

2023

Diversity, Equity,
and Inclusion
Annual Report

 BURR &
FORMAN



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Pictured on opposite page, Associate Elena Bauer; pictured far right above, Partner Sara Solano; pictured above right, Partner James Roberts.

Reflections from Firm Leadership

Throughout the country, and indeed, many parts of the world, the year 2023 was marked by deepening divisions. As ideological and cultural lines solidified, many found themselves instinctively drawn into the illusory safety of “us,” unified in opposition to a caricatured group of “them.” Against this fractionated backdrop, DEI initiatives served as a reminder that, no matter our differences, there is a greater “us” to which we all belong.

To intentionally foster this mindset, several of our DEI programs in 2023 focused on humanizing the so-called “other.” For Black History Month, a virtual concert of Negro spirituals highlighted the humanity of African Americans through expressions of resilience, resistance, and the capacity to transform trauma into art. During AAPI Heritage Month, we learned from Asian cultural practices that the breath within all of us can be trained and harnessed into produc-

tive states of mindfulness and meditation. Our Native American flute presentation underscored the universal human need for creative expression, cultural preservation and self-determination. Through these tangible, sensory experiences, we were able to tap into the shared humanity manifested in various cultures.

Beyond recognizing our shared humanity, we continued to cultivate empathy for marginalized communities as a means of motivating equitable policies and unbiased interactions within the firm. Our Pride Month speaker and firm-wide announcement of National Coming Out Day drew attention to the collective concerns of LGBTQ+ people surrounding threats to their physical safety, job prospects, and personal freedoms. A training for our C-Suite and administrative leaders provided instruction on how to plan inclusive firm events, with heightened empathy for those with disabilities, health challenges, minority religious beliefs, and other less visible forms of diversity. Our Social Justice Initiative’s book club on the Tulsa Race Massacre provided the names, faces, hopes and dreams of the people who lived in, lost and rebuilt Black Wall Street at the turn of the 20th century. These exercises in empathy helped to remind us that we all want the same things: life, liberty, and the pursuit of happiness.

Achieving such lofty goals for the whole, rather than the few, will require that we work together, celebrate our progress, and persevere in the work that remains. In 2023, Burr & Forman celebrated becoming Mansfield Certified for the

first time, a sign of the firm’s commitment to considering diversity in leadership roles. We also celebrated a return to offering domestic partner benefits so that families of all stripes can support and provide for one another. To learn about our other initiatives and achievements in 2023, we invite you peruse the contents of this annual report. Most importantly, we invite your continued support for achieving diversity, equity and inclusion at Burr & Forman.

With Regards,



Ed Christian
Chief Executive Officer



Tamika Walters
Chief Diversity & Inclusion Officer

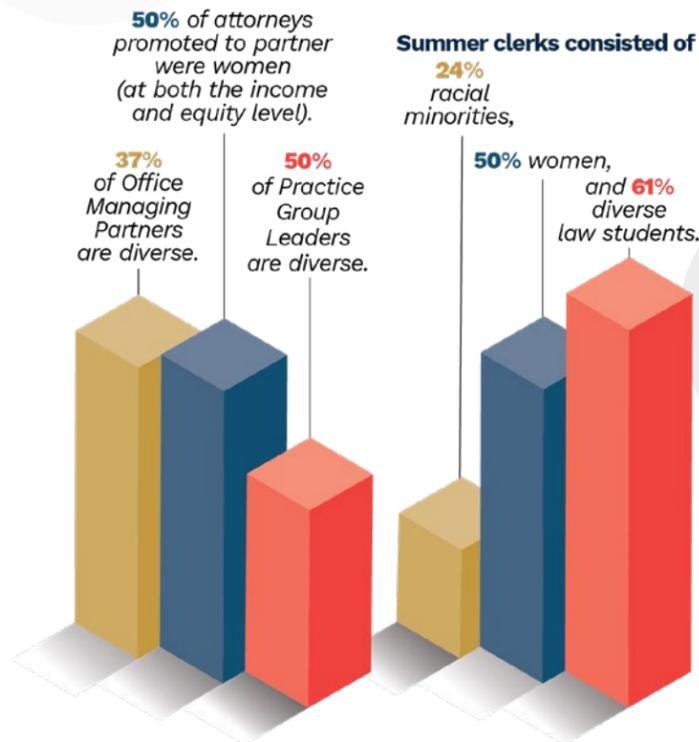
Pictured from left to right: Kara McCord Duplechin, Denzel Okinedo, and Jackson Freese.



