

PHILADELPHIA BAR ASSOCIATION
TAX SECTION
2021 DIVERSITY ACTION PLAN

The Tax Section of the Philadelphia Bar Association (“**Tax Section**”) is committed to advancing diversity, equity and inclusion (“**DEI**”) in the legal profession. The Tax Section strongly believes that DEI in our membership brings a variety of unique and valuable skills and perspectives to the Tax Section and our members. DEI is at the core of the mission of the Philadelphia Bar Association.

To help guide the Tax Section’s efforts to increase DEI in our membership, the Chair of the Tax Section established a task force (“**Task Force**”) to assess the Tax Section’s current environment around DEI and to recommend specific action steps to improve its DEI efforts. In response, the Task Force created a Diversity Action Plan (the “**Plan**”) for the Tax Section that focuses on promoting DEI in three primary areas in the Tax Section: (1) leadership, (2) membership, and (3) activities. The Plan was reviewed and approved by the Tax Section Council on May 18, 2021.

This 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 LGBTQ+ 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. Recognizing that addressing DEI requires expanding the base of our membership, many of the action steps in this Plan are focused on encouraging younger and newer lawyers to become active in the Tax Section. The Tax Section also recognizes that a successful DEI plan must also focus on retention of diverse members. Accordingly, this Plan also includes strategies aimed at creating inclusive and welcoming spaces.

There are no perfect blueprints for advancing DEI in the legal profession. While this Plan adopts current best practices and recommendations, the Tax Section is committed to refreshing this Plan on an annual basis to keep it current.

The action steps for the Plan follow.

Diversity, Equity & Inclusion Plan Action Steps

1. Promote Diversity, Equity and Inclusion in the Tax Section Leadership.

- a.** Establish a Diversity, Equity & Inclusion Committee (the “**DEI Committee**”) to:
 - i.** Ensure that the action steps in this Plan are taken;
 - ii.** Provide a year-end report on the progress made during the year; and
 - iii.** Refresh the Plan on an annual basis to adopt best practices, feedback and recommendations.
- b.** Automatically include the current Vice-Chair and the Past Chair of the Tax Section as ex officio members of the DEI Committee to provide executive sponsorship to the Plan.
- c.** Ensure that diverse candidates are considered by the Tax Section Council in the selection of its Chair, Vice-Chair, Secretary/Treasurer, committee leadership and other leadership positions.

2. Promote Diversity, Equity and Inclusion among Tax Section Members.

- a.** Create and foster an environment of inclusivity through active allyship which includes, but is not limited to, holding or co-sponsoring CLE trainings and events addressing issues impacting diverse communities, providing opportunities for diverse voices to be heard, and ongoing participation of membership in DEI trainings.
- b.** Invite diverse attorneys to join as members of the Tax Section and provide mentorship and leadership opportunities to these attorneys to retain them as active members. The dual focus of this action step is to both increase diverse membership in the Tax Section and to retain these diverse attorneys as active members of the Tax Section.
- c.** Recommend that Tax Section members read one DEI-focused book or attend one DEI-focused CLE in the calendar year. The DEI Committee will recommend a DEI-focused book to the Tax Section and establish a voluntary reading group to discuss the book.

- d. Require dissemination of the DEI plan within the Tax Section and promote the DEI plan on the Tax Section's website.

3. Promote Diversity, Equity and Inclusion in Tax Section Activities.

- a. Establish an annual Tax Section Diversity Scholarship (the “**Scholarship**”) for one diverse local law student with a demonstrated commitment and interest in tax law. The amount, qualifications and details for the Scholarship will be established by the DEI Committee, the Chair, and the current Secretary/Treasurer and be approved by the Tax Section Council.
- b. Implement accountability to DEI by reviewing each of the Tax Section's Committee's activities in this regard. This includes, but is not limited to, the following:
 - i. Ensure diversity on CLE panels by inviting diverse attorneys to speak or moderate the panels;
 - ii. Encourage joint programing and social events with local Affinity Bar Associations/Organizations; and
 - iii. Ensure diversity among the law students that the Tax Section mentors.