



STRATEGIC PLAN

2022–2027



Our vision: To be the center of excellence for tax administration



STRATEGIC PLAN 2022–2027

FTA is pleased to share our five-year strategic plan for calendar year 2022–2027. This plan will be reviewed and discussed regularly.

MISSION

To provide members with the knowledge, tools, and relationships in support of tax administration which furthers voluntary compliance while preserving, protecting, and enhancing tax revenue.

VISION

To be the center of excellence for tax administration.

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The Federation of Tax Administrators (FTA) was organized in 1937 to improve the quality of state tax administration by providing services to state tax authorities and administrators. These services include research and information exchange, training, and intergovernmental and interstate coordination. The Federation also represents the interests of state tax administrators before federal policymakers where appropriate.

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A Message from the **Executive Director** and **President of the Board of Directors**



Sharonne Bonardi
Executive Director
Federation of
Tax Administrators



Neena Savage
President,
Board of Directors
Federation of
Tax Administrators

Dear Board Directors, FTA Members, and Tax Professionals:

We are pleased to present you with the 2022–2027 strategic plan for the Federation of Tax Administrators (FTA), which outlines the necessary goals, objectives, and strategies for achieving the FTA's mission. As an organization, we exist to empower members with the knowledge, tools, and relationships in support of tax administration, which furthers voluntary compliance while preserving, protecting, and enhancing tax revenue.

The strategic plan is the result of a thoughtful, intensive, and collaborative process to identify and prioritize these strategic goals which the organization will emphasize, address, and achieve over the next five years. However, the plan is only the beginning of our continuing efforts and unwavering focus.

We look forward to collaborating with you each day to identify, establish, and sustain best practices across all areas of our industry. Together, we will be recognized nationally as the center of excellence for tax administration in all that we do.

Sincerely,

Sharonne Bonardi
Neena Savage



About the Federation of Tax Administrators (FTA)

FTA services the principal tax collection agencies of the 50 states, the District of Columbia, Philadelphia, and New York City. The work of FTA is directed and governed by an eighteen-member Board of Trustees composed of tax administrators representing all regions of the country. The Commissioner of the Internal Revenue Services is an ex-officio board member.



National Association of Tax Administrators 1934

History of FTA

The Federation of Tax Administrators (FTA) was organized in 1937 by representatives of the North American Gasoline Tax Conference (NAGTC), the National Association of Tax Administrators (NATA), and the National Tobacco Tax Association (NTTA). In 1984, the three associations consolidated into a single organization the National Association of Tax Administrators. In June 1988, NATA merged with FTA, assuming the Federation of Tax Administrators name to improve the quality of state tax administration by providing services to state tax authorities and administrators. These services include: research and information exchange, training, and intergovernmental and interstate coordination.

Board of Trustees and Executive Committee 2022

FTA is directed and governed by an eighteen-member Board of Trustees composed of tax administrators representing all regions of the country.

Executive Committee

President

Neena Savage, Rhode Island

Second Vice President

Nick Maduros, California

First Vice President

Peter Barca, Wisconsin

Secretary

Vernon Barnett, Alabama

Immediate Past President

John Valentine, Utah

Board Members

Northeast

Keith Richardson, District of Columbia

John Ficara, New Jersey

Amanda Hiller, New York

Midwest

Bob Grennes, Indiana

Glenn White, Michigan

Robert Doty, Minnesota

Southeast

Kevin Richard, Louisiana

Jim Zingale, Florida

Ronald Penny, North Carolina

West

Stephanie Schardin Clarke, New Mexico

Phillip Ashley, Texas

Vikki Smith, Washington

Representing Largest State (by dues)

Not Otherwise Represented on Board

Dan Hassell, Pennsylvania

“Leadership is the capacity
to translate vision into reality.”

