

Levin College of Law  
Office of the Dean

**Merritt McAlister**  
*Interim Dean and Levin, Mabie & Levin Professor of Law*

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April 2, 2024

MEMORANDUM

TO: Full-Time Faculty, Levin College of Law

FROM: Merritt McAlister, Interim Dean

RE: Faculty Meeting Agenda, Tuesday, April 9, 2024

Our tenth Faculty Meeting of the 2023-2024 academic year will take place in the Faculty Lounge on the third floor of Holland Hall on Tuesday, April 9, 2024. The meeting will begin at noon and will end no later than 1:30 p.m.

The agenda is as follows:

1. Action Item: Approve Faculty Meeting Minutes for March 5, 2024, attached (Dean McAlister)
2. Action Item: Approve Spring 2024 Graduates, attached (Dean Inman)
3. Action Item: Recommendation of affiliate status for Christopher Thomas, College of Education (Dean McAlister)
4. Action Item: Recommendation for Carliss Chatman as Visiting Professor (Dean McAlister)
5. Information Item: Discussion of Bar Passage and BOT Meeting (Dean McAlister)
6. Information Item: Brown Bag on April 18 to discuss 10x10x10 proposals and Strategic Funding Requests (Dean McAlister)
7. Information Item: Update from the Faculty Council (Wright, Chair)
8. Actions Item: TENTATIVE - Recommendation from the Faculty Council for changes to the Rules and Procedures Manual (Wright, Chair)
9. Action Item: Creation of a Look-See Visitor Policy (Dean McAlister)
10. Information Item: Appointments Committee update on lateral appointments (Lidsky, Chair)

11. Action Item: Recommendation from the Appointments Committee of Candidate for Tax Chair. Documents supporting the appointment can be found on Canvas. (Lidsky, Chair)

Please note that candidate voting will take place electronically shortly after the conclusion of the meeting. Votes will be accepted until 5 pm on April 9.

If you are unable to attend, please contact Peter Molk, who will discuss available options. Otherwise, I look forward to seeing you.

**UF Levin College of Law Faculty Meeting Minutes**  
**March 5, 2024 - 12:00 noon**

PRESENT: Rachel Arnow-Richman, Derek Bambauer, Juan Caballero, Dennis Calfee, Judy Clausen, Lisa De Sanctis, Teresa Drake, Donna Eng, Barbara Evans, Mark Fenster, Ben Fernandez, Thomas Haley, Christopher Hampson, David Hasen, Thomas Hawkins, Berta Hernandez-Truyol, Jiaying Jiang, Benjamin Johnson, Elizabeth-Ann Katz, Zachary Kaufman, Matthew Kim, Heather Kolinsky, Elizabeth Lear, Sabrina Lopez, Lynn LoPucki, Charlene Luke, Tracey Maclin, Pedro Malavet, Jonathan Marshfield, Merritt McAlister, Timothy McLendon, Silvia Menendez, Peter Molk, Robert Rhee, Stacey Steinberg, John Stinneford, Lee-ford Tritt, Derek Wheeler, Steven Willis, Michael Wolf, Sarah Wolking, Danaya Wright, Wentong Zheng

PRESENT ON ZOOM: Donna Erez-Navot, Lea Johnston, Joan Stearns Johnsen, Amy Stein

NOT PRESENT: Yariv Brauner, Annie Brett, Neil Buchanan, Karen Burke, Charles Collier, Julian Cook, William Hamilton, Kristen Hardy, Mindy Herzfeld, Lyrissa Lidsky, Grayson McCouch, Lars Noah, Jane O'Connell, Katheryn Russell-Brown, Paige Snelgro

Meeting called to order at 12:02 pm

1. Action Item: Approve Faculty Meeting Minutes for February 13, 2024.

Interim Dean McAlister presented, and faculty considered the faculty meeting minutes for February 13, 2024.

*Outcome: Minutes were approved.*

2. Information Item: Update from Appointments Committee (Lidsky, Chair)

Interim Dean McAlister discussed upcoming candidates and asked the faculty to participate in the job talks. Informed faculty there are more candidates coming in April and discussed a new proposal for the hiring process to be presented at the next faculty meeting.

*Outcome: Information Item Only.*

3. Information Item: Policy on low enrollment courses (Dean McAlister)

Dean McAlister discussed changing the policy so that classes with 5 or fewer enrollees will not be cancelled, but rather, the class will only be offered every other year.

*Outcome: Information Item Only.*

4. Action Item: Present proposed response to Post Tenure Review for faculty approval. (Zheng, P&T Committee)

Professor Zheng discussed the proposed response to PTR. Faculty discussed optional language and criteria, and proposed amendments.

*Outcome: Document was approved as amended.*

Meeting adjourned at 1:03 pm.

MEMORANDUM

TO: The Faculty

FROM: Rachel E. Inman  
Associate Dean of Students  
Levin College of Law

DATE: March 4, 2024

RE: Spring 2024 Graduation

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Listed below are the students who have applied for graduation for the Spring 2024 semester. We recommend approval of these candidates pending confirmation of their degree requirements.

Juris Doctor Degree

Ariana Adams	James Cannon	Kristin Driver
Jeremy Arnall	Greta Carter	Ava DuBose
Jonathan Aylstock	Torryn Carter	Rachel Duckworth
Steffi Baer	Samuel Chan	Karissa Dzurik
Michaelina Barker	Cheng-Chi Chang	Logan Edwards
Benjamin Bartlett	Reagan Chapman	Josiah Elsaghir
Jeremiah Baxter	Aleksandre Chitaia	Madison Errichetti
Owen Beylus	Laura Chiu	Jacob Etling
Jaxon Blair	Justin Clark	Hakeem Everett
Volodymyr Boitchouk	Rachel Coers	Autumn Finke
Kaley Bonett	Rachel Cohen	Ian Finley
Aslan Boss-Shelby	Christian Collazo	Mckenzie Fischer
Luke Boyett	Serina Combs	Mark Freeman
Devin Branch	Tyler Conti	Stephanie Galvis
Madelyn Brenner	Anna Cook	Andres Garcia
Alice Bronson	James Cory	Summer Garrison
Brittany Brown	Hannah Culbertson	Trace Gerber
Dylan Brown	Christina Dalton	Kaitlin Gibbs
Kyle Brumbaugh	Dana Dammar	Alexandra Giraldo
Samuel Budnyk	Niya Davis	Carlos Giron
Mitchell Buehler	Scott Davis	Connor Glendinning
Emily Bumbulis	Silas Ditocco	Frank Gonzalez
Joseph Burkart	Andrew Diamond	Rene Gonzalez
Aidan Bursten	Jesse Dieterle	Corey Granko
Chamoya Cameron	Garrett Dodd	Catherine Grimley
	Colson Douglas	Rachel Grimley

Logan Grutchfield  
Jacob Guariglia  
Alexandra Guerra  
Luke Haber  
Sienna Hagan  
Gavin Hallisey  
Gabriel Hament  
Zoe Hamstreet  
Samuel Hanna  
Maryssa Hardy  
David Heeren  
Paula Hernandez Garaycoa  
Lauren Hogan  
Amy Hogue  
Nina Hylton  
Joseph Ianno  
Daniella Infantino  
Julia Ingram  
Michael Israel  
James Ivanov  
Joshua Jacobs  
Natasha Jairam  
Sarah Janetzke  
Kendall Jensen  
Mary Johns  
Anna Braswell  
Hope Jones  
Samuel Jones  
Sarah Jones  
Oren Kahn  
Summer Kanstoroom  
Victoria Kass  
Jeffrey Katz  
Benjamin Kelsky  
Eliot Kersgaard  
Sonia Khan  
Sven Kleinhans  
Amanda Kohls  
Kathryn Krajcik  
William Kramer  
Nicole La Roque  
Victoria Lageyre  
Julia Lagnese  
Phillip Latham  
Jung Moon Lee  
Samuel Lee

Nathan Lehman  
Emily Lethbridge  
Lawson Lewis  
Benjamin Lima  
Brennon Lindsey  
Wilson Liu  
Yilin Lu  
Shaun Lynch  
Margaret Lyons  
John Madonna  
Noah Mandel  
Adreanne Martinez  
Benjamin Marton  
Bennett May  
Kelsey McClellan  
Joseph McConnell  
Nathan McCutcheon  
Connor McGuinness  
Mayme-Elizabeth Medlock  
Romy Miller  
Milind Mishra  
Jordan Mitchell  
Hannah Montgomery  
Jisung Moon  
Joshua Mowery  
Alejandro Munoz  
Musa Musri  
Allison Noon  
Connor Nugent  
Pelumi Okeowo  
Nathaniel Otto  
Abolade Oyetunji  
Nina Palmer  
Eric Pardo  
Shelby Parent  
Anthony Pascucci  
Victoria Pawelska  
Matthew Pearl  
Gabriel Pendas  
Ariadna Perez Mendez  
Audrey Perry  
Hanna Perry  
Bryce Peterson  
Kelsey Pena  
Justin Pokotylo  
Nicole Pomerantz

Chase Potter  
Tyler Powell  
Pressly Pratt  
Victoria Puerto  
Christopher Radcliffe  
Emily Ramirez  
Elias Ramos  
Hamza Rashid  
George Theoharis  
Natalie Rickards  
Laura Ricks  
Alfonso Rodriguez  
Janelle Rolle  
Mary Rosado  
KaDee Ru  
Remedy Ryan  
Sabrina Saint Marc  
Rachel Salazar  
Grecia Santos  
Adriel Sauri  
John Scoggin  
Patricia Sculco  
Joseph Seidler  
Sergio Shapiro  
Cara Shelhamer  
Olivia Sica  
Jacob Singleton  
Robert Skrob  
Brandon Smith  
Austin Smykal  
Julian Spiro  
Melvin Stack  
William Stearns  
Katie Stephens  
Hannah Stevenson  
Keegan Stinnett  
Aaron Stone  
Christian Stone  
Eliza Sweeney  
Kelly Tackett  
Kimberly Taulbee  
Evan Taylor  
Tiffany Teska  
Katelynd Todd  
Randi Tolbert  
Diego Triana

Alexander Tyler  
Thomas Tyra  
James Uhrig  
Joseph Vairy  
Lisa Valdes  
Julia Van De Bogart  
Jean Vardaramatos  
Daniel Villa  
Elijah Villafane  
Tyler Visuvasam  
Erin Volesky

Jordan Wade  
Analise Walker  
Grayson Wallace  
Tasha Wallace  
Marc Warren  
Allison Wehle  
Zoe Weiser Dalton  
Leah West  
Brian Whetzel  
Mason Whisnant  
Ryan White-Boyd

Parker Wilkson  
Alexandra Williams  
Shannel Williams  
Daniel Woodruff  
Julia Worman  
Chuande Ye  
Julian Ziaggi

Master of Laws in Taxation

Carsten Archer  
Mason Arterbury  
Gregory Baker  
Anusha Mahesh Barigela  
George Bournazian  
Jacob Buck  
Joseph Cali  
David Choo  
Mary Coleman  
Amber Mccarthy  
Caroline Dozier  
Yessenia Escobedo  
Irina Ewing  
Peter Farrell  
Justin Ford  
William Fox  
Christopher Gero Prado  
Kadeem Hall  
Alexandra Hammock  
Chandler Harr  
Slade Heggen  
Hayley Nusbickel  
Blaze Jeffery  
Lakshmi Ratna Kancherla  
Abigail Kern  
Seoran Kim  
Houston Kimbrough  
Samuel Knell  
Anthony Levitskiy  
Lennox Mark  
Susanne McCrary  
Brayden McNeary  
Jennifer Meiselman

Colton Meister  
Michael Middleton  
Stephen Miner  
James Mitchell  
Laura Moore  
Veronika Morozova  
Grace O'Connell  
Ian Platou  
Jorge Rincon  
Daniel Saathoff  
Justine Scott  
Tyler Shoenfelt  
Thomas Simmons  
Noah Singer  
Samuel Sturgis  
James Thomas  
Cody Townsend  
Miriam Wentzel

Doctor of Juridical Sciences in Tax

Maha Alshalan  
Jonathan Brathwaite  
Eduardo Fleury

Master of Laws in International  
Taxation

Philips Adekemi  
Giordi Candia Heredia  
Salini Chekuri  
Gabriel Hercos da Cunha  
Sebastian de la Bouillierie  
Juan Huaman  
Ivan Martin Jimenez Velazquez  
Isabella Kotzias Pimentel  
Omar Oquendo Claudio  
Khadijah Wright  
Chengxi Ying  
Jinyan Zhang

## **CHRISTOPHER D. THOMAS, J.D., Ph.D.**

**ASSISTANT PROFESSOR OF EDUCATIONAL LEADERSHIP AND POLICY, UNIVERSITY OF FLORIDA**  
**CO-HOST, *CHALK & GAVEL* PODCAST**  
Gainesville, FL • 513-309-0684 • [cthomas.1609@gmail.com](mailto:cthomas.1609@gmail.com)

### **EDUCATION**

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**Ph.D. in Educational Studies, Specializing in Educational Policy** **May 2020**  
The Ohio State University **Columbus, Ohio**

- *Dissertation title:* “An Education Revolution: Student Protests, Teacher Strikes, and the Future of Education Policy”
- *Dissertation committee:* Ann Allen, Jackie Blount, Bryan Warnick (Chair)

**Juris Doctor** **May 2016**  
The Ohio State University Moritz College of Law **Columbus, Ohio**

- *Class rank:* 1<sup>st</sup> (tie) of 179
- *Honors:* *Summa Cum Laude*, Order of the Coif
- *Cumulative GPA:* 3.94

**M.Ed. in Secondary English Education** **June 2012**  
The Ohio State University **Columbus, Ohio**

- *Thesis title:* “Fostering Critical Consciousness: The Learning of the ELA Classroom”

**B.A. in English (Pre-Education)** **June 2011**  
The Ohio State University **Columbus, Ohio**

- *Minors:* Sexuality Studies, Music, Film Studies

### **POST-SECONDARY TEACHING AND RESEARCH EXPERIENCE**

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**ASSISTANT PROFESSOR OF EDUCATIONAL LEADERSHIP AND POLICY**  
**University of Florida** **Gainesville, Florida**

#### **Courses Taught:**

EDA 6232: Public School Law  
EDA 6931: Special Topic: Advanced School Law  
EDA 6931: Special Topic: Legal Analysis in Education Policy  
EDA 6222: Administration of School Personnel  
EDA 6061: Education Organization and Administration  
EDA 6242: Public School Finance

**GRADUATE TEACHING ASSOCIATE, INSTRUCTOR OF RECORD**  
**The Ohio State University** **Columbus, Ohio**

#### **Courses Taught:**

ESPHE 4403: Ethics and the Professional Context of Teaching  
ESPHE 3206: School and Society

# CHRISTOPHER D. THOMAS

## OTHER POST-SECONDARY TEACHING

- EDL 607: School Law** **2021**  
Miami University Oxford, Ohio
- Co-taught a school law course with other Frost Brown Todd attorneys for graduate students in educational leadership.
- ESEADM 6356: Legal Aspects of Educational Administration** **2017- 2019**  
The Ohio State University Columbus, Ohio
- Served as a graduate teaching assistant for Dr. Philip T.K. Daniel and assisted in planning, organizing, teaching, and grading graduate school law courses.
  - Managed the electronic learning management system for Dr. Daniel’s courses, including designing and implementing learning modules and assessments.
- ESEADM 8317: Legal Aspects of Special Education Administration** **2019**  
The Ohio State University Columbus, Ohio
- Served as a graduate teaching assistant and led lessons for a graduate-level course on special education law with Dr. Philip T.K. Daniel.
- ESEADM 7885: School Law for BRIGHT New Leaders for Ohio Schools** **2016, 2018**  
The Ohio State University Columbus, Ohio
- Assisted and co-taught an intensive school law course for future school administrators taking part in Ohio’s BRIGHT New Leaders program with Dr. Philip T.K. Daniel in partnership with The Ohio State University Fisher College of Business.

