



Diversity, Equity, Inclusion and Belonging Report

August 2020

The Story of Us. *For Now.*

TaxJar is a human-first company.

People are accepted and free to be who they are.

We embrace that **diversity, equity, inclusion and belonging** are essential sources of creativity and innovation that bring a richness of thinking and experience to the work that is celebrated at TaxJar. **Simply put, we care.** We will always put people - our team and our customers - first, by supporting our people to do their best work building products our customers love.

Our formula is simple. We believe we have an elevated level of responsibility in everything we do. This means we empower our team to do the right thing for each other and for our customers, and we do the right thing, even when it's harder. We've built a team based on trust, that endeavors to maximize our team members' individual talents so our workplace creates a sense of meaning and belonging **for everyone.**





^ Team TaxJar at JarFest 11 in Savannah, GA.

TaxJar is ours.

This includes building a workforce that better represents our customers' and team members' communities, and creates a workplace rich in meaning and belonging for everyone. Moreover, our team has always worked remotely; teammates log in from a myriad of "home-bases" across the country, bringing unique perspectives, experiences and skills to help TaxJar fulfill its promises.

Holding ourselves responsible means, among other things, taking inventory of our people practices and critically seeking opportunities for improvement. Over the last month, we've begun an exhaustive look through all of our People initiatives - from sourcing and hiring, to education, to performance management and promotion parity - to determine where we can take impactful action toward greater equity and more meaningful belonging at TaxJar.

The time is now.

Influenced by calls challenging companies to address and transparently share representation on their teams, we've decided to showcase our people data; the unique and individual backgrounds that make up our team, along with why diversity, equity, inclusion and belonging matter to us within Team TaxJar

We know that achieving and upholding true equity at work requires ongoing vigilance to so much more than representation alone. We also know it starts with accountability - a place of deeper understanding, from which to take action toward meaningful change.

The Survey

In December 2019, we submitted a survey to our entire team to better assess our diversity, equity, inclusion and belonging efforts. Teammates self-identified across a myriad of inherent and expressed traits and characteristics, and shared what they felt about diversity, equity, inclusion and belonging at TaxJar. We learned a lot, and published our findings internally in February of this year.

Until several weeks ago, we'd planned to resubmit an improved survey in late 2020, and to publish results both internally and externally. On May 25th, 2020, Minneapolis police officers confronted and ultimately unjustly killed George Floyd. This act - representing one incident in an unjust history of violence - sparked national outrage, protest, activism and heightened awareness of systemic racial oppression.



^ Photo credit:
[@mun_shots](#)

This national awakening (and the reckoning spurred from it) has made it even more painfully clear that accountability can't wait. Commitment can't wait. Action can't wait. So we're sharing now. As a fully remote SaaS company, we must embrace this opportunity to listen and learn, and also to strengthen our commitment to action against a backdrop of heightened awareness and public accountability. Our sincere hope is that in doing so we will not only create a more inclusive and diverse TaxJar, but also model the necessary work to which all in our (historically monocultural) industry are responsible.

This report - and the public commitment to *transparency and accountability* that accompanies it - is our first step.

We know that intentions aren't actions; that stating a commitment is only the first step to honoring it. That speaking admirably of belonging isn't the same as working to foster it inside and outside of our virtual walls every day. We'll never stop seeking to learn more, do more and do better when it comes to creating an environment that embraces and celebrates diversity at every step of each teammate's experience.

