



ABA SECTION OF TAXATION

DIVERSITY AND INCLUSION PLAN

May 2015

I. Executive Summary

The American Bar Association Section of Taxation (“Tax Section”) has a long history of supporting diversity and inclusion. We believe that diversity in our membership brings a variety of unique and valuable skills and perspectives to the Tax Section and our members. Diversity is at the core of the mission of the American Bar Association (“ABA” or “Association”), which is “to serve equally our members, our profession and the public by defending liberty and delivering justice as the national representative of the legal profession.” The Association achieves its mission through tireless work towards four goals. Of particular relevance here is Goal III: Eliminate Bias and Enhance Diversity. Goal III has two important objectives: (1) to promote full and equal participation in the Association, our profession, and the justice system by all persons; and (2) to eliminate bias in the legal profession and the justice system.

In May 2001, the Tax Section’s Council adopted the Tax Section’s diversity plan “to assist and encourage the members and leaders of the Section to ensure full and equal participation for lawyers of color, women lawyers, younger lawyers, lawyers with disabilities, and lawyers from diverse ethnic backgrounds.” As stated in the 2001 diversity plan, “the goal of diversity can only be achieved with the unequivocal support and participation of the Section’s leadership and its Committees and the individual commitment of each active Section member.” In furtherance of that goal, the 2001 diversity plan set forth a series of long range goals and action steps to encourage Section and Committee leadership to: (i) actively recruit diverse lawyers; (ii) foster an atmosphere of inclusion to assist in retaining diverse members; (iii) seek the participation of diverse lawyers on panels and task forces; (iv) provide diverse lawyers with opportunities and training to take on leadership roles at both the Committee and Section levels; (v) identify new ways to serve the interests of diverse lawyers, including nontraditional CLE and mentoring programs; (vi) educate Section membership on the need to foster an atmosphere of inclusion for diverse lawyers; and (vii) address tax issues that concern diverse lawyers.

The Tax Section has made great strides in working towards achieving the goals set forth in the 2001 diversity plan. Yet we recognize that the ongoing effort to promote diversity and inclusion requires continued, and even heightened, focus. To renew our commitment in this regard, in May 2014, Council appointed a task force to evaluate the progress made to date by

the Tax Section in fulfilling the Association’s Goal III, and to make recommendations for concrete steps that the Tax Section can take in furtherance of Goal III.¹ The establishment of this task force was announced to all Tax Section members in the Chair-Elect’s column in the Summer 2014 issue of the *NewsQuarterly*, which noted that diversity “is a critical issue facing the bar as a whole, and one that we must address to ensure that the Tax Section remains strong for the next 75 years.” Building on the 2001 diversity plan and the steps taken over the past fourteen years, this Diversity and Inclusion Plan (“D & I Plan”) seeks to encourage full and equal participation in the Tax Section by lawyers and law students with diverse backgrounds and perspectives, including individuals of color, women, members of the lesbian, gay, bisexual and transgender (“LGBT”) community, Native Americans, individuals of diverse national or religious background, individuals of diverse ethnic or cultural heritages, individuals with disabilities, military veterans, and individuals of diverse ages and professional experiences. The Tax Section also wants to encourage participation in its meetings and programs by accountants and other nonlawyer professionals. Recognizing that addressing diversity and inclusion requires expanding the base of our membership, many of the recommendations in this D&I Plan are focused on encouraging younger and newer lawyers, including individuals who choose law later in life, to become active in the Tax Section.

II. Historical Commitment to Diversity and Inclusion

The Tax Section has maintained a long-standing commitment to diversity and inclusion. In just the past 20 years, the Tax Section has achieved the following notable accomplishments by:

- Encouraging law students and first-time attendees to register for Tax Section meetings through free registration options.
- Cosponsoring the *Commission on Opportunities for Minorities Conference* in 1995 designed to bring together CEOs, HR directors, general counsel of major corporations, hiring partners of law firms, and other legal profession leaders to develop an agenda for embracing diversity for competitive advantage.
- Publishing scholarly papers and Committee presentations addressing uncertain tax questions affecting diverse persons.²
- Forming a long range planning task force in 1998 to address membership matters, including diversity.

¹ The members of the 2014-2015 diversity task force were Megan Brackney, Tom Callahan (task force chair), Larry Campagna, Julie Divola, Tom Greenaway, Janet In, Kathy Keneally and Priscilla Ryan. The immediate past Section Chair (Mike Hirschfeld), Section Chair (Armando Gomez), and Chair-Elect (George Howell), were consulted throughout the process. The task force gives thanks to the leadership of the Section’s Diversity Committee, particularly Cathy Fung and Audrey Kucia, for their valuable input.