A Message from DEI Committee Co-Chairs

The DEI Committee develops and champions DEI policies at the firm, and we provide day-to-day support for DEI initiatives. As Co-Chairs of this committee, we offer decades of experience in advancing DEI for our cities, government agencies, clients, professional legal associations, and the firm itself. We have both served on the firm's Executive Committee where we saw, first hand, how committed our fellow leaders are to advancing DEI at Burr & Forman. We have had the honor and privilege of harnessing that commitment to drive change firm wide, with the committee's help. To highlight the results of these efforts, we take pleasure in announcing Burr & Forman's 2023 Diversity Stats.

DIVERSITY BY THE NUMBERS



In addition to these encouraging stats, we are proud to announce that Burr & Forman received two DEI awards in 2023:

- Tipping the Scales Award by the Diversity & Flexibility Alliance—an honor reserved for firms with at least 50% women among the attorneys promoted to partner.
- Aspire Diversity Award by Lawyers of Color—in recognition of racial diversity in the firm's senior leadership.

In the upcoming year, the DEI Committee will continue the momentum by retaining our diverse talent, strengthening mentoring relationships, and further embedding DEI into the way we do business at the firm.



Frannie Heizer
Partner, Co-Chair



Ricardo Woods
Partner, Co-Chair

Pictured on opposite page from left to right: Shannon Zhang, Sean Kim, and Kayla Roddey.



2023 Conferences and Sponsorships

Each year, at Burr & Forman, we thoughtfully sponsor organizations and events that embrace our employees' unique perspectives and support their professional growth and development. During 2023, our attorneys and staff attended an array of conferences that enhanced their skills and expanded their networks.

CONFERENCES



LaddHer Up Presented by Ms. JD, Sonoma, CA



National Asian Pacific American Bar Association (NAPABA) Convention, Indianapolis, IN



Christine Burns-Brown, a Partner and member of the National Asian Pacific America Bar Association (NAPABA), participated in the Partners Summit in New York. The event

provided a platform for networking with influential NAPABA figures and professionals from various firms and companies. In November, Christine co-led a CLE session at the NAPABA Convention in Indianapolis. By focusing on legal issues, including discrimination, civil rights, and immigration, the session aimed to dismantle entrenched racial biases and promote greater awareness. The CLE marked a significant mile-

stone, reflecting NAPABA's commitment to addressing legal, cultural, and social challenges that inter-Asian and mixed-Asian communities encounter.



The Leadership for Women of Color Attorneys, Inc. (LIWOCA) 19th Annual CLE Conference, Washington, D.C.



Women, Influence & Power in Law (WIPL) 2023, New Orleans, LA

NATIONAL SPONSORSHIPS



Equal Justice Works – Scales of Justice



National Association of Women Lawyers (NAWL)



As a part of our NAWL Sustaining Sponsorship Burr's women attorneys have the opportunity to apply to their Leadership Program. In 2023, Partners **Meryl Cowan** (Birmingham) pictured at left, as well as



Sarah Robertson (Bluffton) pictured at left top, **Beth Shirley** (Birmingham) pictured at left center and **Emily Taube** (Nashville) pictured at left bottom were accepted into NAWL's 2023 Leadership Program.



The 7-week intensive training included presentations, small group discussions, and community-building exercises intended to help participants strengthen their leadership skills and build their professional networks.

National LGBTQ Bar Association



LOCAL SPONSORSHIPS



Asian Pacific American Bar Association of Tampa Bay



George Edgecomb Bar Association in Tampa



Georgia Asian Pacific American Bar Association



Illuminate – South Carolina Communities in Schools



MAGIC CITY BAR ASSOCIATION
1984 - BIRMINGHAM

Magic City Bar Association



Southeastern Region of the National Black Law Students Association



Stonewall Bar Association of Georgia

Recruiting and Pipeline Initiatives

SUMMER PROGRAM

In 2023, Burr and Forman welcomed 46 summer clerks and 18 pre-law interns across 11 offices. The goal was to provide these students with practical hands-on experience, mentorship, and advising while giving them an opportunity to experience different practice areas with our attorneys.

For the second year, we held a 3-day Learning & Development Conference in Birmingham, AL for our clerks and interns. This diverse group of students participated in several interactive panels, toured the Negro Southern League Museum, met with members of the firm's Executive Committee, and received an Allyship training facilitated by our Chief Diversity & Inclusion Officer, **Tamika Walters**.