Our Customer Service Organization Team at JarFest 11 in Savannah, GA



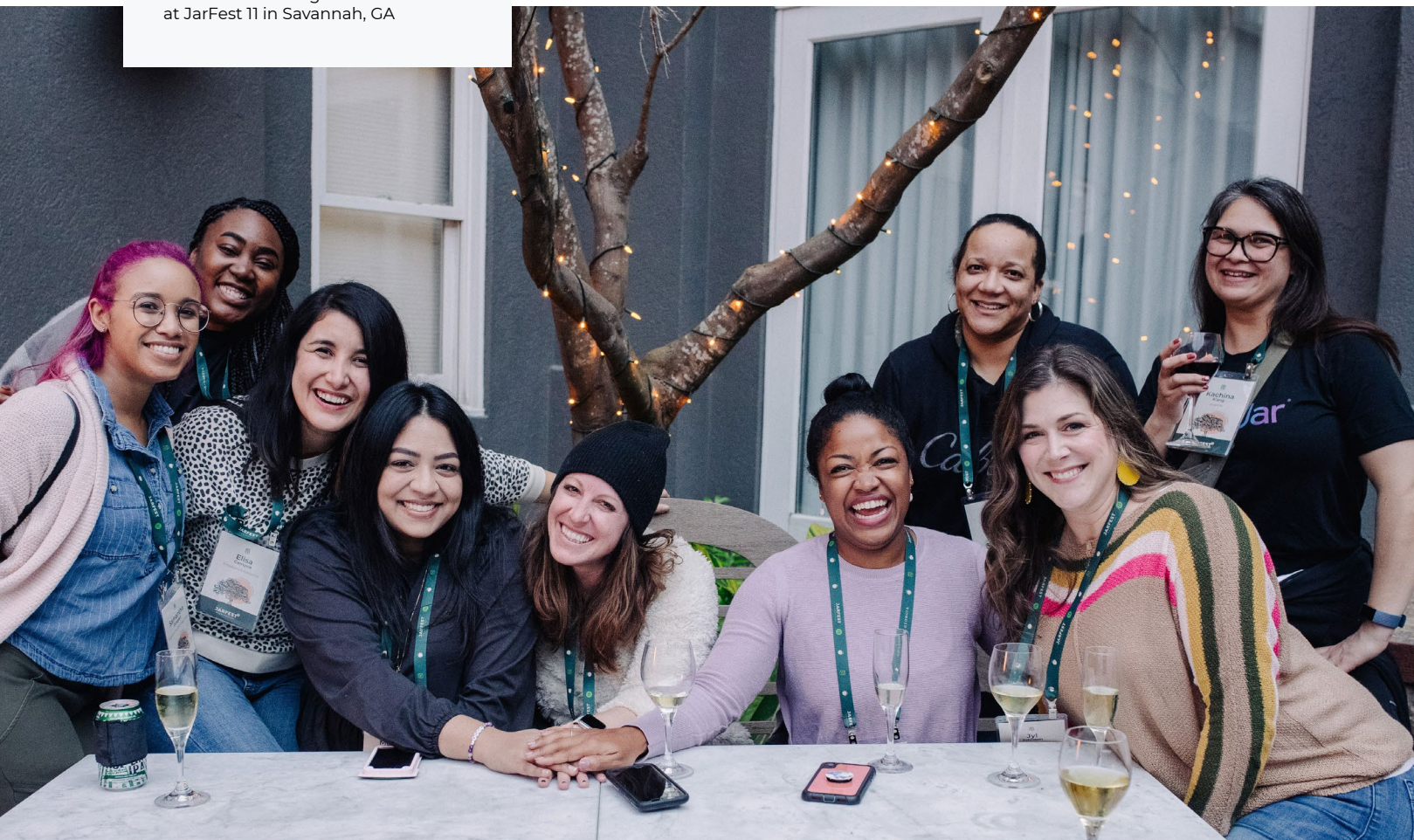
Our Data

In December 2019, 132 of 150 (88%) of TaxJar teammates took our Diversity, Inclusion and Belonging Survey. It consisted of 19 questions: 18 multiple choice and one open-ended answer for shared written feedback.

In the interest of transparency, we want to note that the makeup of the team has changed. We now sit at 159 full-time teammates, some of whom have joined since we collected this data. We will administer another survey at the end of 2020, establishing an annual cadence, and intend to make changes to the questionnaire given learnings from December (for example, we'd like to re-design the survey to help us better understand parity at the team/function level, among other improvements).

As we look at our data, we know we have work to do to increase underrepresented talent at TaxJar. As a result, we are intentionally focusing our efforts on hiring, development and retention to increase representation for these communities.

Some of the strong women of TaxJar at JarFest 11 in Savannah, GA



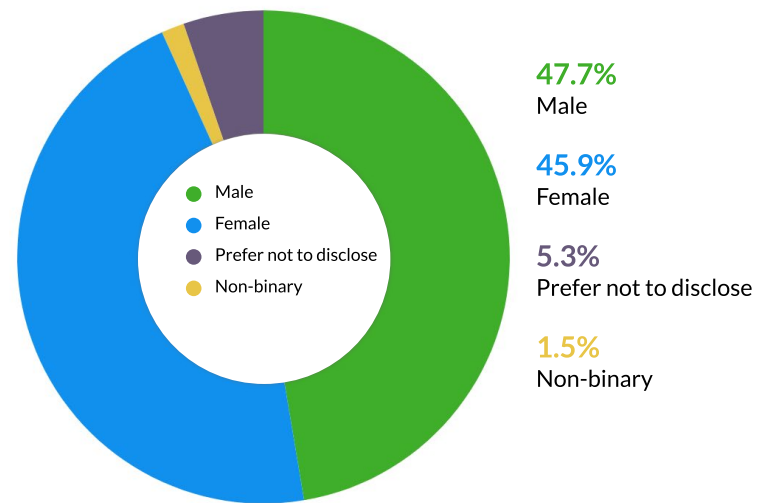
A company-wide look at gender

We're proud of our gender parity as a whole here at TaxJar, but we know that an overall snapshot without a deep dive into each of our teams' make-ups doesn't demonstrate the whole picture, so we've included this, too. Following are our team breakdowns; where we're doing great and where we have room for improvement.

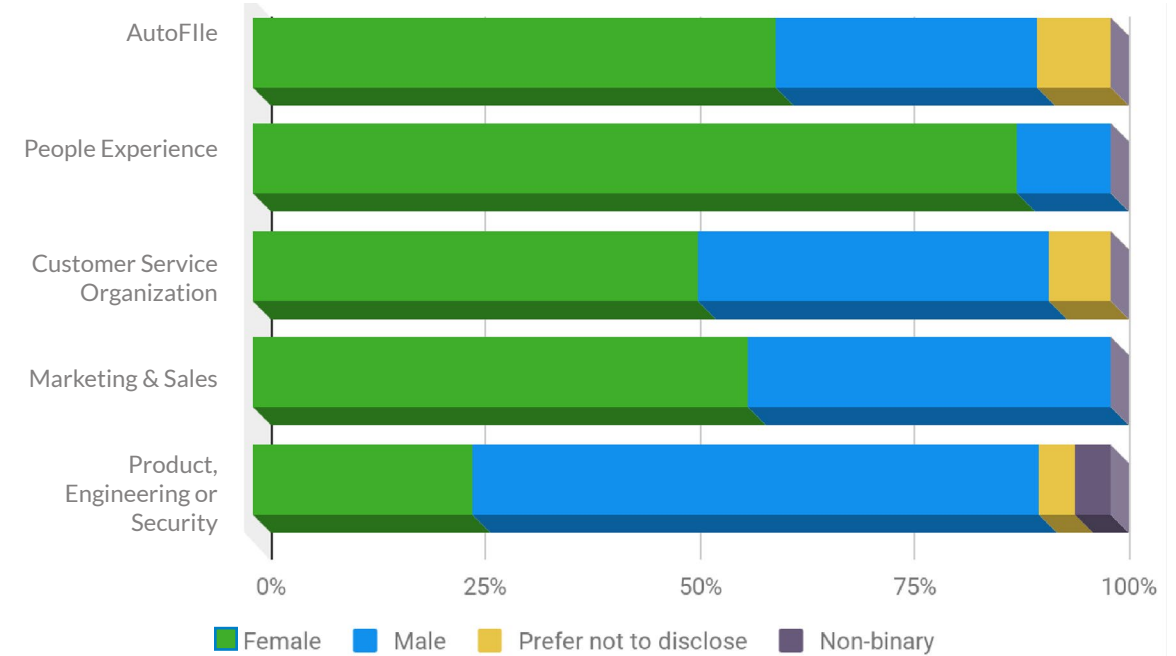
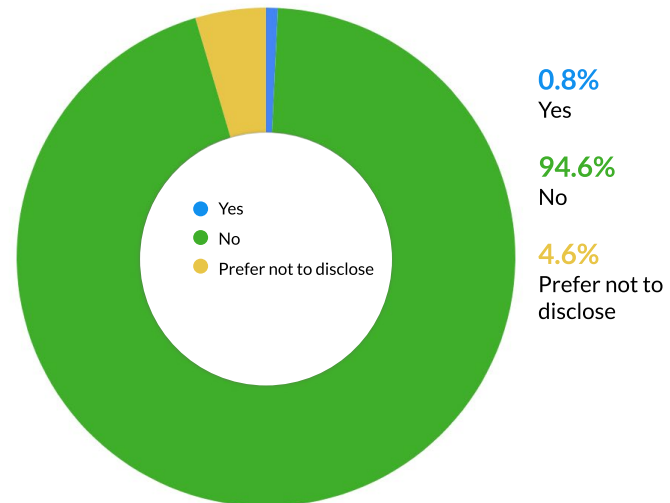
Gender by team



Gender



Do you identify as Transgender?