- Warren Bennis





FTA Team

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Sharonne Bonardi
Executive Director

Charlie Helms
Director of Regional Sections

Ryan Minnick
Chief Operating Officer

Darrell Reeves
Office Manager

Ronald Alt
Director of Economic and Tax Research

Terri Steenblock
Director of Compliance

Cindy Anders-Robb
Director of Motor Fuels
and Tobacco Tax Sections

Linda Tanton
General Counsel

Contact FTA at: support@taxadmin.org



Team Expertise and Demonstrated Competencies

- ✓ Executive leadership
- ✓ State and federal legislative & regulatory process/government relations
- ✓ Customer service
- ✓ Interpersonal skills
- ✓ Tax administration
 - ✓ Legal and tax policy
 - ✓ Audit, fraud detection, and voluntary compliance
 - ✓ Accounts receivable management
 - ✓ Return processing (electronic and forms)
 - ✓ Economic and revenue forecasting
- ✓ Communications and public relations
- ✓ Organizational branding
- ✓ Federal and state Interagency collaboration
- ✓ Technical and creative writing and editing
- ✓ Extensive tobacco, motor fuel, cannabis, and alcohol tax knowledge
- ✓ Fostering international relationships (Canadian Fuel Tax Council and Tobacco Steering Committee)
- ✓ Strategic alliance program management
- ✓ Intercultural team building
- ✓ Conference and operational logistics Planning
- ✓ Emergent technologies
- ✓ Data sourcing and exchange
- ✓ Federal standards and state uniformity practice
- ✓ Teaching and training adult learners
- ✓ Procurement and vendor management
- ✓ Member, partner, and stakeholder relationship creation and management
- ✓ Creative problem-solving

FTA exists to support our membership.




Existing Services Offered

Today, FTA supports the membership by offering a wide variety of services. Our services include but are not limited to: responding to member and stakeholder needs, providing opportunities to share best practices, educational and training opportunities, research, uniformity and standards, and communication.

We have captured a high-level overview of the existing services provided by FTA staff. The services are listed under six strategic goals categories.



Accountability, Sustainability, Transparency

- ✓ Conduct member relationship and services (strategy and transparency)
 - ✓ Perform risk management and analysis
 - ✓ Participate in organizational audits
 - ✓ Board and executive management
 - ✓ Financial management – budgeting, financial modeling, financial reporting, program budgeting
 - ✓ Prioritizing association work
 - ✓ Evaluating conference and work product results
 - ✓ Adapting work products based on results
 - ✓ Gathering and reviewing member engagement metrics
 - ✓ Governance and oversight – General FTA and the bylaws/resolutions for regionals and sections
 - ✓ Providing direction and reviewing work products
- 



Collaboration

- ✓ Interagency liaison representation
- ✓ International liaison representation (Canadian Fuel and Tobacco Council)
- ✓ Association, Congressional, and other stakeholder relations
- ✓ Federal agency interaction, liaison, and support
- ✓ Meetings with regional commissioners
- ✓ Issue resolution resource for external partners and the membership
- ✓ Informational sharing meetings with membership
- ✓ Revenue surveys and reporting
- ✓ State Informational booklets (Tobacco and Motor Fuel)



Communication

- ✓ Brief development and distribution
- ✓ E-List communication and management
- ✓ Newsletter development and distribution
- ✓ Press release drafting and distribution
- ✓ Presentations to stakeholder groups
- ✓ Organizing and presenting information for meetings, website, and other venues
- ✓ Inform membership on developments and impacts of federal and state government actions



Education and Training

- ✓ Conferences (all details of a conference from logistics, content delivery, certificates):
 - ✓ FTA Conferences: Annual, Compliance, E-file and Refund Protection Symposium, Revenue Estimating, and Technology
 - ✓ Sectional Conferences: Alcohol, Cannabis, Motor Fuel, and Tobacco
 - ✓ Regional Conferences: MSATA, NESTOA, SEATA, and WSATA
- ✓ Specialty training delivered on site (Tobacco and Motor Fuel)
- ✓ Advocacy and public policy training
- ✓ Training on products developed by committees FTA facilitates (Letter of Intent)
- ✓ Tax case review and tax highlights updates
- ✓ Master settlement agreement for tobacco