## GRADUATE RESEARCH ASSISTANT

- Research Assistant to Dr. Philip T.K. Daniel** **2016- 2018**  
The Ohio State University Columbus, Ohio
- Researched issues related to inequalities in school discipline, special education issues, and other contemporary issues in education law.
  - Assisted Dr. Daniel in researching, revising, and updating his school law casebook for its new edition.
- Research Assistant for the College of Education and Human Ecology** **2018**  
The Ohio State University Columbus, Ohio
- Assisted various professors in their quantitative and qualitative research projects.

## OTHER TEACHING EXPERIENCE

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- High School English Teacher** **2012-2013**  
Liberty High School Bakersfield, California

## PROFESSIONAL EXPERIENCE

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# CHRISTOPHER D. THOMAS

## Associate

2019-2022

Frost Brown Todd, LLC

Columbus, Ohio

- Represented the legal interests of public school districts and other political subdivisions through litigation and general counsel work.
- Handled litigation and enforcement matters from inception to resolution and through appeal, including claims and enforcement actions under the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act, the Americans with Disabilities Act, Title VI of the Civil Rights Act, Title IX of the Education Amendments, Section 1983, and the Ohio and U.S. Constitutions.
- Provided vital day-to-day guidance to pk-12 public and private school board members and administrators related to all areas of the law, including labor and employment, torts, public ethics, contracts, land use, special education, student discipline, constitutional issues, and regulatory compliance.

## Legal Extern for Chief Judge R. Guy Cole

2015

United States Court of Appeals for the Sixth Circuit

Columbus, Ohio

- Researched and analyzed the complex legal issues in ongoing cases before Chief Judge Cole.
- Wrote legal memoranda for the Judge and his law clerks to inform and advise the Judge's deliberations.

## Legal Intern

2014

The United States Department of Education, Office of the General Counsel

Washington, DC

- Researched current matters of interest to the Department and prepared memoranda for senior staff.

## SCHOLARSHIP

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### BOOKS, AUTHOR

**Thomas, C.** (2022). *Reclaiming democratic education: Student and teacher activism and the future of education policy*. Teachers College Press.

**\*Awarded the Education Law Association's 2022 Steven S. Goldberg Award for Distinguished Scholarship in Education Law**

### BOOKS, EDITOR

**Thomas, C.** (Ed.). (under contract, expected 2025). *Legal Literacy for Public School Teachers* (2<sup>nd</sup> ed.). Education Law Association.

Umpstead, R., **Thomas, C.**, Krimbill, E., Muniz, R., Surface, J., & Everson, E. (Eds.). (under contract, expected 2024). *The Principal's Legal Handbook* (7<sup>th</sup> ed.). Education Law Association.

**Contributing Editor** for Gee, E. G., Daniel, P. T. K., & Pauken, P. D. (2024). *Law and public education: Cases and materials* (6<sup>th</sup> ed.). Carolina Academic Press.

# CHRISTOPHER D. THOMAS

## REFEREED PUBLICATIONS

Holben, D., Lee, A., **Thomas, C.**, Zirkel, P. (forthcoming). “From filing to decision: Predictors of IDEA due process timeliness.” *West’s Education Law Reporter*.

**Thomas, C.**, McElhattan, L., Carlo, S. (2023). Legal literacy and generative artificial intelligence: Comparing the education law knowledge of practicing educators and large language models like ChatGPT. *West’s Education Law Reporter*, 414, 783-797.

Warnick, B., & **Thomas, C.** (2023). At the very apex: What the Supreme Court’s student speech cases have to teach us about a constitutional right to education. *Teachers College Record*, 125(1), 84–103.

**Thomas, C.** (2023). “Positively dystopian”: *Pernell v. Florida Board of Governors* and its implications for curricular backlash bills. *West’s Education Law Reporter*, 406, 12-21.

## BOOK CHAPTERS

Decker, J., & **Thomas, C.** (under review). Strategies to improve school leaders’ legal literacy. In R. Umpstead, C. Thomas, E. Krimbill, R. Muniz, J. Surface, & E. Everson (Eds.), *The Principal’s legal handbook* (7<sup>th</sup> ed.). Education Law Association.

**Thomas, C.** (under review). Rights to education. In R. Umpstead, C. Thomas, E. Krimbill, R. Muniz, J. Surface, & E. Everson (Eds.), *The Principal’s legal handbook* (7<sup>th</sup> Ed.). Education Law Association.

Black, W., & **Thomas, C.** (under review). Academic freedom and employee speech. In R. Umpstead, C. Thomas, E. Krimbill, R. Muniz, J. Surface, & E. Everson (Eds.), *The Principal’s legal handbook* (7<sup>th</sup> ed.). Education Law Association.

Daniel, P. T. K., & **Thomas, C.** (2019). Equal protection clause. In S.C. Bon, D. H. K. Nguyen, & J.A. Rippner (Eds.), *Contemporary issues in higher education law* (4<sup>th</sup> ed.) (pp. 395-419). Education Law Association.

## WORKS IN PREPARATION

**Thomas, C.**, & Kudlats, J. (under review). “Connecting the courtroom to the classroom: How educators can claim their agency through legal literacy.” *AASA Journal of Scholarship and Practice*.

**Thomas, C.**, & Curran, F. C. (in progress). “Thawing the chill: How legal literacy can help educators navigate the intersection of law and educational practice.”

**Thomas, C.**, & Roberts, J., K. (in progress). “Ministry trained wizards: Using *Harry Potter* to teach First Amendment law.”

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Flournoy, S., **Thomas, C.** (in progress). “Navigating the interplay between teacher speech, religious freedom, and transgender students’ rights.”

**Thomas, C.**, Carlo, S., Balser, W. (in progress). “ChatGPT and school law: Implications for school leader legal literacy.”

### PUBLIC SCHOLARSHIP

**Thomas, C.**, & Kudlats, J. (Hosts) (2024, Feb. 27). LGBTQ-inclusive books and parental rights (No. 12) [Audio podcast episode]. In *Chalk & Gavel*.

<https://podcasters.spotify.com/pod/show/chalk-and-gavel/episodes/12--LGBTQ-Inclusive-Books-and-Parental-Rights-e2gak81>

**Thomas, C.**, Kudlats, J., & Katskee, R. (Hosts) (2024, Feb. 20). Religion in schools and the praying coach, part 2 (No. 11) [Audio podcast episode]. In *Chalk & Gavel*.

<https://podcasters.spotify.com/pod/show/chalk-and-gavel/episodes/11--Religion-in-Schools-and-the-Praying-Coach--Part-2-e2g0jon>

**Thomas, C.**, Kudlats, J., & Katskee, R. (Hosts) (2024, Feb. 13). Religion in schools and the praying coach, part 1 (No. 10) [Audio podcast episode]. In *Chalk & Gavel*.

<https://podcasters.spotify.com/pod/show/chalk-and-gavel/episodes/Zero-Tolerance-and-Due-Process-e2f3pqu>

**Thomas, C.**, & Kudlats, J. (Hosts) (2024, Jan. 30). Zero tolerance and due process (No. 9) [Audio podcast episode]. In *Chalk & Gavel*.

<https://podcasters.spotify.com/pod/show/chalk-and-gavel/episodes/Zero-Tolerance-and-Due-Process-e2f3pqu>

**Thomas, C.**, & Kudlats, J. (Hosts) (2024, Jan. 16). School funding and the right to education (No. 8) [Audio podcast episode]. In *Chalk & Gavel*.

<https://podcasters.spotify.com/pod/show/chalk-and-gavel/episodes/School-Funding-and-the-Right-to-Education-e2egd5o/a-aarmpc4>

**Thomas, C.**, & Kudlats, J. (Hosts) (2024, Jan. 2). Teachers and drama over the curriculum (No. 7) [Audio podcast episode]. In *Chalk & Gavel*.

<https://podcasters.spotify.com/pod/show/chalk-and-gavel/episodes/Teachers-and-Drama-Over-the-Curriculum-e2dt8bn>

**Thomas, C.**, Kudlats, J., & Walsh, M. (Hosts) (2023, Dec. 26). Sidebar: The Supreme Court and education (No. 6) [Audio podcast episode]. In *Chalk & Gavel*.

<https://podcasters.spotify.com/pod/show/chalk-and-gavel/episodes/Sidebar-The-Supreme-Court-and-Education-e2dld5f>

## CHRISTOPHER D. THOMAS

- Thomas, C., & Kudlats, J. (Hosts)** (2023, Dec. 19). Cell phone searches and angry parents (No. 5) [Audio podcast episode]. In *Chalk & Gavel*.  
<https://podcasters.spotify.com/pod/show/chalk-and-gavel/episodes/Cell-Phone-Searches-and-Angry-Parents-e2ddrno/a-aaonc0l>
- Thomas, C., & Kudlats, J. (Hosts)** (2023, Dec. 5). Preferred pronouns and student speech (No. 4) [Audio podcast episode]. In *Chalk & Gavel*.  
<https://podcasters.spotify.com/pod/show/chalk-and-gavel/episodes/Preferred-Pronouns-and-Student-Speech-e2cqon7/a-aamrobj>
- Thomas, C., & Kudlats, J. (Hosts)** (2023, Nov. 21). The cussing cheerleader and off-campus student speech (No. 3) [Audio podcast episode]. In *Chalk & Gavel*.  
<https://podcasters.spotify.com/pod/show/chalk-and-gavel/episodes/The-Cussing-Cheerleader-and-Off-Campus-Student-Speech-e2c6636/a-aakrb9d>
- Thomas, C., & Kudlats, J. (Hosts)** (2023, Nov. 7). Sarcasm and teacher discipline (No. 2) [Audio podcast episode]. In *Chalk & Gavel*.  
<https://podcasters.spotify.com/pod/show/chalk-and-gavel/episodes/Sarcasm-and-Teacher-Discipline-e2bg7h3/a-aaild2o>
- Thomas, C., & Kudlats, J. (Hosts)** (2023, Oct. 24). Charter schools and dress codes (No. 1) [Audio podcast episode]. In *Chalk & Gavel*.  
<https://podcasters.spotify.com/pod/show/chalk-and-gavel/episodes/Charter-Schools-and-Dress-Codes-e2ar5jl/a-aags0am>
- Thomas, C.** (2022, Oct. 1). School law: The value of legal compliance. *American School Board Journal*, 209(5), 52-53. <https://nsba.org/ASBJ/2022/october/legal-compliance>
- Scholler, W. J., Ewing, A., **Thomas, C.**, & Hemenway, J. (2022, Jan. 5). *New Ohio law provides further flexibility to Ohio schools for the 2021-2022 school year*. Frost Brown Todd Attorneys. <https://frostbrowntodd.com/new-ohio-law-provides-further-flexibility-to-ohio-schools-for-the-2021-2022-school-year/>
- Thomas, C.**, Hemenway, J., & Phillips, S. (2021, Jul. 28). *Ohio adds “Juneteenth Day” as holiday for counties, townships, and schools*. Frost Brown Todd Attorneys. <https://frostbrowntodd.com/ohio-adds-juneteenth-day-as-holiday-for-counties-townships-and-schools/>
- Ewing, A., Scholler, W. J., **Thomas, C.** (2021, Jul. 28). *New Ohio law restricts public schools’ COVID-19 vaccine responses*. Frost Brown Todd Attorneys. <https://frostbrowntodd.com/new-ohio-law-restricts-public-schools-covid-19-vaccine-responses/>

## CHRISTOPHER D. THOMAS

- Thomas, C.**, Ewing, A., & Scholler, W. J. (2021, July 12). *U.S. Department of Education's Title IX notice gives insight into LGBTQ+ discrimination claims*. Frost Brown Todd Attorneys. <https://frostbrowntodd.com/u-s-department-of-educations-title-ix-notice-gives-insight-into-lgbtq-discrimination-claims/>
- Thomas, C.**, Scholler, W. J., & Ewing A. (2021, Jun. 23). *Court rules on the "cussing cheerleader" case: Implications for schools and student off-campus speech*. Frost Brown Todd Attorneys. <https://frostbrowntodd.com/court-rules-on-the-cussing-cheerleader-case-implications-for-schools-and-student-off-campus-speech/>
- Phillips, S., Hemenway, J., & **Thomas, C.** (2021, Jun. 21). *Juneteenth declared holiday in Ohio and the U.S.: What are political subdivision impacts?*. Frost Brown Todd Attorneys. <https://frostbrowntodd.com/juneteenth-declared-holiday-in-ohio-and-the-u-s-what-are-political-subdivision-impacts/>
- Thomas, C.**, Ewing, A., Scholler, W. J. (2021, Apr. 12). *Ohio grants additional flexibility to schools for year-end testing and graduation requirements*. Frost Brown Todd Attorneys. <https://frostbrowntodd.com/ohio-grants-additional-flexibility-to-schools-for-year-end-testing-and-graduation-requirements/>
- Scholler, W. J., Ewing, A., & **Thomas, C.** (2021, Jan. 15). *"When work follows you home": Ohio court invalidates law prohibiting unions from picketing private homes and businesses of representatives of public employers*. Frost Brown Todd Attorneys. <https://frostbrowntodd.com/when-work-follows-you-home-ohio-court-invalidates-law-prohibiting-unions-from-picketing-private-homes-and-businesses-of-representatives-of-public-employers/>
- Thomas, C.** (2020). *An education revolution: Student protests, teacher strikes, and the future of education policy*. (Electronic Thesis or Dissertation). Retrieved from <https://etd.ohiolink.edu/>
- Scholler, W. J., Ewing, A., **Thomas, C.** (2020, Dec. 3). *Ohio governor signs bill granting school districts additional flexibility during the COVID-19 pandemic*. Frost Brown Todd Attorneys. <https://frostbrowntodd.com/ohio-governor-signs-bill-granting-school-districts-additional-flexibility-during-the-covid-19-pandemic/>
- Burgett, C., Ewing, A., **Thomas, C.** (2020, Oct. 29). *Being unbiased is everyone's job: Sixth Circuit upholds termination of public employee for her out-of-work, public social media post*. Frost Brown Todd Attorneys. <https://frostbrowntodd.com/being-unbiased-is-everyones-job-sixth-circuit-upholds-termination-of-public-employee-for-her-out-of-work-public-social-media-post/>
- Ashrawi, Y., Hartmann, P., **Thomas, C.** (2020, Aug. 6). *Ohio Supreme Court clarifies the requirements for certain expedited annexations*. Frost Brown Todd Attorneys. <https://frostbrowntodd.com/ohio-supreme-court-clarifies-the-requirements-for-certain-expedited-annexations/>

## CHRISTOPHER D. THOMAS

Ewing, A., Scholler, W. J., **Thomas, C.** (2020, Jul. 16). *Ohio enacts bill protecting students' religious freedoms and provides Coronavirus relief measures for schools*. Frost Brown Todd Attorneys. <https://frostbrowntodd.com/ohio-enacts-bill-protecting-students-religious-freedoms-and-provides-coronavirus-relief-measures-for-schools/>

Scholler, W. J., Ewing, A., **Thomas, C.** (2020, Jun. 19). *Supreme Court decision prohibiting LGBTQ discrimination in employment could have important implications for schools*. Frost Brown Todd Attorneys. <https://frostbrowntodd.com/supreme-court-decision-prohibiting-lgbtq-discrimination-in-employment-could-have-important-implications-for-schools/>

Scholler, W. J., Ewing, A., Allen, T., & **Thomas, C.** (2020, May 28). *Sixth Circuit recognizes a fundamental right to a basic minimum education*. Frost Brown Todd Attorneys. <https://frostbrowntodd.com/sixth-circuit-recognizes-a-fundamental-right-to-a-basic-minimum-education/>

### PRESENTATIONS

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**Thomas, C.**, & Kudlats, J. (2024, January). “*Chalk and Gavel: Transgender student pronouns, zero tolerance policies, and not taping students' heads to trees.*” Invited presentation at the *TIES: Topics in Education Symposium at University of Nebraska Omaha*, Omaha, NE.

