



THE CAREER OF A LAWYER

Creating Success at Each Stage

Friday, November 2, 2018
1:30 p.m. - 4:30 p.m.

Presented by:
Oregon Attorney Assistance Program

Qualifies for 2.5 Personal Management Assistance MCLE Credits

World Trade Center
25 SW Salmon St.
Portland, OR 97204
Mezzanines 2,3,4

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MCLE FORM 1: Recordkeeping Form (Do Not Return This Form to the Bar)

Instructions:

Pursuant to MCLE Rule 7.2, every active member shall maintain records of participation in **accredited** CLE activities. You may wish to use this form to record your CLE activities, attaching it to a copy of the program brochure or other information regarding the CLE activity.

Do not return this form to the Oregon State Bar. This is to be retained in your own MCLE file.

Name:		Bar Number:	
Sponsor of CLE Activity:			
Title of CLE Activity:			
Date:		Location:	
<input type="checkbox"/> <i>Activity has been accredited by the Oregon State Bar for the following credit:</i> <div style="text-align: center;"> ____ General ____ Prof Resp-Ethics ____ Access to Justice ____ Child Abuse Rep. ____ Practical Skills ____ Pers. Management Assistance </div>	<input type="checkbox"/> Full Credit. <i>I attended the entire program and the total of authorized credits are:</i> <div style="text-align: center;"> ____ General ____ Prof Resp-Ethics ____ Access to Justice ____ Child Abuse Rep. ____ Practical Skills ____ Pers. Management Assistance </div>	<input type="checkbox"/> Partial Credit. <i>I attended _____ hours of the program and am entitled to the following credits*:</i> <div style="text-align: center;"> ____ General ____ Prof Resp-Ethics ____ Access to Justice ____ Child Abuse Rep. ____ Practical Skills ____ Pers. Management Assistance </div>	

***Credit Calculation:**

One (1) MCLE credit may be claimed for each sixty (60) minutes of actual participation. Do not include registration, introductions, business meetings and programs less than 30 minutes. MCLE credits may not be claimed for any activity that has not been accredited by the MCLE Administrator. If the program has not been accredited by the MCLE Administrator, you must submit a Group CLE Activity Accreditation application (See MCLE Form 2.)

Caveat:

If the actual program length is less than the credit hours approved, Bar members are responsible for making the appropriate adjustments in their compliance reports. Adjustments must also be made for late arrival, early departure or other periods of absence or non-participation.

The Career of a Lawyer: Creating Success at Each Stage

Friday, November 2, 2018

P.M. Session Agenda

1:00 p.m.	Registration
1:30 p.m. – 1:40 p.m.	Introduction – <i>Karen Neri</i>
1:40 p.m. – 2:40 p.m.	Successfully Navigating Lawyer Career Crossroads at Midlife – <i>Susanne Aronowitz, JD, ACC</i>
2:40 p.m. – 3:30 p.m.	OAAP – Progressing Towards Retirement – <i>Bryan Welch and Shari Gregory</i>
3:30 p.m. – 3:40 p.m.	Break
3:40 p.m. – 4:30 p.m.	Retirement Panel - <i>Nancie Potter</i> <i>Douglas Hagen</i> <i>Scott Jonsson</i> <i>Douglas Querin, Moderator</i>

Presenters' Biographies

Susanne Aronowitz, JD, ACC, is a Portland-based career coach and consultant specializing in supporting lawyers in their professional development and career transitions. She guides her clients to deeper engagement in their professional lives, whether that means advancing within their current organization or transitioning to a new opportunity. Susanne has been a featured speaker for bar associations and is included on Diversity Lab's new site, [Top Lawyer Coaches](#). She serves on the board of the ABA Legal Career Center. Susanne previously served as the Associate Dean for Law Career Services and Alumni Relations at Golden Gate University School of Law, where she also served as an adjunct professor and a founder of Golden Gate's Law & Leadership Program. Susanne has been a frequent presenter at NALP's Annual Education Conference and Newer Professionals Forum. Susanne earned her bachelors degree from the University of Michigan, her law degree from UC Hastings, is a graduate of CoachU's Core Essentials Program, and holds an Associate Certified Coach credential from the International Coach Federation.