² See, e.g., *Same-Sex Marriage in 2014: The Aftermath of Windsor, Perry and IRS Action* (Fall Meeting 2014); *Tax Issues for Military Families* (May Meeting, 2014); *Safe Zones for LGBT Employees: Legal and Tax Implications* (Midyear Meeting, 2013); *The Intersection of Race and Tax* (May Meeting, 2004); Jarrett Tomas Barrios, *Growing Pains in the Workplace: Tax Consequences of Health Plans for Domestic Partners*, 47 *Tax Law.* 845 (1994).

- Contributing \$50,000 toward the establishment of the ABA Legal Opportunity Scholarship Fund that provides annual grants to law students from diverse backgrounds.
- Forming a committee on women and minorities³ — which evolved into the Diversity Committee.
- Establishing the Membership and Marketing Committee to attract younger lawyers and to increase the participation of government lawyers.
- Creating the Young Lawyers Forum (“YLF”) to target young lawyers for active participation in the Tax Section.
- Establishing the John S. Nolan Fellowship Program to recognize young tax lawyers who demonstrate superior leadership potential.
- Adopting the 2001 Section of Taxation Diversity Plan.
- Implementing the 2004 “Tax Success Mentoring Program” designed to introduce less experienced lawyers to the Tax Section by assigning to each participant a mentor drawn from Tax Section leadership.
- Forming the 2012 long range planning task force to update recommendations (including diversity) made by the 1998 long range planning task force.
- Ensuring that “factors such as areas of practice, geography, gender, ethnicity, [and] sexual orientation are taken into account in selecting Tax Section Leadership.”⁴

As these examples demonstrate, the Tax Section has a long tradition of promoting diversity and inclusion in Tax Section matters. This tradition continues with the development and adoption of this D & I Plan.

III. Current Best Practices

Based on its review of the Tax Section’s past accomplishments and ongoing efforts to address diversity and inclusion, the task force identified a number of best practices presently being carried out by the Tax Section, including the following items:

- Encouraging diversity and inclusion in all leadership appointment processes.
 - The Tax Section’s Nominating Committee considers diversity and inclusion in its nominations for Tax Section Officers and Council Directors.
 - All Committee Chairs are asked to consider diversity and inclusion when nominating future Chairs and Vice-Chairs. The Tax Section Chair-Elect and Tax

³ See e.g., Pam Olson, *Diversity in the ABA Tax Section*, 68 Tax Law. 65 (2014). Pam was Chair of the Tax Section for the 2000-2001 Term.

⁴ Charles H. Egerton, *Process for Selection of Section Officers and Council Directors*, 30 NewsQuarterly 3, 26 (2011).

Section Vice-Chair, Committee Operations (“VCCO”), review all Committee leadership nominations to confirm that adequate attention is paid to diversity and inclusion.

- Diversity and inclusion are emphasized in all Tax Section leadership training and development programs.
- Supporting the Association’s Goal III to “Eliminate Bias and Enhance Diversity.”
 - The Tax Section actively participates in the ABA’s Goal III data collection and other ABA-wide diversity-related research.
 - The Tax Section works with various ABA diversity commissions to assist them with their diversity efforts.
- Promoting diversity and inclusion in all Tax Section meetings.
 - The VCCO reviews all meeting spotlights to ensure that each Committee accounts for diversity and inclusion when selecting moderators and panelists.
 - The Tax Section engages with lawyers (including government lawyers), bar associations relating to the Diversity Committee’s constituencies, and law schools (including deans, professors, and students) in the local areas for each meeting site to solicit suggestions for diverse speakers and to encourage registration and meeting participation by diverse attendees.
 - The Tax Section follows up with new members and nonmember panelists to invite them to become involved in the Committees.
 - All Council Directors, Officers, and Committee Chairs are encouraged to attend and to invite Tax Section members to attend:
 - the Tax Section Welcome Reception;
 - the First-Time Attendees Dinner; and
 - the Diversity Committee/YLF Networking Reception.
- Incorporating diversity and inclusion in Tax Section awards.
 - The Tax Section’s Pro Bono Award Committee reviews participation in diversity-related pro bono activities when selecting the recipient of the Janet R. Spragens Pro Bono Award.
 - The Tax Section’s Distinguished Service Award Committee considers contributions to diversity and the profession in selecting the recipient of its annual Distinguished Service Award.

