



Declaration of Candidacy

Candidates for election as Second Vice President, Secretary-Treasurer, or Director Elected Nationally must complete this form and submit it to the Chief Executive Officer at the principal headquarters of DRI by 5:00 PM (CDT) on July 1st of the year in which the election is held.

National Director Requirements - Directors Elected Nationally or by Region must be Individual Members of the Corporation admitted to the practice of law. Each such director must meet the following qualifications at the time of election: (a) The candidate shall have been a DRI member for a total of at least five (5) years, and (b) The candidate shall have been a member of at least one DRI substantive law committee for at least three (3) years, and (c) The candidate must have registered for and attended at least one (1) DRI Annual Meeting within the previous three (3) years, and, within the three (3) years prior to the final day of the Annual Meeting, the candidate must have 1) registered for and attended at least two (2) DRI seminars, or 2) registered for and attended one (1) DRI seminar and one (1) DRI Regional Meeting.

Please also see the DRI Board of Director and Officer Competencies, attached.

Position sought:

Second Vice President* Secretary- Treasurer National Director

*If you have declared your candidacy for Second Vice President and are not the successful candidate, will you consider the Secretary - Treasurer Officer position?

Yes No

Sara M. Turner

Baker, Donelson, Bearman, Caldwell, and Berkowitz, P.C.

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How long have you been a member of DRI?

21 years

Areas of practice:

My practice is focused on the nationwide defense of complex commercial and mass tort claims primarily in the following areas of law: Hospitality and Franchise, Drug and Medical Device, Products Liability, and Commercial Litigation.

Please provide your employment history in chronological order beginning with the current position.

2006 – 2024 – Shareholder, Baker Donelson Bearman Caldwell & Berkowitz, P.C., Birmingham, Alabama

2003 – 2006 – Associate, Larson King, LLC, St. Paul, Minnesota

Please describe your previous involvement in DRI, including but not limited to, leadership positions held, projects contributed to, committee memberships, presentations given, and written materials authored. Special accomplishments should also be noted.

I currently serve as the DRI Secretary-Treasurer (2023-2024). In this role, I have worked closely with Dean Martinez, Sean Dolan, and the DRI Auditor to oversee the financial health of our organization, ensuring fiscal responsibility and transparency. My duties have included presenting financial reports to the Executive Committee and the Board of Directors, assisting in development and maintenance of the budget, and collaborating with the Executive Committee to develop strategic financial plans that support DRI's mission and goals. I have also maintained meeting minutes for the Executive Committee and Board of Directors meetings for the review and approval of the respective entities. I also currently serve as the Executive Committee Liaison to DRI for Life and DRI Cares.

Below is a summary of my past DRI Leadership Positions and Involvement:

- Board of Directors – National Director (2020-2023)
- Annual Meeting Steering Committee Chair (2023)
- Women in the Law – Board Liaison (2020-2023)
- Products Liability Steering Committee Member
- Retail and Hospitality Committee Member
- Drug and Medical Device Committee Member
- Diversity Steering Committee Member

- **Retail and Hospitality**
 - Committee Chair (2018-2020)
 - Committee Vice Chair (2016-2018)
 - Seminar Chair (2016)
 - Seminar Vice Chair (2015)
 - Speaker, Retail and Hospitality Seminar (2013)
 - Seminar Planning Committee Member (2012-2013)

- Steering Committee Member (2012-2013)
- Co-Author, Franchisor Liability for Franchisee Actions, In-House Defense Quarterly (2012)
- **Technology**
 - Committee Chair (2011-2013)
 - Committee Vice Chair (2008-2011)
 - Teleconference Chair (2007)
- **DRI For Life**
 - Committee Chair (2020-2022)
 - Steering Committee Member (2014-2016)
- **Annual Meeting Steering Committee**
 - Chair (2023)
 - Vice Chair (2022)
 - Chair, Substantive Law Committees Subcommittee (2022)
 - CLE on the Go, development and planning (2022)
 - Rocky Run / Walk and River Run / Walk development and planning (2022)
 - Vice Chair, Substantive Law Committees Subcommittee (2021)
 - Young Lawyer Steering Committee Member (2009)
- **Products Liability**
 - Steering Committee Member
 - Chair, Products Manufacturer's Risk SLG (2014-2015)
 - Vice Chair, Products Manufacturer's Risk SLG (2013-2014)
 - Chair, Panel Counsel Meetings (2012-2014)
 - Vice Chair, Panel Counsel Meetings (2011-2012)
 - Chair, Membership (2011-2012)
 - Speaker, Products Liability Seminar (2011)
 - Chair, 50th Anniversary Task Force Subcommittee for Products Liability Committee (2010)
 - Chair, Chemical and Toxic Torts SLG, Products Liability Committee (2008-2010)
 - Seminar Planning Committee Member (2009, 2010)
 - Liaison to Diversity Committee and planned Diversity breakfast at Products Liability Seminar (2008-2009)
 - Coordinating Author, Nationwide Products Liability Caselaw Update (2007)
 - Diversity Subcommittee Chair (2007)
 - Strictly Automotive Seminar Steering Committee Member (2007)
 - Chair, Automotive SLG (2006)