The make-up of most of our teams is evenly spread with the exceptions of our Technical Department, mostly represented by males, and our People Experience Department, mostly represented by females. We are actively working toward making representation equal across all teams.

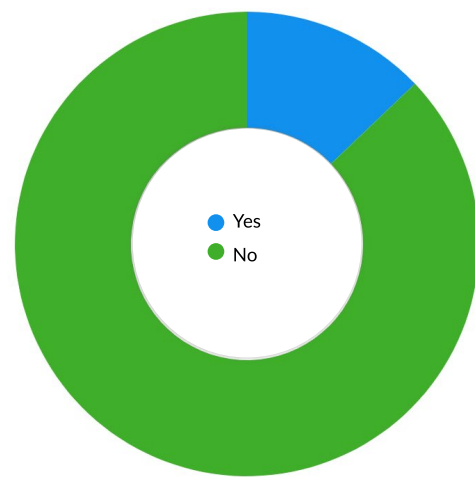
Leadership

Great leaders provide and empower teams to have mastery, autonomy and belonging in their work. To make sure our coaches are equipped and understand how to accomplish this for their teams, unconscious bias, fair and equitable talent assessments, real-time feedback, performance management processes and career development are areas in which we are focused on training our leadership.

Executive Leadership Representation

Inspired by [this post](#) from People of Color in Tech™, we decided to include a photo, and specific breakdown of our Executive Leadership Team (ELT) as part of this report. We have updated this portion of our 2019 data to accurately reflect the current representation of our eight ELT members today.

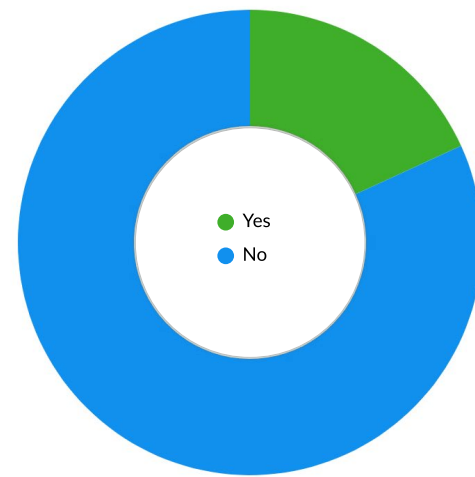
Are you on a Leadership Team?



12.9%
Yes

87.1%
No

Do you manage teammates?