Technology and Resources

- ✓ State Exchange System (SES)
- ✓ Data resources available to the states facilitated by FTA (Department of Defense, Coast Guard, Customs)
- ✓ Technical support internally and to the membership
- ✓ Website updating and maintenance
- ✓ E-list updating, maintenance, and interaction
- ✓ FTA exchange agreement and maintenance
- ✓ Legal database updating and maintenance



Uniformity and Standards

- ✓ Modernized Electronic Filing (MeF) work
- ✓ Schema work and standards for alcohol, business, cannabis, individual, motor fuel, tobacco, and miscellaneous things such as levies
- ✓ Managing and maintaining all the documentation for uniformity and standards material
- ✓ Managing and maintaining product codes for motor fuel, tobacco, alcohol, and cannabis
- ✓ Letter of Intent facilitation and management of document and content



Member Relations

- ✓ Resource to other associations looking to understand the role and importance of state tax administration
- ✓ Field calls, emails, and phone calls
- ✓ Mentoring and membership guidance
- ✓ Office manager tasks that support the operations of FTA, such as billing, conference platform maintenance, and offsite conference support
- ✓ Sponsorship relationships, development, and maintenance
- ✓ Responding to member inquiries



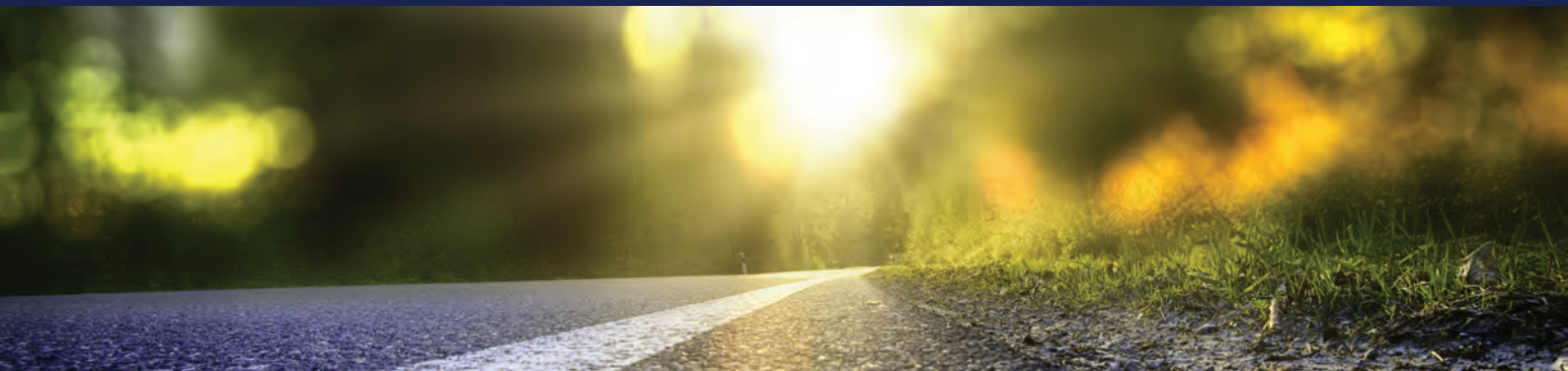


Aspirational Services

As an organization that aspires to be a center of excellence for tax administration, we value the need for continuous improvement and innovation. FTA has identified aspirational opportunities to serve our members which includes:

- Providing more conference, training, and engagement opportunities for all tax types and aspects of tax administration
- Broadening and growing existing programs
- Providing more informational exchange opportunities
- Identifying and facilitating new working groups





2022–2027 Strategic Plan

FTA is pleased to share our five-year strategic plan for calendar year 2022–2027. This plan will be reviewed and discussed regularly. Strategies and tactics may change annually as work is completed and new initiatives are identified.

Mission

To provide members with the knowledge, tools, and relationships in support of tax administration which furthers voluntary compliance while preserving, protecting, and enhancing tax revenue.

