



# CORPORATE COUNSEL COLLEGE

April 27 - 28, 2023

Loews Chicago  
Chicago, Illinois USA

*intimate conference designed  
specifically for in-house  
counsel and their trusted  
outside counsel advisors*



# SCHEDULE

## WEDNESDAY, APRIL 26

12:15 - 5:00 p.m.

### IADC LEADERSHIP FORUM

The IADC Leadership Forum is a half-day program targeting rising stars, regardless of whether you are outside or in-house counsel. The presentations are designed to accelerate the learning curve on the attendees' path to leadership within their law firm or legal department. Managing partners and senior corporate officers are encouraged to attend along with their *rising star*.

*The Forum is complimentary and is open to all, including non-IADC members.* For program information and to register, please visit [www.iadclaw.org](http://www.iadclaw.org).

Program highlights include:

- Keynote Speaker: Melanie Margolin
- Succession Planning
- Economics of Law
- Fireside Chat with Michele Coleman Mayes
- Leadership Goal Setting Workshop

5:00 - 6:30 p.m.

### COCKTAIL RECEPTION

## THURSDAY, APRIL 27

7:30 - 8:15 a.m.

### BREAKFAST

8:15 - 8:30 a.m.

### OPENING REMARKS

*Craig A. Thompson, Corporate Counsel College Dean, Venable LLP, Baltimore, MD USA*

*Mark R. Beebe, IADC President, Adams & Reese LLP, New Orleans, LA USA*

8:30 - 9:45 a.m.

### To Have and To Hold: Strategies for Effective Legal Holds in the Era of Mixed-Media Communications and Use of Personal Devices

What do Slack, Microsoft Teams, Telegram, Google Chat, Discord, WhatsApp, and WeChat all have in common? Today, someone in your organization is using one of these applications to send a communication that is relevant to future litigation. The modern pace of business requires instant dialogue across geographic borders and,

in reality, far beyond corporate preferences to isolate business-related discussions to company-issued phones and email accounts. This panel will highlight best practices for the issuance of litigation holds that address this ever-evolving landscape of communication platforms. The panel will specifically address recent caselaw and regulatory guidance construing corporate obligations to preserve, collect, and produce evidence that was traditionally considered personal, underscore actionable steps to consider when collecting evidence from different applications, and accentuate proactive measures that reduce discovery costs and avoid sanctions.

Moderator: Sherylle Francis, *Universal Property and Casualty Ins. Co., Fort Lauderdale, FL USA*

Panelists: Lawrence Braggi, *Manager e-Discovery Legal Specialist Team, IBM, Armonk, NY USA*; Christine Egner, *Continental Tire the Americas, Fort Mill, SC USA*; John Jablonski, *Managing Partner, Gerber Ciano Kelly Brady LLP, Buffalo, NY USA*

9:45 - 10:00 a.m.

### REFRESHMENT BREAK

10:00 - 11:15 a.m.

### An Update on the Moving Target That is ESG

This panel of ESG gurus will address top-trending ESG issues and share best practices as we await the new SEC Rules on Climate Change and the updated Green Guides. Tackling everything from ESG Communication Reporting to supply chain management while making sure your data collection and auditing can hold up and not subject the organization to greenwashing claims. Learn how to take a proactive approach to develop human capital strategies and incorporate environmental justice into your goals and targets while understanding what regulations and programs you need to watch here and abroad.

Moderator: Heidi B. Friedman, *Thompson Hine LLP, Cleveland, OH USA*

Panelists: Michele Abraham, *VP, Global Corporate Compliance & Ethics, Lineage, Novi, MI USA*; Jillian Charles, *Vice President & General Counsel, Honeywell, Charlotte, NC USA*; Kim Yapchai, *formerly SVP and Chief ESG Officer of Tenneco, St. Joseph, MI USA*

11:15 - 11:30 a.m.

### REFRESHMENT BREAK

# SCHEDULE

11:30 a.m. – 12:30 p.m.

