

Signatories call 11 July 2019 – follow up notes

NB – given the range of discussion and updates from attendees, the detail of all of which it is hard to capture in a note, this is more of a follow up with actions and a summary of discussion than a formal meeting note – I hope that works for you all!

Attendees

Byrne-dean – Richard Martin and Katie Drysdale
Barclays – David McCahon and Phil Aitken (both for part of meeting)
Addleshaw Goddard – Mary Peterson
Pinsent Masons – Jacquie Dunn and Kate Dodd
Ashursts – Deborah Dalgleish
Baker McKenzie – Sarah Gregory
Hogan Lovells – Julie-Anne Johnston
Lloyds – Rachel Holder
Clifford Chance – Louise Hicks
Simmons & Simmons – Robert Allen, Joanna Harris and Helen Souter
Eversheds Sutherland - Tony Ramos and Francesca Wright
Herbert Smith Freehills - Matthew Clements
Michelmores – Lucy Best
Coventry Building Society – Louise Gill
Stone King – Rani Ahmed

1. Welcome

A particular mention for the Coventry Building Society as the first non law firm to come on board post the original signing. They are keen to embed the Charter with the members of their soon to be in place law firm panel and will liaise with other bank signatories to get guidance on how best to do that.

2. Updates

All attendees provided an update on their steps to implement the Charter, and in particular more recent steps. There is too much there to try to capture in this note. As we know, collaboration and shared learning lie at the heart of the Charter and this sharing is vital so that we, as a profession, can drive this forward together as well as assist new signatories as well as reassure and encourage new signatories. You are all encouraged to contact each other directly to follow up on any of the initiatives you have heard of from others that you would like to know more about.

We need more collateral for the “Implementation – Stories and Resources” section of the website.

It was agreed that all signatories would prioritise creating a narrative of their progress thus far with the Charter, with as much detail as possible and reference to useful internal documents and other information that can be shared with signatories and added to the website. All are encouraged to do this but particularly the original signatories to have this done and up on the website prior to 10 October, the first anniversary of the Charter. We will need the material a week or two in advance of 10 October to get it up and ready. Format is up to you but please look at what is there already if you want a guide. The more we can share, the greater the impact. Going forward, each signatory should provide such an update on each anniversary of their signing to keep the momentum going.

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Please also think about case studies of particular issues – eg the GCs at Lloyds who did not take their work phones on holiday – how did that go and what were the benefits they felt?

As a plea from byrne-dean, while we can facilitate and organise and chivvy, this has to come from you as signatories and this sharing is a key part of your Charter commitment!

Particular themes that emerged from the updates which are worth highlighting and perhaps becoming topics for further focussed discussion in due course are:

- The challenge of talking to clients about the Charter and getting them on board
- The challenge of global implementation

3. October event

Simmons & Simmons are kindly hosting – for which thank you.

It would be good to get a small group together to help plan the content of this event. Please let us know if you wish to be part of that. Someone from Simmons is needed obviously anyway, and Katie from byrne-dean will liaise with your events team in due course on practicalities.

There will be the formalities of signing. We probably need a broad update from byrne-dean. One option would then be to have a series of short example stories from signatories around the room describing particular success stories. Perhaps all signatories could think about what they might offer up in that regard and we can take the best sounding group to give a broad sense of what is happening to share with new and potential signatories in the room. We can then perhaps have a panel as per last time.

Do we want a key note speaker? Richard has recently been speaking to (Lord) Dennis Stevenson (he of Thriving at Work report with Paul Farmer) who is very supportive of what we are doing and might be persuaded to come along and give a short address – let us know if that sounds of interest.

We also need to maximise press coverage, from the legal press as well as national press (eg the FT) as there is the scope for significant coverage on the basis of one year in, where has the Charter got to and the scope for various signatories to provide, perhaps, in depth stories of what has been achieved. Please think about your contacts and liaise with Katie in that regard.

4. Update on new signatories

We currently have c.35 potential new signatories in the pipeline with a steady inflow continuing. Currently we have been giving individual briefing calls to each but we plan to schedule group calls for this going forward both to expedite the process and also to reinforce at an early stage the collaborative nature of the Charter. We would hope to get a good proportion of those ready to sign on 10 October. Most are law firms – **please keep talking to clients and send them our way if interested** - but several are not.

A suggestion has been made that, as the signatory group gets wider, it might be helpful for new signatories to be assigned a “buddy” signatory to be a specific source of support and guidance. Can you please let us know if that is something you (a) think is a good idea and (b) would be prepared to do.

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5. Working group update

The working group met for the first time on 10 July. We focussed on identifying areas that we need to address and plan then to take those in turn in future discussions. Issues discussed in more detail (to the extent not covered elsewhere in this note) were:

- Are we focussing on the legal profession or more broadly? The consensus was that as the Charter was born from the legal sector, and currently that is the membership, that should remain our primary focus. At the same time we recognise that the Charter has broader application and so we are open to other sectors adopting it and learning from our work – we are very happy for it to flourish and expand from its legal origins and for the profession to be seen to be taking a lead in this key area. We perhaps need to think about what that means in practice if organisations from other sectors ask to get on board – do we accept them or encourage them to develop their own industry group?
- Where do we see the Charter in 5 years' time? The idea behind this question was that this vision should then inform what we think we need to put in place to achieve that. The answers to that question included wanting to see a marked improvement in the JLD wellbeing report data, wanting the profession to be an attractive career option for graduates (eg would we encourage our children into the profession?), and the Charter having become redundant because its pillars and principles will have become common practice.

6. Other issues

The website is not getting picked up by google searches – we are on the case with this.

We are also working on a LinkedIn page and please use #MBC and #mindfulbusinesscharter as much as you can on social media.

Melissa Fogarty gave an interview to Legal Business on the Charter – can CC please check with Legal Business that they are OK for us to post this on the website and then send us a PDF copy?

What is the appetite for an annual (or semi annual?) conference type event where all signatories come together in person to share and learn – as we grow, the scope to do a round from everyone on a call will be more difficult – we can achieve this by inviting, say, six organisations by rotation on each call to provide an update but an afternoon all together might provide more learning opportunities as well as collaboration and networking around the Charter – we do all have day jobs though of course – thoughts please.

Finally, Thanks again to Pinsent Masons for hosting

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