



# **2022 ACC San Diego Board Retreat**

**January 14, 2022**

# Retreat & Board Meeting Agenda

**1:00**     **Introductions & 2022 Board Meeting Calendar**

**1:10**     **Board Meeting**

- Minutes Approval – November 2021
- Financial Report

**1:30**     **2021 Accomplishments – Be Proud**

- Awarded Gold Chapter of Distinction by ACC Global

**1:50**     **Well-Being In The Legal Profession**

- Jill Kalliomaa, Senior Legal Counsel for Novartis Institutes / ACC Southern CA Wellness Committee

# Retreat & Board Meeting Agenda

## 2:20 Where We Are Headed

- 2022 Sponsors
- ACC San Diego's Vision Statement
- Attendance - In-person vs. Virtual
- Board Attendance – Goals & Expectations
- Other Expectations of the Board
- Social Media Efforts
- Remember it is a Privilege to be on the Board

## 3:30 Committee Presentations

## 4:00 Team Building (Time Permitting)

## 4:30 Happy Hour/Networking

# Introductions

President – *Sven Zabka*

President-Elect – *Tamara Swenson*

Treasurer – *Hollie Bierman*

Secretary – *Josi Swonetz*

Immediate Past President – *Ryan Evans*

Co-Chair, Programs & Events – *Jennifer Bush*

Co-Chair, Programs & Events – *Hannah Cole*

Co-Chair, Sponsorship – *Debora Burke*

Co-Chair, Sponsorship – *Iris Mitrakos*

Co-Chair, Membership – *Kathryn Richman*

Co-Chair, Membership – *Wendy Bulger*

Board Member - *Deanna Brown*

Board Member – *Campbell Chiang (New in 2022)*

Board Member – *Rebecca Hanovice*

Board Member – *Shaka Johnson*

Board Member – *Patrick Murphy*

Board Member – *Caroline Perry*

Board Member – *Erica Peterson*

Board Member – *Nate Sisitsky*

Board Member – *Alexa Zanolli (New in 2022)*

**Director of Marketing, Events and Corporate Sponsorship** - *Audrey Marlow*

# 2021 ACC San Diego Board Meetings Calendar

Friday	January 14	Board Retreat & Happy Hour (2022)
Wednesday	March 2	Board Meeting & Happy Hour
Wednesday	May 4	Board Meeting
Wednesday	July 6	Board Meeting & Happy Hour
Wednesday	September 7	Board Meeting
Wednesday	November 2	Board Retreat & Happy Hour (2023)

*\* Dates are tentative.*

*\* Does anyone have space for in-person meetings?*

## Follow ACC San Diego on Social Media

LinkedIn – <https://www.linkedin.com/company/acc-sandiego>



Twitter - [https://twitter.com/acc\\_sandiego](https://twitter.com/acc_sandiego)



Facebook - <https://www.facebook.com/ChaptersACCSD/>



YouTube - <https://www.youtube.com/channel/UCit1V5pVBADG88dF-OX5tow>



# 2021 Accomplishments

## ACC Global Award Winner

Awarded the 2021 **Gold Chapter of Distinction** by ACC Global  
(12<sup>th</sup> time the SD Chapter has won ACC's highest award)



# 2021 Accomplishments

## Membership

The Chapter began with 626 members in January and ended with 621 members in December

## Sponsorship

2021 Sponsorship revenue was \$233,750 - sponsors received a 15% pandemic discount

## Programs and Attendance

- Most of the year consisted of virtual programs and events
- We started holding in-person programs and events in July
- Held a total of 52 programs and 10 social events
- Attendance across all programs and events was a total of 3,200 attendees
- Platinum Events:
  - A Day at the Races was held in-person at the track in July (Morrison Forester)
  - ACC Golf Tournament was held in-person at Grand Del Mar in July (Procopio)
  - ACC Annual Meeting – Magic & Mixology was held virtually in September (Mintz)
  - Padres Game was held in person at Petco in August (DLA Piper)
  - Jackson Lewis Deferred its Platinum Event to 1<sup>st</sup> Quarter 2022