Values

- **Efficiency**
We are committed to managing our resources efficiently and effectively.
- **Inclusion**
We respect and embrace the differences of our members and employees.
- **Innovation**
We embrace continuous improvement and bold creativity.
- **Integrity**
We are reliable and truthful in all that we do.

Vision

Our vision is to be the center of excellence for tax administration.



2022–2027 Strategic Goals

- | | |
|---|------------------------------|
| I. Accountability, Sustainability, and Transparency | IV. Education and Training |
| II. Collaboration | V. Technology and Resources |
| III. Communication | VI. Uniformity and Standards |

Goal I: Accountability, Sustainability, and Transparency

As the premiere association that supports state tax administration, like the members we serve, FTA must be a steward of its resources by delivering its services within a high performing culture driven by efficiency, integrity, and excellence.

To achieve this goal, FTA will adopt best practices that foster accountability and transparency for the benefit of its mission, vision, strategic goals, objectives, and the interest of its members. By doing so, FTA will increase its membership, stakeholder, and community engagement and improve its organizational outcomes for the purpose of maximizing its relevance, viability, and sustainability within the realm of tax administration.

Objective

Develop sustainable best practices and metrics that tell our story, create accountability, and help members understand their return on investment.

Strategies and Tactics

1. **Identify and evaluate FTA's scope of responsibilities and subject expertise.**
 - a. Determine, document, and promote the services we offer.
 - b. Develop a comprehensive membership needs assessment strategy to ensure we are serving member needs.
 - c. Preserve FTA's history by creating an archival process for materials that tell our story.
 - d. Document organizational processes for knowledge transfer and retention.
2. **Develop and implement comprehensive and sustainable member and financial models.**
 - a. Explore opportunities to define and offer additional membership levels.
 - b. Research and identify options to diversify revenue.
 - c. Create intern associate program to supplement staff time.
3. **Create and display association key performance metrics.**
 - a. Identify and share standard metrics that show the value of FTA.
 - b. Develop standard event and project profit and loss reports.
 - c. Develop a data strategy to capture and consolidate historical data.

Goal II: Collaboration

Collaboration is an integral part of successful tax administration. By fostering relationships with key stakeholders within the tax ecosystem, FTA will be afforded opportunities to provide a voice for state tax administrators and their interests.

Objective

Seek opportunities to foster existing relationships and build new partnerships between our membership, stakeholders, and external organizations.

Strategies and Tactics

- 1. Facilitate the exchange of tax administration best practices and policies.**
 - a. Identify and offer informational sharing opportunities that are based on membership needs.
 - b. Review the existing exchange agreement and procedures to ensure it aligns with member exchange needs.
 - c. Evaluate and refine existing conference structure to provide clarity and align with membership needs.
- 2. Develop an advocacy strategy for engaging with peer organizations and legislators on tax administration matters.**
 - a. Develop and document a process for engaging members in legislative matters effecting tax administrators.
 - b. Identify and engage with peer organizations that are linked to tax administration.
 - c. Participate on external teams with an eye towards monitoring and engaging for the benefit of our members.
- 3. Develop and implement an engagement strategy with federal agencies.**
 - a. Develop a process for submitting, tracking, and resolving questions sent to federal agencies.
 - b. Identify and document informational exchange opportunities available to membership.



Goal III: Communication

We are committed to promoting and distributing information in a way that reflects the work of the organization and the needs of our membership. We strive for communication that is organized, informative, engaging, and transparent.

Objective

Present FTA's mission, vision, and strategic objectives across multiple media channels to inform membership, increase stakeholder engagement, and expand FTA's presence within the state and local tax community.

Strategies and Tactics

- 1. Develop a communication strategy for distributing information.**
 - a. Document and implement a comprehensive communication strategy that can be incorporated into organizational products and services.
 - b. Develop briefing papers for tax topics of key interest to members and stakeholders.
 - c. Redesign the FTA website and develop a website content life cycle strategy.
- 2. Identify and implement cohesive multimedia solutions to distribute information.**
 - a. Create a comprehensive list of communication channels and how we use them.
 - b. Create and adopt an organizational style guide that aligns with the multimedia solutions used.
- 3. Create communication resources that support the organization and our membership.**
 - a. Develop and maintain a media relations strategy and toolkit.
 - b. Develop and maintain an internal and external communications toolkit.
 - c. Develop and implement brand and logo strategies that identify our organization and membership engagement opportunities.