Shari R. Gregory, LCSW, JD is the Assistant Director and an Attorney Counselor with the Oregon Attorney Assistance Program (OAAP). Shari is a graduate of Wurzweiler School of Social Work (MSW 1987) and Rutgers School of Law (JD 1992) and received her Certificate of Business Management from Portland State University (2003) and her license in clinical social work (2010). She is experienced in career and life transition counseling, mental health and trauma counseling, crisis intervention, alcohol and drug counseling and relationship counseling. She worked in indigent criminal defense here in Portland for four years before joining the OAAP staff in 1999. Shari is the OAAP Liaison to the OSB Advisory Committee on Diversity and Inclusion, has served on the boards of the Oregon Women Lawyers, Queen's Bench and the OSB Diversity Section Executive Board.

sharig@oaap.org

503-226-1057, ext. 14

Douglas S. Querin, JD, LPC, CADC I, works as an Attorney Counselor with the Oregon Attorney Assistance Program (OAAP), where he provides resource referrals and confidential mental health and addiction counseling services to lawyers, judges, and law students throughout the state. Before starting with the OAAP in 2006, he worked as a trial lawyer for over 25 years with a firm specializing in state and federal civil litigation. After leaving active law practice, he obtained his Master's Degree in Counseling, and thereafter, became licensed as a Professional Counselor. He also received his Certification as a Drug and Alcohol Counselor. Doug's experience includes working with stress, anxiety, depression, transition, and alcohol and drug issues as well as facilitating work-life balance and healthy habits workshops for the OAAP. Doug has also served as an Adjunct Professor at Portland State University and George Fox University. He frequently presents at law schools and law firms on a variety of wellness topics.

DouglasQ@oaap.org

503-226-1057, ext. 12

Bryan R. Welch, JD, CADC I, is an Attorney Counselor with the Oregon Attorney Assistance Program. He is a graduate of Northwestern School of Law at Lewis and Clark College and a Certified Alcohol and Drug Counselor (CADC I). Prior to joining the OAAP staff in 2015, he was in the private practice of law for 12 years, focusing primarily on family law and family mediation. In addition to his work at the OAAP, his experience includes providing drug and alcohol counseling services for a court-mandated DUII treatment program and for a local non-profit working with people impacted by homelessness, poverty, and addiction. As a group facilitator, Bryan leads peer support groups including groups for lawyers practicing law with ADHD, while going through divorce, or while experiencing anxiety and depression. He has been in recovery since 2001.

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503-226-1057 ext. 19

Karen A. Neri, JD, MA-MCFC candidate, is an Attorney Counselor with the Oregon Attorney Assistance Program (OAAP). Prior to joining OAAP, she was in private practice, and litigated family law, and personal injury cases. She has provided counsel and representation to families and individuals of lower socioeconomic status, or with some appreciable assets. She is completing her MA in Marriage, Couple and Family Counseling, and pursuing dual licensure as a professional counselor (LPC) and marriage family therapist (LMFT). She has a strong interest in diversity and inclusion, in advocating for marginalized populations, and in social justice. It is in building relationships, bringing harmony to personal lives, and promoting well-being that affirmed her commitment to counseling. In her spare time, she loves being outdoors, especially with her three favorite creatures, her husband, and the most adorable Border Collies you will ever meet, named Riley and Rex.

