



To: Multistate Tax Commission
From: John Ficara, Chair Strategic Planning Committee
Date: July 21, 2023
Subject: Strategic Planning Committee Annual Report for FY 2023

At its April 2022 meeting, the Strategic Planning Committee (SPC) decided to do a review of the MTC mission, vision, and values (MVVs). The committee determined that member input would be necessary and determined that a survey regarding potential updates to the MVVs would be valuable. Therefore, at each of the standing committee meetings during the August 2022 meetings in Anchorage, the SPC chair, the executive director and the deputy executive director discussed this review of MVVs, and stated that a short survey would be conducted.

A survey for this purpose was developed and distributed in the fall of 2022 to MTC members using Survey Monkey, and a web link collector was created. The email survey was sent to 668 discrete recipients. Forty responded to the survey (6% response rate). Interestingly, the completion rate was 100% (i.e., anyone who clicked on the link completed the survey).

Survey results were reviewed and discussed during the November 2022 meeting in Little Rock, Arkansas. It was determined from the survey results that respondents were generally satisfied with the status quo, and that no significant changes were necessary to the MVVs. However, the committee also found that the survey results were thoughtful and could lead to some adjustments and improvements. A group of four was appointed to further analyze the results and determine what, if any, recommendations should be made.

The group appointed at the time consisted of John Ficara (Chair/New Jersey), Krystal Bolton (Louisiana), Lee Ann Rouse (Alabama), and Dee Wald (North Dakota), with the executive director also participating. The group met virtually twice after the November meeting and reviewed the survey results in detail. A report was developed and presented to the Executive Committee at the spring 2022 meeting. The report included a summary of survey responses regarding potential need for revision of the MVVs, based on analysis and discussion by the group named above.

Following further review and discussion at the spring 2022 SPC meeting, it was agreed that the Report would be finalized with no revision to the Mission Statement or the stated Values, and only minor non-substantive revisions to the Vision Statement. The final Report as approved by the SPC will be provided to the Executive Committee at the July 2023 Annual Meeting of the Commission, for consideration and action as appropriate.

Training efforts, both virtual and in-person, continue to be a major focus and are moving forward. Recommendations in the strategic planning workgroup's report on training are continuing to be implemented. Virtual training activities are increasing, but in-person training is also very robust. Nexus Schools have started up again and additional content is coming with the Commission's Learning Management System. One example is the very successful virtual training course on Market Based Sourcing, which was released through the Learning Management System. Another example is the new course on partnerships which has also been very popular. Other training courses are being planned for 2023.