



To: Commission
From: Julie Magee, Chair
Date: July 19, 2016
Subject: FY 2015-2016 Strategic Planning Steering Committee Annual Report

Background

The Multistate Tax Commission began its strategic planning process in May 2011. During 2011-2012, the Commission developed its statements of Mission, Values, Vision, and Goals.

MISSION STATEMENT:

The Multistate Tax Commission is an intergovernmental state tax agency. Its mission is to:

- Achieve fairness by promoting compliance and consistent tax policy and practice; and to
- Preserve the sovereignty of state and local governments over their tax systems

VISION

By 2019, MTC will be recognized as:

- The “gold standard” for tax policy development
- The primary authority for the public and public officials on issues of state and local tax uniformity and fairness
- The leading resource for ensuring equitable tax compliance

Summary of the year’s activities

The Steering Committee chartered one new project and work continued on one nexus-related project in 2015-2016. The nexus project team continued their work on reviewing and evaluating the multistate voluntary disclosure process so they could identify ways to make that process work more efficiently for states and taxpayers. As a result of this effort, the team made several recommendations, most of which have been implemented. The Nexus Committee will be working to implement remaining recommendations during 2016-2017.

The new project that was chartered was to develop recommendations for a systematic process of regular outreach to both multistate taxpayers and multistate tax practitioners. This effort would facilitate the Commission’s awareness of tax compliance issues of concern to both groups. The project team of industry and government representatives met monthly by teleconference during the first half of 2016. The team has submitted recommendations for a taxpayer and representative outreach process to regularly solicit issues of concern from taxpayers and taxpayer representatives.

The MTC permanent staff continues to integrating strategic planning into the daily work of the commission. A one-day strategic planning training session for permanent staff based in Washington, D.C., was led by the Commission's strategic planning consultant, Elizabeth Harchenko.

Recommendations made to improve the communications process with permanent staff have been implemented. Steps taken include the holding of all-staff and division meetings, regular use of an all-staff calendar, and improved communications on the results of meetings. Other recommendations are being worked on, such as the development of an intranet for permanent staff.

The Steering Committee continues to evaluate the Commission's progress with strategic planning. These discussions will continue and the committee will report to the Executive Committee on progress and future direction.

The Steering Committee continues to be committed to integrating strategic planning tools and practices into the operations of the Commission.