- **Women in the Law**
 - Board Liaison (2020-2023)
 - Steering Committee Member (2010)
 - Vice Chair Liaison from Products Liability to WITL (2010)
 - Seminar Marketing Committee Member, WITL (2010)
 - Seminar Planning Committee “Sharing Success: A Seminar for Women Lawyers” (2007)

- **Young Lawyers**
 - Seminar Chair (2011-2012)
 - Seminar Vice Chair (2010-2011)
 - Seminar Second Vice Chair (2009-2010)
 - Chair, Annual Meeting Subcommittee (2008-2009)
 - Liaison to Products Liability Committee (2007-2008)
 - Chair, Teleconference Subcommittee (2006-2007)
 - Vice Liaison to Products Liability Committee (2006-2007)
 - Chair, SLDO Subcommittee (2005-2006)
 - Vice Chair, SLDO Subcommittee (2004-2005)

- **Trucking Law**
 - Seminar Planning Committee (2010-2011)
 - Steering Committee Member (2006-2012)
 - Chair, Annual Meeting Programming Subcommittee (2009)
 - Speaker, Trucking Seminar “Development and Use of Transportation Experts” (2008)
 - Teleconference Chair (2007)
 - Seminar Planning Committee, Chair of Young Lawyer Track (2007)

- **Other Taskforces, Committees, Publications, and Seminars**
 - "What Hotels Wish You Knew About Event Contracts," DRI (October 2020)
 - "Working From Home, Homeschooling, and the Issues Both Present," DRI Podcast (May 2020)
 - "Managing Teams Remotely Part One of the Work From Home Series," DRI Podcast (March 2020)
 - Data Management and Security Committee, Steering Committee Member, Annual Meeting CLE Planning Chair (2015)
 - Speaker – Rainmaking Seminar, Las Vegas, NV (2012)
 - 21st Century Lawyer Taskforce Member (2012-2013)
 - Insurance Roundtable – Steering Committee Member and Speaker (2010)
 - Social Networking Committee Taskforce (2010-2011)
 - Climate Change Taskforce (2009)

- Speaker and Marketing Chair, Best Practices for Law Firm Profitability Seminar (2009)
- DRI Representative to the Trial Advocacy Initiative / Law School Advisory Committee (a project of the Civil Bar Roundtable) (2009)
- Planning Chair, Web Conference – “Legal Blogging – Prepare to Practice in the Blogsphere” (2008)
- Large Law Firm Initiative, Steering Committee Member (2007)

List any significant leadership commitment and involvement within the legal field other than DRI, including but not limited to other legal organizations.

Current

- IADC Member (2010-Present)
 - IADC Annual meeting speaker (2021)
- FDCC Member Spouse (2007-Present)
- Alabama Defense Lawyer’s Association
- Chair, Hospitality Industry Service Team, Baker Donelson
- Women’s Initiative Steering Committee, Baker Donelson
- International Franchise Association

Former

- Minnesota Defense Lawyers Young Lawyer’s Section – Founder and Chair
- US Law Young Lawyer’s Section – Founder and Chair
- Speaker, Tennessee Defense Lawyer’s Association / Alabama Defense Lawyer’s Association Joint Meeting
- Alabama ACC Chapter Meeting Host (2012-2013)
- Webinar Presentation – Preparing for and Defending Big Food Lawsuits
- September, 2012 – Inside Counsel Publication – “What to Know About the New Big Food Law” (2012)
- Member of the Diocesan Advisory Council for Catholic Education, Birmingham, AL (a/k/a Birmingham area Catholic Diocesan School Board)
- President, Homewood Youth Cheerleading Board of Directors (2011-2012)
- Vice President, Homewood Youth Cheerleading Board of Directors (2010-2011)
- Member of the Board of Directors, Homewood Youth Cheerleading (2007-2018)
- Baker Donelson Women’s Initiative Speaker (2008)

