

**Report to the Trustees
Long Range Planning Task Force
2008-2009**

Task Force Members: Beth Kern (Chair), Hughlene Burton, Anne Christensen, Lil Mills, Tom Omer, Ed Outslay

Charges

The Long Range Planning Task Force was given the following charges for the 2008-2009 academic year:

- 1 Ascertain the challenges facing tax research, education, practice and the ATA.
- 2 Make recommendations, if appropriate, to the Trustees regarding strategies that the ATA can pursue to meet future challenges.
- 3 Assist the Trustees as needed in implementing new strategies adopted by the Board.
- 4 Make recommendations to the Trustees regarding strategies for increasing the public persona (presence) of the ATA.

Activities

The task force discussed a number of potential challenges and opportunities facing the ATA over the next several years. Although there are a number of potential opportunities for the ATA, the task force recommended that the ATA work on gaining more prominence as a “tax thought leader.” We met with the Trustees during the February 2009 meeting to ascertain if they concurred that this was an appropriate avenue we should pursue. In Spring 2009 we generated several ideas for raising the ATA’s visibility. We also nominated an ATA member to serve on a White House task force on tax reform. Concurrently, the ATA’s Tax Policy Committee formed several initiatives that would also help raise the ATA’s visibility. Over the next year, the Long Range Planning Task Force will be working with the relevant ATA committees to help the ATA become a tax thought leader.