



LEADING SINCE 1998

A Legal Best Practices Community



20 Hours of CLE (6 Hours of Ethics)

# 2020 Leadership Institute

**SMU COX SCHOOL OF BUSINESS**

COLLINS EXECUTIVE CENTER

**SESSION 1: TUESDAY, APRIL 14 – THURSDAY, APRIL 16**

**SESSION 2: TUESDAY, MAY 12 – THURSDAY, MAY 14**



**GT** Greenberg Traurig

KIRKLAND & ELLIS

Weil

# Leadership Institute

Texas General Counsel Forum Leadership Institute, formerly the Forum Institute for Leadership in the Law (FILL), returns to the SMU Cox School of Business this spring for our annual six-day program. The Leadership Institute was designed by general counsel for general counsel and provides a unique management program taught by SMU Cox School of Business faculty. Each three-day session provides an intensive study of leadership, management, and corporate finance in a classroom of 25-30 general counsel, managing counsel, and rising counsel from major companies and organizations.

**REGISTER ONLINE TODAY**  
[www.tgcf.org/Leadership-Institute](http://www.tgcf.org/Leadership-Institute)

The Institute greatly enhanced my in-house business effectiveness. The small, interactive classes, taught by top-notch MBA faculty, helped me focus on legal issues through both a business and leadership lens. Not only did it enhance my in-house success, it changed my career trajectory. In addition to legal oversight, the Institute contributed to my opportunities to lead other functions such as Human Resources, Culture and Corporate Communications. The Institute is unique among programs offered for in-house attorneys. Whether you are newly in-house or a seasoned professional, I recommend this program for all.”

**Chris Willis**  
Chief People Officer and EVP Legal and Corporate Affairs, Interstate Batteries  
Leadership Institute Class of 2006

**SESSION 1**

TUESDAY, APRIL 14 – THURSDAY, APRIL 16

**SESSION 2**

TUESDAY, MAY 12 – THURSDAY, MAY 14

**SMU COX SCHOOL OF BUSINESS**

COLLINS EXECUTIVE CENTER

3150 BINKLEY AVENUE

DALLAS, TEXAS 75275

**2020 PRICING (PER PERSON)**

	Early Bird Price	After February 15th
Members	\$3,800	\$4,200
Non-Members		\$5,500

**2020 PROGRAM BENEFITS**

- 41 hours of study over 6 days
- All study & classroom materials
- Certificate of completion
- 20 CLE credit hours including 6 hours of ethics
- Continental breakfast, lunch, & refreshments
- 2 evening networking receptions
- 2 networking dinners
- Attendee directory

**NOTEWORTHY ALUMNI COMPANIES**

- 7-Eleven, Inc.
- Austin Industries
- AT&T Inc.
- Baylor Scott & White Health
- Ben E. Keith
- Celanese
- CenterPoint Energy
- Chevron Phillips Chemical Co.
- Children's Health System of Texas
- CITGO Petroleum Corporation
- Comerica Bank
- Cook Children's Health Care System
- Dell Technologies
- FedEx Office & Print Services, Inc.
- GM Financial
- Goldman Sachs
- Interstate Batteries
- J.C. Penney
- Kimberly Clark
- Lennox International
- LyondellBasell
- Mattress Firm, Inc.
- North Texas Tollway Authority
- NTA Life
- ORIX Corporation USA
- Orthofix Medical Inc.
- PepsiCo, Inc.
- Rent-A-Center, Inc.
- Ryan, LLC
- Southwest Airlines Co.
- Texas Instruments Inc.
- The Weir Group PLC
- Topgolf
- Trinity Industries, Inc.
- Varsity Brands, LLC
- Vistra Energy

# Session 1

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## DAY 01 TUESDAY, APRIL 14, 2020

- 9:30 AM Networking Breakfast
- 10:00 AM **Making Ideas Stick | Jay Carson**
- 12:00 PM Lunch
- 1:00 PM **Creativity, Innovation and Risk | Jay Carson**
- 5:30 PM Evening Networking Reception

## DAY 02 WEDNESDAY, APRIL 15, 2020

- 8:00 AM Networking Breakfast
- 8:30 AM **Manage for Success or Set-Up-To-Fail | Don Vandewalle**
- 12:30 PM Lunch
- 1:30 PM **Introduction to Financial Reporting | Greg Sommers**
- 6:00 PM Networking Dinner