Other Professional Awards

- AV® Preeminent™ Peer Review Rated by Martindale-Hubbell

- Listed in The Best Lawyers in America® for Product Liability Litigation - Defendants (2024)
- Selected to Mid-South Super Lawyers, Personal Injury - Products: Defense (2016 – 2023)
- Selected to Mid-South Super Lawyers as one of the top 50 female attorneys (2018, 2019, 2022, 2023)
- Selected to Alabama Super Lawyers, Personal Injury - Products: Defense (2014 – 2015)
- Selected to the Birmingham Business Journal's 2024 Best of the Bar List
- Listed in BTI Consulting Group's Client Service All-Stars for Law Firms (2017 and 2023)
- Named by B-Metro Magazine as one of "Birmingham's Top Women Lawyers" (2016 – 2018, 2020, 2022)
- Named to the Birmingham Business Journal's 2020 "Women to Watch" list
- Named by B-Metro Magazine as a "Top Flight Attorney" (2018)
- Named "Top 40 Professional Under 40," Birmingham Business Journal (2013)
- Listed in Alabama Rising Stars, Personal Injury - Products: Defense (2011 – 2013)

Why do you wish to join the board of directors or become an officer and what skills, abilities and attributes identified in the Board of Director/Officer Competencies can you bring to the role?

I am eager to advance within the Executive Committee as the Second Vice President because I am deeply committed to advancing DRI's mission and values. With 21 years of active membership and a variety of leadership roles within DRI, I have developed a comprehensive understanding of the organization's strategic goals and operational needs. My experience as Secretary-Treasurer this past year has equipped me with firsthand knowledge of DRI's financial and administrative functions, further preparing me for the responsibilities of Second Vice President.

I bring a robust and broad set of skills and attributes that align with DRI's key competencies:

- **Leadership:** As Chair of multiple committees and steering committees, including the Annual Meeting Steering Committee, Retail and Hospitality Committee, and Technology Committee, I have demonstrated my ability to lead diverse teams towards achieving strategic goals. Specifically, as Chair of the Retail and Hospitality Committee, I quadrupled the size of our steering committee and added Substantive Law Sub-Committees to address the wide diversity of practice areas represented within that committee.

At the same time, I have taken specific efforts to ensure that my commitments outside this organization are more limited looking forward to the next few years. I have passed on opportunities to engage in other leadership roles to ensure that I have room on my plate to fully

participate as Second Vice President. We all have busy legal practices, but making sure that my non-work-related commitments are focused on DRI had been one of my main priorities this year. I want to be able to fully commit my non-profit time to this opportunity and the service of DRI. My experience as Secretary-Treasurer has shown me the time commitment necessary to be successful as an active member of the Executive Committee. I strongly believe that my perspective on this issue will offer me an advantage in terms of my ability to lead DRI.

- **Governance:** My tenure on the Executive Committee, Board of Directors, service as Chair of two Substantive Committees (Retail and Hospitality and Technology), and my involvement in various governance roles within DRI have provided me with a solid understanding of nonprofit governance and strategic leadership. I have also served on the Boards of Directors for two other non-profit organizations and the Executive Committee of another. I have held significant leadership positions within my firm, and I manage a large team of lawyers and staff as part of my national litigation practice. These roles have provided me with invaluable experience in strategic planning, governance, and community engagement. I have successfully guided these organizations through key initiatives such as policy development, fundraising campaigns, and member outreach programs. These experiences have helped me develop an understanding of effective non-profit management, the importance of collaboration and consensus-building, and the ability to inspire and motivate teams to achieve their objectives.

- **Public Speaking/Spokesperson:** I have consistently represented DRI at national meetings and seminars, showcasing my ability to effectively communicate and advocate for our organization. My role as a spokesperson for other non-profits and my firm has further refined my public speaking skills and my ability to engage diverse audiences, effectively conveying the mission and vision of the organizations I represent. As national litigation counsel, I have had the opportunity to appear before courts in more than 30 states, several appellate courts, and the Judicial Panel on Multidistrict Litigation. I believe these experiences have allowed me to gain a reputation as a highly qualified advocate. I strongly believe in DRI's mission and look forward to the opportunity to continue to use my advocacy skills to promote DRI.

- **Conflict Resolution and Team Orientation:** My collaborative approach and ability to resolve conflicts have been key in leading successful initiatives and ensuring productive outcomes in committee work. My experience on other non-profit boards and as the leader of a large team within my firm has also involved mediating conflicts, facilitating consensus, and fostering a collaborative environment among board / team members and stakeholders, ensuring that diverse perspectives are valued and considered in decision-making processes.