- The Tax Section’s Public Service Fellowship Committee takes into account diversity in selecting the Christine A. Brunswick Public Service Fellows. Each fellow is provided funding for two years, including salary, benefits, and student loan aid, to provide tax-related legal services to the underserved or to address tax policy issues affecting the underserved.
- The Tax Section’s John S. Nolan Fellowship provides scholarships to younger lawyers (currently six) to attend the Tax Section’s three meetings held during a year, taking into consideration criteria (including diversity) established by the Tax Section’s Council.
 - The Tax Section advertises the availability of the Nolan Fellowship among the ABA’s Young Lawyers Division (“YLD”) and in the new member benefits materials.
 - The Nolan Fellowship provides that one of the duties of each scholarship recipient is the active recruitment of other young and diverse lawyers.
- Raising awareness that diversity and inclusion are valued.
 - The Tax Section strongly encourages its Committees to cosponsor programs with the Diversity Committee and YLF, as well as with other ABA Sections or Divisions on diverse panels.
 - The Tax Section includes questions regarding the Committees’ promotion of diversity (including identification of and plans for advancement and inclusion of diverse members into leadership positions) in the “Committee Chair Questionnaire,” which each Committee Chair is required to complete annually and submit for discussion with their Council Director and the VCCO.
- Encouraging diversity and inclusion in Tax Section publications.
 - The Tax Section encourages diverse authors to submit articles and other pieces for publication.
 - The Tax Section encourages the publication of articles that are likely to be of interest to diverse lawyers.
- Promoting the use of Diversity Committee liaisons.
 - All Committee Chairs are required to appoint a liaison to the Tax Section’s Diversity Committee to support the efforts of the Committee towards the Tax Section’s diversity goals. The liaisons report back the Diversity Committee’s activities and plans so that all Committees have regular input and access to thought leadership on enhancing diversity and inclusion.
 - The Diversity Committee regularly communicates with Committee liaisons prior to and after the Tax Section’s three regular meetings held during each year to ensure diversity-related ideas and initiatives are exchanged with the Committees.

IV. Recommended Future Action Steps of the D & I Plan

The task force encourages Tax Section leadership at all levels to continue to employ the best practices identified above, and further recommends a number of additional action steps to promote diversity and inclusion in the Tax Section. A summary of the key action steps is set forth below, and a detailed description of these action steps is provided in Appendix A to this D&I Plan.

A. Promote Diversity and Inclusion to Tax Section Members

Advances in diversity and inclusion will not happen without an active commitment and engagement on the part of Tax Section leadership and staff at all levels. Consistent with the guidance of the Association's Goal III, the Tax Section must promote full participation in the Tax Section and all of its activities by all persons, and work to eliminate bias in the legal profession and the tax system more generally. To that end, the D&I Plan should be made available to all members of the Tax Section, and the goals, best practices, and action steps set forth herein should be regularly referenced and promoted on the Tax Section's website, publications and other communications. In communicating the D&I Plan and the importance of addressing diversity and inclusion to Tax Section members, it is expected that Tax Section leadership will provide examples and suggestions of how the goals can be furthered in particular circumstances.⁵

In this regard, the Tax Section should do more to encourage the development of mentorship or sponsorship relationships. The Tax Section's good track record on diversity issues has been built on the backs of many Tax Section members who reached out to mentor or sponsor less experienced lawyers. As a current Tax Section leader recently wrote, a mentor should not say, "Oh, I see myself in you so I will mentor you and bring you along." Rather, a mentor or sponsor should seek out those who may bring different perspectives, and say, "I see what you can do. Let me help you with that and maybe teach you a few new things."⁶

Moreover, to ensure that Diversity and Inclusion remain at the forefront of the Tax Section's priorities over time, the task force recommends that the goals associated with the Tax Section's mission statement be expanded specifically to address the goals set forth herein.

B. Promote Diversity and Inclusion in Tax Section Leadership

Tax Section leaders must promote diversity and inclusion in all aspects of the Tax Section's work. From the time that new Committee Chairs and Vice Chairs receive their incoming training to when new Officers and Council Directors transition into higher leadership roles, the Tax Section should provide training and support to all Tax Section leaders on best practices to promote diversity and inclusion throughout the Tax Section. Regular guidance to reinforce that training should ensure that diversity and inclusion play a prominent role in leadership activities and communications.

To ensure that Committees are actively implementing the D&I Plan in their work, Committee leaders will be requested to provide periodic reports on the steps their Committees have taken to promote diversity and inclusion.