# 2021 Accomplishments

## Programs and Attendance

- Half-Day MCLE was held virtually over a 5-day period in March
- Afternoon at the Padres was held in-person at Petco in August
- All-Day MCLE was held in-person at Farmer and Seahorse in September
- Our first annual Signature Event was held in-person at Estancia in October
- Virtual programs with the highest attendance:
  - *Teaming Up Against Burnout* (Sheppard Mullin - Wellness Wednesdays)
  - *Alcoholism & The Legal Profession* (Sheppard Mullin - Wellness Wednesdays)
  - *Did You Just Say That? Recognizing and Interrupting Microaggressions* (Wilson Turner)
  - *Ethical Considerations Associated With Internal Investigations* (Stradling)

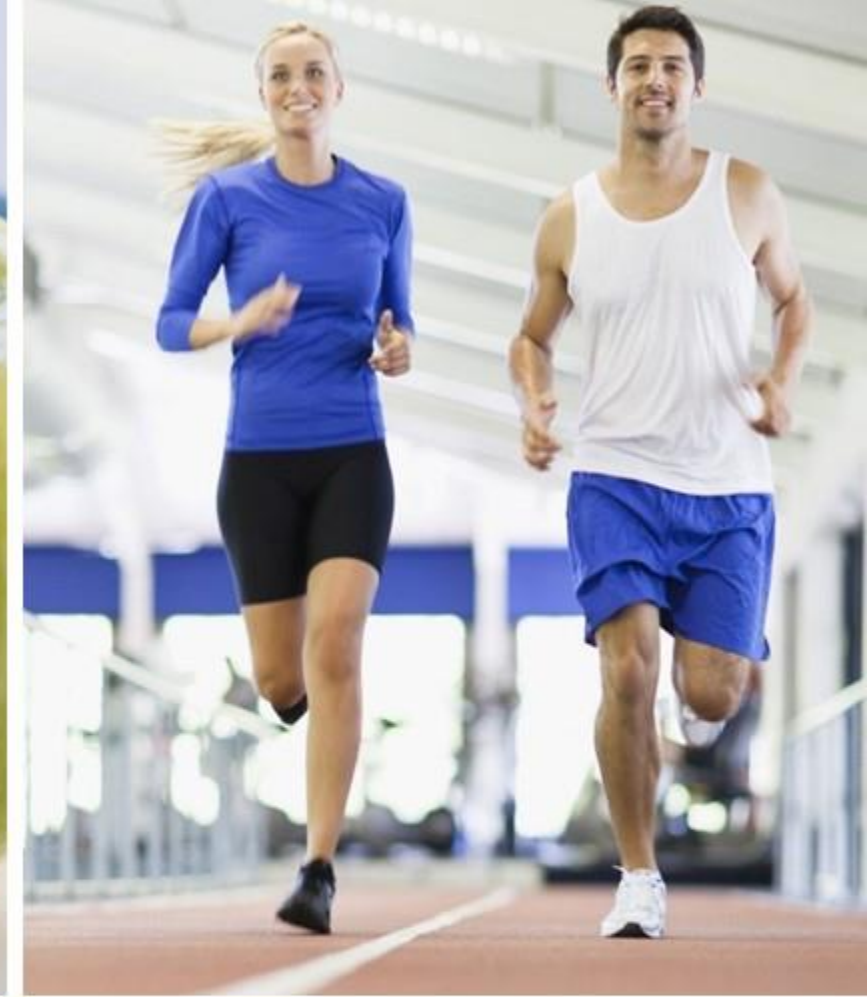
**A lot to be Proud of in 2021 – Thank you Ryan & Audrey**



# Well-Being In The Legal Profession

*Presented by:*

Jill Kallioma  
Senior Legal Counsel for Novartis Institutes  
ACC Southern CA Wellness Committee



WELL-BEING IN THE LEGAL PROFESSION  
PRESENTED TO ACC SAN DIEGO BOARD OF DIRECTORS – JANUARY 14, 2022  
JILL KALLIOMAA

## OVERVIEW

- Background
- Well-Being as a Component of Competence to Practice Law
- Overview of Well-Being issues facing the legal profession, including key studies and current well-being initiatives
- COVID-19 Pandemic – how are we really feeling and coping (or not)?
- Practical tips and practices for “fitting in” wellbeing practices during the day, with a focus on mindfulness
- Resources