- **Innovative and Strategic Thinking:** I have initiated and developed programs such as CLE on the Go and various seminar planning committees, demonstrating my capacity for innovative solutions and strategic planning. In my role on the DRI for Life Committee as Chair and Vice Chair, I developed several DRI programs during the pandemic period to address lawyer mental health and wellness, as well as to provide information regarding COVID-19. I gave DRI members important content during a period during which almost all programming had been halted. My leadership roles in other non-profits have included spearheading innovative projects, strategic initiatives, and fundraising campaigns that have significantly advanced their missions and

ensured their sustainability. As leader of my team at Baker Donelson, I have participated in a 360-review process and worked with a team leadership coach. This continuous feedback and coaching have enabled me to refine my leadership approach, stay adaptable, and promote a forward-thinking perspective. I believe that my work with a one-on-one leadership coach gives me an invaluable asset to bring to the Executive Committee as we work through the business of DRI while also focusing on specific strategic initiatives.

- **Diversity, Equity, and Inclusion (DE&I):** As a member of the Diversity Steering Committee and Chair of the Diversity Subcommittee for the Products Liability Committee, I have actively promoted DE&I initiatives within DRI, ensuring that our organization remains inclusive and representative of all members. My commitment to DE&I is also reflected in my work with other non-profits, where I have championed initiatives to enhance diversity, foster inclusive environments, and implement policies and practices that promote equity and access for all members and stakeholders. My commitment to do the same on my own team has allowed me to recruit diverse members, thereby enhancing our ability to service our clients in critical ways. The same is true for DRI and I am committed to increasing DRI's DE&I efforts.

What suggestions would you make to move the organization forward?

To move DRI forward, I propose the following initiatives:

- 1. Enhanced Member Engagement:** Continue to improve upon our comprehensive member engagement strategy that includes personalized outreach, mentorship programs, and increased opportunities for member involvement in leadership roles. This will inherently foster a stronger sense of community and belonging among our members. I would also propose focusing in more detail on how we can serve specific groups of lawyers that may be key components to DRI's future growth. For example, ensuring that we are meeting the needs / wants of young lawyers as we experience generational shifts, focusing on recruitment of firms and lawyers not traditionally served by DRI (including large law firms), looking for ways to offer increased value to those members that have been with DRI for some time, but have not yet actively engaged in the opportunities we offer, and creating benchmarks for DE&I.

- 2. Innovative Educational and Networking Programs:** Expand our educational and networking offerings by incorporating more virtual and on-demand content, allowing members to access high-quality CLE programs at their convenience or networking opportunities online / closer to home. This will enhance our value proposition and attract a broader audience. Include alternative educational and networking opportunities that are not hindered by our traditional model. For example, CLE on-the-Go or other innovative options that allow members to connect in ways that might feel more engaging for some.

- 3. Strengthened DE&I Efforts:** Continue to advance our DE&I initiatives by setting measurable goals and benchmarks, increasing diversity in leadership positions, and providing training on inclusive practices. This will ensure that DRI remains a leader in promoting diversity within the legal profession.

4. Strategic Partnerships: Develop strategic partnerships with other legal organizations, SLDOs, NDOs, and the Center to expand our reach and influence. Collaboration will enable us to leverage resources, share best practices, and create synergies that benefit our members. The Center is an important part of DRI's future and ensuring that it is well supported is a critical part of where DRI can look for expanded opportunities. There is also no question that the NFJE will continue to be part of DRI's overall mission, and we need to ensure the NFJE is a success.

5. Member Support and Wellness: Prioritize member wellness by offering resources and programs that address mental health, work-life balance, and professional development. Supporting our members' overall well-being will enhance their satisfaction and retention. I have been so impressed with all that the Foundation, DRI for Life, and DRI Cares have done this year and I would be thrilled to have the opportunity to continue to support their important efforts.

Describe one transformational/defining experience in your professional life you have been involved with and what you learned from that experience.

One of the most transformational experiences in my professional life has been managing a demanding trial practice while raising six young children (along with my amazing lawyer spouse, and fellow DRI member). Balancing the responsibilities of a busy legal career with the needs of a large family presented significant challenges, but it also provided invaluable lessons in time management, prioritization, and resilience.

As a mother of six with a full-time trial practice, I had to develop efficient strategies to integrate my work and personal life. This meant mastering the art of multitasking, maintaining a strict yet flexible schedule, and setting clear boundaries to ensure that both my clients and my family received the attention they deserved. I learned to delegate effectively, both at home and in my professional environment, trusting my team to handle responsibilities and empowering them to make decisions.