⁵ See Kathryn Keneally, *From Clique to Community: The Power of Inclusion*, 68 Tax Law. 283 (2015) (providing examples of how the Civil and Criminal Tax Penalties Committee developed opportunities for new and young Committee members to become involved in Committee activities, and how the "old guard" were designated to "welcome anyone who they did not recognize at a meeting, to reach out, to invite them to join the regular crowd for lunch, drinks, or dinner.").

⁶ *Id.*

C. Promote Diversity and Inclusion in Tax Section Meetings

The Tax Section's three annual meetings are some of the largest tax-specific CLE opportunities in the nation. With attendees from around the country coming together to learn about recent developments in the tax law and network with Tax Section members of all backgrounds, these meetings present an ideal opportunity to introduce potential new members to the Tax Section. To ensure that the Tax Section continues to attract diverse new members, the D&I Plan identifies a number of steps that can and should be taken to foster inclusiveness in Tax Section meetings. Among other things, Tax Section staff and leadership should coordinate with diverse bar associations, local bar associations, and local law schools, to invite their members to attend Tax Section meetings. In this regard, the Tax Section should continue its long-standing practice of providing free registration to law students and first-time attendees. In addition, the Membership and Marketing Committee should explore the use of social media and other outlets to help advertise meetings to recruit first-time attendees.

To ensure that young and diverse attendees feel welcome at the Tax Section meetings, the Tax Section should continue to provide welcome receptions, diversity and young lawyer receptions, first-time attendee dinners, and other activities designed to provide networking opportunities for diverse attendees. All Tax Section leaders should be expected to attend these events to welcome new attendees and to introduce them to Committee Chairs and other leaders who can help them get involved in Tax Section activities.

As a component of the Association, the Tax Section's activities are focused primarily on lawyers. However, to ensure that all viewpoints and perspectives are heard at Tax Section meetings, Tax Section staff and Committee Chairs should continue to reach out to other professional groups to invite their members to participate in Tax Section meetings.

D. Raise Awareness That Diversity and Inclusion Are Valued by the Tax Section

Each Tax Section Committee is expected to have a liaison to the Diversity Committee to help ensure information exchange on diversity and inclusion throughout the Tax Section. Through the work of the Diversity Committee and these liaisons, the importance of diversity and inclusion should be regularly advertised to all Tax Section members. In addition, to help ensure that the Diversity Committee receives guidance from seasoned Tax Section leaders, the task force encourages the Section Chair to ensure that one or more former Tax Section Officers be appointed to assist the Diversity Committee in its goals. It is expected that such appointments will be made periodically, to ensure a regular influx of new perspectives.

In addition, Tax Section leadership and staff should ensure that the Tax Section's dedication to diversity and inclusion is regularly reflected in Tax Section communications and publications, including the Tax Section website. Moreover, when recruiting applicants to apply for Tax Section awards and fellowships, the Tax Section should ensure that appropriate outreach is made to include diverse candidates.

E. Coordinate with Diversity-Focused ABA Commissions and Divisions

Over the years the Association has established a number of Commissions and Divisions focused on addressing the objectives of Goal III. The task force believes that it would be helpful for the Tax Section to appoint liaisons to certain of these entities, and to encourage Tax Section members to support the work of these entities. The liaisons appointed by the Tax Section would be expected to attend and participate in meetings of the relevant entity, and to report back to the Tax Section Council and/or Diversity Committee on information learned at those meetings with a view towards better informing the Tax Section and its members on additional steps that the Tax Section can take to enhance our approach to diversity and inclusion.

The Commissions and Divisions identified in Appendix A are focused on diversity and inclusion in the ABA and the profession. The work of the liaisons would benefit the Tax Section, both by demonstrating the Tax Section's commitment to the objectives of Goal III, and by obtaining access to the many resources that have already been developed by these Commissions and Divisions. For example, the ABA Commission on Women in the Profession has created "tool kits" for programs such as the "Grit Project," which is aimed at developing women's leadership skills, and the "Women of Color Research Initiative," which provides strategies for law firms and organizations for inclusion and retention of diverse women attorneys. Another example is the Young Lawyers Division, which provides tremendous resources for young lawyers to use in practice and to develop their leadership skills. YLD also has a robust diversity program of its own. Ideally, the liaison to YLD would bring back ideas and resources for young Tax Section members and partner with YLD to encourage membership in the Tax Section.