## DAY 03 THURSDAY, APRIL 16, 2020

- 7:30 AM Networking Breakfast
- 8:00 AM **Strategic Financial Statement Analysis | Hemang Desai**
- 12:00 PM Lunch
- 12:30 PM **Applied Innovation: Human Centered Design | Tim Sutton**
- 3:30 PM Dismissal



# Session 2

**DAY 04****TUESDAY, MAY 12, 2020**

9:30 AM	Networking Breakfast
10:00 AM	<b>Corporate Governance &amp; Ethics   Hemang Desai</b>
12:00 PM	Lunch
1:00 PM	<b>Value Based Management   Pam Baker</b>
5:30 PM	Evening Networking Reception

**DAY 05****WEDNESDAY, MAY 13, 2020**

8:00 AM	Networking Breakfast
8:30 AM	<b>Managing Through Influence   Jerry Magar</b>
12:30 PM	Lunch
1:30 PM	<b>Managing for Performance   Jerry Magar</b>
6:00 PM	Networking Dinner

**DAY 06****THURSDAY, MAY 14, 2020**

7:30 AM	Networking Breakfast
8:00 AM	<b>Authentic Presence   Kimberly Davis</b>
12:00 PM	Lunch
12:30 PM	<b>Leading in a VUCA World   Jay Carson</b>
3:30 PM	Dismissal



# SESSION 1 PROGRAM & PRESENTERS

TUESDAY, APRIL 14 – THURSDAY, APRIL 16

## Day 01 Tuesday, April 14, 2020

9:30 AM Networking Breakfast

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### 10:00 AM MAKING IDEAS STICK

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Jay Carson

Participants will learn how to better communicate ideas in a way that is memorable and influential. Using six key principles, we will work on ways to improve your communication using language that is simple and concrete, as well as how to use elements of emotion, surprise and story to make sure that the audience remembers and can act on your ideas. The session will utilize video clips, interaction and an application exercise to reinforce the ideas and how they can be used.

12:00 PM Lunch

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### 1:00 PM CREATIVITY, INNOVATION AND RISK

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Jay Carson

In order for organizations to succeed, they must strike a balance between managing complexity with structures and procedures while also managing creativity and innovation, which involves some level of risk taking. The session will use an experiential exercise to demonstrate these tensions and to allow participants to discover key factors that can contribute to organizational creativity and innovation. Emphasis will be on evidence-based modeling for managing innovation in organizations and will help participants develop areas for growing both individual creativity skills and organizational practices that support risk-taking and innovation.

5:30 PM Evening Networking Reception

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HOSTED BY:

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## Day 02 Wednesday, April 15, 2020

8:00 AM Networking Breakfast

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### 8:30 AM **MANAGE FOR SUCCESS OR SET-UP-TO-FAIL**

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Don Vandewalle Why do seemingly strong hires go sour? Why does feedback backfire? Does micromanagement deserve such a bad rap? Evidence-based management models, case studies and role-playing are utilized to develop significant insights into the psychological processes underlying leader-employee relationships. These insights provide powerful guidance to initiate and grow productive relationships. The session also integrates the topics to better understand the characteristics of admired, high performance organizations.

12:30 PM Lunch

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### 1:30 PM **INTRODUCTION TO FINANCIAL REPORTING**

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Greg Sommers Move past being glazed over when financial information is discussed. The initial financial module reviews income, balance sheet and cash flow statements and their interrelation. This module provides detailed examination of the information conveyed by financial statements. It enhances your understanding of the difference between earnings and cash flows and implications of the difference.

6:00 PM Networking Dinner

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**HOSTED BY**

**KIRKLAND & ELLIS**

## Day 03 Thursday, April 16, 2020

7:30 AM Networking Breakfast

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### 8:00 AM STRATEGIC FINANCIAL STATEMENT ANALYSIS

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Hemang Desai

The first accounting session provided an introduction to the basic principles underlying U.S. GAAP, core financial statements and information contained therein. This session will build on the first session and will focus on developing a framework for strategic financial statement analysis. Through a series of ratios, we will examine how a firm's strategy or its business model is reflected in its financials. The ratios will also permit an assessment of how well the management has executed its strategy. The key takeaways will be (i) an understanding of key drivers/levers of a firm's performance (ii) how you can influence your firm's performance and (iii) how the business story is reflected in the firm's financials.

12:00 PM Lunch

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### 12:30 PM APPLIED INNOVATION: HUMAN CENTERED DESIGN

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Tim Sutton

Complex and ingrained problems require a means through which to discover the way to a solution. We will review a process which provides a way to move forward even when the solutions might not appear obvious. Design decisions fit into a larger context which includes history, politics, sustainability, ethics, relationships and aesthetics. Courses work to ground participants in a world bigger than their own through an understanding of design impact.