**Thomas, C.**, Carlo, S., Balsler, W. (2023, November). “The school law knowledge of ChatGPT and implications for school leader legal literacy.” Presented at the annual meeting of the *University Council of Educational Administration*, Minneapolis, MN.

**Thomas, C.** (2023, November). Facilitator for “Community of advocacy: The creation and use of podcasts in education.” A facilitated discussion at the annual meeting of the *University Council of Educational Administration*, Minneapolis, MN.

**Thomas, C.**, & Roberts, J., K. (2023, October). “*Harry Potter and the First Amendment.*” Presented at the annual meeting of the *Education Law Association*, Reno, NV.

Sughrue, J., Alexander, M., D., Alexander, F. K., **Thomas, C.** (2023, October). “Doublespeak in the higher education marketplace of ideas: A case study of Florida.” Presented at the annual meeting of the *Education Law Association*, Reno, NV.

Flournoy, S., **Thomas, C.** (2023, October). “When you cross the loud ones: Lessons from *Loudoun County School Board v. Cross* on employee speech, religion, and transgender students' rights.” Presented at the annual meeting of the *Education Law Association*, Reno, NV.

## CHRISTOPHER D. THOMAS

**Thomas, C.** (2023, October). “ChatGPT and education law: The rise of the machines, a game-changing tool, or much ado about nothing?” Presented as a round-table discussion at the annual meeting of the *Education Law Association*, Reno, NV.

**Thomas, C.** (2023, August). Panelist for “Florida Education Policy Jam Session” Presented at the *UF Education Policy Research Center’s Research Series*, Gainesville, FL.

**Thomas, C., Curran, F. C.** (2023, July). “Thawing the chill: Empowering teachers and school leaders through legal literacy.” Presented at the annual meeting of the *International Council of Professors of Educational Leadership*, Orlando, FL.

**Thomas, C., Curran, F. C.** (2023, January). “Legal literacy and navigating the intersection of educational policy and practice.” Presented at the spring meeting of the *Florida Association of Professors of Educational Leadership*, Orlando, FL.

**Thomas, C.** (2022, November). “Indignant pupils: Responding to student activism through the lens of First Amendment theory.” Presented at the annual meeting of the *Education Law Association*, Orlando, FL.

**Thomas, C., & Carlo, S.** (2022, November). “Antithetical education laws: A Discussion of potential responses for scholars, school attorneys, and school leaders.” Presented as a round-table discussion at the annual meeting of the *Education Law Association*, Orlando, FL.

**Thomas, C.** (2022, September). “By any other name: A brief defense of the concept of ‘equality’ in educational praxis.” Presented at the *UF Education Policy Research Center’s Research Series*, Gainesville, FL.

**Thomas, C.** (2022, May). “Free speech as an educational value: Understanding recent developments in the law of students’ free speech rights.” Invited presentation at the *Martha McCarthy Education Law & Policy Institute at Indiana University*, Bloomington, IN.

**Thomas, C., & Wieg, C.** (2021, December). “Supreme Court(s) update: An Overview of recent and upcoming issues before the Ohio and United States Supreme Courts.” Presented at the annual *Frost Brown Todd Columbus Continuing Legal Education Seminar*, Columbus, OH.

**Thomas, C.** (2021, October). “Making a hard case harder: *Mahanoy v. B.L.* and the lack of a cohesive judicial understanding of school authority.” Presented at the annual meeting of the *Education Law Association*, San Antonio, TX.

**Thomas, C.** (2021, October). “Student rights: Recent legal developments in off-campus speech and protections for LGBTQ individuals.” Presented at the *Preble County Educational Service Center*, Eaton, OH.

## CHRISTOPHER D. THOMAS

Burgett, C., Ewing, A., **Thomas, C.**, & Hemenway, J. (2021, August). "2020-2021 school law update." Presented at the annual administrators' conference of the *Montgomery County Educational Service Center*, Dayton, OH.

**Thomas, C.**, Scholler, J., Hemenway, J., & Cook, E. (2020, August). "Title IX's new regs: What school leaders need to know and do." Presented as a live and on-demand webinar for school leaders, published by *Frost Brown Todd, LLC*, Columbus, OH.

Scholler, J., **Thomas, C.**, & Burgett, C. (2020, August). "2019-2020 school law update." Presented at the annual administrators' conference of the *Montgomery County Educational Service Center*, Dayton, OH.

**Thomas, C.** (2019, November). "The 2018 student protests and teacher strikes: An educational revolution." Presented at the *Ohio State Educational Studies Graduate Student Colloquium*, Columbus, OH.

**Thomas, C.** (2018, March). "These boots were made for walking: Legal and ethical aspects of student protests at school and in the classroom." Presented at the *Ohio State Buckeye Teaching Showcase*, Columbus, OH.

### RESEARCH, TEACHING, AND SERVICE GRANTS

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**Thomas, C.**, Principal Investigator. "Legal Agency: A Framework for Empowering Educators Within the Complex and Contentious Landscape of Education Law and Policy." NAEd/Spencer Postdoctoral Fellowship (under review, \$70,000).

**Thomas, C.**, Principal Investigator. "Educating for Citizenship in a Divided Democracy." Andrew Carnegie Fellows Program (under review, \$200,000).

**Thomas, C.**, Co-Principal Investigator (with Curran, F. C., co-PI). "Florida Youth Leadership, Education, and Policy Academy (Youth LEAP Academy)." University of Florida Strategic Funding (unfunded, \$435,000).

### HONORS AND AWARDS

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Great Teaching for New Faculty Certificate, 2023  
Center for Teaching Excellence, University of Florida

Steven S. Goldberg Award for Distinguished Scholarship in Education Law, 2022  
Education Law Association

Teaching Associate of the Year, Nominee, The Ohio State University, Department of Educational Studies 2017, 2018, 2019

The Order of the Coif 2016



# CHRISTOPHER D. THOMAS

CALI Award for Excellence in Constitutional Law, DC Externship, DC Ethics, 2014-2016  
Fourteenth Amendment Law, Education Law, and First Amendment Law

Marian Wright Edelman Award for Civic Engagement in Education, 2014  
The Ohio State University Office for Student Life

## MEDIA MENTIONS

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Smith, C. (2024, Feb. 13). Hundreds of school districts sue social media companies over youth mental health concerns. *CBS12 News*. <https://cbs12.com/news/nation-world/hundreds-of-school-districts-have-sued-social-media-companies-tiktok-meta-youtube-snap-instagram-kids-parents-teachers-teens-families>

Prothero, A. (2024, Jan. 31). School district lawsuits against social media companies are piling up. *Education Week*. <https://www.edweek.org/policy-politics/school-district-lawsuits-against-social-media-companies-are-piling-up/2024/01>

## PROFESSIONAL SERVICE

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### To the field:

Education Law Association, <i>Board of Directors</i> (2023-2026)	2023-Present
West's Education Law Reporter, <i>Author's Committee and Peer Reviewer</i>	2023-Present
Education Law Association, <i>Awards Committee Co-Chair</i>	2022-Present
Education Law Association, <i>Outreach and Partnership Committee Co-Chair</i>	2024-Present
Education Law Association, <i>Publications Committee Member</i>	2022-Present
Education Law Association, <i>Conference Proposal Peer Reviewer</i>	2023
University Council for Educational Administration, <i>Conference Proposal Peer Reviewer</i>	2023
Education Law Association, <i>Education Committee Member</i>	2022-2023

### To my institution/employer:

University of Florida, College of Education, <i>Faculty Policy Council Member</i>	2023-Present
Frost Brown Todd, <i>Wellness Committee Chair</i>	2020-2022
Liberty High School Gay Straight Alliance, <i>Faculty Advisor</i>	2012-2013

### Other:

Ohio State Journal of Criminal Law, <i>Managing Editor</i>	2015-2016
Ohio State Education Law Association, <i>President</i>	2015

## PROFESSIONAL MEMBERSHIPS & LICENSURES

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Licensed Attorney – Ohio (Active)  
Licensed Educator – Secondary English Language Arts - Ohio (Expired)  
Education Law Association

## **CHRISTOPHER D. THOMAS**

University Council for Educational Administration  
American Educational Research Association  
Council of School Attorneys  
Florida Association of Professors of Educational Leadership  
International Council of Professors of Educational Leadership  
UF Education Policy Research Center – Affiliate Faculty

**UNIVERSITY OF FLORIDA**  
**LEVIN COLLEGE OF LAW**  
**RULES AND PROCEDURES MANUAL**  
**DATE:**

## **Chapter 1- Governance of the College**

Governance of the College of Law shall rest jointly with the Administration and the Faculty, as outlined below.

The Administration of the College of Law shall consist of the Dean, and associate deans, assistant deans, directors and administrative staff as appointed by the Dean. The Dean is appointed by the president, or the president's designee, and should be renewed only upon a positive vote of the faculty.<sup>1</sup> The Dean is the chief administrative officer of the College and has primary responsibility for the operation of the College. The Dean has the powers and responsibilities delegated by the president and outlined in the University of Florida Constitution and Regulations as well as the powers and responsibilities granted in this document. The dean shall also be bound by the ABA Standards and Rules of Procedure for Approval of Law Schools where relevant.

The Faculty of the College of Law shall consist of all persons holding the ranks of assistant professor, associate professor, professor, lecturer, senior lecturer, master lecturer, legal skills professor, senior legal skills professor, and master legal skills professor. These faculty shall be referred to as the "voting faculty" herein. The faculty may also include those persons holding the position of emeritus professor, affiliate professor, legal research professor, visiting professor, professor of practice, adjunct professor, assistants in law, associates in law, and the President of the University (who serves as an ex-officio member).<sup>2</sup> When the latter group of faculty are included, the entire group of faculty shall be referred to as the "campus faculty." The voting faculty of the College has primary responsibility for the College's academic endeavors, such as curriculum, faculty status, and appointments, conducting faculty hiring, and consults with the administration on matters of budget, strategic planning, and administration of the academic mission as spelled out in more detail below. The faculty shall also be bound by the ABA Standards and Rules of Procedure for Approval of Law Schools where relevant.

All persons holding faculty status as voting faculty and who also serve in positions such as dean, associate dean, assistant dean, director, or other administrative title retain their rights as voting faculty in all matters of governance and in all committees unless otherwise expressly excluded herein. Administrative staff who do not hold faculty positions do not have voting privileges in committees or in faculty meetings.

### **Faculty Council and Committees**

The faculty and the administration shall work together to advance the mission of the College of Law through the work of a Faculty Council and Faculty Committees.

### **Faculty Council**

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<sup>1</sup> ABA Standard 203(c) requires meaningful participation by faculty in the choice of a dean. "The dean shall be selected by the university or the governing board of the law school, as appropriate, which shall have and follow a procedure for decanal appointment or reappointment that assures meaningful involvement by the faculty or a representative body of the faculty in the selection of a dean."

<sup>2</sup> See Article VI, § 2(C) UF Constitution.

- A. **Purpose.** The Faculty Council (“the Council”) shall consider and address all issues and matters related to shared governance within the College of Law. It represents the interests of the faculty and will operate to ensure communication, transparency, collegiality, representative participation, mutual accountability, and collaboration between the faculty and the administration.
- B. **Composition.** The Council shall consist of five members elected by and from the voting faculty. At all times three of the five members will be tenure-track faculty members and two will be non-tenure-track faculty. Faculty members currently serving as deans or associate deans are not eligible to serve on the Council during their administrative appointments but are members of the voting faculty and may vote for Council members.
- C. **Authority.** The Council has the authority to place items on the agenda of any regularly-scheduled faculty meeting. The Faculty Council may call a meeting of the faculty. The Faculty Council Chair will preside at such meeting which is subject to normal quorum, notice, and procedure requirements.
- D. **Responsibilities.** The Council’s responsibilities include:
1. Consultation with the administration. The Council will serve as an advisory committee to the Dean. It will provide input regarding all faculty committee assignments (including faculty and non-faculty administrative liaisons), will assist in the drafting of committee charges, and will consult on other administrative decisions or policies that affect faculty teaching and scholarship.
  2. Strategic planning. The Council will evaluate the College of Law’s strategic planning process, facilitate the faculty’s role in periodic strategic planning, and assist the administration with the implementation of any College strategic plan.
  3. Consultation on the budget. The Council will consult with the Dean on budget priorities and will report to the faculty on budget information received from the dean, including budget reports prepared by the administration for outside entities.
  4. Communication and commitment to transparency. The Council will serve as a liaison between the faculty and the administration in matters involving academic policies and procedures. It will facilitate the role of the faculty in shared governance by providing information, facilitating transparency, and assisting with shared governance implementation. It will facilitate opportunities for faculty to discuss issues of importance to the College. The Council will also provide faculty feedback to the Dean and the administration based on periodic evaluations of administrators and staff.

5. Policy compliance and revision. The Council will report to the faculty on compliance with the College of Law's policies and procedures. It may, along with other faculty committees, draft and propose revisions to the policy manual which will be brought to the faculty for adoption.
6. Vote administration. Consistent with University Policy, the Council may participate in the administration of all votes in matters of appointments and for faculty membership on elected committees including the promotion and tenure committee, the Dean's review committee, the Faculty Senate, any faculty consultation committee on dean searches,<sup>3</sup> and the Faculty Council, and may share the results of those votes with the faculty.

#### **E. Election and Term.**

1. Operating term. The Council's annual term will run from June 1 – May 31.
2. Membership term. Council members will serve staggered 2-year terms with two or three members of the Council serving a second term each year. Members may serve consecutive terms.
3. Election of members.
  - a. Election of council members will be by written ballot, which will be conducted and completed by May 1st of each year. The ballot will include a slate of candidates for the tenure-track slots and a slate for the non-tenure-track slots and faculty may vote for as many candidates on each slate as there are open positions on the Council.
  - b. All voting faculty except those serving as deans or associate deans are eligible to serve on the Faculty Council and their names will be presumptively added to the ballot. Faculty on leave, faculty with anticipated heavy service loads, or faculty who may have other personal or professional obligations may remove their name from the ballot, but it is expected that faculty will be willing to serve as it is every faculty member's duty to be involved in governance.
  - c. To be elected to the council, the three recipients of the highest number of votes among the tenure-track and the two recipients of the highest number of votes among the non-tenure-track faculty shall be elected.
  - d. In the event of a tie that exceeds the number of available seats, a runoff ballot will be conducted. The runoff ballot will be limited to the tied candidates. Voting faculty may cast up to the number of votes equal to the number of remaining open seats on the Council.

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<sup>3</sup> Article VI, § 2(D) provides that "The chief executive and administrative officer of the Graduate School, and of each college shall be a dean. The dean shall be appointed by the President. In making this appointment, the President shall give consideration to the opinion of the faculty of the college concerned by consultation with a special committee of at least three faculty members elected by the faculty of the college."