18.2%
Yes

81.8%
No



Carolyn Urban
VP of Customer Success



Elaine Page
VP of People



Mark Faggiano
Founder



Matt Anderson
Co-Founder



Matt Bieniek
VP of Finance



Ryan Thompson
Co-Founder

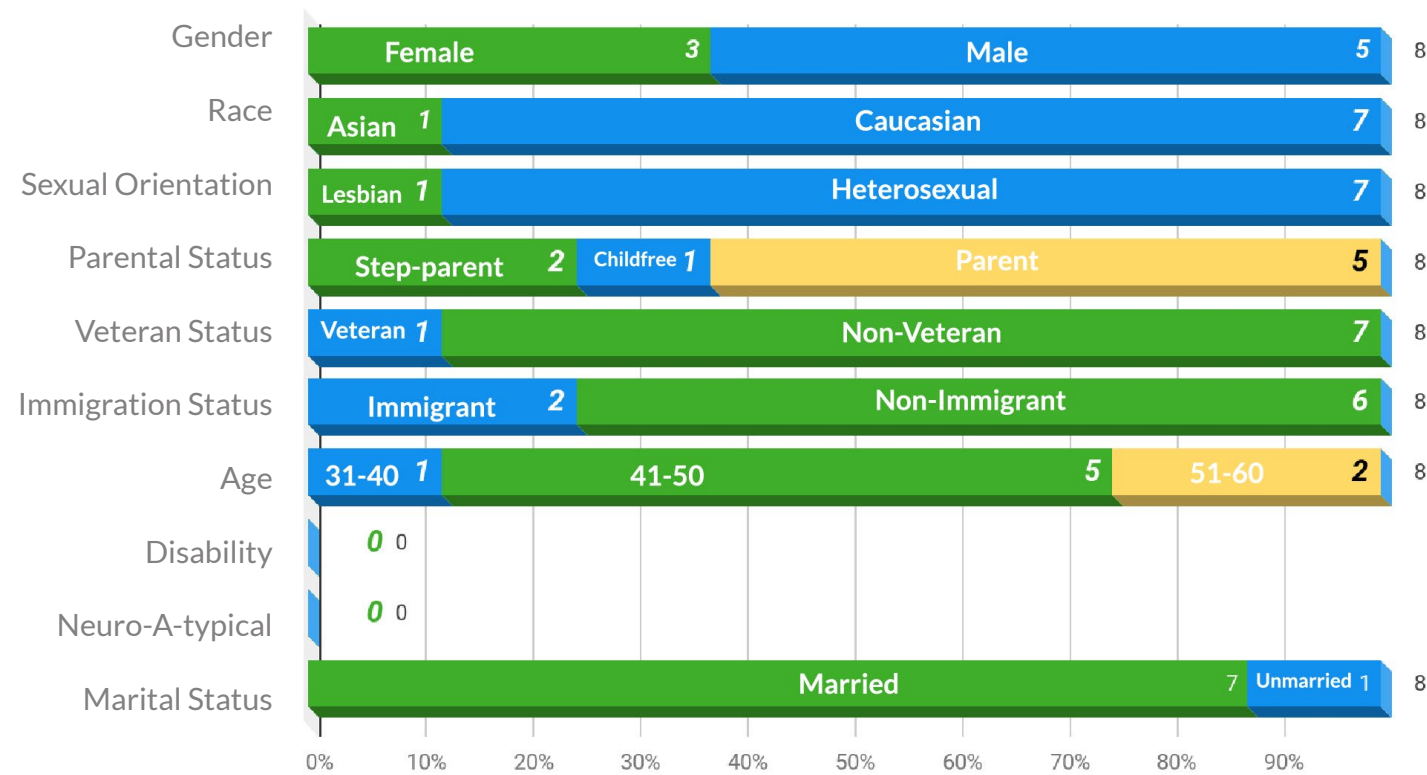


Sara Strobe
VP of Marketing



Vibhor Chhabra
VP of Product

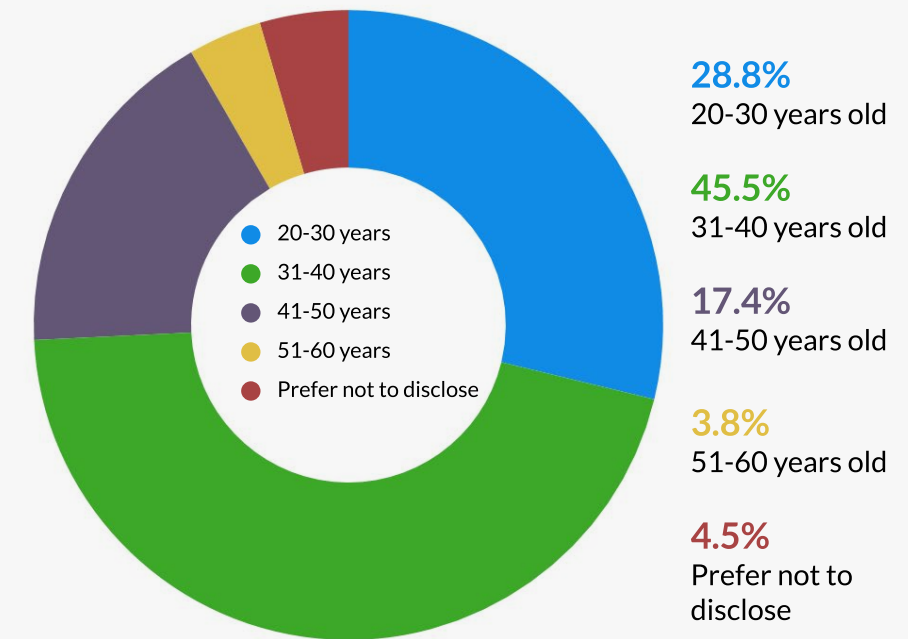
Executive Leadership Representation



Representing our core values is an intrinsic part of our ELT. We are not only committed to diversifying TaxJar as a company; we believe it is imperative that our leadership [reflect our values](#). Thus we are committed to diversifying representation across all leadership, including our ELT.

Age: Company-wide

The largest age-based cohort of our team is between the ages of 31 and 40 years old. Age discrimination in the tech industry is still very real³, and as a remote company we have no reason not to diversify the ages across our teams.

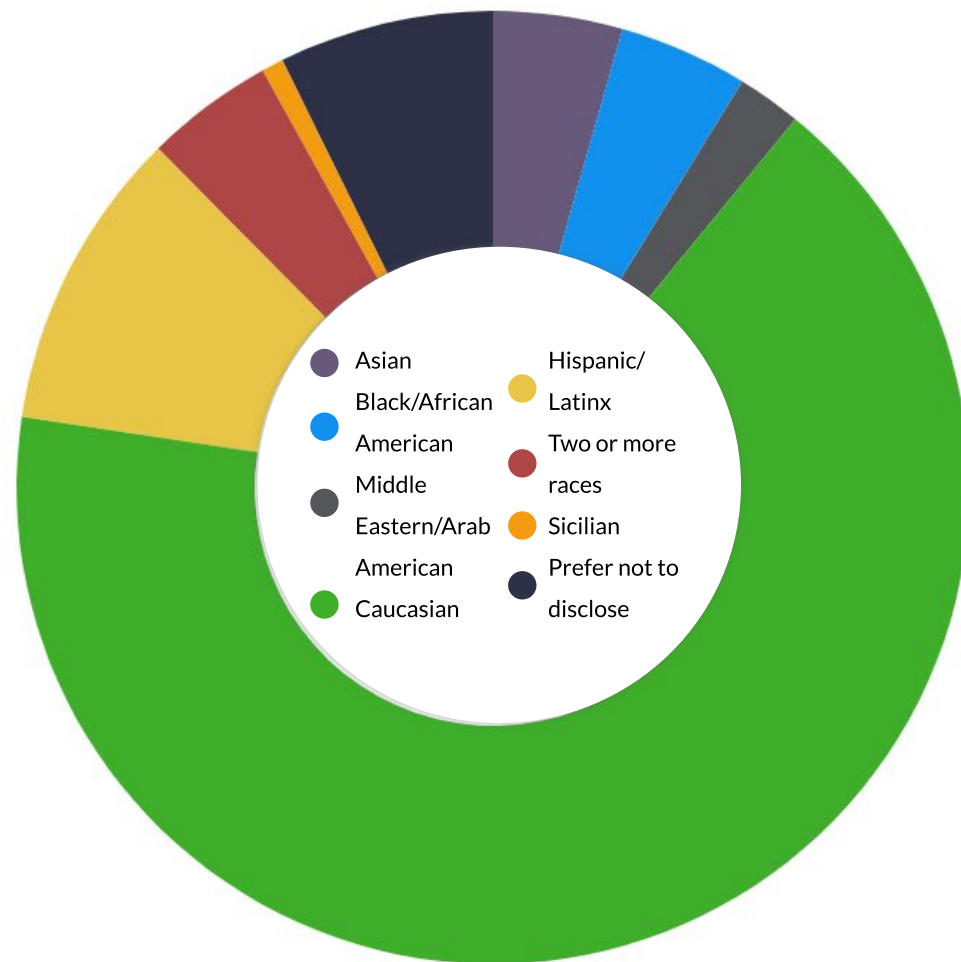


We see opportunities to ensure we fairly source, hire, acknowledge and include teammates across all ages:

- We must continue to evaluate where we choose to communicate, post jobs, and socialize our efforts to ensure we reach all folks who could potentially join TaxJar.
- As a fully remote, tech-based company, we need to ensure that employees of all levels of exposure to virtual office work have the resources and information they need to be successful, and to feel included and valued as a part of our team.