3:30 PM Dismissal

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HOSTED BY

**GT** GreenbergTraurig

# SESSION 2 PROGRAM & PRESENTERS



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TUESDAY, MAY 12 – THURSDAY, MAY 14

## Day 04 Tuesday, May 12, 2020

9:30 AM Networking Breakfast

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### 10:00 AM CORPORATE GOVERNANCE & ETHICS

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Hemang Desai This session will address multiple important themes. Managerial responsibility over financial reporting, corporate ethics and governance and control failures and their implications. The discussion will center around two real case situations. We will examine the above issues with a critical lens discussing the roles ( or failure, if you will) of the Management, the Board, Auditors as well as Analysts and Institutional Investors.

12:00 PM Lunch

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### 1:00 PM VALUE BASED MANAGEMENT

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Pam Baker Business value includes all forms of value that maximize the health and well-being of an organization. This may include economic value and shareholder / stakeholder value that are measured with mathematical models. Other forms of value, such as customer value and supplier value are not as easy to measure. This discussion focuses on the various types of business value and how to incorporate value into decision making to better work toward the long-term success and prosperity of the organization.

5:30 PM Evening Networking Reception

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HOSTED BY:

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## Day 05 Wednesday, May 13, 2020

8:00 AM Networking Breakfast

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### 8:30 AM MANAGING THROUGH INFLUENCE

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Jerry Magar

As work becomes more complex and collaborative, the ability to build trusting relationships distinguishes those who flourish from those who falter. We are often required to achieve results with groups and individuals well beyond where our formal authority lies. Learn to leverage influence to create more productive and even more enjoyable relationships with your boss, peers and employees.

12:30 PM Lunch

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### 1:30 PM MANAGING FOR PERFORMANCE

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Jerry Magar

This session explores various strategies to evaluate and develop employees, introducing skills in coaching, counseling and methods for motivating non-performers. The session will cover both managing the problem performer and developing the high performer.

6:00 PM Networking Dinner

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HOSTED BY

**GT** GreenbergTraurig

## Day 06 Thursday, May 14, 2020

7:30 AM Networking Breakfast

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### 8:00 AM AUTHENTIC PRESENCE

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Kimberly Davis A powerful and engaging session that explores why you do what you have chosen to do professionally. What is the impact you want to have outside yourself on your direct reports, your customers (internal/external), your colleagues, and your community through the work that you do? Be prepared to share.

12:00 PM Lunch

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### 12:30 PM LEADING IN A VUCA WORLD

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Jay Carson Leadership as usual is not enough in a VUCA world. VUCA stands for Volatile, Uncertain, Chaotic and Ambiguous. Leading in a VUCA world not only presents a challenging environment, but also opens the door to an array of skills that are required to succeed. Leaders and their organizations need to develop the mental capabilities and desire to avoid being left behind.

3:30 PM Dismissal

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HOSTED BY:

**KIRKLAND & ELLIS**

# Become a Member Today!

## The Power of the Forum

Founded in 1998, Texas General Counsel Forum brings together more than 650 general counsel and senior managing counsel from across the state. The Forum is a boutique organization of in-house leaders who share legal best-practices in a local, networking community. Our goal is to build relationships and gain knowledge through strategic programming and networking hosted in our chapter cities: Austin-San Antonio, Dallas-Fort Worth, and Houston. Our members are leaders in their industries who understand the power of collaboration. The Forum provides the diverse sources necessary for our members to excel at in-house innovation. To learn more and apply for membership today, visit [www.tgcf.org/Membership](http://www.tgcf.org/Membership).

## Member Benefits



### BEST-PRACTICES

- Address crucial best-practice issues at each chapter's quarterly programs.
- Attend our two-day Annual Conference with a series of short, dynamic discussions from industry leaders. The conference is included in your membership dues.



### NETWORKING

- Develop lasting professional relationships at regular networking and social functions like after hours events, quarterly programs, women's events, holiday receptions, special events and the annual conference.
- Engage in advanced dialogue on current legal topics at our informal roundtable lunches throughout the year.



### LEADERSHIP

- Gain leadership knowledge from programming and fellow members representing more than half of the Fortune 500 companies headquartered in the state as well as prominent companies in each chapter city.
- Participate in our six-day annual Leadership Institute designed by general counsel which provides attendees with a unique leadership and financial management program presented in association with the SMU Cox School of Business. The Leadership Institute is discounted for Forum members.