The experience also taught me the importance of maintaining a work-life balance. I realized that taking care of my well-being and spending quality time with my family was crucial for sustaining high performance in my professional role. This balance allowed me to stay focused, energized, and motivated, even during the most demanding periods of my career. The lessons I have learned apply to numerous other professionals who balance their roles as attorneys with their responsibilities as parents.

Now that most of our children are young adults, I am ready to apply the skills I honed during those years to my work on the Executive Committee. The ability to balance multiple high-stakes responsibilities, integrate diverse aspects of life, and maintain a strategic focus are all competencies that I bring to the table. My personal experience has equipped me with a unique perspective on managing complex situations, fostering a supportive team environment, and ensuring that all aspects of an organization are aligned and functioning effectively. My kids can tell you better than anyone how my leadership style has evolved and grown over the years. I have learned that quality leadership is something you have to work at, not something you are

born with. I believe that the best leaders are those that make intentional decisions to work on that skill set on a daily basis.

This journey has not only shaped me as a professional but also as a leader who understands the value of work-life integration and the importance of supporting those around me. I am eager to bring these insights and skills to the role of Second Vice President, where I am confident they will contribute to the continued success and growth of DRI.

Describe the greatest challenges and opportunities that lie ahead for DRI over the next five+ years.

The greatest challenges and opportunities for DRI over the next five years include:

- **Adapting to Technological Advances:** The rapid pace of technological change, and particularly the transformative capabilities of AI, presents both challenges and opportunities for DRI. We must stay ahead of these changes by integrating new technologies into our educational programs and member services to remain relevant and competitive.
- **Enhancing Member Value:** As the legal industry evolves, we need to continually reassess and enhance the value we provide to our members. This includes offering cutting-edge CLE programs, expanding networking opportunities, and providing resources that address emerging legal trends and issues.
- **Promoting DE&I:** Ensuring that DRI remains a leader in promoting diversity, equity, and inclusion is both a challenge and an opportunity. We must continue to implement effective DE&I initiatives and strive to create a more inclusive and representative organization.
- **Navigating Economic and Political Uncertainty:** The pandemic taught us well that economic and other significant fluctuations can impact our members and the legal industry. We must be prepared to support our members through these challenges by offering resources, networking opportunities, and professional development programs that help them navigate these uncertain times.
- **Expanding Our Reach:** There is an opportunity to expand DRI's reach by forming strategic partnerships, increasing our presence, especially within North America, and attracting new members from nascent practice areas, regions, and firm sizes. This will strengthen our organization and enhance our ability to achieve our mission.

DRI strives to be governed by a diverse board of directors—in terms of race, ethnicity, age, gender, religion, sexual orientation, disability, location, and/or professional level, and other facts that enhance diversity and inclusion --- who can and will help advance DRI's goals through the power of collaboration. In what ways have you demonstrated a commitment to Diversity, Equity and Inclusion in your work, and how will your DE&I experience inform your contributions as a Board member?

I have demonstrated a strong commitment to DE&I through various leadership roles within DRI and my professional career. As a member of the Diversity Steering Committee and Chair of the Diversity Subcommittee for the Products Liability Committee, I have actively promoted DE&I initiatives, organized diversity-focused events, and advocated for greater representation within our organization. Additionally, I co-chaired the parental leave committee at Baker Donelson, which was tasked with developing a new, comprehensive parental leave policy. We created a policy that greatly expanded the firm's support and flexibility for new parents. This initiative not only improved the work-life balance for our lawyers but also fostered a more inclusive and supportive work environment, promoting employee well-being, and organizational success.

My DE&I experience will inform my contributions as a Board member by ensuring that we continue to prioritize and advance our DE&I goals. I will advocate for inclusive policies, support initiatives that promote equity and access, identify issues and elevate perspectives from diverse community, and work to create an environment where all members feel valued and respected. Additionally, I will leverage my experience to mentor and support emerging leaders from diverse backgrounds, helping to build a more inclusive and representative leadership pipeline for DRI.

Is there anything else you would like to add that has not already been previously stated?

I am deeply honored to be considered for the role of Second Vice President. Throughout my 21 years of membership and extensive involvement in DRI, I have developed a profound appreciation for our organization's mission and the incredible impact it has on the legal profession. Now, more than ever, I am committed and able to serve our members with integrity, dedication, and a forward-thinking approach. I am confident that my skills, experience, and passion for DRI will enable me to make meaningful contributions as Second Vice President and help lead our organization to new heights.