A number of the Goal III entities have annual awards to recognize lawyers for their contributions to particular diverse issues in the profession. For example, the Commission on Women in the Profession offers the Margaret Brent Women Lawyers of Achievement Award, the Commission on Disability Rights offers the Paul G. Hearne Award, and the Commission on Sexual Orientation and Gender Identity offers the Stonewall Award. When appropriate, which may not be annually given the nature of these awards and the expectation that they be bestowed on individuals who have demonstrated a long history of achievement or contribution in the particular area, the Tax Section staff should work with leadership to identify Tax Section members who should be nominated for these and similar awards. Moreover, Council should periodically consider providing financial support for diversity-related awards, subject to availability of Tax Section resources and other financial commitments.

F. Periodically Review and Re-Evaluate the Tax Section D & I Plan

There are no perfect blueprints for advancing diversity and inclusion in the legal profession. While this D & I Plan takes into account best practices and recommendations developed based on years of experience, the task force expects that over time additional best practices and lessons learned will inform the Tax Section on how the D & I Plan can be enhanced. The Section Chair should ensure that effectiveness of the D & I Plan is evaluated by Council periodically for this purpose.

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This D & I Plan was approved by the Section Officers and Council on May 7, 2015, at the 2015 May Meeting of the Section of Taxation.

Appendix A: Diversity & Inclusion Plan Action Steps

	Action Step	Responsible Person	When
A. Promote Diversity and Inclusion to Tax Section Members.			
	I. Require wide dissemination of the D & I Plan within the Tax Section and make the D & I Plan available to other interested groups, including:		
	(a) Disseminate the D & I Plan to all Section members, with a cover letter or email from the Tax Section Chair.	Section Chair	Once Upon Adoption
	(b) Post D & I Plan prominently on Tax Section website.	Section Staff	Ongoing
	(c) Incoming Chair to refer to D & I Plan in his or her first <i>NewsQuarterly</i> column and first Meeting.	Section Chair-Elect	Annually
	(d) Refer to the D & I Plan in member solicitation materials.	Section Staff	Ongoing
	(e) Ensure accessibility of the D & I Plan to members with visual or other disabilities by providing the D & I Plan in an appropriate format.	Section Staff	Ongoing
	(f) Confirm commitment to diversity and inclusion by adding a commitment to diversity and inclusion as one of the Tax Section's goals.	Council	May Meeting 2015
	(g) Circulate the Tax Section D & I Plan to the ABA's Commission on Disability Rights, Center for Racial and Ethnic Diversity, Commission on Women in the Profession, Commission on Sexual Orientation and Gender Identity ("SOGI"), Task Force on Gender Equity, Staff Diversity Council and Law Student Division ("LSD").	Section Staff	After Adoption by Council
B. Promote Diversity and Inclusion in Tax Section Leadership.			
	I. Obtain support and participation of Section Officers, Council Directors, Committee Chairs and Vice-Chairs in implementing the D & I Plan.		
	(a) Provide a copy of the D & I Plan to each incumbent and incoming Section Officer, Council Director, Committee Chair and Vice-Chair, together with a letter or email from the Tax Section Chair stressing the importance of the D & I Plan and the active participation of each Committee in implementing the D & I Plan.	Section Chair/ Section Staff	Annually
	(b) Council Directors will contact the Chairs of Committees who have not demonstrated the promotion of diversity and inclusion within their Committees and, with the input of the Section Officers, assist those Committee Chairs in the implementation of the D & I Plan within their Committees.	Council Directors/VCCO	Annually
	(c) Encourage Section Officers to use the Section Officers Conference to network with other ABA Section/Division/Forum Officers to share and identify best practices regarding the promotion of diversity and inclusion that can be implemented within the Tax Section.	Section Chair	Ongoing
	2. Provide diversity and inclusion training to the incoming Section Leaders and Committee Chairs as part of their orientation.	VCCO/Section Staff	May Meeting
	3. Provide guidance to the Committee Chairs and Vice-Chairs with respect to diversity and inclusion issues.		