## Membership Levels

<b>INDIVIDUAL CORPORATE</b>	<b>\$600</b>
<b>INDIVIDUAL GOV'T/NON-PROFIT</b>	<b>\$300</b>
<b>CORPORATE LEGAL DEPARTMENT</b>	<b>\$1200</b>
General counsel & up to 3 managing counsel. Additional members \$300 each.	
<b>GOV'T/NON-PROFIT LEGAL DEPARTMENT</b>	<b>\$900</b>
General counsel & up to 3 managing counsel. Additional members \$225 each.	
<b>CORPORATE MENTORING SPONSOR</b>	<b>\$2500</b>
General counsel & up to 8 managing counsel. Additional members \$300 each.	

*All memberships are valid for the duration of the calendar year (January 1 - December 31)*

# TEXAS GENERAL COUNSEL FORUM MEMBER COMPANIES

As of 9.9.19

<b>#</b>	7-Eleven, Inc. 7-Eleven, Inc.   SEI Fuel Services, Inc.	Enterprise Products Partners L.P. Environmental Resources Management (ERM) Eureka Midstream Exchange Income Corporation Exeter Finance LLC Exterran ExxonMobil Corporation	Matador Resources Company Match Group MBL Title McCoy Corporation McGrath McLane Company, Inc. McLane Foodservice, Inc. Memorial Hermann Health System Merichem Company Monadnock Resources, LLC MoneyGram International Motiva Enterprises, LLC MRC Global Inc. Munich Re Trading LLC	Stream Strike, LLC Summit Financial Group, Inc. Summit Midstream Partners, LLC Supreme Court of Texas
<b>A</b>	A. H. Belo Corp. Accenture LLP Accretive Solutions Advocare International LP AIC Title Service, LLC AIG Air Liquide USA LLC Amit Energy Americas Styrenics, LLC AMN Healthcare Anadarko Petroleum Corporation Apex LPO Aramco Services Co. Armadillo Financial Partners, LLC Ascension Texas Asset Living AT&T Inc. AT&T Services, Inc. Atmos Energy Corporation Austin Industries, Inc. Avant Energy	Farm Credit Bank of Texas Federal Reserve Bank FedEx Office & Print Services, Inc. Flowserve Corporation Fluor Corporation Fogo de Chao, Inc. Forcepoint ForeFlight LLC Fort Bend County Fossil Group, Inc. Frank's International, N.V. Frito Lay, Inc. FTS International	Nabors Industries National Instruments NCI Building Systems, Inc. NCS Multistage Holdings, Inc. NexBank Capital, Inc. Noble Corporation plc Noble Drilling Services, Inc. Noble Energy, Inc. North Texas Tollway Authority (NTTA)	Talos Energy Inc. Targa Resources, LLC Tauber Oil Company TaxAct, Inc. Teacher Retirement System of Texas (TRS) TechnipFMC PLC Tellurian Inc. Tenet Healthcare Corporation TETRA Technologies, Inc. & CSI Compressco LP Texas Children's Hospital Texas Hospital Association Texas Medical Association Texas Mutual Insurance Company Texas Reliability Entity, Inc. Texas State Board of Pharmacy Texas United Corporation Texas Workforce Commission The Beck Group The Beneficient Company Group (USA), LLC The Boeing Company The Brock Group The Freeman Company, LLC The George W. Bush Foundation The HollyFrontier Corporation The Museum of Fine Arts, Houston The Neiman Marcus Company LLC The Potter's House of Dallas, Inc. The Texas LawBook The University of Texas at Dallas The Weir Group PLC Third Coast Midstream Tidewater Inc. TMK IPSCO Tokyo Electron U.S. Holdings, Inc. TollPlus, LLC Topgolf Total E&P USA Total Petrochemicals & Refining USA, Inc. Toyota Motor North America, Inc. TPC Group, Inc. Trinity Industries, Inc. TrinityRail Trive Capital Tuesday Morning Corporation
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<b>C</b>	C&J Energy Services, Inc. Cabot Oil & Gas Corporation Caiman Energy II, LLC Blue Racer Midstream, LLC Callon Petroleum Company Camden Property Trust Capital Senior Living Corp. CaptureRx (Formerly) CARBO Ceramics Inc. Cardtronics plc Carrizo Oil & Gas, Inc. Cathexis Holdings, LP CEC Entertainment, Inc. CenterPoint Energy, Inc. Chambers Energy Capital, LP Charles Schwab & Co., Inc. Cheniere Energy, Inc. Chevron Africa & Latin America Exploration & Production Company Chevron Downstream Americas Shipping & Pipeline Chevron