Race: Company-wide

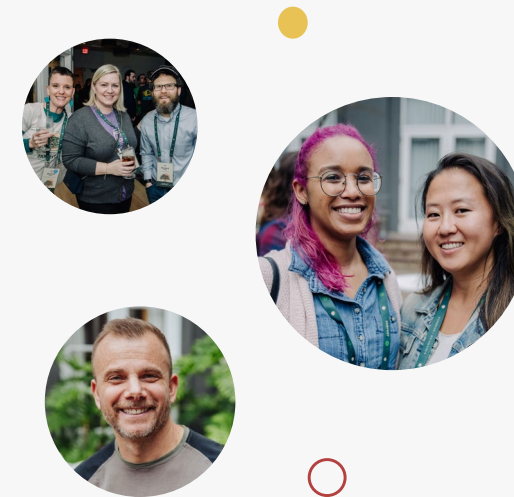
There are no two ways about it: we have some work to do here. While we don't yet have a set makeup in mind where we know we'll feel comfortable with racial representation at TaxJar, we do know that this isn't it. At minimum, as a company with teammates distributed across the country, we'd like to realize numbers more reflective of the American Workforce at 13% Black and 17% Hispanic².



- 4.4% Asian
- 4.4% Black or African American
- 4.6% Middle Eastern or Arab American
- 66.4% Caucasian Non-Hispanic
- 10.2% Hispanic or Latinx
- 4.4% Two or more races
- 0.7% Sicilian
- 7.3% Prefer not to disclose

Intentional Hiring

We've always been committed to hiring the best and brightest to join our team. Improved processes for sourcing, screening and interviewing candidates connect us with even more amazing talent. This brings us closer to ensuring that all qualified candidates have an equal opportunity to make their case as a potential TaxJar teammate. We're hiring and building for the best-in-class team. We also recognize that traditional hiring platforms and networks/networking structures don't equitably elevate all candidates. To truly say we've hired the right person for the job we need to ensure every qualified candidate has the opportunity to show us their stuff. That means it's on us to do our due diligence. We need to, first, look beyond platforms and realms that predominantly elevate white, male talent, and then ensure we have a welcoming, supported, safe and positive experience for all candidates, through the hiring process and well, well beyond.

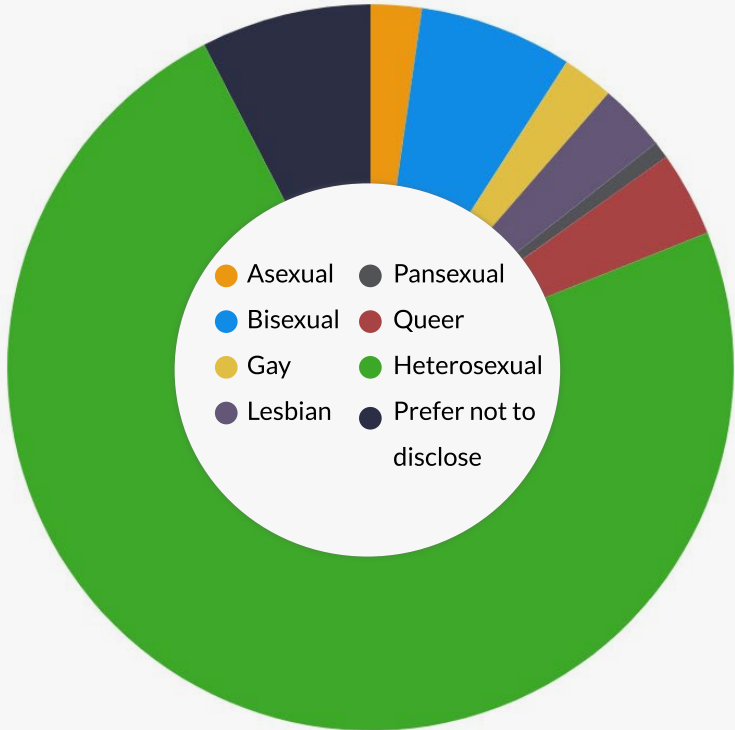


In addition to efforts we've already had in-place:

- Our recruiting team remains committed to its anti-bias practices, and has further committed to sourcing a more inclusive pool of candidates by posting on job boards like [Joonko](#), [People of Color in Tech](#) and [abilityJOBS](#). These sites assist companies in building and broadening diversity in talent by reach
- Including Diversity, Inclusion and Belonging questions as part of our culture interview - it is important that our teammates are not only willing, they actively embrace others' perspectives
- Attend career fairs designed for under-represented groups (once travel is safe again)
- Utilize social media in a more inclusive way, for example avoidance of gender coded wording and job postings accompanied by graphics representative of diversity and inclusion

Sexual Orientation

18.9% of our team identifies as other than straight. We are proud of this, and strive to be a place where our entire team never hesitates to identify as their true selves.

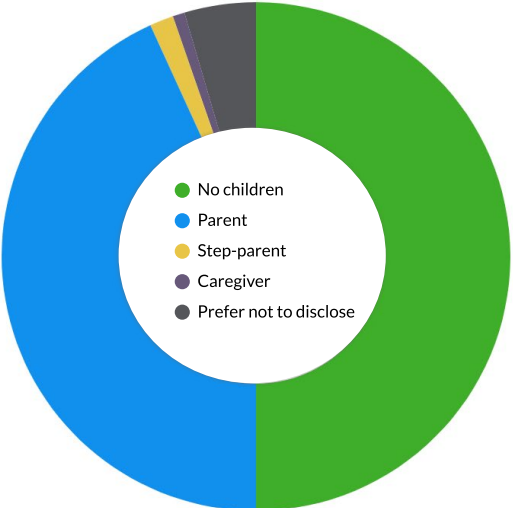


- 2.3% Asexual
- 6.8% Bisexual
- 2.3% Gay
- 3% Lesbian
- 0.8% Pansexual
- 3.8% Queer
- 73.5% Heterosexual
- 7.6% Prefer not to disclose

Some of Team TaxJar horseback riding outside of Nashville, TN during JarFest 10.



Family Status



- 50% No children/dependents
- 43.2% Parent/legal guardian
- 1.5% Step-parent
- 0.8% Caregiver to elderly parent
- 4.5% Prefer not to disclose

Some may be surprised to learn that here at TaxJar, **we don't call ourselves a family**. This is because our team has their own families and we want them to design their lives in a way that puts those families first. We offer 12 weeks of paid parental leave for all of our teammates. You'll see kids on our Friday company-wide Zoom calls, and during unprecedented times we've reassured teammates to continue putting **family-first through COVID-19**. We are also cognizant of approaching time-off equitably. All caregivers are encouraged to take the time they need. There are no questions asked when employees exercise medical leave options or take leave for caretaking whether or not it is related to children. We also have generous PTO guidelines separate from sick time.