Burr's clerks and pre-law interns met with several of our clients. They participated in a walking tour at the Good People Brewery and learned about the history of the firm's role in founding and sustaining the enterprise. They also learned about the firm's contributions to community development in the City of Birmingham from Orchestra Partners and Executive Vice President, **Steve Sewell** at the Economic Development Partnership of Alabama.



Through the mentors and professionals I was able to speak with and learn from at the firm, I had the rare opportunity to see for myself what working at a law firm was really like in terms of culture and other intangibles that you can only really learn by experiencing.

Sean Kim, University of Chicago



My cohort at the Birmingham office was unique in that our entire group had already been accepted to the UA School of Law. We were

paired with mentors and received more advice than could fit in a book. The Pre-Law program prepared us to navigate a challenging first year, and I strongly believe I would not have done as well without the coaching beforehand. Returning to Burr as a summer clerk, I was already comfortable with the office culture from my time as a Pre-Law, which helped me make the most of the summer program. I was able to narrow my practice group focus and catch up with previously met attorneys instead of feeling overwhelmed by the experience. Being a pre-law was an amazing and fun experience, and returning to Burr as a summer clerk was even better.

Anna Robinson, UA School of Law

Pictured from left to right: Alisha Clay, Isabella Lablanc, Zach Warren.

I was able to hear and gain insight from practicing lawyers about their field and specialty which is invaluable to someone early in their legal journey. My eyes were opened to types of law that I had never been exposed to. This program has helped me understand what skills should be developed in order to be successful in this field, such as writing, analysis, attention to detail and peer collaboration. I will take everything I learned throughout the program and continue to build on it.

Kayla Roddey, Spelman College

Participating in this internship over the summer marked the first time I truly delved into the intricacies of the legal field. It was an eye-opening experience that allowed me to apply the theoretical knowledge I had acquired in my pre-law studies to real-world situations.

Brandon Scruggs, USC

DIVERSITY JOB FAIRS

Burr & Forman participated in the following job fairs in 2023:

- 1L Minority Clerkship (Atlanta)
- Damali Booker 1L Minority Job Fair (Nashville)
- Lavender Law Career Fair (Chicago)
- Southeast Minority Job Fair (Atlanta)
- Southeast Region Black Law Student Association Career Fair (Orlando)

1L AND 2L DIVERSITY FELLOWSHIPS

The Burr & Forman Summer Diversity Fellowship is an opportunity for law school students who have promoted diversity within their sphere of influence. Our 2023 Diversity Fellows have summered at Burr and demonstrated exceptional talent with a proven track record of academic and professional achievements in the face of substantial obstacles.

Burr & Forman's 2023 Diversity Fellows:



Alisha Clay
University of Alabama School of Law



Lamar Dukes
Cumberland School of Law, Samford University



Michael Strickland
Georgia State University College of Law

Each fellow received a Burr Partner mentor to provide guidance and support during their upcoming academic years. Our firm has taken a vested interest in Alisha, Lamar, and Michael's continued success and growth within the legal community.

Before Burr, I thought I would struggle to fit in at a law firm. I knew that black people made up only about 5% of attorneys and that black women made up even less. I knew that my parents were blue-collar employees rather than lawyers, and I hardly knew any lawyers. However, what I had not yet learned was the power of an inclusive environment where even the most underrepresented can feel a sense of belonging. I'm happy to have realized this power after my experience at Burr.

Alisha Clay, UA



Pictured from left to right: Shun Sheffield, Taylor Moore-Jones, Liberty Wigen, Kaddyja Jallow, Amiyah Drake, Malija Goggins, P. Brady McCormick, Roosevelt Long.

OUTREACH TO LAW SCHOOLS

Each year, Burr attorneys and staff make a concerted effort to engage with future legal professionals. During the fall, **Chandler Brown, Rachel Cash, Allen Howell, Annie Kate Ingle, Ally Mancuso, and James Roberts** visited Cumberland School of Law and the University of Alabama School of Law. They met with Black Law Students Association members on each respective campus and shared practical advice, valuable interview skills, and exam preparation tips.



Pictured above: B. Isaac Scruggs and Maddie Gall.