## **Staying Connected (and Compliant) With Your Workforce in a Remote (or Hybrid) World**

Employees are the backbone of a company's success. Conflicting employment laws are sometimes viewed as the bane of a company's existence and, in the advent of a post-COVID world with more employers offering (or employees demanding) increased remote or hybrid options, it's no wonder companies face a myriad of compliance, and cultural, issues. This panel will discuss the legal and practical realities of a hybrid or remote workplace, focusing on both traditional "legal" issues including ADA and FMLA compliance and the difficulties of employees located across the country (or the world) when laws often differ, as well as the practical challenges of managing employees in multiple locations, inclusion and equity issues which arise when managing a workforce that does not always work together, and maintaining a corporate culture that maximizes performance and retention of the company's most valuable resource—employees.

Moderator: Karen Glickstein, *Jackson Lewis P.C., Overland Park, KS USA*

Panelists: Latrice Lee, *Senior Corporate Counsel, Alaska Airlines, Seattle, WA USA*; Makila Scruggs, *Deputy General Counsel - Labor and Employment, Trane Technologies, Charlotte, NC USA*

12:30 - 1:30 p.m.

## **NETWORKING LUNCHEON**

1:30 - 2:15 p.m.

## **KEYNOTE SPEAKER**

2:15 - 2:30 p.m.

## **REFRESHMENT BREAK**

2:30 - 3:45 p.m.

## **To Speak or Not to Speak: How Companies Decide Whether to Take Stances on Hot-Button Political and Social Issues**

George Floyd. The January 6 attack on the Capitol. Gender equity. Voting rights. Abortion rights. Climate change. War in Ukraine. Corporations are increasingly pressured to take a stand on a growing list of political and social issues, many

of which were once considered the exclusive province of government or political and social action groups. In this program, you will hear from a distinguished panel of corporate leaders as they discuss their process for determining whether and how to engage on potentially divisive political and social issues. Topics include:

- How do companies determine which issues warrant comment? What factors/interests must be considered?
- What is the purpose of a corporation: to maximize shareholder value or to serve the public good?
- What are the risks of commenting—or, perhaps more importantly, not commenting?
- Who makes the call? How is legal involved?
- How (and when) should the company's position be communicated?
- Personal Comment vs. Corporate Position: Can they be separated?

Moderator: Spencer H. Silverglate, *Clarke Silverglate, P.A., Miami, FL USA*

Panelists: Thomas J. Harris III, *Cushman & Wakefield, Chicago, IL USA*; Nancy Laben, *Chief Legal Officer, Booz Allen, Washington, DC USA*; Sheila Schiffman, *General Counsel, Vitesco Technologies, Auburn Hills, MI USA*

3:45 - 4:00 p.m.

## **REFRESHMENT BREAK**

4:00 - 5:15 p.m.

## **Supreme Court Update: Looking Back and Moving Forward**

The Supreme Court has been front and center in the last few years due to a number of important and landmark decisions. 2023 will likely be another attention-grabbing year for the court. Leading scholars and experts will discuss recent cases before the Supreme Court and explore the issues facing the Court in 2023 and possibly beyond. An all-star panel will explain the impact of these decisions (and non-decisions) on various industries, and field questions from audience members about the controversial and intriguing issues the Court will hear and important legal questions that seek answers.

Moderator: Craig A. Thompson, *Venable LLP, Baltimore, MD USA*

Panelists: Roman Martinez, *Latham & Watkins LLP, Washington, DC USA*; Taylor Meehan,

# SCHEDULE

Consovoy McCarthy PLLC, Arlington, VA USA;  
Christopher G. Michel, Quinn Emanuel Urquhart  
& Sullivan, LLP, Washington, DC USA; Erin Murphy,  
Clement & Murphy PLLC, Washington, DC USA

5:15 - 5:20 p.m.

## CONCLUDING REMARKS - DAY ONE

Craig A. Thompson, *Corporate Counsel College  
Dean, Venable LLP, Baltimore, MD USA*  
Mark R. Beebe, *IADC President, Adams and Reese  
LLP, New Orleans, LA USA*

5:30 - 6:30 p.m.

## COCKTAIL RECEPTION

## FRIDAY, APRIL 28

7:30 - 8:15 a.m.

## BREAKFAST

8:15 - 9:30 a.m.

## Challenges and Strategies for Preserving Privilege When In-House Counsel Serves in a Dual Role with Business and Legal

How do in-house counsel effectively protect the privilege of their communications when asked to advise on business, technical, ethical, and even financial matters? This panel will discuss application of the attorney-client privilege and the work product doctrine to protect communications in situations commonly encountered by in-house counsel such as communications with experts, consultants, outside auditors, and former employees, virtual meetings, preparing for deposition testimony, and most importantly giving business advice that later becomes relevant to litigation. The program will focus on the challenges and offer strategies for where and how to draw the lines when the lines are blurred between legal counsel and business advice.