Cory Schmitt
Marine Veteran
External Integrations,
Engineering

Alexandra Boyer
Military Spouse
Sales

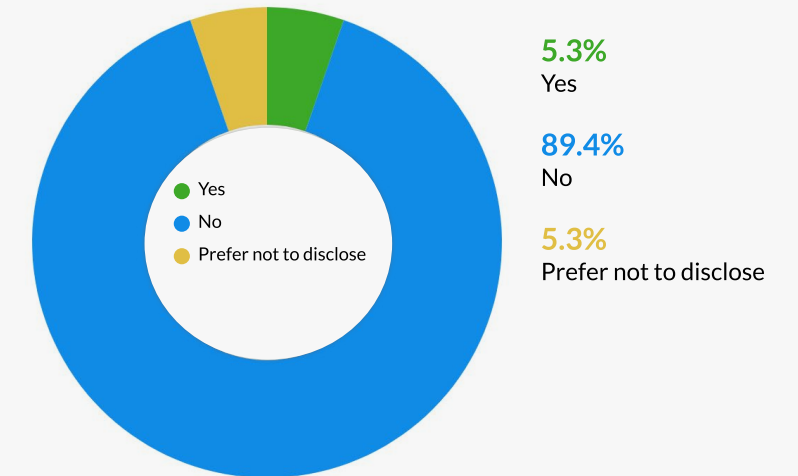
Ryan Le
Army Veteran
Technology Partnerships

Heather Wilson, CMP
Military Veteran Spouse
People Experience Team

Physical disability

We believe that remote provides the autonomy to define workspaces without the impediment of a commute, opens up fulfilling career options for those with physical disabilities and is a step toward diversifying the tech space. We will remain welcoming of candidates with a physical disability who pursue a career with us.

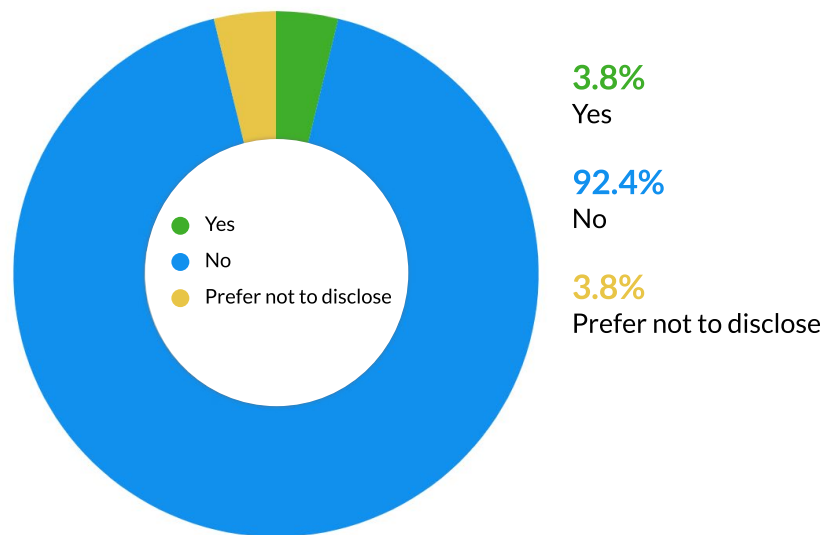
Do you live with a physical disability?



Veteran Status

Veteran and military spouse underemployment remain a challenge⁴. They are a highly qualified, yet continually overlooked pool of talent in the tech industry. With remote, regardless of where they live or how often they have to move, there is no reason for those transitioning out of the military, and spouses of active duty military members to lack work options and career progression. Our recruiting team is currently discussing initiatives to do a better job of bringing Veterans and military spouses into our candidate pool like working with organizations such as [Vets in Tech](#) and [Operation Code](#), for whom some of our team is already volunteering.

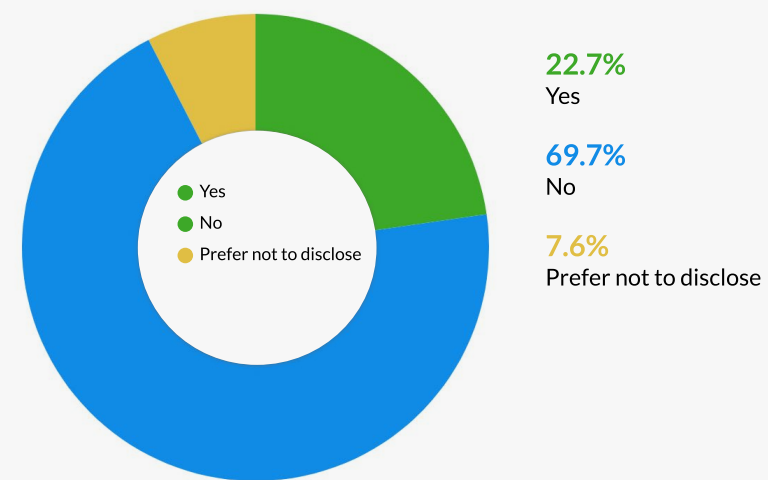
Are you a Veteran?



Neuroatypical identification

At the time of this survey, we asked the team whether they identify as neurotypical. We've since learned it would have been more appropriate to use the term *neurodiverse*, meaning a variation in the human brain regarding sociability, learning, attention, mood and other mental functions. We'd like to acknowledge this oversight, and will continue to seek, embrace and maximize the talents of all of our teammates - current and potential. We maintain our strength lies in diverse talent and thought, and it is our hope to be part of eliminating the stigmas surrounding mental health conditions and variations.

Do you identify as neuroatypical?



Culture & Belonging



Earlier this year, we embarked on an innovative project to visually map our culture, enabling us to build a custom blueprint for the growth and success of our team.

