



FEDERAL BAR ASSOCIATION SECTION ON TAXATION

MEMBERSHIP PLAN

Adopted May 12, 2016

Recognizing that the strength of FBA is in the vitality of its Sections, the Section on Taxation (the “Section”) hereby adopts the following Membership Plan. The Membership Plan is guided by FBA’s Best Membership Practices: (1) RETAIN existing members, (2) ATTRACT new members, and (3) LEAD by having a designated Section leader who is responsible for execution of the Section’s Membership Plan.

A. LEADERSHIP

1. The Section will have a specified Membership Chair or Chairs (“Chair” shall refer to one or more such designees), who will be primarily responsible for implementation of this Membership Plan. The Membership Chair shall be elected by the FBA Tax Steering Committee.
2. The Membership Chair shall have a Membership Committee formed from FBA Tax Steering Committee members, which the Chair shall appoint within the first month of taking office. The Committee will be responsible for assisting the Membership Chair with implementation of this Plan. The Committee will generally include:
 - a. A clerk for a judge serving on the U.S. Tax Court
 - b. One or more local law students
 - c. A Chair of the Younger Tax Lawyers committee
 - d. A Chair of the Women in Tax Law committee
 - e. The Section’s Regional Chairs
3. Although the Section will have certain members designated to lead in the area of membership, the Section recognizes that all Section members should be engaged in membership. To this end, the FBA Tax Steering Committee will include Membership in its regular agendas, where a member of the Membership Committee will provide an update as to the monthly membership numbers supplied by FBA National and upcoming membership efforts.

B. RETAINING AND ATTRACTING MEMBERS

The Section will retain existing members and attract new members in two ways: engaging in personal outreach and providing excellent programming.

1. Personal outreach

a. Retaining existing members

- i. The Membership Chair, or a member of the Membership Committee, will personally contact new Section members within six months of joining to welcome them to the Section and encourage them to attend Section events and/or become involved with Section leadership.
- ii. The Membership Chair, or a member of the Membership Committee, will personally contact existing Section members when notified by FBA National that the existing members are coming due on renewal. The contact may be by telephone, e-mail, or letter and it will highlight benefits of FBA membership and the Section. The person making contact with the Section member will provide contact information for the Membership Chair and will encourage the existing member to renew.
- iii. The Membership Chair, or a member of the Membership Committee, will personally contact each renewing Section member to thank them for renewing and recognizing their support for FBA. The contact will also invite the member to upcoming event(s).
- iv. The Membership Chair, or a member of the Membership Committee, will personally contact each non-renewing Section member to encourage them to renew. The contact will remind the non-renewing member of the benefits of FBA.
- v. The Section's Regional Chairs, Chair of the Young Tax Lawyers Committee, Chair of the Women in Tax Law Committee, and Chair of the Tax Practice and Procedure Committee shall invite all Section members to events planned by such Chairs and their committees.

b. Attracting new members

- i. The Membership Chair, or a member of the Membership Committee, will send an annual communication to FBA members who indicate that they have a tax practice but are not members of the Section inviting them to join the Section.
- ii. The Membership Chair, or a member of the Membership Committee, will send an annual communication to local tax attorneys that are not members of the Section inviting them to join the Section.
- iii. The Membership Chair, or a member of the Membership Committee, will strive to ensure that the Section has a presence in every newly-admitted attorney's materials in the U.S. Tax Court, the Court of Federal Claims, and the District Court for the District of Columbia.

- iv. The Membership Chair, along with all FBA Tax Steering Committee members, will invite at least one new person who is a non-member to a Section event each year.
- v. The Membership Chair or Membership Committee will reach out to include law students and judicial law clerks in events, and will encourage law students to join as Law Student Associate members of the FBA and the Section.
- vi. Members of the FBA Tax Steering Committee will form an informal mentoring “hot line” as a benefit for new members.
- vii. The Membership Committee will set annual numerical goals for increasing membership that is at least three percent growth per year.
- viii. The Membership Committee will organize at least one membership drive a year designed to achieve the membership goal set by the Committee. The Membership Committee will work with FBA National to obtain reduced membership rates during the membership drive(s).
- ix. The Membership Committee will coordinate with the Tax Law Conference Co-Chairs to provide new members of the Section with promotional pricing on membership and also offer promotional awards for joining the Section.

2. Programming

- a. When the Section plans any Section event, the Section will consider how the event will further the Section’s goals of retaining existing members and attracting new members. The Section will implement the strongest programming possible in order to demonstrate the value of membership. The Section will also invite the local federal judiciary to attend its events.
- b. At each Section event, upcoming events and encouragement to join will be included in either introductory or concluding remarks.
- c. At each Section event, each check-in area will include membership applications, information about membership, information about upcoming programs, copies of FBA and Section publications, and CLE certificates if applicable.
- d. After each Section event, the Membership Chair, a member of the Membership Committee, or the organizer of the event will contact any non-FBA members who attended and encourage them to join the FBA and the Section and also attend future events.
- e. The Section will hold events that not only provide legal programming, but networking and social opportunities. In addition, the Section will hold events that are of interest of varying groups, whether that be litigators, bankruptcy attorneys, or younger attorneys.
- f. The Section will co-sponsor or advertise Section events with other organizations who share similar interests or goals (e.g., the D.C. Bar’s Section on Taxation).
- g. When possible, the Section will provide a cost benefit that encourages membership, such as reduced fees for existing members or those who join at an event.
- h. The Membership Committee will send an annual survey to Section members to solicit ideas for programming and ways to improve the value of the Section to its members.

C. ADOPTION, AMENDMENT, DISTRIBUTION

1. This Membership Plan may be adopted and amended by approval of a simple majority of the FBA Tax Steering Committee in attendance at any Section meeting.
2. The goals and duties in this Membership Plan are the shared obligations of all the FBA Tax Steering Committee's members. This Membership Plan shall be distributed to all members of the FBA Tax Steering Committee, and the Section's Chair shall regularly remind FBA Tax Steering Committee members of the contents of the plan and the Section's dedication to following the plan.
3. If an officer of the Section refuses to comply with this Membership Plan after having been asked by the Section's Chair or the Membership Chair to comply with its terms, then the Section's Chair may remove or replace the officer.