## BACKGROUND – LEGAL & WELL-BEING

- Senior Legal Counsel, Novartis Institutes for BioMedical Research (GNF) in La Jolla
- Legal background includes contracts, compliance and general counsel services, with broad experience in creating solutions and relationships in innovative industries including biotechnology and telecommunications.
- Board and Executive Committee Member Southern California ACC Chapter; Co-Creator and Co-Chair of the chapter's Well-Being Committee, 2021 ACC Innovative Programming Award.
- Advisor, ACC Global Wellness initiative.
- Co-Author of ACC Docket series on well-being during the COVID-19 pandemic.
- Mindfulness and meditation practitioner, completed the MBSR (Mindfulness Based Stress Reduction) program as well as many silent meditation retreats.



# WELL-BEING & THE PRACTICE LAW

- **Competence as a Requirement of Practicing Law**

- Well-Being is part of a legal professional's duty of competence, enhancing ability to make responsible decisions for clients.
- **California Rules of Professional Conduct – Rule 1.1 Competence:** For purposes of this Rule, “competence” in any legal service shall mean to apply the (i) learning and skill, and (ii) mental, emotional and physical ability reasonably necessary for the performance of such service.
- Other related duties and obligations are set forth in the California Rules, the ABA Model Rules and other state rules including general obligations of competence, promptness, and diligence.

# OVERVIEW OF WELL-BEING ISSUES FACING THE LEGAL PROFESSION

- **2017 National Task Force on Lawyer Well Being**
  - In 2020 became the **Institute for Well-Being in Law**
  - Task Force supported by many ABA divisions as well as the Hazelton/Betty Ford Foundation in conjunction with the ABA's Commission on Lawyer Assistance Programs
  - Published *The 2017 Path to Lawyer Well-Being: Practical Recommendations for Positive Change*
- The Report identified higher rates of addiction and depression in legal profession:
  - Substance abuse (at least 21% problem drinkers)
  - Depression, anxiety, stress higher than general population (23%)

# OVERVIEW OF WELL-BEING ISSUES FACING THE LEGAL PROFESSION

## Six Components of Well-Being from the 2017 Study:

### 1. Occupational

- Cultivating personal satisfaction, growth, and enrichment in work; financial stability

### 2. Emotional

- Recognizing the importance of emotions
- Identify and manage our own emotions to support mental health, achieve goals, and inform decision-making. Seeking help for mental health when needed

### 3. Physical

- Regular physical activity
- Proper diet and nutrition
- Sufficient sleep, and recovery
- Minimizing the use of addictive substances
- Seeking help for physical health when needed.

# OVERVIEW OF WELL-BEING ISSUES FACING THE LEGAL PROFESSION (CONTINUED)

## Six Components of Well-Being from the 2017 Study:

### 4. Intellectual

- Engaging in continuous learning and the pursuit of creative or intellectually challenging activities that foster ongoing development; monitoring cognitive wellness

### 5. Spiritual

- Developing a sense of meaningfulness and purpose in all aspects of life

### 6. Social

- Developing a sense of connection, belonging and a well-developed support network while also contributing to our groups and communities



# ATTORNEY WELL-BEING INITIATIVES

- **ACC SoCal Attorney Well-Being Committee – 2019**
  - **Goal:** Fill an unmet need by providing:
    - Activities, information, resources and support focused on managing stress, work-life balance increasing resilience, and creating and maintaining a healthy lifestyle
  - Helping people in the legal profession have a healthier quality of life which results in better quality work – incorporating well-being practices into daily life
  - Ex: Cocktails & CLE – changed to CLE Express
- **ACC Global wellness program**
- **Institute for Well-Being in Law**
  - [www.lawyerwellbeing.net](http://www.lawyerwellbeing.net)