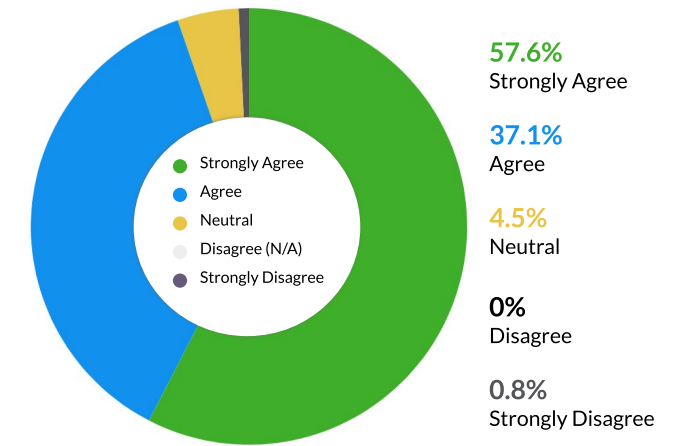
Our blueprint, informed by everyone here TaxJar is in essence, our people “operating system” and is built by our people, for our people. Codifying this operating system, and infusing the cultural blueprint into all our people-practices and programs is helping us to understand what it takes to develop mastery in our work, how to support autonomous actions as well as developing a meaningful sense of belonging for everyone as our company scales.

We have discovered that so much of the work around diversity, equity, inclusion and belonging is really about ensuring everyone can show up and be their most authentic selves during their time at TaxJar.

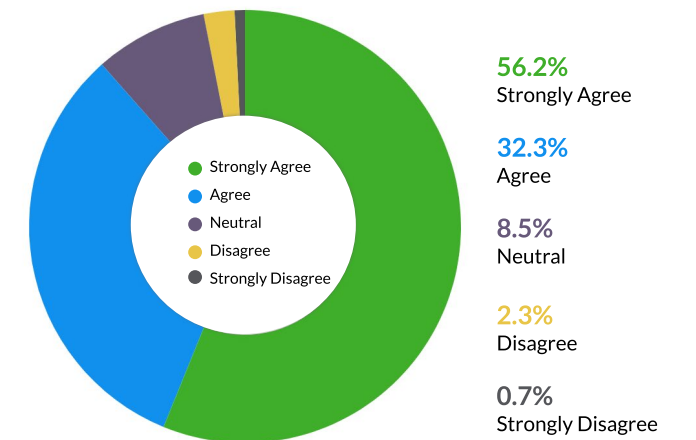
Using [Meaningful Work Lab's](#) proprietary methodology, built from over 30 years of experience and psychological research working around the globe with companies big and small, we now have a data-driven and sustainable way of understanding how our culture works so we can successfully communicate that to attract, onboard, support and develop people who can decide if they can thrive in our highly collaborative, and self-regulating company. It's exciting stuff and another innovative way we are leaning into building a values-driven company, together.

Overall, our team feels they belong at TaxJar, can show up as their authentic selves, and voice opinions that are meaningful. We will continue working so all teammates are confident they matter and are the reason for TaxJar's continued growth and success.

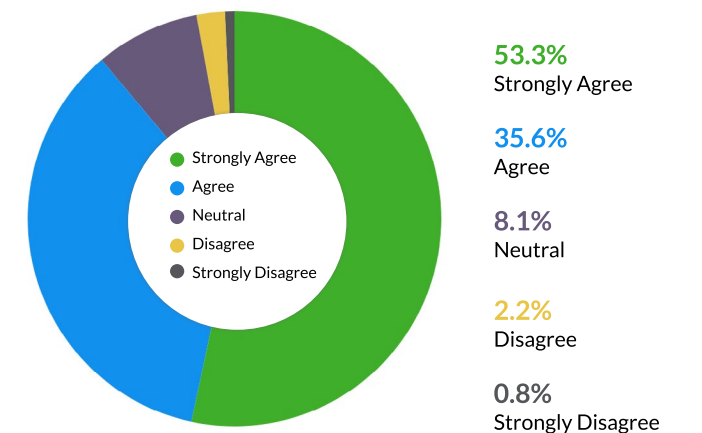
I belong at TaxJar



I can be my authentic self at TaxJar



When I speak up at TaxJar, my opinion is valued

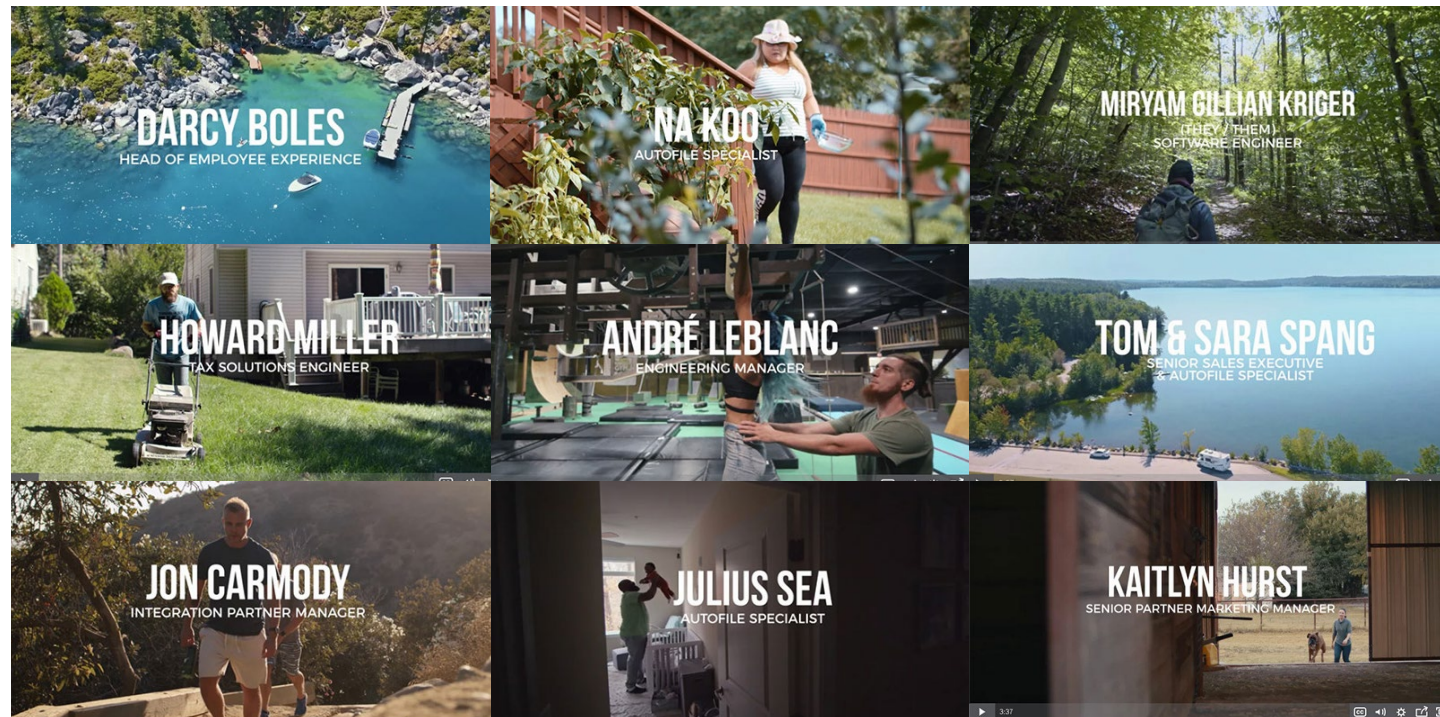


#RemoteLife

Our strength lies in our diverse and passionate team. With remote built into the core of our company, we have **no** excuses when it comes to hiring diversely and sourcing from diverse places.