North America Exploration and Production Company Chevron Phillips Chemical Company Cinépolis USA Classic Industries, LP Comerica Bank Comfort Systems USA, Inc. Commercial Metals Company ConocoPhillips Inc. Cook Children's Health Care System Crestwood Equity Partners LP Crown Castle International Corp. CSW Industrials, Inc. Cyber Law Consortium	H.D. Vest Financial Services Hall Group Halliburton Halliburton Energy Services, Inc. Hanger, Inc. HealthSmart Holdings, Inc. Helis Oil & Gas Company, L.L.C. Herff Jones, LLC Hewlett Packard Enterprise HighGround Advisors Hill & Wilkinson General Contractors Hilltop Securities Inc. Hines Advisors LP HMS Holdings Corp. Honeywell Process Solutions Houston Botanic Garden Houston Community College System Houston Housing Authority Houston Methodist Huawei Technologies USA Hunt Consolidated, Inc.	Pacific Drilling Services, Inc Pacific Holdings Group Panda Power Funds Parker Drilling Company Parkland Health & Hospital System Patra Corporation Patterson-UTI Management Services, LLC Peak Completion Technologies, Inc. Pedernales Electric Cooperative, Inc. PepsiCo, Inc. Perry Homes Pilot Flying J Pin Oak Corpus Christi, LLC Pinnacle Propane, LLC Pioneer Natural Resources USA, Inc. Plains All American Pipeline, L.P. Planned Parenthood Gulf Coast Pon North America, Inc. Premier Trailer Leasing PrimeSource Building Products, Inc. PROS, Inc. Prudential Asset Resources, Inc.	Varsity Brands, LLC Vine Oil & Gas LP Vimar Group Vistra Energy
<b>D</b>	Dallas Fort Worth International Airport Danaher Dental Platform Darling Ingredients Inc. Daseke, Inc. Dave & Buster's, Inc. Dean Foods Company Dell Technologies DentalOne Partners DexYp Digital Discovery, LLC Direct Energy	JCPenney K Katy Independent School District Kayne Anderson Energy Funds Keane Group, Inc. Keurig Dr Pepper Inc. Key Energy Services, Inc. KidKraft, Inc. Kimberly-Clark Corporation Kintetsu World Express (USA), Inc. Kronos Worldwide, Inc. Kubota Credit Corporation U.S.A.	Rackspace RealPage, Inc. Reddy Ice Corporation RetailMeNot Rice University Rosehill Resources Inc. Rug Doctor, LLC Russell Reynolds Associates Ryan, LLC	Waste Connections, Inc. Waste Management, Inc. Weatherford International Ltd. Weingarten Realty Investors Welocalize, Inc. Western Gas Holdings LLC WEX Payments Whataburger Wilks Brothers, LLC Williamsburg Enterprises Wingstop Inc. Wolfenson Electric, Inc. Wood Group
<b>E</b>	Ecolab Inc. Ecopetrol America Inc. Electric Reliability Council of Texas, Inc. Elemetal, LLC Embree Group of Companies Enable Midstream Enbridge Enerflex Ltd. Energy Transfer LP ENGIE North America Inc. Enserve, Inc./ Entrust Energy	L LALA U.S., Inc. Le Duff America, Inc. Lennox International Inc. Lewis Energy Group LGI Homes, Inc. Lincoln Property Company Lone Star Circle of Care Lower Colorado River Authority LSG Sky Chefs, Inc. Lucid Energy Group LyondellBasell Industries	S & B Engineers and Constructors, Ltd. SAM Holding Company, Inc. & Subsidiaries Samsung Austin Semiconductor, LLC San Antonio Water Systems Schneider Electric Scientific Drilling International Seabed Geosolutions Seatrax, Inc. Select Energy Services, Inc. Service Corporation International (SCI) Service Experts LLC Service King Collision Repair Centers Siemens PLM Software Inc. Siltstone Capital LLC Silver Eagle Distributors, L.P. SilverBow Resources, Inc. Sinelli Concepts International, Inc. Smoothie King SoftLayer Technologies, Inc. South Texas Money Management, Ltd. Southern Methodist University Southwest Research Institute Southwestern Energy Company Spark Energy, Inc. Sparta Systems, Inc. SRS Group Holdings, Inc. Stallion Oilfield Services Stevens Transport, Inc. Stonebriar Commercial Finance	X3EM Brands, LLC Y YETI Coolers LLC Z Zachry Group



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