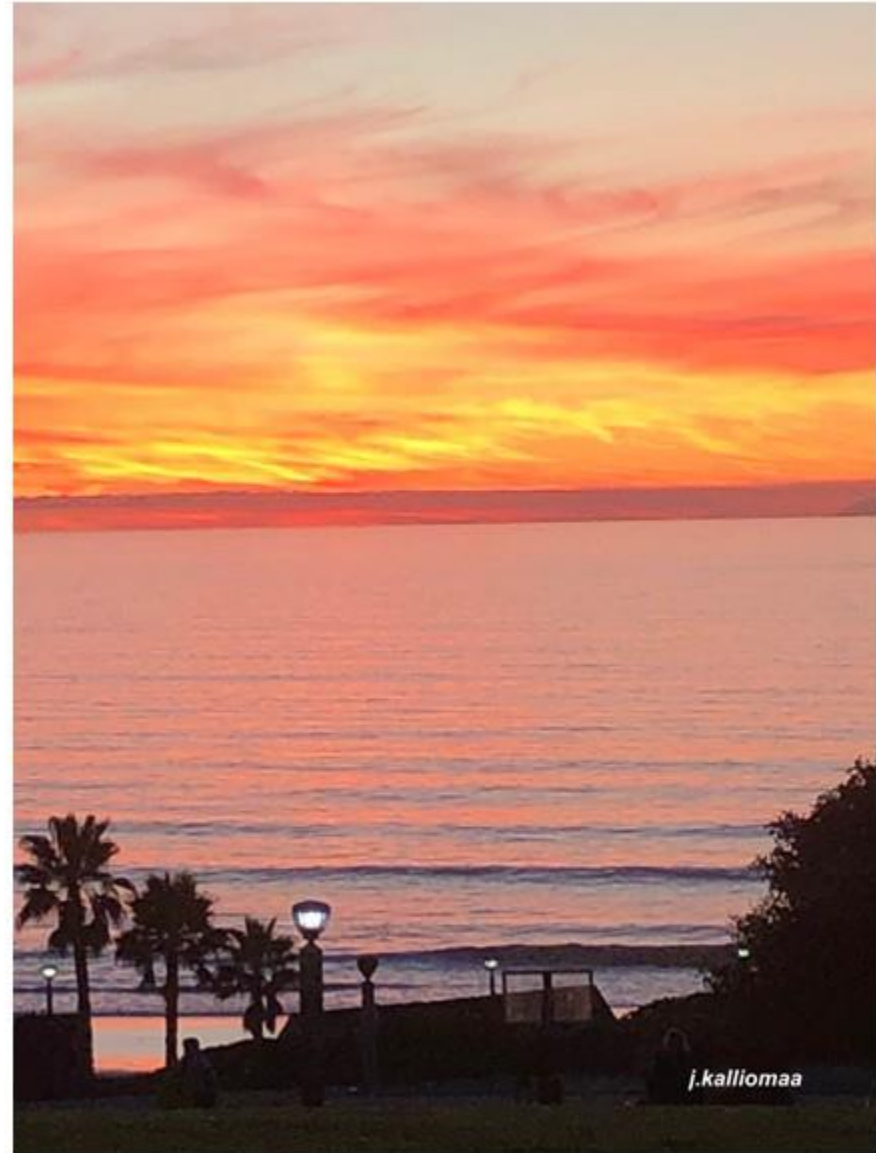
# COVID-19 PANDEMIC – HOW ARE WE REALLY FEELING AND COPING (OR NOT)?

- Work/Life Boundaries – Managing priorities
  - COVID blurred all boundaries – more difficult to find time for work, family, myself
  - Maintaining professional demeanor from home – what really is required?
- Zoom Fatigue - Constantly being on Zoom calls is exhausting
- Returning to office
  - Concerns about returning and trying to get back into the routine of work
- Vaccines
  - Should I get it, should I discuss it, fear of judgment, other fears
- The Great Resignation – burnout, work life balance, wellness, priorities?



## SMALL CHANGES

- Important during COVID-19 and equally important Post-Pandemic
- We have learned we cannot control our environment
- We have the ability to make small healthy changes: what could be helpful to you?
- What can you do to support your team's well-being?
- Post Traumatic Growth



*j.kallioma*

# MINDFULNESS

- “Mindfulness”
  - Paying attention, on purpose, to the present moment, an awareness of where we are and what we are doing and feeling, without being overly reactive or overwhelmed by what is going on.
  - A skill that can be developed through meditation and other training and practices.
  - Documented research in neuroscience lists benefits including:
    - Increased brain function associated with learning and memory
    - Reduced brain function associated with anxiety and stress  
<https://news.harvard.edu/gazette/story/2011/01/eight-weeks-to-a-better-brain/>
- Daily practices:
  - Breathing exercise (before work, meetings, driving, etc.)
  - Gratitude
- Today: short relaxation/guided body scan
- Apps – Many available including:
  - Headspace, Chill, Insight Timer, Calm