4. Council chair. The Council will elect its own chair and vice chair each year at the first meeting of its annual term. The outgoing Chair will continue to serve as Acting Chair until such time as a new Chair is elected. The Chair will serve as the College of Law's representative to the College Faculty Council Chairs Committee.

## **College of Law Committees**

Shared governance is understood as a collaboration between the faculty and the administration in the governance of an academic institution. Generally speaking, the faculty *determine* (i.e., have primary responsibility over) matters of academic policy, curriculum, accreditation standards, evaluation of students, the criteria and evaluation of faculty for appointments and for promotion and tenure, and faculty development in consultation with the administration. Similarly, the administration *determines* operational matters, such as policy implementation, budgeting, compliance, external relations, and developing and managing resources in consultation with the faculty. In between are matters where both the faculty and administration are expected to collaborate, such as with strategic planning, facilities planning, finance and research allocation, and areas of academic emphasis.

The faculty's principal role in shared governance is in setting policy for the College of Law in those areas in which faculty have primary responsibility. The faculty also play a role in implementation of policies directly affecting faculty and the academic mission, assist the administration in fulfilling those policies, play a key role in the hiring and promotion and tenure policies, and consult in the general administration of the College. The faculty shall participate in governance and administration through the following committees.

### **Clerkship Committee**

### **Curriculum and Academic Programs<sup>4</sup>**

### **Faculty and Community Engagement<sup>5</sup>**

### **Non-tenure-track Appointments<sup>6</sup>**

### **Non-tenure-track Promotion<sup>7</sup>**

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<sup>4</sup> This committee establishes policies on matters such as curriculum, academic standards, international programs, distance learning, and accreditation.

<sup>5</sup> This committee establishes policies on matters of faculty development, faculty research and scholarship, teaching and pedagogy, and community engagement.

<sup>6</sup> This committee establishes hiring policies and facilitate the hiring of non-tenure-track faculty and adjuncts.

<sup>7</sup> UF Regulations require that promotion committees be half-elected – see UF Regulation 7.019(6)(c)(2) for clinical faculty. It is unclear whether faculty holding lecturer positions must also be reviewed by an elected committee. To

## **Student Life and Support<sup>8</sup>**

## **Tenure-track Appointments<sup>9</sup>**

## **Tenure – track Promotion and Tenure<sup>10</sup>**

The Dean may consolidate any of these committees in cases where it is anticipated that there will be a lighter work load so long as all requirements about membership are satisfied. In addition, the Dean and the Faculty Council may establish temporary ad hoc committees, but any ad hoc committees that might be established shall sunset after no more than two academic years unless they are authorized by the faculty to continue for a longer period.

## **Membership on Committees**

All members of the voting faculty are eligible to serve on all committees, except that the tenure-track promotion and tenure committee is limited to tenured full professors and the tenure-track appointments committee is limited to tenure-track faculty.

The chair of each committee shall be chosen by the committee within one month of the formation of the committee. Meetings will be convened by the longest serving faculty member until a chair is selected.

The dean may appoint up to two non-faculty administrative liaisons to each committee who shall be non-voting members. The dean may appoint one faculty administrative liaison to each committee who shall be voting members.

## **Faculty Meetings**

Faculty meetings shall be scheduled at least once per month during the academic year, with additional meetings scheduled by the Dean or the Faculty Council as needed. Any faculty meetings scheduled by the Faculty Council shall be scheduled during normal business hours and appropriate notice shall be given to promote widespread faculty participation.

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be consistent, it makes sense that this committee also be half-elected so there is no distinction between clinical and lecturer positions.

<sup>8</sup> This committee establishes policies around student life, such as admissions, student services, career placement, academic integrity, and student support.

<sup>9</sup> This committee establishes policies around the hiring of tenure-track faculty and facilitates their hiring. The dean, in consultation with the Faculty Council, may combine the Tenure-track and Non-tenure track Appointments committees, or create subcommittees, in years where hiring needs are light or heavy in order to better consider the hiring needs of the faculty as a whole.

<sup>10</sup> As required by the UF Constitution, a majority of faculty to this committee must be elected. See UF Regulation 7.019(6)(b)(2).



**Agenda:** The Dean, Dean’s designees, the Faculty Council, and committee chairs may place items on the agenda, which shall be approved and published by the Dean at least five days prior to a scheduled faculty meeting. Any faculty member who wishes to place an item on the agenda for a faculty meeting may do so by requesting the Dean or the Faculty Council add that item. If neither approve adding the item to the agenda, five voting faculty members may petition the Faculty Council to add the item, and that item must be placed on the agenda at the next regularly-scheduled meeting.

**Quorum:** A quorum for faculty meetings shall be those voting faculty present, except for the graduation meeting, which requires the presence of only one or more voting members of the faculty in attendance. A majority of those voting faculty present shall be sufficient to approve any item or policy on the agenda unless University Regulations or the College Rules and Procedures Manual requires otherwise.

**Voting:** Voting on all matters except appointments and promotion and tenure shall be by voice vote unless a request for a secret ballot is made and a majority of the voting faculty members present choose to vote by secret ballot. All ballots for appointments, promotion and/or tenure, and any other secret ballot, shall be by written or anonymous electronic ballot. The Faculty Council may participate in the administration of all written or electronic ballots. All voting faculty are entitled to vote on all matters, unless limited by University Regulation or the College Rules and Procedures Manual. [The college currently prohibits non-tenure-track faculty from voting on hiring tenure-track faculty and the university permits voting on tenure-track and non-tenure-track promotion/tenure decisions only by those at a higher rank.]

### **Hybrid Attendance and Proxy Voting Policy**

- A. Faculty meetings may be held in-person, entirely online, or in a hybrid format at the discretion of the Dean. Participants in online or hybrid meetings are expected to have their cameras on and may participate fully in all discussions and votes.
- B. Eligible voters who are aware that they will be unable to attend any meeting may authorize another eligible voter to serve as the non-attending member’s proxy voter at the meeting. All proxies must be directed proxies. Eligible voters who wish to designate a proxy voter must notify the dean’s office of the voter’s inability to attend and the reason therefor.
- C. Reasons for non-attendance shall be limited to the following: (1) personal or family illnesses, accidents, or other emergencies that would cause the voter to cancel a class; (2) military duty, jury duty, or other compelled attendance at a legal proceeding; (3) attendance at an academic conference, continuing legal education program, or other professional meeting; (4) the meeting conflicts with a regularly-scheduled class or examination; or (5) the voter is on leave or not on duty, and is away from the Gainesville metropolitan area at the time of the meeting.
- D. Eligible voters who will be unable to attend for a reason specified in paragraph (C) should provide the notification specified in paragraph (B) as soon as they become aware of their inability to attend. Whenever feasible, eligible voters who will be unable to attend a meeting should endeavor to provide this notification more than one week in advance of the meeting.
- E. All proxy ballots shall be marked “proxy.”

April 2, 2024

MEMORANDUM

To: Full-Time Faculty, Levin College of Law

From: Merritt E. McAlister, Interim Dean

Re: Look-see Visitor Policy

To ensure that we remain flexible and competitive in the marketplace for new and lateral faculty, I recommend we adopt a formal look-see visitor policy. Consistent with our current policies, all visitors would receive a faculty vote, but, where the Appointments Committee agrees, the Dean would have the authority to invite the visitor to give a job talk as part of the visit offer. The faculty would know whether the visit was a podium or look-see at the time of the faculty vote. The Appointments Committee convened at the time of the visit would then consider the visitor's candidacy in the normal course. The Dean would not have the power to offer a look-see visit to a visitor hired on an emergency basis.

This new policy would go into effect upon its adoption, and it could be used for this coming academic year, provided the processes are followed. It would be expected that the Dean charge the Appointments Committee with identifying and recruiting potential look-see visitors each year, including through the process of a standing reading group.

To that end, I propose the following revisions to our current Faculty Policy Manual (page 7, paragraph 8, of Section 2.B):

8. Visiting appointments: For visiting appointments, the Dean will recommend visitors and the faculty will vote yes or no on the Dean's recommendation (with at least twenty-four hours notice). With approval of the majority of the then-existing Appointments Committee, the Dean may invite a faculty member for a look-see visit, which shall include a job talk to be scheduled before the conclusion of the visit. Consideration of that look-see visitor for a permanent position will otherwise follow existing procedures for new faculty hires. In the event that the Dean needs to hire a visitor to cover a course on an emergency basis, the Dean may do so provided that such visitor will be ineligible to be considered for a permanent position until the semester following the conclusion of the visit.

**Deleted:** solely for the purpose of course coverage,

**Moved down [1]:** In the event that the Dean needs to hire a visitor to cover a course on an emergency basis, the Dean may do so provided that such visitor will be ineligible to be considered for a permanent position until the semester following the conclusion of the visit.

**Moved (insertion) [1]**

**Deleted:** Faculty vote on look-see visits will be in accordance with

# Carliss Chatman

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Associate Professor  
Southern Methodist University Dedman School of Law  
[cnchatman@smu.edu](mailto:cnchatman@smu.edu)

## Academic Appointments

### **ASSOCIATE PROFESSOR | SOUTHERN METHODIST UNIVERSITY DEDMAN SCHOOL OF LAW | FALL 2023-PRESENT**

- Teach Race, Entrepreneurship and the Law, Professional Responsibility, Business Enterprises, and Commercial Law.

### **FACULTY AFFILIATE | SAMUEL DUBOIS COOK CENTER | DUKE UNIVERSITY | SPRING 2023-PRESENT**

### **VISITING ASSISTANT PROFESSOR, ASSISTANT PROFESSOR, ASSOCIATE PROFESSOR | WASHINGTON AND LEE UNIVERSITY SCHOOL OF LAW | FALL 2018-JUNE 2023**

- Taught Securities Regulation, Sales, Mergers and Acquisitions Practicum, Mergers and Acquisitions: Actual Practice (Representing Businesses in the Walker Program), Start-Up Practicum: Actual Practice (Representing Businesses in the Walker Program), Business Associations, Core Commercial Concepts (UCC Articles 2, 3, 4, and 9), Business Immersion Program.
- Director, Business Immersion Program: redesigned 2-week program simulating a transactional practice experience, taking a company from a general partnership, to a limited liability company, to a conversion to corporation, and finally through a reverse triangular merger. Taught in and managed a program with 8 instructors, 8 client actors, and 97 students.

### **VISITING ASSOCIATE PROFESSOR | WILLIAM AND MARY LAW SCHOOL | SPRING 2022**

- Teach Commercial Law Survey (UCC Articles 2, 3, 4, and 9).

### **VISITING PROFESSOR | THE GEORGE WASHINGTON UNIVERSITY LAW SCHOOL | FALL 2021**

- Teach Contracts.

### **INSTRUCTOR—CONTRACTS AND DELAWARE CORPORATIONS | BARBRI | OCTOBER 2021-PRESENT**

- Deliver lectures for bar exam preparation for national Contracts, and Mississippi, Florida, and Virginia state distinctions.
- Deliver lecture for bar exam preparation on Delaware Corporations.

### **SUBJECT MATTER EXPERT | ILAW | SUMMER 2020-PRESENT**

- Teach fully synchronous Business Organizations virtually, with a focus on document drafting.
- Design and teach an asynchronous Business Organizations course launched in Summer of 2021.

### **ASSISTANT PROFESSOR | NORTHERN ILLINOIS UNIVERSITY COLLEGE OF LAW | JUNE 2017-DECEMBER 2018**

- Taught Contracts I and II, Agency and Unincorporated Entities, Corporations, Business Associations, and Corporate Skills: Mergers and Acquisitions.

### **VISITING ASSISTANT PROFESSOR | STETSON UNIVERSITY COLLEGE OF LAW | JULY 2015-JUNE 2017**

- Taught Professional Responsibility, Business Entities, and Non-Litigation Drafting: Mergers and Acquisitions.

**RESEARCH ASSISTANT | PROFESSOR CHARLOTTE PIERCE-BAKER, DUKE UNIVERSITY | SPRING 1999-2001**

- Assisted with interdisciplinary research on sexual violence in African and African-American communities, the impact of African linguistic patterns in African-American speech, and the depiction of rape and trauma in African-American literature.

**INSTRUCTOR, SEXUAL VIOLENCE AND DOMESTIC ABUSE HOUSE COURSE| DUKE UNIVERSITY | FALL 2000**

- Co-taught house course for the Women's Studies Department.

## **Courses**

- Business Associations, Corporations, Agency and Unincorporated Entities, Transactional Skills: Mergers and Acquisitions, Mergers and Acquisitions Practicum, Mergers and Acquisitions: Actual Practice (Representing Clients in the Walker Program), Start-Up Practicum: Actual Practice (Representing Clients in the Walker Program), Professional Responsibility, Securities Regulation, Contracts I and II, Sales, Core Commercial Concepts (UCC Articles 2, 3, 4, and 9), Business Law Immersion, Race, Entrepreneurship and Inequality Seminar.

## **Awards and Honors**

- 2023 Recipient, Outstanding Scholar Award, presented by Lutie A. Lytle Black Women Law Faculty Writing Workshop.
- 2022 Recipient Jessine A. Monaghan Fellowship. An award for experiential education, given in recognition of contributions to the transactional component of the Law School's experiential program for work on the Walker Program.
- 2021 Recipient, Derrick A. Bell, Jr. Award, presented by the Association of American Law Schools Section on Minority Groups.
- 2020 Recipient Jessine A. Monaghan Fellowship. An award for experiential education, given in recognition of contributions to the transactional component of the Law School's experiential program for work on the Business Immersion Program and for the development of a Mergers and Acquisitions Practicum.
- 2020 Recipient Lewis Prize for Excellence in Legal Scholarship. An award given to recognize outstanding legal scholarship supported by summer grants.
- 2018 Professor of the Year, Northern Illinois University Black Law Students Association.

## **Education**

**J.D. | 2004 | UNIVERSITY OF TEXAS AT AUSTIN SCHOOL OF LAW**

- Staff Editor, Texas Journal of Women and the Law
- Fundraising Chair, Thurgood Marshall Legal Society
- Member, Student Recruiting and Orientation Committee

**B.A. | 2001 | DUKE UNIVERSITY**

- Majors: English and African-American Studies; Minor: Women's Studies
- Honors: English Distinction Thesis; Dean's List 1998-2001; Griffith Service Award
- Founder and Presenter, Beaufort Student Leadership Retreat
- Editor, *Voices* Literary Magazine

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## Publications

*Corporate Human Trafficking*, 102 U. TEX. L. REV. \_\_\_ (2024).

Co-Author (with Carla Reyes) *Uncovering Elon's Data Empire*, \_\_ STETSON L. REV. \_\_ (2024).

*Teaching Slavery in Commercial Law*, 28 MICH. J. RACE & LAW 1 (2023).

Co-Author (with Tammi Etheridge), *Federalizing Caremark*, 70 UCLA L. REV. 908 (2023).

*Citizens United* Chapter in FEMINIST JUDGMENTS: REWRITTEN CORPORATE LAW (January 2023).

Co-Author (with Carla Reyes), BUSINESS ENTITIES: A SYSTEMS APPROACH, Carolina Academic Press (2022).

*We Shouldn't Need Roe*, 28 UCLA JOURNAL OF GENDER 81 (2022).

*Honoring Lutie A. Lytle and John Mercer Langston with our Words*, 78 WASH. & LEE L. REV. 1719 (2022).

*We Shouldn't Need Roe* Chapter in A WAR ON MY BODY (January 2022).

*Corporate Family Matters*, 12 UC IRVINE L. REV. 1 (2021).

