

UPDATED COMMUNICATION PLAN

MTC STRATEGIC PLANNING COMMITTEE

PHASE 2 – Planning for the Future

V 3.0 – December 30, 2011

DRAFT

KEY MESSAGES FOR PHASE 2:

What are we doing?

- We are developing a strategic plan for the Multistate Tax Commission.
- Our plan will be completed by the annual meeting in July 2012.

What is a strategic plan and what does it mean for the MTC?

- A strategic plan is a tool for setting priorities and focusing the efforts and resources of an organization to achieve its primary purpose.
- When our plan is developed, we will have set the MTC's direction for the next 5-7 years.
- The strategic plan will establish specific goals and objectives to help the MTC achieve its primary purpose.
- The strategic plan will also give us a process to establish and update our priorities for investing our time and resources.

Why are we doing this now? What do we want to accomplish?

- MTC hasn't done any significant strategic planning for quite a while. The pace of change today makes it more important to clearly understand and agree where we want to be going and how we plan to get there.
- Our 2011 environmental scan confirmed that there are challenges and opportunities that MTC must be ready to act on. We want to be fully prepared to meet the challenges and take advantage of the opportunities.
- We want the MTC to be recognized as a leader in the field of multistate tax policy development and compliance, and a valued partner to the states and our stakeholders.

How will the planning process be done?

- The Steering Committee will complete the key building blocks:
 - Mission – a succinct statement of the core purpose for the MTC
 - Values – a description of the key principles that drive the MTC's actions
 - Vision – a statement of the high level direction for the MTC over the next 5-7 years
 - Goal areas – a description of the key areas in which we need to focus in order to achieve our vision
- The Steering Committee will draw on the knowledge and talents of the states, our staff and our stakeholders to help us develop strategic goals that will define success at a high level and decide how we will monitor our progress.
- The Steering Committee will select one or two strategic goals for further refinement so that we can describe the outcomes that will help MTC make progress toward its strategic goals and vision.
- Small groups will be tasked to develop action plans to achieve the selected outcomes.

Who is managing this process?

- There is a steering committee to manage the planning process. Steering committee members are: Cory Fong (chair), Steve Cordi, Alana Barragan-Scott, Nancy Prosser, and Joe Huddleston. The Steering Committee's role is to lead and coordinate the planning process.
- There is also a facilitator-Elizabeth Harchenko. The facilitator will guide the process and assist the steering committee in conducting the planning process.

PHASE 2 TIME LINE:

- Steering Committee meeting – **January 18, 2012**
 - Prioritize goal areas; begin to develop goal statements for highest priority goals
 - Continue to develop goal statements for top priority goal areas
 - Select one or two goal areas (examples: compliance; communication) for development of strategic objectives that will help MTC achieve the stated goals.
 - Identify one or more groups (committees; staff; commissioners) to help define strategic objectives for the selected goal(s).
- Steering Committee meeting - **February 2012**
 - Review feedback from states, staff and stakeholders on Mission, Values, Vision statements – approve final drafts
- Steering Committee meeting – **March 2012**
 - Reports from delegated groups on progress on strategic objectives.
 - Provide feedback, guidance to delegated groups.
- Steering Committee meeting – **April 2012**
 - Final reports from delegated groups on strategic objectives.
 - Select one or two strategic objectives (from priority goal areas) and identify potential tactical plans that will help the MTC begin to achieve those strategic objectives. (Ideally, a tactical plan will support more than one strategic objective.)
 - Identify resources (state, staff, stakeholders) needed to develop details of tactical plan.
 - Form tactical plan work groups.
- Steering committee meeting –**May 2012** (in conjunction with spring Executive Committee meeting)
 - Select a tactical plan or plans to pursue.
 - Assign responsible for development of the plan(s) – who does what and when; what resources will be needed; how success will be measured.
 - Update report to Executive Committee.
- Steering Committee meeting – **June 2012**
 - Progress reports from tactical plan work group(s).
 - Feedback and guidance for tactical plan work group(s).
- Steering Committee meeting – **July 2012**
 - Final reports from tactical plan work group(s).
 - Prepare report for Executive Committee and Commission.
- Implement tactical plan. **August 2012**

KEY COMMUNICATORS: MTC Chair; planning committee chair; Strategic Planning Steering Committee members

Contact Information:

Steering Committee members:

Cory Fong, North Dakota Tax Commissioner, Chair, coryfong@nd.gov

Steve Cordi, District of Columbia Office of Tax and Revenue, Stephen.cordi@dc.gov

Nancy Prosser, Special Assistant for Tax Policy, Texas Comptroller of Public Accounts, nancy.prosser@cpa.state.tx.us

Alana Barragan-Scott, Director, Missouri Department of Revenue, Alana.barragan-scott@dor.mo.gov

Joe Huddleston, Executive Director, Multistate Tax Commission, jhuddleston@mtc.gov

Consultant: Elizabeth Harchenko, former Director, Oregon Department of Revenue, esharchenko11@gmail.com

COMMUNICATION OPPORTUNITIES:

Web sites: MTC; FTA TaxExPRESS; trade associations; taxpayer associations

MTC Annual Meeting; committee meetings; Executive Committee session; Commission session

Regularly scheduled teleconferences – updates for the states; committee teleconferences; electronic communications

Stakeholder meetings; presentations or speeches

KEY AUDIENCES: State tax administrators; State staff; MTC staff

Stakeholders – taxpayer groups; taxpayer representatives; other government associations

Business partners – FTA, IRS, other organizations that share operational goals or functions or that collaborate with MTC to achieve operational goals.

State tax press