Moderator: Nicole Brunson, *Arrival, Charlotte, NC  
USA*

Panelists: Veronica M. Lei, *Eli Lilly and Company,  
Indianapolis, IN USA*; Amanda Perez, *Vice  
President, Chief Counsel Civil Litigation, Pfizer  
Inc., New York, NY USA*; Jackie Welch, *Assistant  
General Counsel, The J.M. Smucker Company,  
Orrville, OH USA*

9:30 - 9:45 a.m.

## REFRESHMENT BREAK

9:45 - 11:00 a.m.

## Ending the Insanity: Emerging Trends in Bringing Mass Litigation to Finality

Corporate clients increasingly expect their counsel to bring creative solutions to the table to end significant repeat litigation. From the emergence of the divisional merger transaction to private equity firms investing in asbestos litigation, corporations are utilizing unique strategies to bring finality to inefficient mass tort litigation. This panel will highlight the restructuring, bankruptcy, and M&A transaction trends in this area. The panel will specifically discuss the due diligence required to identify potential solutions, recent M&A transactions associated with asbestos and product liability, pros and cons of bankruptcy, and insurance coverage concerns associated with funding present and future claims. Finally, the panel will provide insight into managing litigation and business goals following the sale of asbestos liabilities to a third party.

Moderator: Mark Behrens, *Shook, Hardy & Bacon,  
LLP, Washington, DC USA*

Panelists: Valerie E. Ross, *ArentFox Schiff LLP,  
Washington, DC USA*; Mahsa Kashani Tippins, *President, DCo LLC, Nashville, TN USA*; Richard Worf, *Robinson, Bradshaw & Hinson, P.A.,  
Charlotte, NC USA*

11:00 - 11:15 a.m.

## CONCLUDING REMARKS

Craig A. Thompson, *2023 Corporate Counsel  
College Dean, Venable LLP, Baltimore, MD USA*  
Amy Sherry Fischer, *2024 Corporate Counsel  
College Dean, Foliart, Huff, Ottaway & Bottom,  
Oklahoma City, OK USA*

# GENERAL INFORMATION



## LOCATION

### The Loews Chicago Hotel

455 N. Park Dr., Chicago, IL 60611 USA

Phone: +1.312.840.6600

[www.loewshotels.com/chicago-downtown](http://www.loewshotels.com/chicago-downtown)

The luxurious Loews Chicago Downtown Hotel, situated steps from Navy Pier, offers guests spectacular city skyline and lake views while enjoying the comforts of home. The top-rated luxury hotel, ideal for business or for leisure, is located near the Magnificent Mile, and close to the city's most popular attractions including Millennium Park and the John Hancock Center.

## RESERVATIONS AND ROOM RATES

The room rate, which is subject to the current applicable occupancy and sales tax per room, per night, is \$239 single/double occupancy. **In order to make your hotel reservation you must first register for the meeting with the IADC.** Once registered, a link will be generated by the IADC, along with your registration confirmation, that will allow you to secure a hotel room at the Loews Chicago. You must contact the hotel directly, either by web link or telephone. Hotel reservations in IADC's room block and at the group rate are for registered attendees only. **Reservations must be made prior to Tuesday, April 4, 2023.** Unused rooms held for this meeting will be released on this date. Any reservation requests received after April 4, 2023 will be accepted only on a space-available basis at the group rate. Please note that the room block may fill before April 4, so we encourage you to register with the IADC so that you can make your hotel reservation early. Cancellations must be made at least 72 hours in advance of check-in to avoid forfeiture of first night room deposit. Check-in time is 4:00 p.m. and check-out time is 12:00 noon CST.

## GROUND TRANSPORTATION

Average one-way cab fare to the hotel from O'Hare International Airport is \$45-\$55 and from Midway Airport is \$40-\$50. GO Airport Express provides service from both O'Hare and Midway airports to downtown Chicago for discounted fares. For more information, please visit the GO Airport Express website at [www.airportexpress.com](http://www.airportexpress.com). During rush hour times, you may consider taking the Orange Line train (Midway) or Blue Line train (O'Hare) to the downtown Loop stations and taking a short cab ride to the hotel. ([www.transitchicago.com](http://www.transitchicago.com))

## CLIMATE AND DRESS

When packing for your trip, please note that average temperatures in Chicago this time of year range from a high of 65 degrees Fahrenheit to a low of 45 degrees Fahrenheit. Business attire is recommended for the meeting.