# MINDFULNESS EXERCISE

- If your day is filled with work and noise and interruptions and distractions, **morning is a perfect time** to start your day with even a few minutes of meditation. You can simply focus on your breath and observe your thoughts as they arise, noticing that they are simply thoughts, and letting them pass, like clouds in the sky.
- Meditation and mindfulness practices can lower levels of the stress hormone cortisol and may help ease conditions including anxiety, pain, high blood pressure, insomnia, and migraine headaches.
- However, there are simple practices you can do **anytime during the day** that can help you regain your calm, focus, and attention.
- Today, **we will do a short mindful practice together.**



## GROUP DISCUSSION –NEXT STEPS

- Prioritizing Self Care
- Legal Managers – leading by example
- Company well-being programs
- Legal Profession – upcoming survey focused on corporate counsel well-being challenges
- Institute for Well-Being in Law – virtual conference, January 19-21



# RESOURCES

- ACC Global: <https://www.acc.com/acc-wellness>
  - The wellness initiative provides suggested guidelines and resources for the in-house legal committee, regardless of department size, to support the needs of the whole person, including those who may be experiencing impairment.
- California Lawyers Association Health and Wellness Committee, <https://calawyers.org/health-and-wellness/>
- Lawyer Assistance Programs:
  - State Bar of CA: 877-LAP-4HELP/877-527-4435
    - Mental Health Issues, Substance Abuse, Career Transition
- Institute on Well-Being in Law: [www.lawyerwellbeing.net](http://www.lawyerwellbeing.net)
  - Advancing policy – Innovative programming – pioneering research – spotlighting the issues



# QUESTIONS

THANK YOU FOR YOUR TIME AND ATTENTION  
BE WELL!



# Where We Are Headed

## 2022 Sponsors

### Platinum Sponsors

- DLA Piper
- Jackson Lewis
- Mintz
- Morrison & Forester
- Procopio

### Gold Sponsors

- Cooley
- Paul Plevin
- Pettit Kohn Ingrassia Lutz & Dolin
- Poisinelli – (NEW)
- Sheppard Mullin

### Silver Sponsors

- Allen Matkins
- Berg Hill Greenleaf Ruscitti – (NEW)
- Higgs Fletcher Mack – (NEW)
- Knobbe Martins
- Latham & Watkins

- Perkins Coie
- Paul Hastings – (NEW)
- Stradling Yocca Carlson & Rauth
- USI Insurance
- Wilson Turner Kosmo

# ACC San Diego Vision Statement

**“Building connections among in-house counsel and their community to foster engagement, education and excellence in a dynamic and inclusive environment.”**

ACC San Diego will accomplish its vision by:

- Creating professional and social opportunities to build meaningful relationships
- Empowering in-house counsel in their professional development through education and peer-to-peer mentorship
- Seeking to improve our community through charity, outreach and inclusion
- Using innovative strategies to increase brand visibility in a dynamic market

**Every goal and initiative we undertake must tie back to this Vision**

# Where We Are Headed

## Attendance – In-person vs. Virtual

- At the Highest Level – We will respect every member's decision based on their individual circumstances
- We will continue to monitor best practices and currently are asking that only vaccinated members attend events in-person
- With that said, the pandemic has made us lax in attending events generally and attending events in-person (for those not on lockdown)
- We are a unique Chapter made up of professionals who enjoy not only networking but socializing with one another
- Our Board needs to foster this dynamic by making attendance our highest priority (virtual and in-person) – we need to lead our members by example
- As a board member, we have a responsibility to keep our members engaged and happy
- As a board member, we have a responsibility to keep our sponsors happy and their programs well attended

# Where We Are Headed

## Board Attendance – Goals & Expectations

- Make it a goal to attend every board meeting and try to make it in-person
- Attend in-person at least 3 of the quarterly board meetings with a happy hour
- Make it a goal to attend as many events and programs as you can throughout the year
- Attend at least 3 events/programs per quarter, and at least 2 of those events in-person
- Make it a goal to be a presenter or moderator on one or more sponsor panels
- Promote and encourage your company colleagues to attend events and programs
- Don't RSVP yes and then not attend – this made us look bad a lot last year