Earlier this year, we set out to tell the story of remote through ten of our incredible teammates. It is through our different backgrounds, geographies and life experiences that though miles apart, we write TaxJar's story.

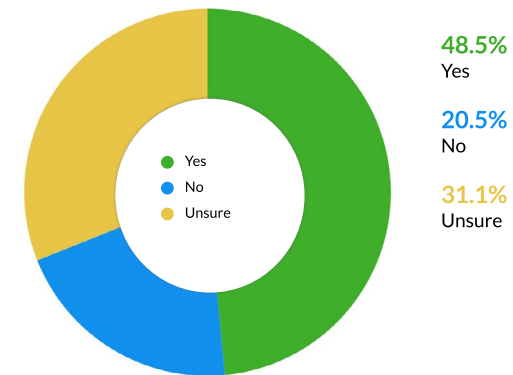
Here are those films...



Click each film to watch

DEIBs Focus

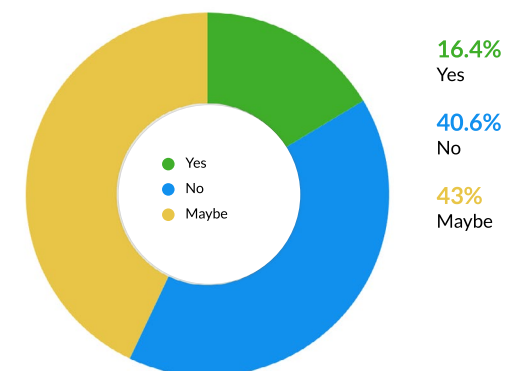
Do you feel like you would benefit from company-wide diversity and inclusion training?



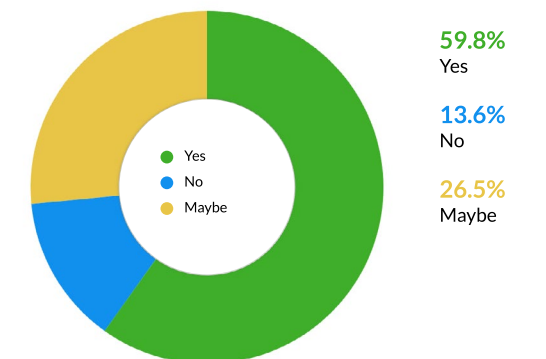
We asked the team their thoughts on Diversity and Inclusions efforts. Truth is, we were surprised with the figures that came back, and presumed interest would be greater.

Open communication and transparency is paramount, and we will continue conversations with our team to answer questions and better understand their thoughts, and address concerns and hesitancies surrounding our efforts.

Would you like to be included in the organization of these efforts?
(i.e. D&I sub-committee, lead an ERG group, etc.)



Would you like to see specific internal efforts focused on Diversity and Inclusion?



What's next?

TaxJar's annual Diversity, Equity, Inclusivity and Belonging Report is a critical component of building a culture that fosters understanding of inequity, bias, diversity, inclusion and how to do better. We are looking within our virtual walls to critically assess opportunities that build more intentionally equitable and inclusive practices. These include, but are not limited to:

- We have donated a total of \$25,000 to the following organizations that our team feels strongly about and who support the changes needed to move toward racial equity:
 - [ACLU - The American Civil Liberties Union](#), mobilizes attorneys, volunteers and offices throughout the US to fight government abuse and defend equal freedoms and protections
 - [Black Girls Code](#), uses community outreach and after school programs in pursuit of their mission to teach coding to 1 million black and girls of color by 2040
 - [EJI - Equal Justice Initiative](#), challenges racial and economic injustice in its long term commitment to ending mass incarceration and excessive punitive measures.
 - [LaunchCode](#), makes tech education and job placement accessible to folks of all backgrounds.
 - [SPLC - The Southern Poverty Law Center](#), uses litigation, education and advocacy to expose and counter hate groups in United States, fight hatred and bigotry and seek justice in these areas



- Re-assessing our internal policies. We love the spirit of flexibility that runs through many of our internal procedures and we acknowledge that the wider team does, too. We also recognize that in certain cases, ill-defined if/then, lack of clarity, or outright omissions create opportunities for inequitable practices. In the coming weeks, we will re-visit the contents of the TaxJar Handbook through a new lens, focusing on policy and procedure updates to prioritize equity and inclusion
- Evaluating our approach to time off and holidays, our travel and expense policies, and our perks and allowances
- Continuing to encourage self-care, and stressing the importance of mental health by providing resources such as our 24/7, no-cost Employee Assistance Program
- Thoughtfully meeting with outside consultants to determine what types of diversity & inclusion training would best benefit our team. While we have the resources and people available to facilitate such training in-house, we feel outside expertise will have a greater impact across our whole team
- Reviewing our branding to make sure it is accessible, for instance that the colors we use on our website and in collateral materials meet accessibility guidelines
- Continue our deep work to codify TaxJar culture (more to come, stay tuned)
- Continuing to regularly share our internal efforts publicly - we believe this not only holds us accountable, it will inspire other Tech companies to evaluate their policies and do better

Resources:
1 [Social Talent - How to: Increase Diversity Through Improved Recruitment and Hiring Processes](#)
2 [US Bureau of Labor & Statistics - Labor force characteristics by race and ethnicity, 2018](#)
3 [IT Pro - Life Ends at 40 in The Tech Industry](#)
4 [Forbes - How Hiring Veterans Wins The War For Tech Talent](#)

It is our sincere hope that sharing our story will teach, help and inspire other companies and entrepreneurs to build great businesses. We embrace being corrected, learning, growing and changing our course as needed. And we sincerely thank our team and the TaxJar community for their support on this important journey.