karenn@oaap.org

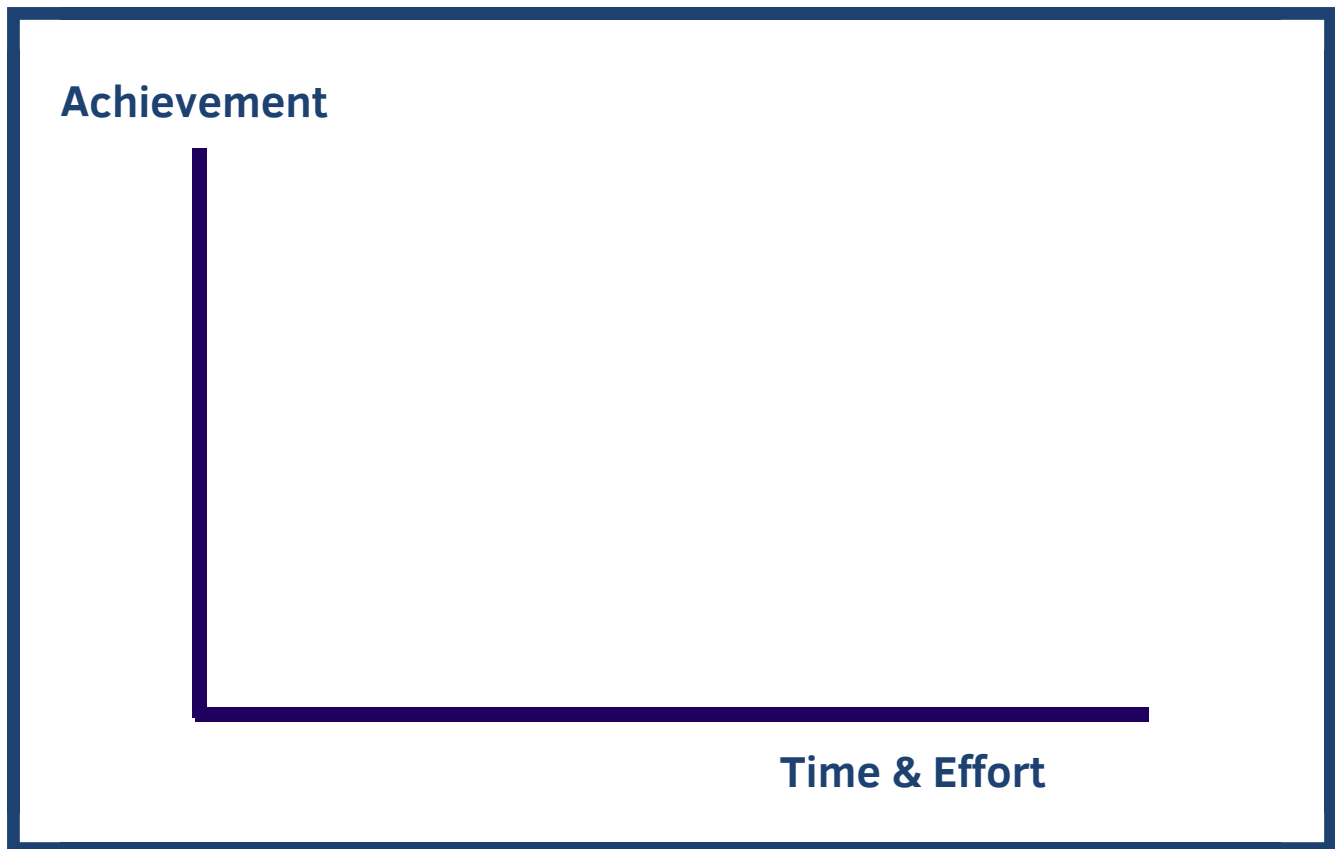
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Successfully Navigating Career Crossroads at Midlife

Susanne Aronowitz, JD ACC

OAAP Career of A Lawyer | November 2, 2018

Your Career Path



Questions? Let's Talk!



Schedule a 30-minute call at <http://susanne.youcanbook.me/>
Enter "OAAP Program" in "How did you hear about me?"