	Action Step	Responsible Person	When
	(a) Provide information to new Committee Chairs and Vice-Chairs at the Committee Chairs Breakfast and include diversity and inclusion materials in the “Guide to Committee Operations”, including the D & I Plan.	Section Staff	Before the Fall Meeting
	(b) Provide Tax Section Leadership with information and materials prepared by the ABA, such as the ABA’s Goal III to Eliminate Bias and Enhance Diversity.	Section Staff	Annually or as provided by the ABA
	4. Implement accountability to diversity and inclusion by reviewing each Committee’s efforts in this regard.		
	(a) Invite incumbent Committee leadership to complete a self-audit and self-reflection report on past diversity and inclusion efforts.	Committee and Subcommittee Chairs	Annually
	(b) Vice Chair Committee Operations (“VCCO”) to provide a report at Council meeting(s) regarding Committees’ responses to diversity and inclusion questions on the annual Committee Questionnaire, and will identify best practices and success stories identified through that process.	VCCO	After Committee Questionnaires are submitted to Section Staff
	(c) Council Directors to provide best practices and success stories with leadership of the committees they supervise.	Council Directors	Periodically
	(d) Recognize those Committees that are making strong efforts to diversify their Committee leadership, speakers and membership.	Section Chair	Incoming Chairs Breakfast
	5. Automatically include all Section Officers and Council Directors as members of the Diversity Committee.	Section Staff	Annually
	C. Promote Diversity and Inclusion in Tax Section Meetings.		
	1. Foster inclusiveness in all of the Tax Section’s and its Committees’ activities.		
	(a) Solicit information regarding special needs from lawyers with disabilities and determine how best to accommodate those needs by including in the Tax Section program registration forms an option to request special accommodations and inquiring in post-meeting questionnaires whether such special accommodations were adequately provided.	Section Staff	Ongoing
	(b) Provide services to members with disabilities and ensure adequate signage exists to indicate where services can be accessed or requested; when requested, provide large print documents for visually impaired members for all sessions; for blind members, make available materials in DOC format in advance of meetings so that such members have adequate time to process the materials through a reader; and select and examine all meeting facilities, including sites for receptions, dinners and other Tax Section or Committee events, to ensure easy access for lawyers with disabilities.	Section Staff	As needed
	(c) Invite any nonmembers to become members at the conclusion of each Committee Meeting.	Committee and Subcommittee Chairs	All Committee Meetings
	(d) Advertise in all materials for all Meetings that nonCommittee members are welcome to attend Committee or Subcommittee Meetings. (Note, however, that certain Committees, such as the Nominating Committee and the Appointments to the Tax Court Committee, meet in executive session to address Tax Section business.)	Committee and Subcommittee Chairs/Section Staff	All Committee Meetings

	Action Step	Responsible Person	When
	(e) Prepare a list of Committee and Subcommittee projects and provide opportunities for members at all levels, including law students, to get involved and post lists of opportunities to get involved on Committee web pages.	Committee Chairs/Section Staff	All Committee Meetings
	(f) Encourage Committees to hold meetings at law schools, including satellite seminars, and select affordable lunch and dinner venues to engage law students and young lawyers in Committee events.	Committee Chairs/Section Staff	As needed
	(g) Invite Tax Section members to take a series of implicit bias/unconscious bias educational programs. Qualify programs for CLE/CPE credit.	Section Staff	Annually
	(h) Provide a simple and voluntary method (e.g., stickers or colors) on name badges at Meetings to show identification with, or support for, diverse groups.	Section Staff	Ongoing
	2. Involve in Tax Section activities diverse lawyers who are active in diverse local and national bar associations.		
	(a) Request lists of diverse bar associations from the Commission on Disability Rights, the Center for Racial and Ethnic Diversity, the Commission on Women in the Profession and SOGI, and send to the leaders on those lists Meeting brochures.	Section Staff/ Diversity Committee	Prior to All Meetings
	(b) Encourage joint programming with national and local diverse bar associations.	Section Staff	Prior to All Meetings
	(c) Encourage joint programming with the Commission on Disability Rights, Center for Racial and Ethnic Diversity, Commission on Women in the Profession, SOGI, Task Force on Gender Equity, the ABA Staff Diversity Council, Young Lawyers Division (“YLD”), and LSD.	Section Staff/ Committee Chairs	One to two months prior to speaker submission deadline
	(d) Advertise the Tax Section’s programs in periodicals and newsletters directed to diverse bar associations.	Section Staff	Prior to Meetings
	(e) Send information on Tax Section membership and benefits to meetings of national diverse bar associations.	Section Staff	Prior to Meetings
	(f) Communicate first-time registration discounts to diverse bar groups.	Section Staff	Prior to Meetings
	(g) Personally invite members and leaders of diverse bar associations in the host city to programs and social events, waive or reduce registration fees for the leaders of such associations as feasible, and appoint Tax Section Leadership to serve as hosts to such attendees.	Section Officers	Prior to Meetings
	(h) Organize a Tax Section speakers clearinghouse that may be accessed by Section Staff to provide information about diverse speakers to Tax Section leadership, the Diversity Committee, and Committee Chairs.	Section Staff	Ongoing
	3. Ensure that first-time meeting registrants feel welcome prior to the Tax Section Committee Meetings.		
	(a) Develop a “First-Timers Guide” for new registrants. Post the Guide on the Meeting website and app.	Section Staff	Prior to All Meetings
	(b) Develop a list of Tax Section members who are willing to escort First Time registrants to various Tax Section activities.	Section Staff/Diversity Committee/Young Lawyers Forum	Ongoing
	(c) Arrange for Tax Section members to escort and introduce a First Time registrants to Meeting events.	Volunteer Members	Ongoing