Goal IV: Education and Training

FTA plays a key role in supporting our membership with their training needs. Whether that be providing supplemental material that can be used for new hire training, advanced tax training, or other educational and training topics that help members with their tax administration work.

Objective

Providing informational resources and training solution that are flexible and evolve with changing membership needs.

Strategies and Tactics

- 1. Develop a culture of learning within the association and among membership.**
 - a. Perform education and training needs analysis that will be utilized to develop an education and training strategy that defines training, educational, round tables, and other information sharing opportunities offered by FTA at various experience levels (basic, intermediary, advanced).
 - b. Identify, evaluate, and promote subject matter expertise and provide opportunities for professional development for agency and association staff.
- 2. Evaluate credit and certification-based programs for delivery to membership.**
 - a. Research and evaluate continuing education programs.
 - b. Explore collaboration opportunities with other organizations that offer continuing education and certification programs. (Ex: GAO audit standards).
 - c. Offer participation certificates for attendees to present to their state certification boards for credit.
- 3. Prominently integrate education and training into online FTA programs and systems.**
 - a. Define content categories and create a content distribution matrix which identifies how content will be distributed. (Classroom training, conferences, e-learning modules, hybrid, virtual training, webinars etc.).
 - b. Maintain usable library/repository of educational, historical, training, and reference material.
 - c. Identify and evaluate content criteria for a Learning Management System (LMS).

Goal V: Technology and Resources

FTA is an organization that provides critical support and services to government agencies, and we must give special attention to how we acquire and utilize our technology resources. With the proper resources and strategies, FTA can create and support a culture of continuous improvement, experimentation, and modernization with the technology tools we use to meet the needs of both our internal team and members.

Objective

Identify and implement scalable solutions that produce professional member engagement and transfer of information.

Strategies and Tactics

1. **Adopt an internal technology modernization strategy that prioritizes continuous improvement for membership experience.**
 - a. Adopt a continuous improvement process for internal use of technology.
 - b. Identify and analyze different platforms for websites to determine best platform to modernize our website and enhance member experience.
 - c. Explore different conference hosting platforms that will integrate with our website, accounting systems and maximize our member experience.
2. **Advance the use of technology for tax administration and data exchange.**
 - a. Evaluate and provide a repository for common member needs (RFPs, Legislative DB, Legal DB, etc.)
 - b. Evaluate, develop, and use the FTA State Exchange System to facilitate a central, secure data repository for appropriate use by members.
 - c. Develop a repository for FTA historical information for use by members.



Goal VI: Uniformity and Standards

FTA's uniformity and standards foster a unique and effective partnership among membership, industry, and federal government. By providing uniformity and standards guidance, our members have the foundation and tools to help them improve compliance and reduce administration costs.

Objective

Facilitate, develop, and maintain uniformity and standards that support tax administration and promote voluntary compliance.

Strategies and Tactics

- 1. Develop, document, and deploy a clear and understandable standards practice.**
 - a. Document and deliver a process our members and stakeholders can use to request and revise schemas and standards.
 - b. Create and publish a road map for updating and developing standards.
 - c. Assemble a standards advisory council to assist with standards work.
- 2. Proactively develop and provide resources from the standards practice.**
 - a. Develop supporting material for business and IT members on existing and new standards.
 - b. Redesign and update the standards repository.
- 3. Provide tools and resources that advance uniformity.**
 - a. Promote existing uniformity guidelines to help members with tax administration and compliance.
 - b. Invest in technology that allows us to make uniformity information transferable for membership and stakeholder use.