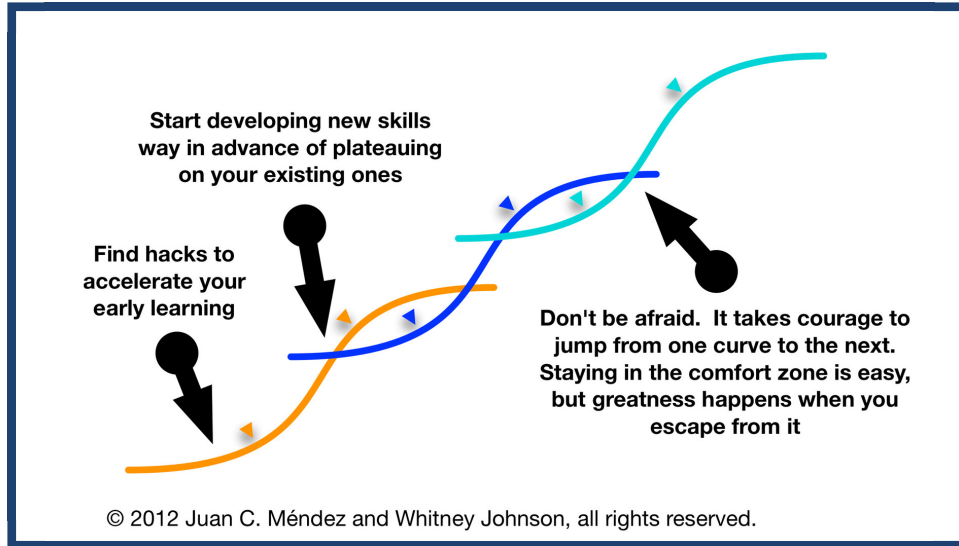


971-361-6822



Susanne@SusanneAronowitz.com

Understanding the S-Curve



What State Are You Living In?

RED ZONE

*Fight-Flight-Freeze
Frantic-Fearful-Frustrated*

- ↑ Cortisol and adrenalin (stress hormones) spike
- ↓ Blood flow siphoned from brain and sent to arms/legs
- ↓ Mental resources (creativity, strategy) drained
- ↓ Thinking becomes narrow, rigid, black-and-white
- ↓ Immune, digestive, and reproductive systems cannabilized and depleted
- ↓ Resiliency derailed
- ↓ Optimism disappears

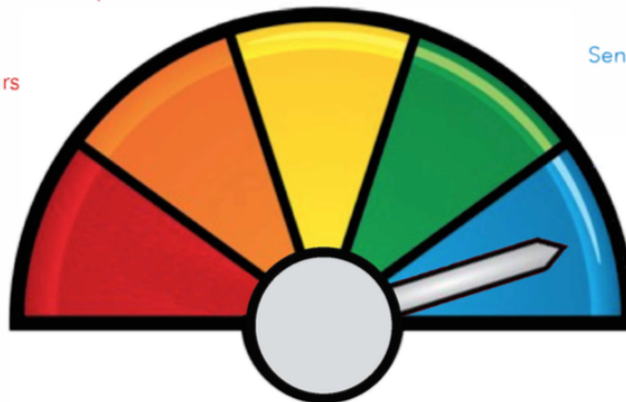
**THREAT
PROTECT
STATE**

BLUE ZONE

*Flow-Flourish, Peace-Possibility,
Calm-Connect, Create-Confident*

- ↑ "Happy" neurochemicals (dopamine, serotonin) flow
- ↑ Blood flow to "smart" brain increases
- ↑ Problem-solving, ideation, and learning increase
- ↑ Social engagement and trust increase
- ↑ Cardiovascular health and immune system improve
- ↑ Resiliency and ability to take action increase
- ↑ Sense of identity and goal-orientation increase

**SAFETY
CREATE
STATE**



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SCARF

Adapted from David Rock, *Your Brain At Work*

	Strategies	Ideas
Status Position relative to others	<ul style="list-style-type: none">• Promotion• Compete against self• Leadership opportunities	
Certainty Predictability, satisfying expectations	<ul style="list-style-type: none">• Create a plan to inject predictability and structure• Divide projects into smaller pieces• Clarify expectations• Create certainty for others	
Autonomy Having control over work direction and environment	<ul style="list-style-type: none">• Create opportunity to make choices• Assert control over your responses• Initiate projects that you control• Set boundaries	
Relatedness Sense of belonging and connection	<ul style="list-style-type: none">• Mitigate adversarial interactions with opportunities to collaborate• Create mentoring relationships	
Fairness Consistent application of rules and behavior	<ul style="list-style-type: none">• Increased transparency & communication• Set clear ground rules• Make sure decisions are consistent with priorities	

Launching Your Next S-Curve

Approach	Application
<p>1 Identify subject you're curious or excited about: e.g., subject matter, industry, client, process, skill.</p>	
<p>2 Identify area of frustration, resistance or boredom.</p>	
<p>3 Which SCARF areas are involved? What impact are they having on you?</p>	
<p>4 What do you want to be the focus of your s-curve? Can you blend your SCARF goals with your interests?</p>	
<p>5 What action(s) do you want to take? How can you blend your interests with the SCARF element you want to address?</p>	
<p>What's the first step?</p>	
<p>When will you take it?</p>	
<p>What obstacles do you anticipate?</p>	
<p>What resources/support will you need?</p>	
<p>How will you stay accountable?</p>	
<p>What will success look like?</p>	