	Action Step	Responsible Person	When
	4. Improve communication between the Tax Section and the Young Lawyers and Law Students Divisions.		
	(a) Provide membership materials to law students focusing on benefits and emphasizing the opportunities in the Tax Section for law students and young lawyers. Membership materials should promote diversity and inclusion.	Section Staff	Ongoing
	(b) Sponsor pre-meeting law school programs (prior to each Section Meeting), funded by the Tax Section, and hosted by members of the Tax Section who are professors at host city law schools.	Membership & Marketing Committee	Prior to All Meetings
	(c) Encourage Tax Section members in academia to speak with students regarding the benefits of membership in the Tax Section and provide information regarding the opportunities to attend Tax Section and Committee Meetings and get involved as a law student and young lawyer.	Membership & Marketing Committee/ Section Staff	Periodically
	(d) Advertise to law students and tax lawyers in the Young Lawyers Division the “basic” programs available at each of the Meetings.	Section Staff	Prior to All Meetings
	(e) Encourage Tax Section leaders to encourage young, new and diverse lawyers to consider membership and facilitate their attendance at Tax Section meetings.	Officers	Periodically
	(f) Expand outreach to law students through on campus programs in which Tax Section leaders participate to introduce law students to the benefits of Tax Section membership.	Officers/Council Directors/Membership & Marketing Committee/Section Staff	Periodically
	5. Include Other Professionals in Tax Section Meetings.		
	(a) Contact local societies of CPAs and accounting firms in host city to determine if there is an interest in participating in Tax Section programs.	Section Staff/ Committee Chairs	Prior to All Meetings
	(b) Contact National Association of Enrolled Agents regarding potential speakers in host city.	Section Staff/ Committee Chairs	Prior to All Meetings
	6. Solicit Corporate Donors to Fund Diversity Programming.	Section Staff	Ongoing
	D. Raise Awareness That Diversity and Inclusion Are Valued by the Tax Section.		
	1. Promote Diversity Committee Liaisons by:		
	(a) Regularly circulating the list of liaison duties, which include: identifying, recruiting and grooming diverse members to join the Committee; mentoring diverse members who have joined the Committee and who participate in the Committee, noting if participation was influenced by Tax Section funding; and reporting back to each substantive Committee the Diversity Committee’s current initiatives.	Diversity Committee	Ongoing
	(b) Appointing one or more former Tax Section Officers to assist the Diversity Committee in its goals.	Section Chair	Ongoing
	2. Emphasize diversity in print and electronic media.		
	(a) Ensure content of publications appeals to diverse communities.	Publications Committee/Vice Chair Publications	Ongoing
	(b) Ensure content of publications is accessible to persons with disabilities by providing publications in an appropriate format.	Section Staff	Ongoing

	Action Step	Responsible Person	When
	(c) Advertise diversity programs in periodicals and newsletters for lawyers with disabilities; and minority, women, gay and lesbian bar associations, and the Young Lawyers Division	Section Staff	When appropriate opportunities arise
	(d) Publicize diversity programs and other Tax Section initiatives in ABA publications.	Section Staff	When appropriate opportunities arise
	(e) Urge Tax Section members and staff with expertise in diversity and inclusions matters to write and speak on behalf of the Tax Section.	Section Staff	When appropriate opportunities arise
	3. Encourage and recognize contributions by diverse lawyers in the Tax Section publications.		
	(a) Include photos acknowledging diversity of membership in membership materials.	Section Staff	Periodically
	4. Use Tax Section website to promote diversity and inclusion.		
	(a) Advertise on the Tax Section website both Section and Committee information and materials on diversity and inclusion.	Section Staff	Periodically
	(b) Redesign and regularly update website to promote diversity (e.g., by showing diverse individuals and referencing diversity programs), to provide a mechanism for potential new members to ask questions and get information about specific topics via the internet; and for Committee business.	Committee Chairs/ Section Staff	Periodically
	5. Incorporate diversity and inclusion in the Tax Section Fellowships and Awards.		
	(a) When evaluating candidates for the Christine A. Brunswick Public Service Fellowship ("PSF"), encourage diverse applicants by advertising the PSF in minority bar associations.	Public Service Fellowship Committee	Ongoing
	(b) When forming the Law Student Tax Challenge problems, urge the Young Lawyers Forum to consider a diverse audience.	Young Lawyers Forum	Ongoing
	(c) When seeking nominations and evaluating candidates for the John S. Nolan Fellowship, highlight the importance of diversity and inclusion.	Chair-Elect	Ongoing
	(d) When considering candidates for the Distinguished Service Award, take into account each candidate's contributions to diversity and inclusion.	Distinguished Service Award Committee	Ongoing
	(e) When seeking nominations and evaluating candidates for the Janet R. Spragens Pro Bono Award, consider diversity and inclusion, including each candidate's contributions to addressing the needs of diverse populations.		
	E. Coordinate with Diversity-Focused ABA Commissions and Divisions.		
	1. Appoint liaisons to:		
	(a) Commission on Women in the Profession	Section Chair	Periodically
	(b) Center for Ethnic and Racial Diversity	Section Chair	Periodically
	(c) Commission on Disability Rights	Section Chair	Periodically
	(d) Commission on Sexual Orientation and Gender Identity	Section Chair	Periodically
	2. General responsibilities of liaisons.		

