

TO: States and Stakeholders
FROM: Strategic Planning Steering Committee
DATE: January 24, 2012
SUBJECT: **Draft statements of Mission, Values, Vision and Goal Areas**

Background

The Multistate Tax Commission (MTC) is engaged in a strategic planning effort. The foundation of that plan rests on these four elements:

- Mission of the MTC – the mission statement describes why the MTC exists and explains its organizational purpose.
- Values – the statement of values describes the cultural values, principles or norms that influence the Commission's policy and business decisions.
- Vision – the vision statement describes the strategic business purpose(s) that will drive the commission's work over the next 5-7 years. This is the statement that establishes overall direction for the organization going forward.
- Strategic Goal areas – These are the areas in which change in the way things are being done today will be needed. These categories capture the most important areas for work over the next several years so that the MTC can achieve its vision.

From this base, the MTC will develop detailed strategic objectives and action plans to help the MTC achieve its vision.

What we need from you

Below you will find our working drafts of statements of the mission, values, vision and strategic goal areas for the MTC strategic plan. We ask for your comments and suggestions on these drafts before we finalize them. Please consider the following questions as you review these drafts:

- Is the draft statement clear and understandable? If not, what could be clarified?
- Does the draft statement ring true to you? In other words, as you think about the MTC, is each draft statement consistent with your understanding of and experience with the MTC? If not, please describe the difference you see.
- Taken as a whole, are these foundational elements complete? If something is missing, please describe it.

We need your input no later than February 20, 2012. Please send your comments to Elizabeth Harchenko, consultant to the committee, at esharchenko11@gmail.com. Thank you for taking the time to review these statements, and for providing your input. It will help us develop the strongest possible strategic plan.

Working Draft Statements for MTC Strategic Plan

MISSION – Essential Purpose of MTC

MTC works on behalf of state and local tax authorities to preserve sovereignty over their tax systems and achieve tax fairness by promoting compliance and consistent tax policy and practice.

VALUES – MTC's cultural norms

- Collaboration
 - We share the expertise of our staff, members and stakeholders
 - We leverage the resources of the states
 - We strive to cooperate with states, local governments, taxpayers and the federal government
- Quality
 - We pursue excellence in developing and using our shared resources
 - We pursue excellence in the legal, policy, education and compliance work we do
 - We pursue excellence in the technical support we provide
- Inclusiveness and transparency
 - We honor our status as an intergovernmental entity created by mutual state legislation, with the authority to act on behalf of the states.
 - We are open to participation by all governmental entities and public and private stakeholders and we conduct our business openly
- Professionalism and integrity
 - We conduct all of our business to the highest ethical standards
- Tax sovereignty
 - We promote state and local government control and authority over their tax systems
- Uniformity
 - We pursue consistency of tax policies and practices by tax jurisdictions, collectively and over time
 - We pursue equity and balance in state and local taxation
 - We pursue equal treatment of taxpayers and full accountability by all taxpayers

VISION – Direction for the next 5-7 years

By 2019, the MTC will be recognized as:

- Setting the “gold standard” for the process to develop model tax policies.
- A credible and authoritative voice to the public and public officials concerning issues of state and local tax sovereignty, tax uniformity and tax fairness.
- A leading resource for ensuring equitable tax compliance.

Comment Draft

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STRATEGIC GOAL AREAS- Areas in which MTC must focus in order to achieve its vision

Vitality and reputation of the commission – The vitality and reputation of the MTC will be reflected by:

- A high level of institutional knowledge within the states about the MTC.
- A stable model for funding the activities and services of the MTC.
- A positive image and reputation nationally.
- A high level of awareness and use of the MTC's services by state and local tax authorities.
- Effective and efficient decision-making processes and communication.

Engagement of states and other stakeholders – Engagement of the states and other stakeholders in the MTC will be reflected by:

- A high level of participation by states and local jurisdictions in the activities of the MTC.
- A significant number of top tax administrators will be directly involved in leadership of the MTC.
- Significant public participation in commission activities
- Significant public use of MTC services such as voluntary disclosure and alternative dispute resolution.
- Strong relationships and strategic partnerships that help the MTC achieve its mission and vision.

Uniformity – Achievement of the MTC's uniformity goal will be reflected by:

- Greater adoption of uniformity recommendations by state and local tax jurisdictions.
- Selection of uniformity projects that have the greatest value to the states and stakeholders.
- Referral of multistate tax issues to the MTC for recommendation or resolution by the states, taxpayers and the federal government.

Compliance programs – Achievement of the MTC's compliance goals will be reflected by:

- Greater voluntary compliance by taxpayers with state and local tax laws.
- Early identification of compliance challenges by the states and MTC staff.
- Prompt development of strategies to address new compliance challenges by the states and MTC staff.