Successfully Navigating Career Crossroads at Midlife

Susanne Aronowitz, JD ACC
OAAP Career of A Lawyer | November 2, 2018

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Overview

- Stages of career growth
- Context
- Framework to stimulate engagement
- Plan of action

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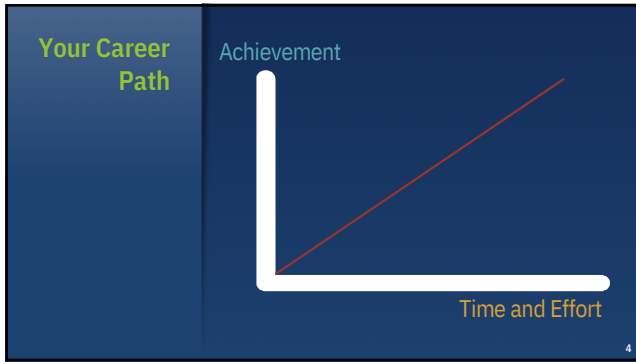
Your Career Path

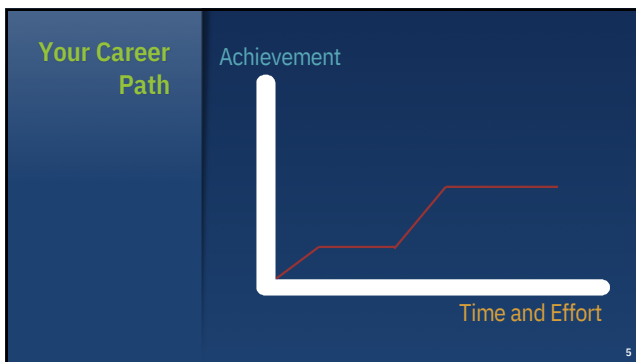
Achievement

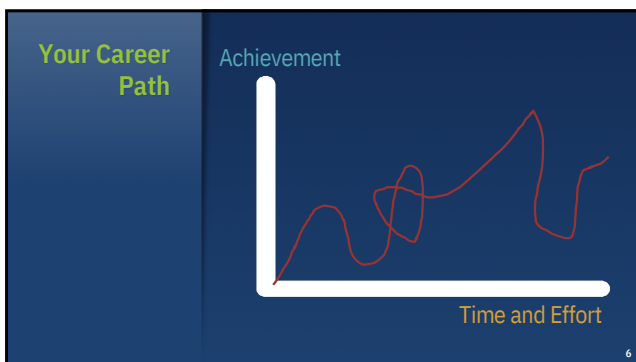


Time and Effort

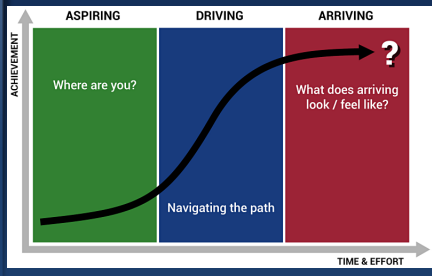
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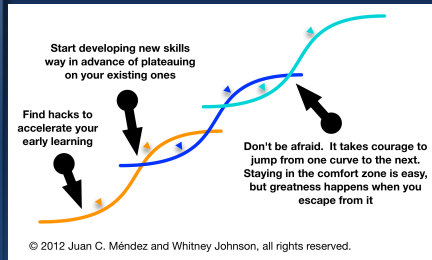
The S-Curve



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Chain of s-curves



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The Framework

1. Identify focus of **curiosity**
2. Identify area of **dissonance**
3. Understand **context** for resonance/dissonance
4. **Apply** context to your situation
5. **Action Plan**: design what you will do

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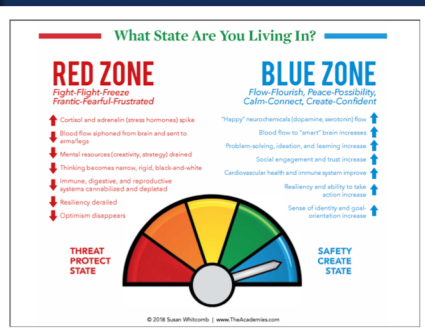
Step 1:
Identify
area of
curiosity

On your handout:
Identify at least 1 thing you're curious or excited about. For example:
New subject matter
Client industry
Business development approach
Leadership opportunity
Professional skill

Step 2:
Identify
area of
dissonance

On your handout:
Identify at least 1 thing at work that generates frustration, resistance or boredom.