	Action Step	Responsible Person	When
	(a) Join Commission listserv.	Liaisons	Ongoing
	(b) Participate in at least one Commission event each year (with financial support of the Tax Section, if needed and appropriate), and report back to the Tax Section leadership.	Liaisons	Ongoing
	(c) Coordinate with Diversity Committee and Section Staff to present diversity-focused program developed by the Commissions at Tax Section meetings.	Liaisons	Ongoing
	3. Consideration of other ABA Commissions and Divisions focused on diverse populations.		
	(a) Commission on Women in the Profession		
	i. Consider nominating Tax Section member for the Margaret Brent Women Lawyers of Achievement Award.	Section Staff	Annually (nominations due in Dec.)
	(b) Center for Ethnic and Racial Diversity		
	i. Consider nominating Tax Section member for the Spirit of Excellence Award.	Section Staff	Annually (nominations due in June)
	ii. Sponsor a Tax Section member to attend the annual ABA National Forum on Diversity and Inclusion in the Profession of Law, subject to availability of Tax Section resources and other financial commitments.	Section Chair/Council	Annually
	(c) Commission on Disability Rights		
	i. Consider nominating a Tax Section member for the Paul G. Hearne Award for Disability Rights.	Section Staff	Annually (nominations due in June)
	ii. Join in signing the “Pledge for Change in the Legal Profession”.	Section Chair/Council	One Time
	(d) SOGI		
	i. Consider nominating Tax Section member for “Stonewall Award.”	Section Staff	Annually (nominations due in June)
	(e) YLD		
	i. Update Tax Section YLF homepage to link to YLD publications of general interest as well as the “101 Practice Series: Back to Basics” articles on tax topics.	YLF Chair/Section Staff	Ongoing
	ii. Update Tax Section YLF homepage to link to YLD’s awards and scholarships.	YLF Chair/Section Staff	Ongoing
	iii. Ask YLF to link to information about the Nolan Fellowship and Christine A. Brunswick Public Service Fellowship on the YLD page for awards and scholarships.	YLF Chair/Section Staff	Ongoing
	(f) LSD.		
	i. Provide scholarships for LSD Student Liaison to attend Tax Section meetings or specific events at meetings, subject to availability of Tax Section resources and other financial commitments.	Section Chair/Council	Ongoing
	ii. Invite LSD Student Liaison to Tax Section events such as Council Dinner.	Section Staff	Ongoing
	F. Periodically Review and Re-Evaluate the Tax Section D & I Plan.		
	I. Enhance the current tracking and reporting of progress in diversity efforts, including:		

	Action Step	Responsible Person	When
	(a) Assess which initiatives are working and which are not and determine why they are not working; incorporate new ideas; and respond to then existing circumstances.	Section Staff/ Diversity Committee/Council	Periodically
	(b) Periodically assess the diversity plans of other entities that are associated with the ABA to obtain new ideas and improve Section efforts.	Section Staff	Annually
	(c) Report recommended changes to the Tax Section's D & I Plan to, and seek approval from, Council approximately every 2 years, commencing in 2018.	Section Chair	Midyear Meeting
	(d) Participate in the ABA's annual Goal III data collection process, and other ABA-wide diversity-related research.	Section Staff	Ongoing
	(e) Identify other feasible methods to improve collection of demographic information from Tax Section members, program presenters, authors, and others engaged in Tax Section initiatives.	Section Staff	Ongoing