

DATE: July 10, 2015
TO: Strategic Planning Steering Committee
FROM: Elizabeth Harchenko
SUBJECT: **STRATEGIC PLANNING PROGRESS EVALUATION**
Spokane, Washington - July 28, 2015

Please review this memo and be prepared to discuss the questions below on July 28. Your primary resource is the Communications Plan. I have attached a copy of v. 10.0 for your use.

Purpose for Discussion

The Commission is five years away from the target date for achieving its vision. The purpose for our discussion is to evaluate where we are, and to determine whether we are moving in the right direction and at the right pace, in order to achieve the vision by 2019.

The results of this discussion will serve as the basis for developing guidance for the Commission and its staff over the next several years. It is likely that the steering committee will need to continue this conversation after the July 28 meeting.

Background

The Multistate Tax Commission began its strategic planning work in May 2011. By July 2012, the Commission had adopted a Mission statement, a statement of the values of the organization, a Vision for the Commission and a set of goal areas on which to focus in order to achieve that vision.

The MTC Vision is:

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

The four goal areas are:

- Vitality and reputation of the commission
- Engagement of states and other stakeholders
- Uniformity
- Compliance programs

Since 2012, the MTC Strategic Planning Steering Committee has chartered seven projects, which have touched each of these goal areas. Five of those projects have been completed and recommendations were implemented for four of the completed projects. One project has been suspended. One project is ongoing. The MTC permanent staff has also begun work on strategic planning. The Joint Multistate Audit Program staff has developed its own statements of mission, values, vision and goals, and is beginning to plan for a project. The central office staff in Washington, D.C. will begin a project in September.

Discussion Questions

1. What progress has the Commission made toward achieving its Vision?
 - a. What qualities should the Commission demonstrate in order to be recognized as the “gold standard” for tax policy development?
Which of these qualities does the Commission have today?
Which goal areas are most closely tied to this part of the Vision?
 - b. Is the Commission generally regarded by the public and public officials as the primary authority on issues of state and local tax uniformity and fairness?
How do we know what our level of recognition is today?
Which goal areas are most closely tied to this part of the Vision?
 - c. Is the Commission becoming the leading resource for ensuring equitable tax compliance?
What qualities should the Commission demonstrate in order to meet this part of the Vision?
What has the Commission done in the past few years to make progress in ensuring tax compliance?
Which goal areas are most closely tied to this part of the Vision?
2. Assuming that there is more work to do in order to achieve the vision by 2019, what work needs to be done, and who needs to do it?
 - a. What work needs to be done to continue to make progress on improving the national image and reputation of the commission?
 - b. Who should be doing the vitality and reputation work?
 - c. What work needs to be done to continue to increase the level of institutional knowledge within the states about the MTC?
 - d. Who should be doing the state engagement work?
 - e. What work needs to be done to increase uniformity in tax policy and administrative practices among the states?
 - f. Who should be doing the uniformity work?
 - g. What work needs to be done to develop strategies that will enable the Commission to address new compliance challenges?
 - h. Who should be doing the compliance work?
3. What do the Executive Committee and the Steering Committee need to do in order to continue to lead the MTC toward achieving its vision by 2019?