Pictured from left to right bottom row: Shannon Zhang, Shery Girgis, Cerrin Crawford, Ar'Monio Smith, Malija Goggins, Liberty Wigen, Alison Schwartz, Tamika Walters, Kaddyja Jallow; second row from left to right: P. Brady McCormick, Sean Kim, Kaki Burleson, Blake Summers, Amiyah Drake, Taylor Moore-Jones, Kayla Roddney; third row from left to right: Shun Sheffield, James Roberts, B. Isaac Scruggs.

Affinity Group Highlights

Burr & Forman's affinity groups provide equitable support to African American, Asian American, Hispanic/Latinx, LGBTQ+, Multiracial, Veteran, and Women attorneys. Membership in these groups is open to attorneys of any background, including allies who recognize the value of diversity and wish to invest in the inclusion and professional development of others, for the benefit of the firm overall. Below are a few highlights of affinity group programs and events in 2023.

HISPANIC/LATINX AFFINITY GROUP

During the spring, our Hispanic/Latin X Attorney affinity group piloted the Burr Spanish Academy. The academy, led by



certified Spanish teacher **Elizabeth Stemen**, accommodated beginners and advanced learners seeking to enhance their Spanish language skills.

Participants delved into the nuances of the language, highlighting the variations across different Spanish-speaking cultures. Burr's Spanish Academy emphasized interactive reading, writing, and speaking exercises, ensuring attorneys and staff not only learn but internalize vocabulary, advanced grammar, and pronunciation. The 10-week course also focused on legal language, which underscored the firm's commitment to fostering a culturally inclusive environment by meeting the needs of our diverse clientele.

WOMEN'S INITIATIVE

Burr & Forman's Women's Initiative aims to empower women attorneys and clients to cultivate their leadership skills in a safe, collaborative, and inclusive environment. Throughout the year, the Women's Initiative sponsored local or regional gatherings that strengthened a sense of community and fostered mentoring relationships.



The Women's Initiative also organized firm-wide programs. In April, the group welcomed guest speaker **Kendall Berg** to discuss leadership and playing to one's

strengths. Kendall has over a decade of experience working for Fortune 100 financial institutions alongside CEOs and CFOs, and she shared a wealth of knowledge and expertise with the Women's Initiative members on how to leverage and capitalize on their best competencies to progress their careers.



The Women's Initiative featured guest speaker **Michelle McKenna** during an Ignite Innovation workshop in June. Michelle is a seasoned executive with experience

leading large-scale transformations at America's largest media and entertainment brands, including Disney and Universal. She spoke about her journey, from being the first in her family to attend college to being the first female C-suite executive in the NFL. During Ignite Innovation, Michelle also highlighted for our attorneys how to lead strategically and how

she spearheaded the league's technology activities, including in-game technologies, the in-stadium fan experience, and reaching new fans through data and digital marketing.



Over the holidays, members of the Women's Initiative spearheaded events for women in 15 offices. For example, Myrtle Beach Office Managing Partner

Bhumi Patel teamed up with DEI department to recognize and honor local women leaders with a fun and festive event entitled, "Wonder Women Winterfest: Celebrating Women in Leadership This Holiday Season." On December 5th, over 35 attendees mixed and mingled in the newly renovated Dunes Club. The success garnered several compliments from prominent female trailblazers across the city.



Pictured at top right: Michael Choy, Partner; pictured at right bottom: Ronald "Scott" Williams, both co-chairs of the Multiracial Attorney Affinity Group.



MULTIRACIAL ATTORNEY AFFINITY GROUP

In honor of Loving Day, our Multiracial Attorney Affinity Group shared insights about the historically significant day. As a special touch, each firm office received cupcakes adorned with "Loving Day 2023" toppers, uniting us in remembrance of Mildred and Richard Loving and the celebration of their legacy.



Cultural Programs

MARTIN LUTHER KING JR. CONSCIOUS CONNECT

On January 13, 2023, Burr & Forman welcomed internationally acclaimed photographic artist



Sheila Pree Bright to present her body of work for Martin Luther King Jr. Conscious Connection Workshop. These sessions gave space for Burr attorneys and staff to learn

more about each other, broaden their perspectives, and generate purposeful conversations about ongoing struggles that affect our communities. Sheila's photographs, #1960Now, Invisible Empire, and We Will Breathe, helped to guide our discussions. Her pieces give voice to unheard populations and reminded us of Dr. King's vision, ultimately inspiring us to move that vision forward into contemporary times.

BLACK HISTORY MONTH CONCERT



Burr & Forman celebrated Black History Month with an exceptional performance by the award-winning Pine Forge Academy Choir, led by **Jarrett Roseborough**.

