've identified four areas that contribute to well-being that are trainable and measurable in the lab: **awareness, connection, insight and purpose.**

Let's take a deep dive into the four pillars of well-being. Our friends at **Healthy Minds Innovations (<https://hminnovations.org/>)**, the external nonprofit affiliated with the Center, also share practices below on promoting your well-being.

Awareness

What it is: A heightened, flexible attentiveness to your environment and internal cues such as bodily sensations, thoughts and feelings. Training in awareness during meditation practices can increase what's called “meta-awareness” or being aware of what is happening in your mind.

What it looks like:

Noticing thoughts, feelings, sensations as they arise - commonly called **mindfulness** **Catching yourself from being distracted** or in auto-pilot mode while doing daily tasks like cleaning or driving

The Science:

People with **higher levels of awareness have higher levels of well-being** and positive emotions.

Distraction, the main detractor from awareness, can impair executive function as well as increase stress and anxiety, ADHD symptoms, and depression.

Some studies show that **distraction and the effects of perceived stress can harm our health** and produce stress responses in the body related to inflammation and aging. Bringing awareness to one's thoughts recruits lateral regions of the prefrontal cortex that form part of the brain's central-executive network.

Practice: Close your eyes and take 10 intentional breaths, counting each silently and noticing how each inhale and exhale feels in your body. What do you notice? Whatever arises is fine. It's the noticing that matters. Want a guided practice? Try the **Tour of the Senses Seated 10 Minute practice (<https://soundcloud.com/user-984650879/a-tour-of-the-senses-10-minute-sitting-meditation>)** from Healthy Minds Innovations.

Connection

What it is: A feeling of care and kinship toward other people, promoting supportive relationships and supportive interactions

What it looks like:

Acknowledging people's differences (like politics or points of view), and trying to understand that person's unique perspective and acknowledge that *just like you, they are worthy of dignity and respect* as a fellow human being

Showing appreciation to people in your life by acknowledging them and sharing why you're grateful for them

Focusing on a shared characteristic when you meet someone for the first time

The Science:

Forming negative first impressions (or even neutral ones in some cases), can potentially lead to apathy, intergroup bias, and perceived social isolation.

Social relationships are better predictors of health than some biological and economic factors.

Making inferences about someone we perceive to be similar to ourselves activates the ventromedial prefrontal cortex, which is central to the perception of social safety and feelings of social connection.

One Center study has reported that just **30 minutes of compassion meditation training per day over the course of two weeks** resulted in changes in people's caring behaviors as well as resulted in measurable changes in the brain.

^

Practice: Make a habit of noticing the positive in other people. You do this as a sitting meditation practice by bringing a close friend or family member to mind and noticing things you admire or appreciate about them. Recall situations where they expressed these qualities and then imagine expressing your appreciation. You can then extend this to people you don't know very well and eventually even to people you find challenging. Then apply this skill in daily life by noticing the positive in the people you see and interact with and expressing your appreciation.

Try a guided practice! Listen to this **Appreciation 10 Minute Seated Meditation** (<https://soundcloud.com/user-984650879/appreciation-sitting-practice>) from Healthy Minds Innovations.

Insight

What it is: Self-knowledge concerning how our emotions, thoughts and beliefs shape our experiences and sense of self

What it looks like:

Recognizing an anxious thought and being curious whether it's coming from a fearful expectation or self-criticism

Clarify and **challenge “unchangeable” beliefs** about yourself and people around you

The Science:

Rigid and negative self beliefs can result in an increase in mental health disorders, while accepting and growth-oriented beliefs about the self are linked to lower levels of depression and anxiety and even things like improved academic performance.

Scientific studies of the self suggest that there does not appear to be a single, unitary network associated with insight in the brain.

Meditators with significant experience who have done insight-related deconstructive meditation appear to show enduring changes in self-related processing in the brain.

Practice: If you've ever found yourself already in a bad mood before even joining a meeting, that's a moment for insight. You can **question your assumptions, and notice them.**

Want to try a guided practice? Listen to **Deconstructing Inner Experience** (<https://soundcloud.com/user-984650879/deconstructing-inner-experiencegratitude-sp-10-cd>) from Healthy Minds Innovations.