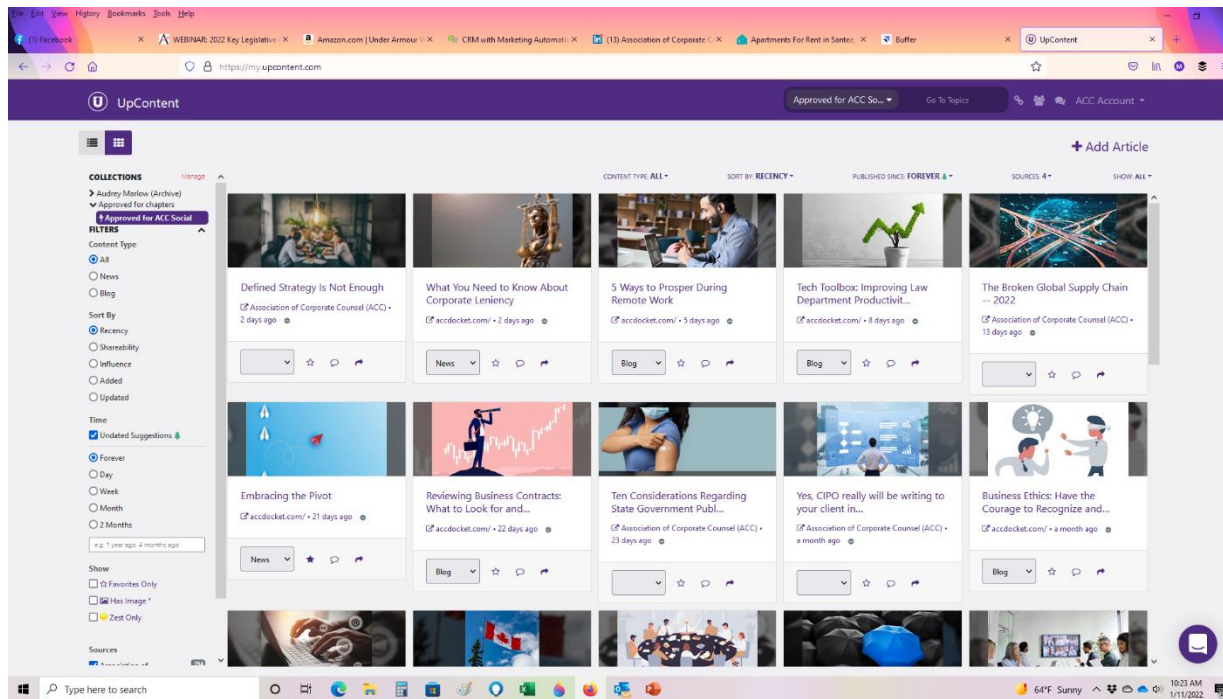
## Other Expectations

- Co-Chair one committee starting in the second year of your term and participate in another
- Follow ACC San Diego on social media and actively promote our content
- Identify and develop good candidates as future board members