Co-Author (with Najarian Peters), *The Soft-Shoe and Shuffle of Law School Hiring Committee Practices*, 69 UCLA L. REV. DISC. 2 (2021).

COMPANIES ARE PEOPLE TOO, Illustrated by Winsome Reed (A children's book on corporate personhood) (December 31, 2020, Amazon Best Seller).

Co-Author (with Marissa Jackson Sow), *The Disregarded Canary: On the Plight of Black Women Voters*, NORTHWESTERN L. REV. OF NOTE, October 29, 2020.

*If a Fetus is a Person, It Should get Child Support, Due Process and Citizenship*, 76 WASH. & LEE L. REV. NO. 1, 2020.

*The Trump Administration Should Have Attorney Whistleblowers*, 73 SMU L. REV. F. 196 (2020).

*The Myth of the Attorney Whistleblower*, 72 SMU L. REV. 669 (2019).

*The Corporate Personhood Two-Step*, 18 Nev. L. J. 811 (2018).

*Judgment Without Notice: The Unconstitutionality of Constructive Notice Following Citizens United*, 105 KY. L. J. 49 (2016).

*HOLA Preemption and the Original Intent of Congress: Are Federal Thrifts Necessary to Stabilize the Housing Market?*, 18 FORDHAM J. CORP & FIN. L. 565 (2013).

## Works in Progress

1981.

*The Slippery Slope of Fetal Personhood*.

*Consider the Black Woman: A Reimagination of Citizens United Through the Lens of Black Radical Feminism*.

Co-Author (with Karen Woody), SECURITIES TRANSACTIONS: DOCUMENTING THE DEAL, West Academic (projected Spring 2025).

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Co-Author (with Christina Sautter), *MERGERS AND ACQUISITIONS: DOCUMENTING THE DEAL*, West Academic (projected Spring 2025).

## **Service Activities**

Member, Appointments Committee, Fall 2023-Present.

Board Member, Michael J. Redmond Memorial Dance Scholarship, Fall 2023-Present.

Advisory Board, The Walker Program, 2020-Present.

Vice Chair, Article 2 Committee, American Bar Association, 2021-Present.

Member, AALS Business Associations Section Executive Committee, 2021-Present.

Member, AALS Section on Unincorporated Organizations Executive Committee, 2021-Present.

Programming Committee, Lutie U. Committee, and New Lutie Committee Chair, Lutie Lytle Black Women Law Faculty Workshop and Writing Retreat, 2018-Present.

Member, EPCC Committee, 2022-2023.

Board Member, Rockbridge Regional Library Foundation, 2021-2023.

Co-Host and Event Coordinator, Lutie Lytle - John Mercer Langston Hybrid Winter Writing Workshop, Washington and Lee University, December 16-17 2021.

Co-Host and Event Coordinator, Lutie Lytle - John Mercer Langston Winter Writing Workshop, Virtual, December 2020.

Law School Representative, Washington and Lee University Faculty Antiracist Plan ad hoc Committee (FAPC), 2020-2023.

Washington and Lee University Ambassador, 2019-2023.

Member, Washington and Lee University Board of Appeals, 2019-2021.

Member, Washington and Lee University Houston H. Harte Center for Teaching and Learning Advisory Board, 2019-2023.

Chair, Washington and Lee University School of Law Diversity and Inclusion Committee, 2019-2020.

Host and Event Coordinator, Regional Mid-Year Lutie/Langston Black Law Faculty Workshop, Washington and Lee University School of Law, November 2019.

Faculty Advisor and Sponsor, Washington and Lee Law Review Lara D. Gass Symposium, 2019-2020.

Faculty Advisor, Women's Law Student Association, 2019-Present.

Law Review Note Advisor, 2019-2023.

Visiting Assistant Professor Advisory Committee, Spring 2019.

Director of Admissions Search Committee, Spring 2019.

Planning Committee Member, Chicagoland Junior Faculty Scholars Works-in-Progress Conference, October 2018.

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Faculty Development Committee, Northern Illinois University College of Law, 2017-2018.

Library Committee, Northern Illinois University College of Law, 2017-2018.

Faculty Advisor, Student Bar Association Diversity Committee, Stetson University College of Law, 2016-2017.

Supervise Independent Studies: Stetson University College of Law, Spring 2017; Northern Illinois University College of Law Spring 2018 and Summer 2019; Washington and Lee School of Law Summer and Fall 2020, Summer 2021.

## **Selected Presentations and Workshops**

Panelist, *Reimagining Law School Faculty Recruitment*, AALS Committee on Recruitment and Retention of Minority Law, January 2024.

Inaugural Speaker, *1981*, UCLA Law Review Table Talk Series, October 30, 2023.

Participant, Academic Forum on the Intersection of Race and Business Law, University of Pennsylvania Carey Law School, September 15, 2023.

Panelist, Research and Innovation Roundtable, Pennsylvania State Dickinson School of Law, September 7, 2023.

Guest Lecturer, *Corporate Human Trafficking*, Law and Economics Workshop, Washington and Lee University School of Law, September 6, 2023.

Panelist, "The Art of Self-Promotion," Southeastern Association of Law Schools Annual Conference New Scholars Workshop, August 2023.

Presenter, "New Trends in Corporate Governance," presented *Corporate Human Trafficking*, University of Genoa, Genoa Center for Law and Finance, Genoa, Italy, July 11, 2023.

Presenter, "The Corporate Governance Landscape," presented *Federalizing Caremark*, Bocconi University, Milan, Italy, July 6, 2023.

Center for Law, Policy, and Social Action Inaugural Scholar in Residence, Drexel University Thomas R. Kline School of Law, February 15 and 16, 2023.

Presenter, *Federalizing Caremark*, University of Pennsylvania Institute for Law and Economics Fall Corporate Roundtable, December 9, 2022.

Presenter, *Teaching Slavery in Commercial Law*, University of North Carolina School of Law, November 2022.

Inaugural Speaker, Texas Law's Office for Equity and Inclusion Diverse Voices Speaker Series, *Federalizing Caremark*, October 19, 2022.

Panelist, "Personhood, Reproductive Choice, and Family Formation: Tax Traps and Opportunities in the Post-Dobbs Era," ABA Section on Tax, October 11, 2022.

Presenter, "Dobbs, Personhood, and the 14th Amendment," Metropolitan Richmond Women's Bar Association, October 5, 2022.

Presenter, *Federalizing Caremark*, DePaul University School of Law, September 2022.

Panelist, "Comparative Conversation: Race and Discrimination in the American and German Legal Professions," German Law Journal and Transnational Law Institute, Washington and Lee University, September 19, 2022.

Presenter, "Navigating the Regulatory Landscape in an Age of Growth, Change, and Scrutiny," Compliance.AI Expert in the Loop Forum, September 8, 2022.

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Panelist, "Post-Roe: Testing the Law," ProPublica, [https://youtu.be/sY\\_K\\_wJPwTg](https://youtu.be/sY_K_wJPwTg), September 7, 2022.

Panelist, "On Ownership: Beauty, Property, and Personhood," Rofhiwa Book Café, September 7, 2022.

Panelist, "*Roe v. Wade*: The Murky Waters of a New Era," Memphis Bar Association, August 30, 2022.

Presenter, *The Soft-Shoe Shuffle of Law School Hiring Committee Practices*, University of Arkansas at Little Rock William H. Bowen School of Law, August 2022.

Panelist, "Twitter v. Musk—What's Next in the Epic Legal Drama," MKM Partners, August 23, 2022.

Panelist, "The Future of Abortion Rights," Southeastern Association of Law Schools Annual Conference New Scholars Workshop, August 2022.

Panelist, "Elon Musk and the Law," Southeastern Association of Law Schools Annual Conference New Scholars Workshop, August 2022.

Panelist, "Race, Racism, and Corporate Law," Law & Society Association, 2022 Global Meeting, Conference *Rage, Reckoning, & Remedy*, July 2022.

Roundtable Participant, "The Corporate Form and Society (with Jill Fisch and Christina Sautter)", Scuola Superiore Sant'Anna, Pisa, Italy, July 8, 2022.

Presenter, "Corporate Law, Society, and the Planet," presented *Corporate Human Trafficking*, Bocconi University, Milan, Italy, July 6, 2022.

Panelist, Elon Musk's Bid for Twitter, University of Virginia School of Law, <https://perma.cc/V4Q5-KEKH>, April 26, 2022.

Featured Speaker, *We Shouldn't Need Roe*, NARAL Lawyers for Choice, December 9, 2021.

Guest Lecturer, *Teaching Slavery in Commercial Law*, University of Virginia School of Law, October 2021.

Presenter, *Teaching Slavery in Commercial Law*, Tulane University School of Law, October 2021.

Presenter, *Corporate Family Matters*, George Washington University Law School, October 2021.

Moderator, Keynote Speaker Panel Featuring Stephanie Maddin Smith and Danica Roem, 2021 Lara D. Gass Women in the Law Symposium: Female Leaders in Times of Crisis, September 2021.

Keynote Speaker, Learn4Life College Access Program College Week, September 2021.

Moderator, "Diversity and the U.S. Public Company Board: California and Beyond," Law and Society, May 2021.

Panelist, "Where Will Corporate Law Go Next?" (Honoring Margaret Blair), Law and Society, May 2021.

Presenter, *Corporate Family Matters*, University of Kansas School of Law Faculty Workshop, March 2021.

Moderator, "Health Care, the Affordable Care Act, and Reproductive Rights," 2020 Lara D. Gass Symposium Equal Justice: A Celebration of Chief Judge Roger L. Gregory's Twenty Years on the Federal Fourth Circuit, March 2021.

Moderator, "FemTech: An Act of Congress," FemTech Focus Summit, March 2021.

Moderator, "Black Entrepreneurs: Where Does Money Fit Into Protest?" 2021 Ted DeLaney Lecture, February 2021.

Presenter, *Corporate Family Matters*, University of Utah S.J. Quinney College of Law, Faculty Workshop, March 2021.



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Panelist, "Insights on Teaching Race in Business Law," University of Chicago Center on Law and Finance and the University of Virginia John W. Gynn, Jr. Law & Business Program, February 5, 2021.

Presenter, *Corporate Family Matters*, Gonzaga University School of Law, Faculty Workshop, January 2021.

Panelist, "Teaching Commercial Law in the 21<sup>st</sup> Century," AALS Section on Commercial and Consumer Law, January 2021.

Panelist, "Spreading the Word—Law Professors as Teachers, Scholars, and Legal Influencers," AALS Section on New Law Professors, January 2021.

Panelist, "A Growing Divide: Examining the Relationships Between Race, Federal Policy, and the Housing Finance Market," CFA Virtual Financial Services Conference 2020, <https://perma.cc/7EE9-D4XJ>, December 10, 2020.

Moderator, "Socioeconomic Inequality," *Journal of Civil Rights and Social Justice* 2020 Symposium "Race and the Pandemic," October 29, 2020.

Panelist, "Code Switching," Black FLEX: The Black Playbook, Student Association of Black Unity, Washington & Lee University, October 24, 2020.

Moderator, "Economic Inequalities: Examining the Unique Challenges of Black Business in America," Black Law Students' Association and Business and Law Association, October 1, 2020.

Presenter, *Corporate Family Matters*, Chicagoland Junior Faculty Scholars Works-in-Progress Conference, Northern Illinois University College of Law, October 2020.

Presenter, *Corporate Family Matters*, Temple Law School, Faculty Workshop, October 2020.

Instructor, "Seinfeld Business Law," Yada Yada Law School, Summer 2020.

Panelist, Roundtable, "Corporate Purpose, Corporate Personhood, and Our Corporate Society," Law and Society, Summer 2020.

Panelist, "Tweeting While Black," SXSW, Austin, Texas, March 2020 (moving to virtual due to Covid-19).

Presenter, *Corporate Family Matters*, Southern Methodist University Dedman School of Law, Faculty Workshop, January 2020.

Presenter, *Breaking Silos*, Regional Mid-Year Lutie/Langston Black Law Faculty Workshop, Washington and Lee University School of Law, November 2019.

Presenter, "Men Get Stereotyped Too: The Title VII Trilogy," American Constitution Society Supreme Court Preview, Washington and Lee University School of Law, September 2019.

Presenter, *The Myth of the Attorney Whistleblower*, Chicagoland Junior Faculty Scholars Works-in-Progress Conference, Northern Illinois University College of Law, September 2019.

Panelist, "Gender, Race, and New Media," Women's Leadership in Legal Academia Conference, University of Virginia School of Law, July 2019.

Presenter, "The Slippery Slope of Fetal Personhood," 50 Ways Rockbridge, Lexington, Virginia, June 2019.

Presenter, *The Myth of the Attorney Whistleblower*, Culp Colloquium and Emerging Scholars Program, May 2019.

Podcast, "A Conversation on Reproductive Rights," American Constitution Society, Washington and Lee University School of Law, April 2019.

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Presenter, *The Myth of the Attorney Whistleblower*, The Privacy, Power and Ethics Conference, Seton Hall University, April 2019.

Speaker, "Navigating Law School as a Student of Color," UC Berkeley School of Law, April 2019.

Moderator and Event Coordinator, "Robert W. Lee and Ted Delaney: A Conversation on Reconciling our History," Washington and Lee University School of Law, March 2019.

Presenter, *The Myth of the Attorney Whistleblower*, Maryland-Baltimore Junior Faculty Workshop, March 2019.

Moderator, The Washington and Lee Law Review Lara D. Gass Symposium, March 2019.

Panelist, "Building Bridges: Teaching to Students of Different Backgrounds, Interests, and Strengths," AALS New Law Professors, January 2019.

Presenter, *The Myth of the Attorney Whistleblower*, Corporate and Securities Litigation Workshop, University of Richmond School of Law, October 2018.

Presenter, *The Myth of the Attorney Whistleblower*, Chicagoland Junior Faculty Scholars Works-in-Progress Conference, Northern Illinois University College of Law, October 2018.

Presenter, *The Myth of the Attorney Whistleblower* (WIP); Presenter, Using Technology in Legal Education, Lutie A. Lytle Black Women Law Faculty Workshop and Writing Retreat, Southern Methodist University Dedman School of Law, July 2018.

Presenter, *The Myth of the Attorney Whistleblower*, National Business Law Scholars Conference, June 2018.

Presenter, The Corporate Personhood Two-Step, University of Surrey School of Law, Guildford, Surrey, UK, December 2017.

Presenter, *The Myth of the Attorney Whistleblower*, 2017 Rocky Mountain Junior Scholar's Form, November 2017.

Presenter, *The Corporate Personhood Two-Step*, The Corporate Person: Criminal Law and Beyond, University of Iowa College of Law, October 2017.

Presenter, *The Corporate Personhood Two-Step*, Oklahoma Junior Scholars Conference, Summer 2017.

Presenter, Citizen's United's *Silver Lining* (Intensive), Lutie A. Lytle Black Women Law Faculty Workshop and Writing Retreat, University of Michigan Law School, Summer 2017.

Panelist, Roundtable Session, "Mergers and Acquisitions as a Complex Contract," Law and Society, Summer 2017.

Moderator, Business Litigation, National Business Law Scholars Conference, Summer 2017.

Presenter, "Building a Better Board," Youth Speaks Institute for Emerging Organizations, Spring 2017.

Presenter, ABA Law Student Division Diversity and Inclusion Month, "Why Intersectionality Can't Wait," Stetson University College of Law, Spring 2017.

Presenter, International Students Association, "Ethics for International Practitioners," Stetson University College of Law, Fall 2016.

Presenter, Citizens United's *Silver Lining*, Southeastern Association of Law Schools Annual Conference New Scholars Workshop, Summer 2016.

