

REPORT TO STEERING COMMITTEE

ENGAGEMENT TEAM MEETING FROM 5-7-12

Participating: Alana Barragan-Scott, Joe Huddleston, Len Lucchi, Julie Magee, Matt Massman, Elizabeth Harchenko

Meeting Objective: Begin to develop action plan for Commissioner Outreach, Recruitment & Education Project

Discussion Topics

The team reviewed the goals approved by the MTC Executive Committee in December 2011.

New tax administrators need to understand early in their tenure what the MTC is and what it does, how the states (particularly their own) are involved and what benefits they get from membership or participation. Information about the financial benefits of participating are important, given the competing demands of technology, training and process improvement.

The high level outcome expected from this project is to develop a formal plan that the MTC uses to reach out to new tax administrators. These activities will be integrated into the annual calendar of events. They will be designed to provide key information early, initiate and sustain contact between MTC and new tax administrators and result in active engagement by top tax administrators and their staff in MTC committees and programs.

Team members noted that new tax administrators need to get to know one another as well as to learn about MTC and other state tax organizations.

There is a goal to increase engagement for associate member states. The team may recommend that the focus of this goal would be to identify those states that would benefit financially from sovereignty status (savings on program fees), and set targets for increasing the number of states that attain sovereignty status. Also, there could be a focus on attracting more states to the audit and nexus programs.

Project Activities

The team identified these key activities:

- First contact: letter of introduction from MTC Chair and Executive Director.
- Telephone contact: at least four times during the first year after a new tax administrator is appointed.
- MTC executive committee members and past chairs will be assigned to new tax administrators as their key contact.
- New tax administrators will be given specific information about their state's history of involvement with the MTC, including program results (audit, nexus), and fees.
- Follow up telephone and e-mail contact by the key contact will be coordinated with the executive committee and commission meeting schedule.

Project Measures

The team identified several key measures to help evaluate the effectiveness of the project in increasing engagement and participation by the states:

- **Contacts:** capture data that will show how many new tax administrators are being contacted timely (letter within 20 to 30 days after they take office; follow up by key contact, reminders before key meeting dates). No baseline data needed. Target to be set.
- **State histories:** capture data that will show that historical information about each state's participation is up to date and is provided timely. No baseline data needed. Target to be set.
- **Participation in Commission meetings:** baseline will be set from the past 5 years' attendance at annual commission meetings (data will be gathered for each state, as well as each top tax official). Target to be set.
- **Participation in Executive committee meetings:** baseline will be set from past 3 years' attendance at Executive Committee meetings (data will be gathered for each state, as well as each top tax official). Target to be set.
- **Participation in working committees (Audit, Nexus, Legal, and Uniformity):** baseline will be set from past 2 years' participation in committee meetings (data will be gathered for each state, including who participates and how many from each state). Target to be set.
- **Participation by states that are not compact members or sovereignty members:** baseline will be set by program participation in Audit and Nexus programs for past 3 years (data will be gathered by state). Target to be set.
- **Participation by stakeholders in MTC activities (commission and committee meetings):** baseline will be set from past 3 years of attendance records. Target to be set.

Next Steps

Team needs to work with staff on details of the contact calendar, content of communication materials and setting baselines and targets for measures.