

Strategic Planning 2.0 Initiative:

Taxation Section of the State Bar of Michigan

Effective as of October 1, 2019

Mission

The Strategic Plan provides a plan for implementing the Mission of the Taxation Section of the State Bar of Michigan:

“The Taxation Section, as a representative of the legal profession, shall serve its members and the public through education and leadership in efforts to achieve an equitable, efficient, and workable tax system. The purpose of this Taxation Section is to improve public understanding of, confidence in, and respect for the federal, state and local tax systems;

to provide leadership in simplifying and improving the federal, state and local tax systems; to provide unbiased, thoughtful and timely input into the legislative and administrative process at the national, state and local levels;

to promote and maintain an active, vigorous, growing and interested Section membership; to provide programs and services of unique quality which promote professionalism, competence and ethical conduct;

to provide a forum for communication among Taxation Section members and interchange between the public and private sectors.”

Matters that are relevant to the Mission include the following:

(i) educating Taxation Section members and other attorneys regarding our current federal, state and local tax systems;

(ii) engaging in improving public policy, by filing amicus curiae briefs, and commenting on proposed and finalized legislation and regulatory guidance;

(iii) establishing, implementing, and improving pro bono, grant, and other public service programs;

(iv) offering networking opportunities for Taxation Section members, other attorneys, government officials, etc.; and

(v) maintaining a strong foundation for the Taxation Section by increasing membership, planning ahead for seamless leadership changes, increasing leadership training, and sponsoring substantive programs.

Background

Recognizing the importance of establishing a mission statement and goals, Tax Council endeavors each year to develop methods and strategies to accomplish the Taxation Section's mission and goals.

Since the Taxation Section implemented its first strategic plan, effective October 2016, Tax Council has endeavored to consider ways to continuously improve on this new initiative of following a strategic plan.

To this end, Tax Council decided to move to an annual strategic plan, adopted by Tax Council in October each year, that would represent the new Taxation Section Chair's goals for the year to carry out the Section's Mission.

As Tax Council considers goals for the upcoming fiscal year, beginning October 2019, the following accomplishments from the past fiscal year will serve as the starting points for shaping the Tax Section's next Strategic Plan:

- **Goal:** maintain better contact with Taxation Section members. This goal has been achieved by the implementation of a new, published e-newsletter, disseminated to all members of the Taxation Section quarterly since the fall of 2018, titled "Tax in the Great Lakes State."
- **Goals:** education to achieve an equitable, efficient, and workable tax system. These goals were met by creating a new "Tax Highlights" report summarizing selected legislative and regulatory tax developments for the benefit of members, partnering with the Michigan Court of Claims to publish online opinions and orders issued in all tax cases, and filing an amicus curiae brief in a case pending before the Michigan Supreme Court, *TOMRA North America v. MI Dep't of Treasury*.
- **Goals:** drive traffic to the SBM website and keep website updated. These goals have been achieved by efforts to completely revamp and update the SBM Taxation Section webpages in the fall of 2018 and by working with the SBM to continuously and frequently upload content about Section activities, meetings and events.
- **Goals:** improve the pro bono and grant initiatives. These goals have been achieved through the efforts of the Pro Bono Project / Community Service Initiative Coordinator and the Grant Coordinator. Many pro bono communications and multiple pro bono training sessions were held, and multiple grants were made by Council for pro bono activities, including a new, one-time grant to the Michigan State Tax Clinic.
- **Goal:** appoint vice chairs to each committee to assist with leadership and the transfer of knowledge. This goal was achieved and vice chairs have been appointed.
- **Goals:** offer a "Tax Boot Camp" and "signature events" to educate tax attorneys. These goals were achieved. A "Tax Boot Camp" was held on October 25, 2018 with a networking event after; certain committees have created a "signature event" such as the "Tax Practitioner Success Panel" hosted annually by the Young Tax Lawyers.
- **Goal:** Develop better participation by law students. This goal was achieved by law school mixer/networking events held at the law schools of Michigan State University and University of Detroit Mercy and by the development of a new Law Student Writing Challenge in January 2019, marketed to law school students, with cash scholarships available to the winning law school students.

Strategic Plan 2.0 Initiative

Based on the accomplishments outlined above, the following goals and actions are to be implemented for the fiscal year beginning October 1, 2019 and ending September 30, 2020 in order to meet the Mission of the Taxation Section.

Mission	Goal		Action	Responsible Council Members / Progress		
				Officers	Council Members	Committee Chairs
Promote and maintain an active, vigorous, growing and interested Section membership.	Develop better participation by academics, in-house tax attorneys and attorneys working as tax professionals in accounting and other non-legal firms.	Focus on law school outreach and increase law student participation - add five new law students to social media and host an event at two different law schools.	Continue offering and improving the "Tax Boot Camp".			
			Continue growing engagement of law students in the annual writing challenge by marketing it to law students earlier in the year (overseen by the Membership and Student Outreach committee member).			
			Host annual "signature" law school events / mixers for Student Outreach at U of M and Wayne State University.			
	Increase in-house/accounting firm participation - develop a contact/liaison at five non-legal firms.		Expand Student Outreach role to include Membership Outreach.			
			Implement regular "brown bag" programs for a "lunch-and learn" approach to education, hosted by the committees, and seek participation - as presenters and attendees - from non-legal firms.			
			Membership and Student Outreach committee member to act as a liaison to these different non-legal firms.			

Mission	Goal		Action	Officers	Council Members	Committee Chairs
Serve its members and the public through leadership in efforts to achieve an equitable, efficient, and workable tax system.	Serve as a resource for federal tax practitioners by submitting a federal comment letter to interpret certain tax laws.		Appoint a Council member to work with the federal income tax committee to select a tax issue and draft a comment letter to Treasury/IRS.			
			Promote and draft a federal comment letter (in the form of priority guidance or request for comment).	Host an event promoting the comment letter and explaining the issue at bar.		
Serve its members and the public through education.	Implement and expand programming focused on educating tax attorneys.	Sponsor/host events that provide tax attorneys with the ability to learn about new tax laws/the federal, state tax system - sponsor/host ten events.	Implement regular "brown bag" programs for a "lunch-and learn" approach to education, hosted by the committees.			
			Continue disseminating the Legislative Report.			
Communication among Taxation Section members and interchange between the public and private sectors.	Increased effort on networking events.	Achieve over 450 attendees (members and non-taxation section members) at networking events throughout the year (counted via sign-in sheets).	Each committee to host and promote its "signature event".			
			Partner with other SBM sections.			