Vocally talented, diverse, and committed students performed Negro spirituals that highlighted the Black experience from the 17th century to modern day.

MINDFULNESS PROGRAM

To celebrate AAPI Heritage Month, Burr & Forman hosted a Mindfulness at Work workshop featuring Krishtel Coaching. Mindfulness is a practice originating in cultural traditions throughout Asia,



including yoga and meditation. Facilitated by **Rudhir Krishtel**, owner of Krishtel Coaching and former IP lawyer, participants discovered how to practice mindfulness at work while learning

about why mindfulness is crucial for success in the workplace.

PRIDE MONTH PROGRAM

During PRIDE Month, the firm hosted a Sexual Orientation, Gender Identity, and Expression (SOGIE) 101 workshop facilitated by **Asta Kills** of Hugh Lane Wellness Foundation. The Hugh Lane Wellness Foundation was established in 2017 to improve the health of the LGBTQ+ community. Asta Kill, a corporate trainer, is a former attorney and transgender woman who transitioned later in life, which provides her with the perspective needed to bring LGBTQ+ inclusion to the corporate world. This workshop provided participants with a high-level review of terminology, concepts, and best practices to create an inclusive and welcoming environment for our clients, attorneys, and staff.



BURR SHERO AWARDS FOR WOMEN'S HISTORY MONTH

As part of our Women's History Month celebration, the firm honored our very own with the Burr SHERo Award. A Burr SHERo is an attorney, staff member, or client that has a proven track record of exceptional leadership, mentoring, and an unwavering commitment to supporting their communities. After receiving numerous nominations, three outstanding women were select as our 2023 Burr SHERos: Activist and Educator, **Pearlie Harris**, Jacksonville Partner, **Cheri Turnage Gatlin**, and Chief Marketing Officer, **Kathryn Whitaker**.



Pearlie is simply remarkable. She's a true motivational story for any and all women. Pearlie is a retired Greenville County educator recognized many times in the

community, as well as recently being honored in a book by Oprah Winfrey. I simply cannot say enough nice things about this amazing person, woman, educator, and influencer of all things noble and good.

Doug Lineberry (Partner, Greenville)



Kathryn Whitaker has 18 years of experience in the legal marketing and business development profession and is highly regarded in our industry.

She is active in our leading professional organization...Kathryn enthusiastically searches for professional development opportunities for her team members and proactively finds opportunities for development in each team member's role, allowing them to grow within the department and at the firm.

Jessica Haarsgaard (Director of Business Development, Greenville)



Cheri mentored me for over a decade. No one has taught me more about the practice of law. Above all, she genuinely cares for her friends,

co-workers and clients...I have seen her make the same effort and level of service in defense of pro bono individual clients in small claims court. Above all, I admire her determination and fearlessness. You can count on her. She will act in bold support of you when it's needed most.

John Lassiter (Partner, Jacksonville)

HISPANIC HERITAGE MONTH

Burr & Forman observed Hispanic Heritage Month by engaging in firm-wide educational micro-learning activities. In a series of interactive events, members of the firm learned about inventors and thought leaders from Latin America, the indigenous roots of Latin American culture, and the diversity of Latin American music.

NATIVE AMERICAN HERITAGE MONTH

During Burr & Forman's 2023 Native American Heritage Month program, we featured



Jonny Lipford, an award-winning musician specializing in the Native American flute. As a skilled flutist with over two decades of experience, Jonny curated a program for Burr that included musical performances and information about the historical evolution of the Native flute's sound, physical composition, and cultural significance. This program underscored the resilience of Native Americans and the ongoing quest to preserve Native American culture.

VETERANS DAY PRESENTATION AND DONATION DRIVE

For Veterans Day 2023, we sought the advice of Ret. Sergeant First Class, **Aaron Jamison**, on how to build an effective team. With more than 20 years of military service, he learned to lead through mentorship, cultural awareness, and empathy. During the interview with our CDIO, Tamika Walters, Jamison discussed the qualities that define an effective leader and strategies

to encourage underperforming team members. Jamison provided critical insights for anyone leading a group or project and underscored our Wounded Warriors giving campaign to support U.S. Veterans.



Social Justice Initiative/ Community Impact

Established in 2021, the primary objectives of SJI are to raise awareness of injustice and inequities facing historically marginalized communities and provide opportunities to realize justice by making a meaningful improvement in the lives of individuals and communities suffering injustice.