# Where We Are Headed

## Social Media

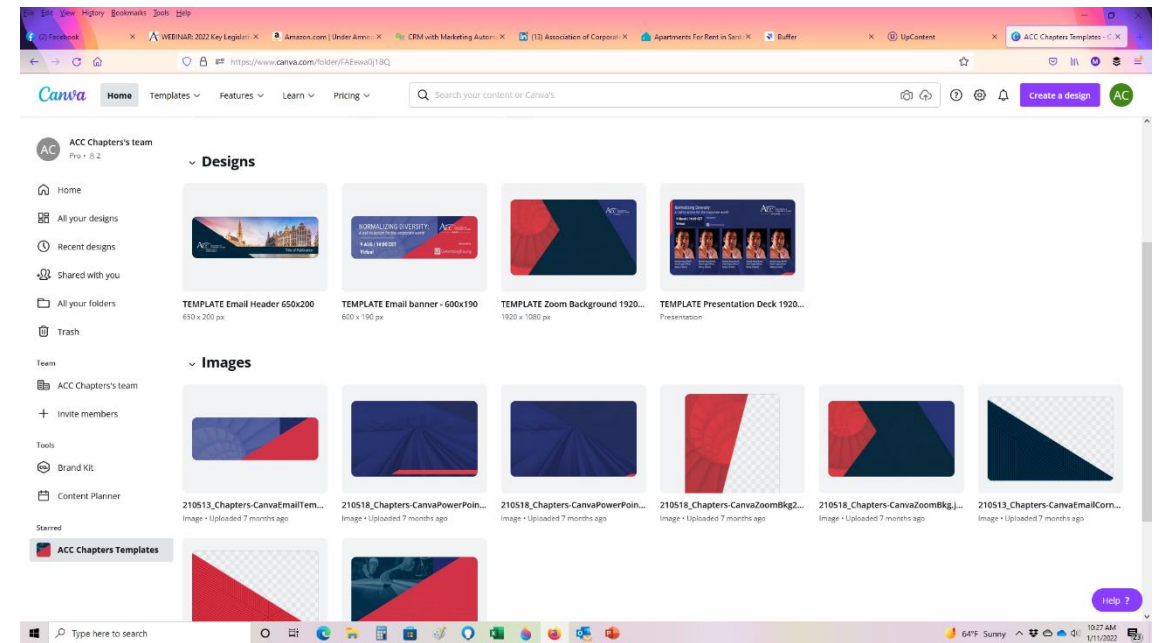
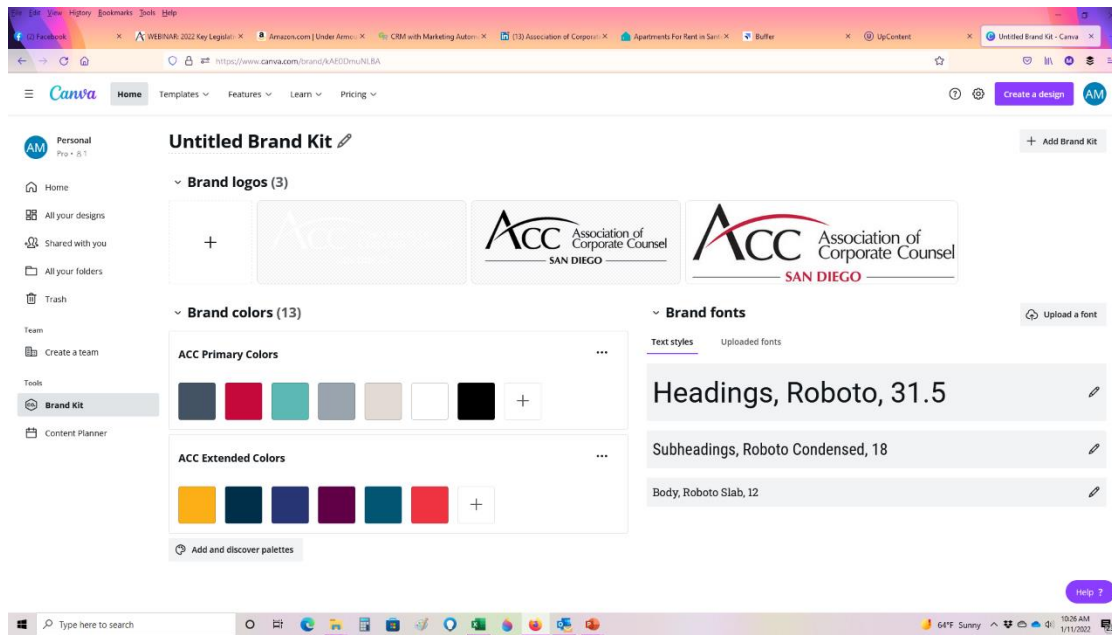
- New software integration: Buffer and Upcontent
- Ability to upload ACC content and schedule postings



# Where We Are Headed

## Social Media

- New branding guidelines using Canva, including font usage and colors



# Meet the Committees

## Programs & Events – Co-Chaired by Jennifer Bush & Hannah Cole (thank you Alexa Zanolli)

- ▶ LawLapalooza – Chaired by Tamara Swenson with Jen Bush & Alexa Zanolli as Members
- ▶ Pro-Bono & Community Service – Co-Chaired by Erica Peterson & Hollie Bierman
- ▶ Wellness Program – Chaired by Alan Kholos