Step 3:
Understand
context



Moving from Red to Blue: SCARF

- Status
- Certainty
- Autonomy
- Relatedness
- Fairness

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Status: Position relative to others

Strategies

Create opportunities to be recognized for your contributions & effort

- Promotion
- Leadership role within organization
- Leadership role outside of organization
- Compete against self

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Certainty: Need to recognize patterns and predict outcomes

Strategies

Create plan to inject predictability

- Divide large responsibilities into manageable pieces
- Take initiative to clarify expectations with stakeholders to avoid surprises
- Create certainty for those around you

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Autonomy:
Control over choices and direction

Strategies
Identify and exercise choices

- Create plan to respond, not react
- Find opportunities to retain control over approach to work
- Initiate projects/activities that you control

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Relatedness:
Connection or belonging

Strategies
Create opportunities to connect & collaborate

- Engage teams inside or outside of work
- Become a mentor
- Pro bono work
- Peer support

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Fairness:
Integrity to decision making

Strategies
Cultivate culture of fairness

- Use your influence to communicate policies and ensure even-handed application
- Root decisions in clearly-established priorities

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Step 4:
Application

Designing your next s-curve:

- Why** you want change:
Which SCARF elements?
Impact
- What** you want as the focus for change:
Review items that excite, intrigue, or connect to future goals
- How** can you connect the **why** and the **what**?

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Step 5:
Action Plan

On your handout, select 1 idea to pursue.

- What **actions** do you want to take?
- What **obstacles** might you encounter?
- What **resources & support** will you need?
- What's the **first step**?
- When will you **commit** to doing it?
- How will you stay **accountable**?
- What **impact** will this have on your satisfaction?

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With a Partner

Share your action plan

- What action will you take?
- Review the questions with your "coach"
- Get insights and suggestions
- Gain clarity on your next steps

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Your next s-curve!





Will this next s-curve bring you closer to the blue zone?
Will it sustain you in the blue zone, or is bigger change required?
Takeaways?


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Questions

Let's continue the conversation!

 Schedule 30 minutes at <http://susanne.youcanbook.me/>
"OAAP Event"

 Susanne@SusanneAronowitz.com

 971-361-6822

Slide design by SlidesCarnival 23

Progressing Towards Retirement

Friday, November 2, 2018, 2:40 p.m. – 3:30 p.m.

Shari R. Gregory, LCSW, JD

&

Bryan R. Welch, JD, CADC I

Progressing Toward Retirement

The story of the life's journey is told everywhere, e.g., nature, literature, mythology, religions, cultural rituals, child and adult development. Life transitions can be a mixture of excitement, pain and challenges. Often, we meet the challenges with resistance to change. Through understanding and preparing for the process, we can effectively use our energy to progress toward retirement in a healthy way.

- A. Change vs. transition. Change refers to a life event that starts and stops. Some of the life events we choose or make happen (changing jobs, moving, marriage, etc. Other events happen to us (illness, being fired, death of significant others). Transition often refers to the psychological reorientation to changes in our life.
- B. William Bridges' model of transition (see his book *Transitions: Making Sense of Life's Changes*) is composed of three phases. First, there is an ending, followed by an "in-between" period that feels confusing and sometimes empty called the Neutral Zone, and finally, a new beginning.
 1. Endings. There are four aspects of the natural ending experience which we can easily apply to preparing ourselves for retirement.
 - a. Disengagement
 1. Separation from the old and familiar setting or role. We are disengaged by life events (i.e., the death, job change, divorce, a move or an illness) from the context which we typically experienced.
 2. Disengagement begins a process of change, and if clarified and supported, the change can lead toward evolution and renewal.
 - b. Misidentification
 1. Through endings/disengagement, we lose ways of self-identification. In this part of the process most people experience a bit of uncertainty as to who they are or who they are becoming.
 2. Misidentification is an important part of the evolutionary process toward retirement because one's old identity can stand in the way of the transition and self-renewal process.

