

TO: MTC Strategic Planning Steering Committee

DATE: April 26, 2015

FROM: Elizabeth Harchenko, Consultant

SUBJECT: Report on status of current projects

There are three strategic planning projects currently underway.

Project description: Increase Membership in National Nexus Program (chartered July 2014)

The purpose of this project is to identify the barriers to state membership in the National Nexus Program and propose solutions to remove those barriers. The project will also identify the program characteristics that attract states to become members.

Current status: The project team has been meeting since fall 2014. Their plan was to survey the 13 states that are not currently participating in the Nexus Program to learn why those states are not participating, and what might attract them to join. The team has completed surveys from five states. Team members have worked diligently to make contact with the other states, but have had difficulty getting anyone to respond. The team has also surveyed member states about the key activities of the Nexus Program that they value. The team is now in the process of reviewing the information it has, and will develop conclusions and recommendations for the Nexus Committee meeting in July.

Project description: Improve Multistate Voluntary Disclosure Program (chartered July 2014, begun January 2015)

The purpose of this project is to identify opportunities to streamline the MTC Multistate Voluntary Disclosure Program to make it more efficient and effective. The project will involve review of the current process from the perspective of the states, taxpayers and the MTC National Nexus Program staff.

Current status: The project team has reviewed the entire process for multistate voluntary disclosures. The team has also surveyed participating states, and taxpayer representatives, to identify opportunities to streamline the process. The team has decided to focus on the pieces of the voluntary disclosure program that are carried out by the MTC central staff and the states. MTC central staff is gathering additional data about the time spent on specific stages in the process. The team will evaluate data, and develop conclusions and recommendations for the Nexus Committee meeting in July.

Project description: Develop a Strategic Plan for MTC Joint Audit Program (begun January 2015)

This project was initiated by Keith Getchell, the MTC Joint Audit Program Director. The purpose of the project is to develop a strategic plan (Mission, Values, Vision and Goals) for the Joint Audit Program that reflects the key compliance elements of the Multistate Tax Commission's strategic plan. The planning team is made up of managers and staff from the Joint Audit Program. They have done their environmental scan and are now drafting their mission, values, vision and goals. The working draft will be shared with other members of the Joint Audit Program in May. The final draft will serve as the basis for setting priorities and developing plans for improvement projects. I anticipate that the team will complete its work in June. The next phase will begin shortly thereafter.