## REGISTRATION FEES AND PROCEDURES

IADC outside counsel members – contact your in-house clients today and invite them to join you at the Corporate Counsel College. Outside counsel members and partners of members can attend the College only if they are accompanied by a client. The package registration fee is \$1,925 [includes one outside counsel (\$1,430) and one ticket for an in-house client (\$495)]. The fee for additional clients is \$495 each. For in-house counsel and insurance executive members and in-house counsel and insurance executive non-members who are attending on their own, the fee is \$495. Register online at [www.iadclaw.org](http://www.iadclaw.org).

## CLE CREDIT

Approximately 8.5 hours of general CLE credit in 60-minute states and 10.2 hours of general CLE credit in 50-minute states will be requested for accreditation from all mandatory continuing legal education jurisdictions.

# GENERAL INFORMATION

## CPD CREDIT (CANADA)

The IADC is a Pre-Approved Provider of CPD Credit with the Law Society of British Columbia. The Quebec CPD Committee recognizes courses approved by other Canadian bars as approved in Quebec. 8.5 CPD credits are available for attendance at the Corporate Counsel College.

## CANCELLATION POLICIES

Registration Fee: A CASH REFUND, less a \$150 processing fee, will be made if a written notice of cancellation is received by the IADC office more than thirty (30) days prior to the first day of the meeting. No reason for the cancellation need be provided for a timely notice of cancellation. NO CASH REFUND will be made if notice of cancellation is received by the IADC office thirty (30) days or less prior to the first day of the meeting. However, if special circumstances arise before the meeting which prevent attendance, a member may request a future meeting credit. The request needs to be in writing and submitted to the IADC office. It should be directed to the Finance Committee's attention and note the special circumstances which caused cancellation. The credit request can only apply to meeting registration fees (not air, hotel, activity, tour, or special event fees) and, if approved, will be valid for use toward any IADC meeting for one (1) year from the date of the meeting for which credit is requested. A \$150 processing fee will be deducted from the total future meeting credit. All future meeting credit requests will be considered by the Finance Committee and the decision of that Committee will be final.

## SPECIAL NEEDS

If you have any special needs during the meeting (i.e. diet or accessibility) or have any other questions about the Corporate Counsel College, please contact Melisa Maisel Vanis, Director of Professional Development, at [mmaisel@iadclaw.org](mailto:mmaisel@iadclaw.org).

## DATA PRIVACY AND COLLECTION

Data is collected on attendees through registration for the purposes of executing the meeting and communicating with attendees about the meeting. Meeting sponsors have access to the registration list provided to all attendees. If any attendee has questions on data use and privacy, please contact Executive Director and CEO Mary Beth Kurzak at [mkurzak@iadclaw.org](mailto:mkurzak@iadclaw.org).

## PHOTO POLICY

Photos are taken at the meeting by staff and hired photographers and those photos of attendees may be used in association marketing. If you wish to not be included in photos that are used in association marketing, please contact Ashley Hatfield, Director of Communications, at [ahatfield@iadclaw.org](mailto:ahatfield@iadclaw.org).

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A special thanks to each member for their effort and expertise.

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Johner T. Wilson, III, *Epstein Becker & Green, P.C., Chicago, IL USA*

Sandra J. Wunderlich, *Tucker Ellis LLP, Saint Louis, MO USA*

### **WHO SHOULD ATTEND?**

**In-house counsel responsible for hiring and managing outside counsel /  
Senior insurance industry executives / Corporate compliance officers /  
Senior executives and counsel to non-profit corporations /  
Heads of corporate governmental relations departments /  
Heads of litigation departments / Experienced outside defense trial counsel**

The IADC Corporate Counsel College is designed to be an interactive and dynamic learning experience that takes advantage of the vast knowledge and experience of panelists, in-house corporate counsel, and the outside counsel attendees. While each session will follow a slightly different format, panelists and moderators will share their experiences and what they learned. The moderators will engage the audience and panel members in a spirited and educational discussion about the issues, sometimes posing hypothetical situations to stimulate further discussion.