2. The Neutral Zone

The neutral zone is a place between who you used to be and who you are going to be; a gap, an empty space, a void in one's sense of self; symbolically a desert, a wasteland, the wilderness. It is a time of inner reorientation and exploration and reflection.

- a. The neutral zone can bring on feelings of loss and feeling lost. One may feel stuck and at times confused about what comes next. We may feel uncomfortable having more unknowns than knowns about our futures.
- b. The problem may not be that we do not want to move forward or that we cannot let go of our identity and our deep rooted ways; the problem may be that before we do not know who we will be when we retire.
- c. In the rites of passage of traditional societies, individuals were taught what to do during the natural gaps of life. They were taught to meditate, chant and fast and participated in rituals. They were also taught to solicit the aid of the spirit guides. In all these ways, traditional societies opened the individual to the transformative experience of the neutral zone. One of the difficulties of the neutral zone is that our culture is slow to recognize and validate this experience.
- d. In the neutral zone a different way of seeing and understanding reality begins to take shape between one life phase and the next. Neutral zone activity involves surrender and allowing ourselves to be with uncertainty. It can raise anxiety and feelings of isolation until clarity starts to take shape.
- e. This period of transition may effect significant others since our life changes and moods may affect them the most.
- f. Incorporate self-care and reflection while in the Neutral Zone.
 1. Schedule alone time daily/weekly.
 2. Journal the best and most challenging parts of your day to gain insights and notice patterns.
 3. Review past periods of change to remember what resiliency factors you use to endure change and progress as smoothly as possible- humor, support, perseverance, creative outlets.
 4. Take a small trip to somewhere new and have some reflection time mixed with adventure.
 5. Take time to discover and explore what you really want.

3. A New Beginning

- a. The first hint of a new beginning may come in the form of an inner idea, an impression, an external opportunity, a dream or an image that resonates with you.

- b. The goal is to realign ourselves and our outlooks to fit with a new way of doing things, and emphasizes different parts of our identity, and often creating an entirely new identity.
 - c. The transition process is analogous to the death and rebirth process. Dying before we can be reborn appears in nature with trees shedding leaves and is thematic in religion and mythology. The process of disintegration and reintegration, although painful, is the source of our renewal.
- C. Checklist: To maximize your chances of finding meaning from life's changes/events, growing from them and having a healthy/comfortable retirement, consider implementing the following suggestion which originated from William Bridges:
1. Take your time. The inner reorientation of change takes time; it cannot be rushed.
 2. Arrange temporary structures. You need to work out ways of continuing while progressing towards retirement. Many people use i.e. a modified employment arrangement or temporary jobs or an inner resolve to accept a given situation as temporary.
 3. Do not act for the sake of action. The transition process requires not only that we bring a chapter of our lives to conclusion, but that we discover whatever we need to learn for the next step we are going to take.
 4. Understand the process. Expect times of anxiety; expect others to feel uncomfortable; expect old fears to be triggered.
 5. Take care of yourself. This will involve tending to your physical, emotionally, spiritual, intellectual self in different ways.
 6. Explore the other side of change. If change has been forced on you, try to see its benefits. If you have chosen change, try to see its costs to you and your significant others.
 7. Get someone to talk to/ a support system. Empathic listeners vs. advisors.
- D. Use Resilience: Cultivating resilience as you progress toward retirement can be characterized by the acronym ABC. To strengthen your resilience, and, in turn, your well-being, while progressing toward your retirement ,consider:
1. **Acknowledge**. Acknowledge and adhere to those matters that contribute to your positive emotional experiences. Research shows us that possessing a positive affect can have the powerful effect of deterring the influence of negative events such as stress and pain. These include:
 - a. **Identifying and reframing negative thoughts**. The way you view adversity or challenges can impact your productivity, creativity, and self-worth. Viewing stressful events as a challenge or an opportunity instead of a hardship can shift our beliefs and the resulting consequences.