Presenter, *Judgment Without Notice*, 11th Circuit Legal Scholarship Forum, Stetson University College of Law, Fall 2015.

## Selected Press and Media Appearances

“How the Texas ban on mifepristone could jeopardize telemedicine for everyone,” THE HILL, <https://thehill.com/opinion/healthcare/4182967-how-the-texas-ban-on-mifepristone-could-jeopardize-telemedicine-for-everyone/>, September 5, 2023.

Quoted, “GOP representative wants to ban COVID vaccine mandates in private sector,” SPECTRUM NEWS 1 AUSTIN, <https://spectrumlocalnews.com/tx/south-texas-el-paso/politics/2023/08/03/gop-representative-wants-to-ban-covid-vaccine-mandates-in-private-sector>, August 3, 2023.

Quoted, “JPMorgan settles with Jeffrey Epstein Victims for \$290 million,” REUTERS, <https://www.reuters.com/legal/jpmorgan-agrees-settle-with-epstein-victim-class-action-suit-2023-06-12/>, June 12, 2023.

Quoted, “Fox’s Dominion Deal Puts Squeeze on Murdoch in Investor Lawsuits,” BLOOMBERG LAW NEWS, <https://news.bloomberglaw.com/us-law-week/foxs-dominion-deal-puts-squeeze-on-murdoch-in-investor-lawsuits>, April 24, 2023.

Quoted, “JPMorgan’s Jes Staley Suit Seen as Prelude to Settlement Over Epstein Claims,” BLOOMBERG.COM, [https://www.bloomberg.com/news/articles/2023-03-13/jpmorgan-s-jes-staley-suit-seen-as-prelude-to-epstein-settlement?in\\_source=embedded-checkout-banner](https://www.bloomberg.com/news/articles/2023-03-13/jpmorgan-s-jes-staley-suit-seen-as-prelude-to-epstein-settlement?in_source=embedded-checkout-banner), March 13, 2023.

Quoted, “AmerisourceBergen Spat Gives Investors Edge in Corporate Suits,” BLOOMBERG LAW NEWS, <https://perma.cc/HEM4-EZPS>, January 17, 2023.

“Twitter Wants to Force Musk to Buy It. But There’s a Hitch,” Barron’s, <https://www.barrons.com/articles/twitter-elon-musk-thirteenth-amendment-51659101363>, July 30, 2022.

Quoted, “Her Ex-Husband Is Suing a Clinic Over the Abortion She Had Four Years Ago,” PROPUBLICA, <https://www.propublica.org/article/arizona-abortion-father-lawsuit-wrongful-death>, July 15, 2022.

Featured, “How to Talk to Your Friends and Family Members about ‘Roe v. Wade,’” COSMOPOLITAN, <https://www.cosmopolitan.com/politics/a39947639/roe-v-wade-abortion-explained-to-friends-family/>, May 12, 2022.

“Some states want a fetus to be considered a person. Defining those rights is tough,” NPR MORNING EDITION, <https://www.npr.org/2022/07/06/1109965594/some-states-want-a-fetus-to-be-considered-a-person-defining-those-rights-is-toug>, July 6, 2022.

“Elon Musk’s Twitter Takeover,” NHK WORLD JAPAN, <https://photos.app.goo.gl/AYjRjCB3VLSQv9n96>, June 2022.

“Could Dobbs signal the end of Brown v. Board?” THE GRIO, <https://thegrio.com/2022/05/06/could-dobbs-signal-the-end-of-brown-v-board-of-education>, May 6, 2022.

“Justice Alito’s eugenics argument in Dobbs decision is a nod to Clarence Thomas,” THE GRIO, <https://thegrio.com/2022/05/04/justice-alitos-eugenics-argument-in-dobbs-decision-is-a-nod-to-clarence-thomas/>, May 4, 2022.

Quoted, “What is a Poison Pill Defense,” NEW YORK TIMES, <https://www.nytimes.com/2022/04/15/business/twitter-poison-pill-explainer.html>, April 15, 2022.

Quoted, “To Capture Twitter, Elon Musk Showcases New Type Of Takeover Warfare,” FORBES, <https://www.forbes.com/sites/abrambrown/2022/04/19/to-capture-twitter-elon-musk-showcases-new-type-of-takeover-warfare/?sh=28396e2dd00a>, April 19, 2022.

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"Texas's 6-Week Abortion Ban," BBC WORLD NEWS, <https://www.youtube.com/watch?v=D6mdSLFGi1k>, May 19, 2021.

"Carliss Chatman on Corporate Family Matters," BUSINESS SCHOLARSHIP PODCAST, <https://andrewkjennings.com/2021/04/15/carliss-chatman-on-corporate-family-matters/>, April 15, 2021.

"Business Scholarship Podcast Biden Symposium: Panel 4 Corporate Power," BUSINESS SCHOLARSHIP PODCAST, <https://andrewkjennings.com/2020/12/07/biden-symposium/>, January 4, 2021.

"Covid and the Corporate Family," THE CLS BLUE SKY BLOG, <https://clsbluesky.law.columbia.edu/2020/12/22/covid-and-the-corporate-family/>, December 22, 2020.

"The Injustice of the Bar Exam," CONTRACTSPROFSBLOG, [https://lawprofessors.typepad.com/contractsprof\\_blog/2020/07/guest-post-by-carliss-chatman-on-the-bar-exam.html](https://lawprofessors.typepad.com/contractsprof_blog/2020/07/guest-post-by-carliss-chatman-on-the-bar-exam.html), July 27, 2020.

"Carliss Chatman and Anthony Kreis on Reproductive Rights," IPSE DIXIT PODCAST, Season 1, Episode 522, <https://shows.acast.com/ipse-dixit/episodes/carliss-chatman-anthony-kreis-on-reproductive-rights>, May 4, 2020.

"Men Get Stereotyped Too. It's Time the Court Acknowledges It: The LGBTQ rights cases at the Supreme Court turn on stereotypes of what it means to be male," SLATE, <https://slate.com/news-and-politics/2019/10/title-vii-supreme-court-masculinity-stereotypes.html>, October 7, 2019.

"Carliss Chatman on Attorney Whistleblowers," IPSE DIXIT PODCAST, Season 1, Episode 377, <https://shows.pippa.io/ipse-dixit/episodes/carliss-chatman-on-attorney-whistleblowers>, September 13, 2019.

"What Kind of Business Entity Should You Choose?" LVRG DISCUSSION, <https://youtu.be/E4ixEJe9POs>, September 5, 2019.

"An Alabama Woman Was Charged After Someone Else Killed Her Fetus. Critics Say New Laws Are 'Criminalizing Pregnancy,'" TIME MAGAZINE, <https://time.com/5616371/alabama-woman-charged-criminalizing-pregnancy/>, July 3, 2019.

"Why Draconian Anti-Abortion Laws Are Likely Doomed," CNN ONLINE, <https://www.cnn.com/2019/05/29/opinions/supreme-court-abortion-fight-chatman/index.html>, May 29, 2019.

"Abortion laws Create New Legal Issues Regarding the Unborn," CBS MORNING NEWS, <https://youtu.be/DakjzejFA-s>, May 21, 2019.

"If a fetus is a person, it should get child support, due process and citizenship," THE WASHINGTON POST, [https://www.washingtonpost.com/outlook/if-a-fetus-is-a-person-it-should-get-child-support-due-process-and-citizenship/2019/05/17/7280ae30-78ac-11e9-b3f5-5673edf2d127\\_story.html?utm\\_term=.31d394a8e525](https://www.washingtonpost.com/outlook/if-a-fetus-is-a-person-it-should-get-child-support-due-process-and-citizenship/2019/05/17/7280ae30-78ac-11e9-b3f5-5673edf2d127_story.html?utm_term=.31d394a8e525), May 17, 2019.

"What's behind the absurd gamble on women's rights and health," CNN ONLINE, <https://www.cnn.com/2019/05/13/opinions/georgia-alabama-abortion-bills-carliss-chatman/index.htmlfbclid=IwAR05SDQnc6sK7SxHvRByvAHxLAlYeb886SkD0NaUCWLZ6E4xFviRQ7725vs>, May 13, 2019.

Podcast, "A Conversation on Reproductive Rights," <https://perma.cc/SK2A-WV5G>, AMERICAN CONSTITUTION SOCIETY, WASHINGTON AND LEE UNIVERSITY SCHOOL OF LAW, April 2019.

Compliance.ai Advisor's Corner, "Why we Need the CFPB," <https://www.compliance.ai/advisor/episode-5-feat-carliss-chatman/>, January 2018.

## **Practice and Business Experience**

### **HOST | GETTING COMMON | VOICE AMERICA NETWORK EMPOWERMENT CHANNEL | DECEMBER 2021-DECEMBER 2022**

- Host a weekly call-in radio show and podcast. <https://youtube.com/@gettingcommon609>;  
<https://podcasts.apple.com/us/podcast/getting-common/id1598185007>.

### **ADVISORY BOARD MEMBER AND LEGAL CONSULTANT | COMPLIANCE.AI (FORMERLY JURISPECT) | AUGUST 2015-PRESENT**

- Consult on corporate governance and securities matters, and accuracy of platform results.

### **CHIEF LEGAL OFFICER | MENA DEVELOPMENT PARTNERS | FEBRUARY 2013-JUNE 2015**

- Consult on transactions and draft contracts for operations in the Kingdom of Saudi Arabia.

### **OF COUNSEL | MARTIN, DISIERE, JEFFERSON AND WISDOM | SEPTEMBER 2010-APRIL 2013**

- Worked in insurance defense and complex commercial litigation.

### **ASSOCIATE | MORGAN, LEWIS AND BOCKIUS, LLP | MARCH 2008-NOVEMBER 2009**

- Worked in mass and toxic torts, and oil and gas litigation.
- Worked on appellate matters.
- Consult on FCPA and CFTC compliance.

### **ASSOCIATE | VINSON & ELKINS, LLP | SEPTEMBER 2004-MARCH 2008**

- Worked in mass and toxic torts, pharmaceutical, oil and gas, financial services, tax controversy, and securities litigation.
- Consult on litigation and environmental risks of transactional matters.

## **Community Activities**

### **MJJR BOARD**

#### **BOARD MEMBER | LUTIE LEGACY SOCIETY | 2022-PRESENT**

#### **BOARD MEMBER | THE WALKER PROGRAM | 2020-PRESENT**

- Serve on Fundraising Committee
- Designed courses at Washington and Lee University School of Law to provide businesses with pro bono legal services in collaboration with Vinson & Elkins, LLP.

#### **BOARD MEMBER | ROCKBRIDGE REGIONAL LIBRARY FOUNDATION | 2021-2023**

#### **PAST-PRESIDENT, PRESIDENT AND ADMINISTRATION COMMITTEE CHAIR | WRITERS IN THE SCHOOLS | 2007-2018**

- Helped take organization from \$1MM to \$3MM annual operating budget.
- Worked with management to develop arts programs that incorporate STEM, including the launch of WITS Digital.
- Assisted with solicitation of additional grants from foundations and government organizations, including the NEA and Houston Arts Alliance.
- Participated in Rice University Business School case study.

#### **BOARD MEMBER, DEVELOPMENT COMMITTEE, BOARD AFFAIRS COMMITTEE | GULF COAST PLANNED PARENTHOOD/PLANNED PARENTHOOD ACTION FUND/PLANNED PARENTHOOD TEXAS VOTES | 2012- 2018**

- Chair, Roe v. Wade Luncheon, 2013.

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- Assisted with outreach to Black community, including religious organizations.



## LAW REVIEW ARTICLES

### TAX LAW

1. *The Enigma of the United States, Base Erosion, and Global Tax Cooperation*, 57 LOYOLA OF LOS ANGELES L. REV. \_\_\_\_ (forthcoming 2024)
2. *US International Taxation: A Matter of Taxpayer Election?*, 23 HOU. BUS. & TAX L.J. \_\_\_\_ (2024) (forthcoming)
3. *Reform of Section 367(a) and Section 367(b) for a Post-TCJA Era*, 23 HOU. BUS. & TAX L.J. 195 (2023)
4. *Foreign Tax Credit Redux*, 26 CHAPMAN L. REV. 159 (2022)
5. *Revisiting the Interaction of the Interest Expense Deduction and the Foreign Tax Credit*, 26 FLORIDA TAX REV. 168 (2022)
6. *Reform of Section 355*, 68 Am. U. L. Rev. 447 (2018)
7. *Reform of Corporate Distributions in Subchapter C*, 37 VIRGINIA TAX REV. 365 (2018)
8. *International Tax Reform By Means of Corporate Integration*, 20 FLORIDA TAX REV. 71 (2016)
9. *The Foreign Tax Credit War*, 2016 BYU L. REV. 1895 (2016)
10. *Revisiting §367(d): How Treasury Took the Bite Out of Section 367(d) and What Should Be Done About It*, 16 FLORIDA TAX REV. 519 (2014)
11. *Tax Base Erosion: Reformation of Section 482's Arm's Length Standard*, 15 FLORIDA TAX REV. 737 (2014) (with C. Lowell)
12. *Pass-Through Entity Taxation: A Tempest in the Tax Reform Teapot*, 14 HOUS. BUS. & TAX L.J. 1 (2014)
13. *Income Tax Treaty Policy in the 21<sup>st</sup> Century: Residence vs. Source*, 5 COLUM. TAX J. 1 (2013) (with C. Lowell) republished in India in 10 INT'L TAX'N 181 (March 2014) (India).
14. *Territorial Taxation: Homeless Income is the Achilles Heel*, 12 HOUS. BUS. & TAX L.J. 1 (2012)
15. *Disposable Personal Goodwill, Frosty the Snowman, and Martin Ice Cream All Melt Away in the Bright Sunlight of Analysis*, 91 NEB. L. REV. 170 (2012) (with C. Bergez)
16. *Tax Base Erosion and Homeless Income: Collection at Source is the Linchpin*, 65 TAX L. REV. 535 (2012) (with C. Lowell)
17. *New Schedule UTP: Uncertain Tax Positions in the Age of Transparency*, 63 BAYLOR L. REV. 392 (2011), republished in 44 TEX. J. BUS. LAW 61 (2011)
18. *Economic Substance: How Codification Changes Decided Cases*, 10 FLORIDA TAX REV. 411 (2010)
19. *Voluntary Compliance: This Return Might Be Right But Probably Isn't*, 29 VIRGINIA TAX REV. 645 (2010)

### OIL AND GAS LAW

1. *The Exceptions Prove the Rule: Recalibrating the Discovery Rule and Equitable Fraud Exceptions to the Legal Injury Rule*, 71 BAYLOR LAW REV. 63 (2019)
2. *Abandoned But Not Forgotten, Improperly Plugged and Orphaned Wells May Pose Serious Concerns for Shale Development*, 8 MICH. J. ENV. & ADMIN. L. 115 (2018) (with T. Hester)
3. *Allocation Wells: Lessor's Remedies for Multi-Tract Horizontal Wells Drilled Without Pooling Authority*, 68 BAYLOR LAW REV. 1 (2016)
4. *The Dominant Mineral Estate in the Horizontal Well Context: Time to Extend Moser Horizontally*, 53 HOUS. L. REV. 193 (2015)
5. *Please Give Us One More Oil Boom – I Promise Not to Screw It Up This Time: The Broken Promise of Casinghead Gas Flaring in the Eagle Ford Shale*, 9 TEX. J. OIL, GAS & ENERGY LAW 319 (2014)

## SCHOLARLY ESSAYS, AMICUS BRIEFS AND COMMENTS

1. *Year-End Update on the Foreign Tax Credit*, CCH AnswerConnect (December 2023)
2. *Amicus Brief in Support of Respondent in Moore v. United States*, Docket 22-800 (with Reuven Avi-Yonah and Clinton Wallace) (October 19, 2023)
3. *Pillar 2 and the Corporate AMT*, 107 Tax Notes Int'l 693 (Aug. 8, 2022)
4. *The BEAT and Treaty Overrides: A Response to Rosenbloom and Shaheen*, 92 TAX NOTES INT'L 383 (Oct. 22, 2018).
5. *Get with the BEAT*, 158 TAX NOTES 1023 (February 19, 2018)
6. *Corporate Inversions and Whack-a-Mole Tax Policy*, 143 TAX NOTES 1429 (June 23, 2014)
7. *Cant and the Inconvenient Truth About Corporate Inversions*, 136 TAX NOTES 429 (July 23, 2012)
8. *What Corporate Inversions Teach Us About International Tax Reform*, 127 TAX NOTES 1345 (June 21, 2010)
9. *Adopting the More Likely Than Not Standard for Tax Returns*, 2010 TNT 82-10, Doc. 2010-7488 (April 29, 2010)



## **BOOK REVIEWS**

FRANK L. BRUNETTI, *FEDERAL TAX ACCOUNTING* (Wolter Kluwer: 2017)

## **OPINION AND/OR PRACTITIONER PIECES**

*Tax Base Defense: History and Reality*, 20 Int'l Transfer Pricing J. 72 (Mar.-Apr. 2013) (with C. Lowell)

*Tax Base Defense: Time to Update the Model Treaties?* 39 Int'l Tax J. 5 (Jan.-Feb. 2013) (with C. Lowell), republished at *Global Tax Weekly*, Feb. 7, 2013, at 43.