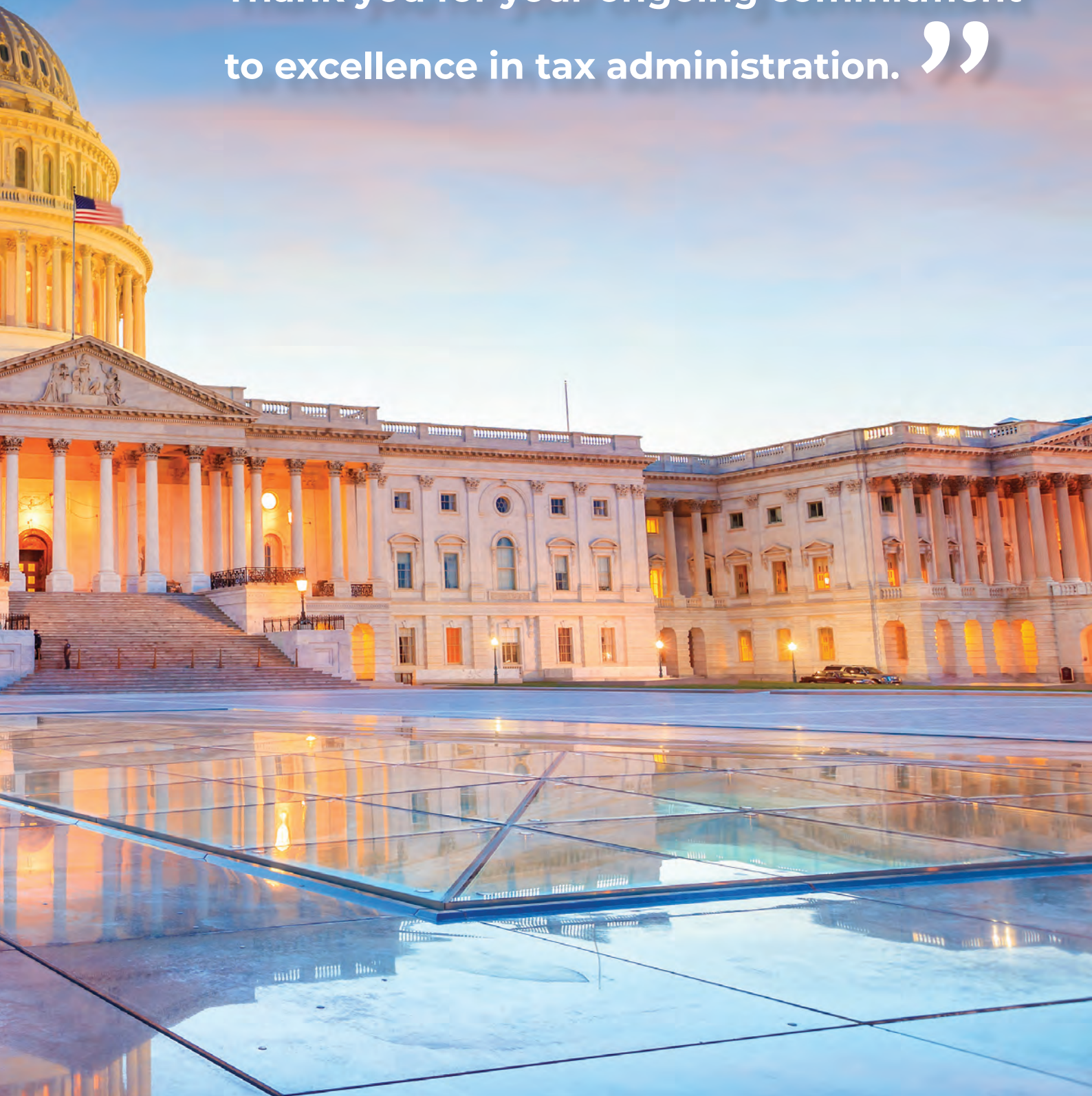






“ We look forward to working with you
to achieve our five-year strategic goals.

Thank you for your ongoing commitment
to excellence in tax administration. ”





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