- b. ***Practicing Self-Compassion.*** Kristin Neff, a professor and self-compassion researcher, defines self-compassion as "being kind and understanding toward oneself in instances of pain or failure, rather than being harshly self-critical; perceiving one's experiences as part of the larger human experience, rather than seeing them as isolating; and holding painful thoughts and feelings in mindful awareness, rather than over-identifying with them." (Seppala, 2011, p. 60). Self-compassion has been associated with lowered anxiety while allowing us to see shortcomings with greater calm and as a learning opportunity (Seppala, 2011).
 - c. ***Exercising Gratitude.*** Gratitude elicits positive feelings and leads to emotional well-being. A study of a three-month trial of gratitude journaling showed a significant favorable impact on well-being, affect, and depression (O'Connell, O'Shea, & Gallagher, 2017).
 - d. ***Identifying your strengths, assets, and resources.*** Individuals who use their strengths experience greater subjective well-being, which is related to mental and physical health-related quality of life (Proctor, Maltby, and Linley, 2010). Make a list of your strengths such as your skills, attitudes, aptitudes, talents, or qualities, and keep it nearby so you can easily be reminded of it. If you are seeking to find your strengths, recall past instances when you overcame a stressful or traumatic situation.
2. **Balance.** Balance the needs of the different dimensions of your life to increase your resolve, well-being and sense of person. Regularly checking in with ourselves and the ways we are supporting these areas can help us find the balance that works for us. The report of the National Task Force on Lawyer Well-Being lists six dimensions of well-being:
- a. Six Dimensions of Well-Being: Occupational, Emotional, Physical, Intellectual, Spiritual, and Social.
3. **Connect.** Connect with and maintain a socially resilient environment. Research informs us that having a sense of shared community and accountability where individuals are encouraged to be there for each other and help one another creates a socially resilient environment and leads to better health outcomes.

Panelists' Biographies

Nancie Potter earned her JD from Lewis & Clark Law School in 1978 and her Master's in Marriage and Family Therapy from George Fox University in 2010. In between, she practiced law in New York and Oregon, spent 11 years as a stay home mom, and attended graduate school while she continued her career as a litigator and arbitrator. During a 12- week period in 2010 she defended her Master's thesis, completed her clinical internship, graduated from George Fox, began her career as a therapist, sold her home and moved, retired from law practice, and remarried. She retired from clinical practice in 2015 and now offers workshops on mental health topics. In addition to her own experiences with second career, life transitions, and retirement, Nancie has provided therapy for clients dealing with all of these changes.

Douglas Hagen, JD graduated from Willamette Law in 1974 and spent the next ten years in a two- person law firm, in downtown Portland, doing a general practice. From then until Doug retired in 2015, he was a sole practitioner, doing mostly plaintiffs' work, sharing office space with a variety of other lawyers. He continues to live in Portland, spending time with family and friends, and pursuing various other interests.

Scott Jonsson, JD graduated from the University of Oregon Law School in 1983 and is currently retired from an active civil litigation practice that wound down in the summer of 2018. He still maintains a practice as an arbitrator and mediator.

He came to his law career somewhat late having earlier tried his grown up hand as a semi-itinerant U.S. Forest Service Smokejumper, high school basketball coach and teacher. Earlier, he labored as a winter snow shoveler, summer lawn cutter, all seasons paper boy, grocery store clerk/bagger, cowboy, survey tech and crew foreman, dorm kitchen dishwasher, athletic department laundry employee, college gym supervisor, plant nursery worker, Red Cross first aid instructor, Emergency Medical Tech [EMT] first responder, logger, wildfire hot shot crew member and squad boss and worked construction here and there.

He was a four-year letterman for the University of Oregon Crew Team and competed, not very well, in two Olympic trials.

He is admitted to practice in Oregon and Washington and all Federal Courts. During law school, he was a member of the Moot Court team and a civil practice law clerk and was a summer clerk for a judge on the Colorado Supreme Court. He has engaged in civil litigation his entire legal career split roughly between plaintiff and defense cases. His practice areas are business and contract litigation, commercial real estate disputes, construction defect, employment, antitrust and all manner of tort cases. He figures he has over 100 jury and court trials. Mediated and arbitrated cases exceed the number of trials. Settled matters likely dwarf both preceding case totals.