## **PUBLIC INTEREST WRITING PRIOR TO JOINING UHLC FACULTY**

Comment Letter: Proposed Change to §901 Definition of Foreign Tax, 2007 TNT 160-10, Doc 2007-18951

*Comment Letter: Proposed Change to Definition of Highway Vehicle*, 2003 TNT 11-27, Doc. 2003-554

Tax-Effective Methods to Finance Latin American Operations, 28 Int'l Tax J. 21 (2002)

Interest Allocation: The Dog Days of Summer, 53 Tax Executive 365 (2001)

Interest Allocation: A Regime in Desperate Need of Sound Policy, 53 Tax Law. 859 (2000)

Tax Consequences of Participations in International Trade Finance, 13 Tax Notes Int'l 1883 (1996)

## **PUBLIC INTEREST TESTIMONY**

Expert Witness Testimony before the United States Senate Finance Committee Hearing on International Tax Reform (October 3, 2017)

Expert Witness Testimony before the United States Senate Finance Committee Hearing on Integrating the Corporate and Individual Tax Systems: The Dividends Paid Deduction Considered (May 17, 2016)

Expert Witness Testimony before the United States Senate Permanent Subcommittee on Investigations at the hearing on "Offshore Profit Shifting and the U.S. Tax Code—Part 3 (Caterpillar)" (April 1, 2014)

Expert Witness Testimony (by invitation) to the staff of the United States Senate Finance Committee as part of an Academic Roundtable discussion on fundamental tax reform (January 5-6, 2012)

Expert Witness Testimony (by invitation) to the U.S. House Committee on Ways and Means Subcommittee on Select Revenue Measures on Tax Reform and Investment in the United States (June 23, 2011)

Prepared Testimony to the Internal Revenue Service on Proposed Regulations, 67 F.R. 38,913, Washington, D.C. (February 27, 2003)

## **PUBLIC SPEAKING**

### **2024**

Presentation on Pillar 2, Base Erosion and Tax Competition at the University of San Diego and Chamberlain Hrdlicka International Tax Institute (February 19-20, 2024)

Presentation on United States Supreme Court- Tax Decisions & Moore at the University of San Diego and Chamberlain Hrdlicka International Tax Institute (February 19-20, 2024)

Presentation on *Aroeste v. United States* at the University of San Diego and Chamberlain Hrdlicka International Tax Institute (February 19-20, 2024)

Presentation on International Taxation Hot Topics at the Houston Bar Association Tax Section (January 17, 2024)

### **2023**

Presentation on International Taxation Hot Topics at the State Bar of Texas Tax Section's International Taxation Symposium (November 17, 2023)

Commentator at the University of Virginia Tax Invitational Conference (October 27-28, 2023)

Presentation on Mineral Deed Conveyance Ambiguities at the Oil and Gas Law Conference hosted by the Rocky Mountain Mineral Law Foundation (October 19, 2023)

Presentation of paper entitled *The Enigma of BEPS, the United States, and Global Tax Cooperation* to the Tax Research Network at Cambridge University (September 6, 2023)

Presentation on Foreign Tax Credit Update for the 39<sup>th</sup> Annual Federal Tax Institute (June 7, 2023)

Presentation on Section 367(a) and Section 367(b) for the International Tax Policy Colloquium at the University of Florida Levin College of Law (March 10, 2023)

## **2022**

Presentation on Foreign Investment in Real Property Act at the State Bar of Texas Tax Section's International Taxation Symposium (November 4, 2022)

Presentation on Foreign Tax Credit Regulations at the State Bar of Texas Tax Section's International Taxation Symposium (November 4, 2022)

Presentation on Mineral Deed Conveyance Ambiguities at the Oil and Gas Law Conference hosted by the Rocky Mountain Mineral Law Foundation (October 20, 2022)

Presentation on International Taxation at the State Bar of Texas Tax Section's Leadership Academy (September 23, 2022)

Presentation on Foreign Investment in Real Property Act at the State Bar of Texas, 40<sup>th</sup> Annual Tax Law Session: Practicing Tax Law in Uncertain Times (August 2, 2022)

Presentation on the Foreign Investment in Real Property Act at the State Bar of Texas Tax Section's Annual Meeting (June 17, 2022)

## **2021**

Presentation on Mineral Deed Conveyance Ambiguities at the Oil and Gas Law Conference hosted by the Rocky Mountain Mineral Law Foundation (October 21, 2021)

Presentation on OECD and US International Tax Update, KPMG (August 17, 2021)

## **2020**

Presentation on International Tax Update to the 2<sup>nd</sup> Annual Denney L. Wright International Energy Tax Conference (Feb. 28, 2020)

Presentation on International Taxation at the Houston International Tax Forum (Feb. 6, 2020)

Presentation on International Taxation at the State Bar of Texas Tax Section's Leadership Academy (January 24, 2020)

## **2019**

Panelist on the International Implications of the TCJA for the Oil and Gas Industry at the Parker Fielder Oil and Gas Taxation Conference (November 21, 2019)

Presentation on Mineral Deed Conveyance Ambiguities at the Oil and Gas Law Conference hosted by the Rocky Mountain Mineral Law Foundation (October 24, 2019)

Presentation on Federal Taxation to Kaplan Bar Preparation Course (July 2, 2019)

Presentation on the International Tax Implications of the 2017 Tax Act to the Portland Tax Forum (June 20, 2019)

Presentation on the International Tax Implications of the 2017 Tax Act to the Houston IRS-CPA Society (June 13, 2019)

Presentation on Section 45Q's carbon sequestration tax credit as part of the UH Energy's Center for Carbon Management (June 12, 2019)

Presentation on International Taxation at the 1<sup>st</sup> Annual Denney Wright International Oil & Gas Taxation Conference (March 1, 2019)

Presentation on the Economic and Design Features of the 2017 Tax Act to the Texas Community College Teachers' Association Annual Meeting (March 1, 2019)

Presentation on the International Tax Implications of the 2017 Tax Act to the Wednesday Tax Forum of Houston (February 26, 2019)

Presentation on the International Tax Implications of the 2017 Tax Act to the HBA Tax Section (January 16, 2019)

Moderator of Panel on Fixed v. Floating Non-Participating Oil and Gas Royalty for the Oil and Gas Section of the State Bar of Texas 2019 Conference on Oil and Gas Disputes (January 10, 2019)

## **2018**

Discussant for paper presented as part of a session that addressed the topic “On Tax Havens” at the 111<sup>th</sup> Annual Conference of the National Tax Association (Nov. 17, 2018)

Presentation on the International Implications of the 2017 Tax Act to the 66<sup>th</sup> Annual Taxation Conference, University of Texas, Austin (Nov. 15, 2018)

Presented paper on Risk of Hydraulic Fracturing in Close Proximity to Improperly Abandoned Wells at Symposium at the 2018 Global Land & Resources Colloquium hosted by the University of Oklahoma College of Law (October 12, 2018)

Presented paper on Risk of Hydraulic Fracturing in Close Proximity to Improperly Abandoned Wells at a Symposium hosted by LSU Law School (September 7, 2018)

Panelist on Impact of Tax Reform in the Trump Era at the Southeastern Association of Law Schools (August 10, 2018)

Panelist on Tax Compliance and Privacy at the Southeastern Association of Law Schools (August 9, 2018)

Lectured on two sessions on Federal Income Taxation and one session on Oil & Gas Law to the UHLC Pre-Law Pipeline Program (June 11, 2017)

Presentation on Reform of Section 355 to the Texas Tax Faculty Workshop at Texas Tech Law School (June 1, 2018)

Presentation entitled US Tax Reform: Impact on International Investment as part of the UHLC CLE Series (May 24, 2018)

Presentation on Reform of Section 355 to the Association of Mid-Career Tax Law Professors at Georgetown Law Center (May 22, 2018)

Presentation on Permanent Establishment Issues to the Houston Tax Roundtable (May 9, 2018)

Presentation on Cross-Border Commerce & Differing Climate Policy at the 2<sup>nd</sup> Annual North American Environment, Energy, and Natural Resources Conference hosted by the University of Houston Law Center (May 3, 2018)

Presentation on Permanent Establishment Issues to the Houston Bar Association Tax Section (April 18, 2018)

Presentation on Carbon Taxes at the Symposium on Federal Options to Price Carbon hosted by UHLC’s Environment, Energy, and Natural Resources Center in partnership with the Duke Nicholas Institute in Houston (February 21-22, 2018)

Presentation on Recent Developments in Oil and Gas Law to the Institute for Energy Law’s Annual Oil and Gas Conference in Houston, Texas (February 15, 2018)

Presentation on International Implications of the Tax Cuts and Jobs Act at the Houston International Tax Forum (February 1, 2018)

## **2017**

Presentation on Permanent Establishment Issues to 20<sup>th</sup> Annual International Tax Symposium for the Tax Section of the State Bar of Texas (in Dallas on November 2) (in Houston on November 3)

Presentation on Business Tax Reform to the Young IFA Network of Houston (October 10, 2017)

Presentation of my paper entitled “Abandoned But Not Forgotten: Improperly Plugged and Orphaned Wells May Pose Serious Concerns for Shale Development at the Colloquium on Environmental Law Scholarship at Vermont Law School (September 23, 2017)

Presentation of Panelist on Current US and Mexican Cross-Border Tax Issues at the ABA Tax Section Fall Meeting in Austin, Texas (September 14, 2017)

Panelist on Tax Analysts webcast hosted by Vinson & Elkins in Houston entitled “Tax Reform: Perspectives From Across the Nation” (June 21, 2017)

Lectured on two sessions on Federal Income Taxation and one session on Oil & Gas Law to the UHLC Pre-Law Pipeline Program (June 12, 2017)

Organized the 3<sup>rd</sup> Annual Texas Tax Faculty Workshop hosted by the University of Houston Law Center (May 19, 2017)

Presentation on “Allocation Wells” at the 4<sup>th</sup> Annual GDHM Land & Mineral Owner Seminar in Austin, Texas (May 12, 2017)

Presentation on “Section 385 Traps and Pitfalls” to the Austin Tax Study Group (February 21, 2016)

Presentation on “Section 385 Traps and Pitfalls” at the Tax Section of the Houston Bar Association (February 16, 2017)

Presentation on “Texas Oil and Gas Law” to the Houston Business and Tax Law Journal’s Annual Symposium (February 10, 2016)

Panel Discussion on Allocation Wells, Oil, Gas & Energy Resources Law Section of the State Bar of Texas, Oil and Gas Disputes Course (January 27, 2017)

## 2016

Presentation on “Section 385 Traps and Pitfalls” at the Wednesday Tax Forum (December 13, 2016)

Presentation on “Section 385 Traps and Pitfalls” at the International Tax Forum of Houston (December 1, 2016)

Presentation on “Section 385 Traps and Pitfalls” at the 64<sup>th</sup> Annual Taxation Conference, University of Texas, Austin, Texas (November 30, 2016)

Presentation on “Section 385 Traps and Pitfalls” at the 19<sup>th</sup> Annual International Tax Symposium for the State Bar of Texas (in Dallas on November 3) (in Houston on November 4)

Presentation of my paper entitled “*International Tax Reform By Means of Corporate Integration*” to the International Tax Symposium hosted by the University of Florida Levin College of Law (October 28, 2016)

Lectured on two sessions on Federal Income Taxation and one session on Oil & Gas Law to the UHLC Pre-Law Pipeline Program (June 13, 2016)

Presentation of my paper entitled “*International Tax Reform By Means of Corporate Integration*” to the Wednesday Tax Forum (May 24, 2016)

Presentation of my paper entitled “*International Tax Reform By Means of Corporate Integration*” to the Texas Tax Faculty Workshop hosted by SMU Law School (May 20, 2016)

Presentation of my paper entitled “*International Tax Reform By Means of Corporate Integration*” to the Houston Tax Roundtable (May 11, 2016)

Presentation of my paper entitled “*International Tax Reform By Means of Corporate Integration*” to the International Tax Forum (May 5, 2016)

Presentation on “International Tax Update” to the Tax Executive Institute (May 5, 2016)

Presentation of my paper entitled “*Allocation Wells: Lessor’s Remedies for Multi-Tract Horizontal Wells Drilled Without Pooling Authority*” to the Baylor Law Review Annual Symposium (April 7, 2016)

Presenter of my paper entitled “The Foreign Tax Credit War” to the BYU Law Review Symposium on International Taxation (March 11, 2016)

Presentation on Offset Well Clauses and Allocation Wells in the Horizontal Shale Development Context, UHLC EENR Speaker Series (March 4, 2016)

Presentation on “Texas Oil and Gas Law” to the Houston Business and Tax Law Journal’s Annual Symposium (February 26, 2016)

Panelist to discuss “Foreign Tax Credit Developments” at the 2016 IFA USA Annual Conference in Miami, Florida (February 25, 2016)

Presentation on “International Tax Update” to the Tax Section of the Houston Bar Association (February 17, 2016)

## **2015**

Panel Member on Oil and Gas Taxation at the Parker Fielder Oil and Gas Tax Conference (November 19, 2015)

Presentation on “Revisiting Section 367(d)” at the 18<sup>th</sup> Annual International Tax Symposium for the State Bar of Texas (Dallas on November 12; Houston on November 13).