JUNETEENTH

As part of Burr & Forman's observation of Juneteenth 2023, SJI circulated information on the history of the holiday, its promise of freedom, and the nation's current challenges with mass incarceration and wrongful convictions.

Pictured at top right from left to right: Sharon Amerson, Sarah Bullins, Chandler Aragona, George Morrison, Jenny Maestas; pictured below at left from left to right top row: LaTasha Blair and Gabi Pierce; pictured below at right from left to right: Scott Walker, Patrick Ayers, Ryan Corbett; bottom row from left to right: Jacqueline Simms-Petredis, Ereina Hirneisen, Tamiracle Williams, Megan Hisey, Li Lin.

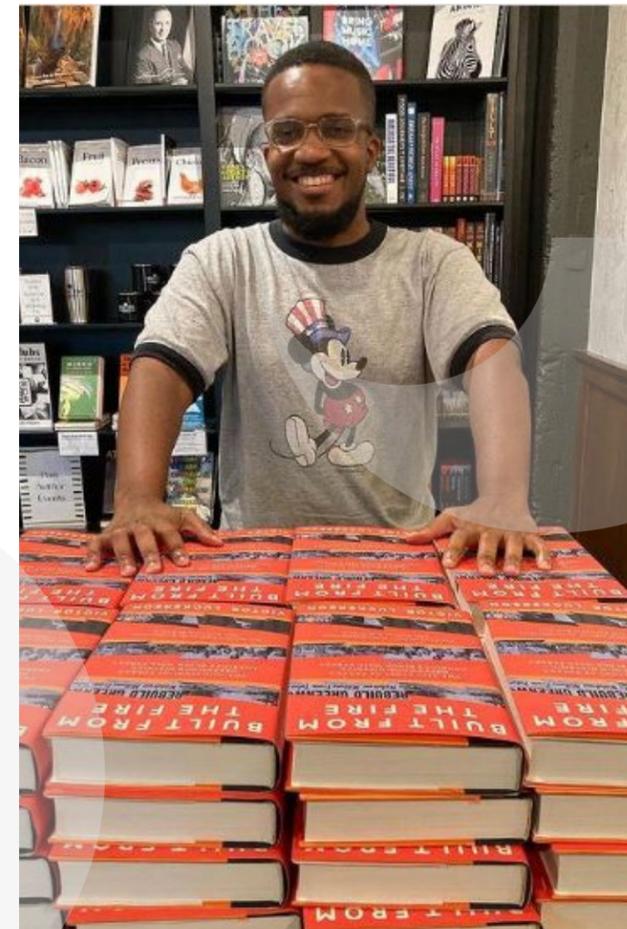
SUPPLY DRIVE

Local offices proudly supported Chiamonte Elementary in Tampa as well as Communities in Schools (CIS) sites in Georgia, Florida, and South Carolina with a school supply drive. CIS provides supportive programming for students attending Title I schools, with the goal of empowering them to focus on their education. Our drive collected more than 1200+ school supplies in addition to monetary donations which helped to support young people throughout Burr's footprint.



BOOK CLUB AND SPEAKER

In honor of Burr & Forman's 2023 Day of Remembrance, our Social Justice Initiative (SJI) organized a book club featuring *Built From the Fire*, a historical account of the infamous 1921 Tulsa Race Massacre. The author, **Victor Luckerson**, was also hosted by SJI on November 13. During his presentation, Victor chronicled the legal battles fought following the massacre, and highlighted the determination of Tulsa residents and business owners who suffered as a result of the melee.



HOMELESS YOUTH

SJI sponsored a holiday drive in the Atlanta office that benefitted a charity for transient LGBTQ+ youth, a population that is severely overrepresented among the homeless. The office came together to donate money, clothing, housewares and toiletries.

PRO BONO

Lawyers at Burr & Forman provide pro bono services to marginalized groups within their communities. Highlights in 2023 included:

- blocking an anti-LGBTQ+ ordinance that banned public displays of homosexuality in a suburb of Nashville, TN
- conducting two wills clinics for African American residents with heirs property in Clemson, SC
- advocating, in the legislature and litigation, for the expungement of sex-trafficking victims' criminal records on the grounds that they were coerced by their traffickers
- ongoing federal litigation seeking to limit capital punishment of the intellectually disabled

Such matters support the broader goals of DEI and give aid to the most vulnerable populations.

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