Purpose



What it is: Being clear about your core values and deeper motivation and being able to apply them in your daily life

What it looks like:

Being able to **link mundane activities with a meaningful value** or motivation, such as doing the dishes as an act of generosity for the people you live with

Viewing challenges and setbacks as opportunities to learn and grow, including strengthening your connection to meaningful values and goals

The Science:

A strong sense of purpose is associated with improved health outcomes and behaviors, including increased physical activity, decreased incidence of stroke, fewer cardiovascular events, reduced risk of death, lower health care utilization, and even better financial health.

In a sample of African Americans at high-risk for psychiatric disorders, **purpose in life emerged as a key factor predicting resilience** and recovery from traumatic events.

A pioneering study found people who prioritized more transcendent values (those that extend beyond themselves) had different activity in the left and right amygdala and left anterior insula, suggesting more transcendent values may reduce defensiveness and promote openness.

Practice: In moments of hardship (like many people around the world are experiencing this year with the pandemic), **identify what is most meaningful to you.** For some whose aspirations might be to create a kinder world, how can you find actionable ways to be kind in this moment?

Guided practice: **Purpose Practice: Core Values** (<https://soundcloud.com/user-984650879/purpose-practice-core-values>) from Healthy Minds Innovations

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ADVANCE PLANNING CAN GO A LONG WAY TO PREVENT OVERLOAD

Lawyers often take on too much. Regardless of how much we want to help or how difficult it can be to say no to a potential client, there are only so many hours in the day that we can dedicate to our jobs. This overload often leads to some common causes of malpractice claims, including failure to properly review and analyze documents, neglect, and lack of attention to detail. Admittedly, it can be challenging to predict how many hours each case will require and at what point you may become overwhelmed. Especially with litigation, you don't always know when your cases will be scheduled for court appearances. Some may be postponed, and you could end up with a large bundle of hearings or deadlines in a short window of time. Try some of these ways to better manage your calendar before things get out of control.

1. Create case timelines before agreeing to representation

Do your best before taking on a case to ascertain how long it will take and draft a timeline for duties throughout the matter. While you can't always accurately predict at the beginning stages what will occur, this exercise can give you a better understanding of what work will be needed and when. Use checklists specific to your practice area to help you make these assessments.

2. Set aside time in your calendar to work on each matter

In addition to meetings, administrative work, deadlines, and court appearances, block out time in your calendar to complete the necessary tasks — everything from gathering documents to legal research to trial preparation. Populate these activities into your calendar to ensure you have the time to complete them.

3. Maintain an updated active case list

Keep a current active case list so you always know how many cases you have — and their respective stages of the representation — at any given point. Consulting this list will help you determine how busy you are before taking on new clients, personal projects, or other professional commitments. Many options exist to help you generate your case list, ranging from a legal pad to an Excel spreadsheet to practice management software. Choose the best fit for you, and periodically evaluate whether it's working.

4. Schedule regular reviews of your active cases

In addition to maintaining an active case list, consider weekly appointments to assess all active cases to ensure all issues are being addressed and your calendar is up to date.

5. Get comfortable with saying no

Lawyers can feel pressure to accept responsibility for cases and other personal and professional obligations, often because they want to help people, or the potential client is in a bind. However, it is in everyone's best interest to say no rather than risk taking on more than you can handle effectively. Consider referring them to another attorney who may be able to assist.

Thoughtful scheduling coupled with diligent organization can help both your caseload and your clients. By taking a more strategic and proactive approach to case screening and workload management, you will be better prepared to combat overload. In short, take control of your calendar before you feel like it is taking control of you.

📌 **Categories:** [Time Management \(/blog/topics-of-interest/time-management/\)](/blog/topics-of-interest/time-management/) / [InPractice](#) / by [Rachel Edwards \(/blog/staff-authors/rachel-edwards/\)](/blog/staff-authors/rachel-edwards/)

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