Commentator at the Invitational Tax Conference hosted by the University of Virginia Law School (November 6-7, 2015)

Presentation on “Status of Business Tax Reform” to the 33<sup>rd</sup> Annual Advanced Tax Law Symposium of the State Bar of Texas (October 30, 2015)

Presentation entitled “The Foreign Tax Credit War” to the ExxonMobil Tax Department Lunch & Learn (October 9, 2015)

Presentation entitled “The Foreign Tax Credit War” to the International Tax Forum of Houston (October 1, 2015)

Lecture on Federal Income Taxation to the UHLC Pre-Law Pipeline Program (June 4, 2015)

Presenter of “The Foreign Tax Credit War” to the Texas Tax Faculty Workshop hosted by the UT Law School (June 3, 2015)

Presentation: “Revisiting §367(d) in Light of IP Migration Strategies: How Treasury Took the Bite Out of §367(d) and What Should be Done About It” to the Houston Business and Tax Law Journal’s Annual Symposium (April 16, 2015)

Presentation on “Corporate Inversions” to the SMU Tax Colloquium Speaker Series (March 3, 2015)

Presentation entitled “Update on Corporate Inversions” to the Houston Bar Association (February 18, 2015)

Panelist Member, “US Tax Treaty Issues,” Diversity Committee of the ABA Tax Section (January 31, 2015)

Moderator for Panel Discussion on International Taxation at the Andrews Kurth National Moot Court National Championship (January 22, 2015)

## **2014**

One-Day Training Course on US Inbound International Taxation as part of the UHLC Advanced Legal Studies Program for Petrobras (December 9, 2014)

Presentation entitled “Corporate Inversions: What These Transactions Tell Us About Profit-Shifting and US International Tax Reform” to a joint meeting of the Houston Journal of International Law and Corporate and Tax Law Society (November 20, 2014)

Presentation on “Corporate Inversions” to the Houston Tax Roundtable (November 12, 2014)

Presented paper entitled “Revisiting §367(d): How Treasury Took the Bite Out of §367(d) and What Should Be Done About It,” as part of the Georgetown Law School’s Graduate Tax Program’s Speaker Series (November 6, 2014)

Presentation on “Revisiting Corporate Inversions” before IFA/ITF (October 3, 2014)

Invited Panelist to discuss “Corporate Inversions,” International Tax Policy Forum, Washington, D.C. (September 12, 2014)

Presentation on Tax Base Erosion: Reformation of Section 482’s Arm’s Length Standard at the Houston International Tax Forum (May 1, 2014)

Presentation on Tax Base Erosion: Reformation of Section 482's Arm's Length Standard as part of the Advanced Topics in Taxation Series, Northwestern University School of Law (April 3, 2014)

Conference Director for the first Federal Income Tax Update conference hosted by University of Houston Law Center (February 21, 2014)

Presentation on Base Erosion & Profit Shifting, Houston Bar Association (February 19, 2014)

Panel Moderator and Presentation on the OECD'S Initiative to Combat Base Erosion & Profit Shifting, International Fiscal Association (February 5, 2014)

## **2013**

Presentation on Ethical Issues Related to Tax Opinions, Houston Bar Association (October 16, 2013)

Presentation on Ethical Issues Related to Tax Opinions, Wednesday Tax Forum (October 15, 2013)

Presentation on Ethical Issues Related to Tax Opinions, the Tax LLM Alumni Reunion (October 11, 2013)

Presentation on Tax Planning Implications from Small Business Tax Reform, Wednesday Tax Forum (September 17, 2013)

Presentation on State of Tax Reform, 30<sup>th</sup> Annual Advanced Tax Law Conference, Tax Section of the State Bar of Texas (August 15, 2013)

One-Day Training Course on US Inbound International Taxation as part of the UHLC Advanced Legal Studies Program for Petrobras (August 9, 2012)

University of Virginia School of Law, Virginia Tax Study Group Meeting: Panel Discussion of Corporate Inversions (March 22, 2013). Fellow panel participants included Hal Hicks (partner of Skadden Arps), Williard Taylor (partner of Sullivan & Cromwell), David Lenter (Legislative Counsel for Joint Committee on Taxation). My paper on Corporate Inversions was presented as part of the conference materials.

Presentation to the International Tax Forum entitled "Implications of a Territorial Tax Regime for the United States" (February 7, 2013)

Presentation to the Greater Houston Partnership entitled "Implications for Small Business of Business Tax Reform" as part of the University of Houston Law Center Legal Excellence Series (January 29, 2013)

Presentation to the Wednesday Tax Forum entitled: "Nothing Certain Except More Debt and Taxes" (January 15, 2013)

## **2012**

One-Day Training Course on US Inbound International Taxation as part of the UHLC Advanced Legal Studies Program for Petrobras (December 14, 2012)

Presentation on Disposable Personal Goodwill in the Closely-Held Corporate Context, 29<sup>th</sup> Annual Advanced Tax Law Conference, Tax Section of the State Bar of Texas (August 17, 2012)

Intensive Short Course (20 hours) covering US inbound and outbound taxation issues as part of the UHLC Advanced Legal Studies Program for Sonangol (July 2-9, 2012)

One-Day Training Course on US Inbound International Taxation as part of the UHLC Advanced Legal Studies Program for Petrobras (June 29, 2012)

Presentation on the Codification of the Economic Substance Doctrine to the Exxon Tax Department Lunch & Learn (April 12, 2012)

Presented paper entitled "Territorial Taxation: Homeless Income is the Achilles Heel" to the Annual Symposium sponsored by the Houston Business & Tax Law Journal (March 7, 2012).

Co-presented paper entitled "Disposable Personal Goodwill, Frosty the Snowman, and Martin Ice Cream All Melt Away in the Bright Sunlight of Analysis" to the Wednesday Tax Forum (February 28, 2012).

Co-speaker in series of Webcasts for Thomson Reuters ONESOURCE® on The Obama Administration and Transfer Pricing Evolutions. The first webcast was entitled “International Tax Reform: History, Current Needs, and the Obama Administration Proposals” (December 6 & 7). The second webcast was entitled the “Territorial Proposal of Chairman Camp of the House Ways & Means Committee (January 24 & 25). The third webcast was entitled "Planning Considerations for U.S. and Foreign-based Groups" (February 15 & 16).

Presentation to the Houston Bar Association: “Codification of the Economic Substance Doctrine” (January 18, 2012)

## **2011**

Presiding Officer for the 59<sup>th</sup> Annual Taxation Conference, University of Texas, Austin, Texas (December 7, 2011)

Presentation to the Houston Tax Roundtable: “Codification of the Economic Substance Doctrine” (November 9, 2011)

Presented paper on “Homeless Income: Collection at Source is the Linchpin” at the American Tax Policy Institute Conference on International Taxation and Competitiveness in Washington, D.C. (October 17, 2011).

Presentation entitled “Codification of the Economic Substance Doctrine—What Does It Mean?” to the 28<sup>th</sup> Annual Advanced Corporate Tax Course sponsored by the Taxation Section of the State Bar of Texas (August 19, 2011)

Presentation to the Wednesday Tax Forum: “A VAT Regime in the United States?” (July 26, 2011)

Intensive Short Course (20 hours) covering US inbound and outbound taxation issues as part of the UHLC Advanced Legal Studies Program for Sonangol (July 6-8 and 11-15)

Presentation as part of a Legal Ethics Seminar to the Tax Executive Institute on Ethical and Legal Issues: “Taking Uncertain Tax Positions” (June 14, 2011)

Presentation to the Wednesday Tax Forum: “Codification of the Economic Substance Doctrine,” (April 19, 2011)

Presentation to the Wednesday Tax Forum: “Schedule UTP: Uncertain Tax Positions in the Age of Transparency,” (March 29, 2011)

Presentation to the International Tax Forum: “What Corporate Inversions Teach Us About U.S. International Tax Reform,” (March 3, 2011)

Presentation to the Council for International Tax Education: “Outbound Transfers Under Section 367(a) and Section 367(d),” Houston, Texas (January 26, 2011)

## **2010**

Chairman for Panel Discussion: “*The Real Angel’s List: Transactions to Which the Economic Substance Doctrine Does and Does Not Apply*,” 58<sup>th</sup> Annual Taxation Conference, University of Texas, Austin, Texas (December 9, 2010)

Presentation to the Tax Section of the Houston Bar Association: “*Ethical Issues with Taking Uncertain Tax Positions on a Tax Return*” Houston, Texas (September 22, 2010)

## **Pre-2010**

Presentation at the ATLAS TAX CONFERENCE: *Direct and Indirect Foreign US Tax Credits*,” Houston, Texas (November 11, 2003)

Panel discussion on US International Tax Policy with US Treasury International Tax Counsel at the 30<sup>th</sup> Annual Conference of the US Branch of the International Fiscal Association, Washington D.C. (March 12, 2002)

## **SERVICE TO MEDIA (Quoted as a Significant Source; Excludes Republication)**

1. Bloomberg Money Stuff, Robinhood Ends its Popularity Context, Bloomberg (Aug. 11, 2020)
2. Richard Rubin and Theo Francis, Losing Money Is a Winning Pandemic Tax Strategy for Some Companies, Wall Street Journal (Aug. 8, 2020)
3. Jesse Drucker & Jim Tankersley, “How Big Companies Won New Tax Breaks From the Trump Administration,” New York Times (Dec. 30, 2019) (selected as the New York Times “Quote of the Day”), available at

<https://www.nytimes.com/2019/12/30/business/trump-tax-cuts-beat-gilti.html?action=click&auth=login-email&login=email&module=Top%20Stories&pgtype=Homepage>; Quote of Day citation:

<https://www.nytimes.com/2019/12/30/todaypaper/quotation-of-the-day-business-got-big-tax-cut-lobbyists-made-it-bigger.html>

4. Richard Rubin & Jared S. Hopkins, “Going Out of Style: Tax-Driven Deals to Move Corporate HQs Outside U.S.” Wall Street Journal Online (August 1, 2019), available at <https://www.wsj.com/articles/inversion-reversions-arrive-as-companies-get-smaller-tax-edge-from-foreign-addresses-11564662353>.
5. Randy Diamond, Flaring fight is in the hands of Texas oil and gas regulators,” San Antonio Express-News (July 19, 2019)
6. Jonathan Curry, “Business of Tax: Allergen Flips Role in Pharma Mega-Merger,” 2019 TNTF 130-8, Doc. 2019-26033 (July 8, 2019)
7. Bret Wells, “Alberta Repealed its Carbon Tax. What Now?” Forbes.com (June 6, 2019), available at <https://www.forbes.com/sites/uhenergy/2019/06/06/alberta-repealed-its-carbon-tax-what-now/#3daeb7ed5dd1>.
8. Alex Parker, “Calls to Repeal Foreign Income Incentives May Be Misguided,” 2018 Law360 333-196 (Nov. 29, 2018)
9. Laura Davison, “U.S. Companies Flee No-Tax Caribbean Havens After EU Crackdown,” Bloomberg (Nov. 15, 2018), available at <https://www.bloomberg.com/news/articles/2018-11-15/corporate-america-flees-zero-tax-caribbean-havens-post-crackdown>.
10. Kiah Collier, Jamie Smith Hopkins and Rachel Levin, “As oil and gas exports surge, West Texas becomes the world’s ‘extraction colony,’” Center for Public Integrity (Oct. 21, 2018), available at <https://apps.publicintegrity.org/blowout/>.
11. Vidya Kauri, “Easing of Debt-Equity Regs Won’t End Need for Documentation, Law 360 (Sept. 21, 2018)
12. Andrew Velarde, “Final Inversion Regs Stick to Previous Policy,” 2018 W.T.D. 134-1, Tax Doc. 2018-28754 (July 12, 2018)
13. Bret Wells, “The 2017 Tax Act’s Fascinating Change to the Tax Consequences of Alimony,” TaxProf Blog (July 4, 2018), available at [https://taxprof.typepad.com/taxprof\\_blog/2018/07/wells-the-2017-tax-acts-fascinating-change-to-the-tax-consequences-of-alimony.html](https://taxprof.typepad.com/taxprof_blog/2018/07/wells-the-2017-tax-acts-fascinating-change-to-the-tax-consequences-of-alimony.html).
14. Natalie Olivo, “Carbon-Related Tax Unlikely Under Int’l Rules, Prof Says,” Law 360 (Feb. 21, 2018), available at <https://www.law360.com/energy/articles/1014575/carbon-related-tax-unlikely-under-int-l-rules-prof-says>
15. Jonathan D. Rockoff and Nina Trentmann, “New Tax Law Haunts Companies That Did ‘Inversion’ Deals,” Wall Street Journal (Feb. 11, 2018).
16. Amanda Athanasiou, “U.S. Tax Reform Will Affect Global M&A, Experts Say,” 2018 WTD 15-3 (Jan. 23, 2018).
17. Amanda Athanasiou, “U.S. Companies’ Goals for Offshore Earnings Unlikely to Match Trump’s,” 89 Tax Notes Int’l 291 (Jan. 22, 2018)
18. Alex Parker, “Tax Pros Skeptical New Law Will Bring IP Home,” Law 360 (Dec. 22, 2017),
19. Joe Nocera, “Don’t Fix the Senate’s Tax Goof. It’s a Great Idea!” Bloomberg News (Dec. 6, 2017)
20. Lynnley Browning, “Senate’s ‘Unpleasant Surprise’ Hurts Tax Breaks for Tech, Others,” 232 Daily Tax Report G-6 (Dec. 5, 2017)
21. Mindy Herzfeld, “International Tax Changes: Too Late For Debate?” 2017 W.T.D. 232-1 (Dec. 5, 2017)
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## **AFFILIATIONS AND SERVICE ACTIVITIES TO PROFESSIONAL ORGANIZATIONS**

Admitted to the State Bar of Texas (since 1990)

Licensed as a Certified Public Accountant by the Texas State Board of Public Accountancy (since 1992)

Official Observer to the United Nations Committee of Experts on International Cooperation in Tax Matters

Elected Member, American Law Institute (2020 to present)

Trustee, Foundation for Natural Resources and Energy Law

Law School Representative to the Tax Section Council for the State Bar of Texas (2017 to Present)

Houston Bar Association, Tax Section

Member of Planning Council (2011 to present)

Houston International Tax Forum

Member of Board of Directors (2011 to present)

American Bar Association, Tax Section

International Fiscal Association, Tax Section

American College of Tax Counsel

Wednesday Tax Forum

Houston Tax Roundtable

Texas Federal Tax Institute, Board Member

Tax Procedure Group

Faculty Advisor to the Houston Business & Tax Law Journal

Faculty Advisor to the Corporate & Tax Law Society

## **PROFESSIONAL WORK EXPERIENCE**

**Vice President-Treasurer & Chief Tax Officer, BJ Services Company** February 2002 to April 30, 2010

BJ Services was a leading provider of pressure pumping and other oilfield services to the petroleum industry with \$5 billion in revenue. BJ Services has 18,000 employees located in 50 countries. My responsibilities included overall management of the company's Risk Department, Credit Department, Treasury Department, and Tax Department on a worldwide basis. I reported to the Chief Financial Officer. In this role, I also served as the company's key contact for rating agencies, insurance underwriters, relationship banks, and tax authorities. My role prior to my last position was the position of Tax Director for the company.

**Assistant Vice President and Asst. General Tax Counsel, Cargill, Inc.** June 1993 to September 2001

Cargill is an international marketer, processor and distributor of agricultural, food, financial and industrial products and services with 159,000 employees in 68 countries and \$116 billion in sales. In my position with the company, I was the primary tax advisor responsible for overseeing a 30-person group of tax professionals who provided advice and tax support to Cargill's Latin American based commodity trading, processing, and financial businesses. Prior roles included an overseas assignment in Singapore where I was responsible for both the US and non-US tax advice related to Cargill's trading, processing, and financial businesses in Asia and Australia. I was awarded the CFO's Award for Financial Excellence (1998 and 1999) and the Chairman's Broken Silo Award for Teamwork (1998).

**Associate Attorney, Baker & Botts, L.L.P.**

April 1990 to June 1993

Baker & Botts is an international law firm with approximately 800 lawyers worldwide. My practice included providing U.S. federal income tax advice on corporate, partnership, and general income tax issues.