## Sponsorship – Co-Chaired by Debora Burke & Iris Mitrakos

## Membership – Co-Chaired by Kathryn Richman & Wendy Bulger

- ▶ New to In-house – Chaired by Josi Swonetz
- ▶ jursiBREWdence – Chaired by Michelle Booth

## Collective Commitment

- ▶ Hold Monthly Meetings
- ▶ Circulate to the Board a Summary of each Monthly Meeting
- ▶ Follow ACC San Diego on social media and actively promote our content with your communities
- ▶ Get Word Out Initiative to promote Program & Event Attendance by Members

# Program and Events Committee

## Goals and Initiatives – 2022 Co-Chaired by Jennifer Bush & Hannah Cole

- Create a Recommended List of Programming Topics that is of Interest to our Members
- Lead our Sponsors to choose from the Recommended List Programming Topics
- Monitor and Adapt our Pandemic Protocols to Foster a Return to In-Person Events
- Support all Programs & Events
  - La-Law-palooza All-Day
  - jurisBREWdence – One per Quarter
  - Pro-Bono & Community Service – One or More per Quarter
  - New to In-house – 3 Events
  - Wellness – 3<sup>rd</sup> Wednesday of each Month
  - Day at the Padres
  - 2 Sponsor Appreciation Events
  - Signature Event
  
- **Get Word Out Initiative to promote Program & Event Attendance by Members**



# Sponsorship Committee

## Goals and Initiatives - 2022 Co-Chaired by Debora Burke & Iris Mitrakos

- Sponsors Satisfaction Survey (Quarterly)
  - Promote and Support 2 Sponsor Appreciation Events
  - Calendar & Orchestrate Board Members taking a Sponsor to Lunch twice this Year (1<sup>st</sup> & 3<sup>rd</sup> Quarter)
    - Generate a set of questions that each sponsor should be asked during the lunch
  - Create a Recommended List of Sponsor Events
    - Night at Museum; Magic Show; Chocolate Pairing; Theatre Happy Hour; Bowling Party; Golf Tourney; Padres Game
  - Obtain Buy-In from Sponsors for fewer Signature Event Tickets / Update Sponsorship Packages for 2023
  - Generate a List of Members who have strong contacts with our Sponsors & target Sponsors
- 
- **Get Word Out Initiative to promote Program & Event Attendance by Members**

# Membership Committee

## Goals and Initiatives – 2022 Co-Chaired by Kathryn Richman and Wendy Bulger

- Increase Membership by 5%
- Recruit Large Companies (suggestion is top 25)
  - Companies that do not have ACC members – reach out to GCs to share benefits of membership
  - Companies with existing ACC members – reach out to GCs to encourage continued membership & full representation
- Survey Membership by Demographic (2x annually)
  - Lapsed members – why didn't they renew
  - New members – what is most important to them
  - Renewing members – thank you – what benefits to you use/value most
- Analyze Membership Data
  - Programing interests, event locations, time of day/week, hobbies, virtual vs. in-house, etc.
- Establish Liaison between Membership and Program Committees
- Explore Referral Program (based off of Global ACC)
- Consider 5 Minute Orientation Video on how to maximize benefits of Programs/Networking/Resources
  
- **Get Word Out Initiative to promote Program & Event Attendance by Members**

# New to In-House Committee

## Goals and Initiatives – 2022 Chaired by Josi Swonetz

- Hold a few specialized happy hours
    - Meet the Board – Today
    - New to In-House Only
    - Other
  - Establish & Foster a Mentorship Program
  - Moderate a Panel – “How to Select Outside Counsel”
- 
- Get Word Out Initiative to promote Program & Event Attendance by Members

# Team Building

## Marshmallow Challenge

- Each Team is given a handful of supplies – spaghetti, string and tape – and 18 minutes to build the tallest possible tower that can SUPPORT a marshmallow
- Supplies
  - 20 sticks of spaghetti
  - 1 yard of string
  - 1 yard of tape
  - 1 marshmallow

**Thank you for  
being an ACC  
Board Member.**