

FINAL

Maine Municipal Tax Collectors and Treasurers Association

Strategic Plan 2008

Developed at The Lucerne Inn

September 4th and 5th, 2008

FINAL

Strategic Plan 2008 - Index

Key Outcomes	Page 3
The Big To Do List	Page 4 - 6
Committee Restructuring	Page 7 – 8
General Notes	Page 9
Executive Committee Expectations	Page 10
Appendices	
Letter to Members	
Draft Survey	

Maine Municipal Tax Collectors and Treasurers Association

Strategic Plan 2008

KEY OUTCOMES

I. New Mission Statement: Revise Mission Statement to Equate with
“Purpose” in By-Laws

New Mission Statement:

Maine Municipal Tax Collectors and Treasurers Association will provide leadership, education and resources to achieve professionalism, uniformity of processes and networking opportunities.

II. Task Force to Review Certification 01 / 09

Revise Requirements
Incentives
Advance Level Certification
Trainers Succession
New Courses

III. Task Force to Re-Write Committees’ Roles 01 / 09

IV. Survey Outreach to Members 03 / 09

V. Revise By-Laws for Adoption 4 / 09

Attendance – “Excused”
Committee Restructuring – 4 Committees
Executive Committee Commitment
At least 1 Committee, 3 EC Members per Committee
Read / Understand – Officer Succession / Rules

VI. Re-Write and Re-Distribute “Administrative Guide” 08 / 09

VII. Encourage County Meetings 10 / 09

FINAL

THE BIG TO DO LIST!

EXECUTIVE COMMITTEE

As an Executive Committee, resolve to desire and embrace organizational change and new member involvement and ideas.

Re-write the Mission Statement (as agreed) and include it in the next newsletter w/ short article about tying it to the Purpose Statement in the By-Laws.

Adopt By-Law changes by 05/09.

Have MMA draft revisions to the Administrative Guide based on By-Law amendments; MMTCTA to review guide for adoption. This is due for completion by 08/09.

Have Joan develop a 12-month Timeline of activities to be done / routine activities (e.g. Nominations on April agenda, May Annual Meeting) / training courses.

Place "Nominations" on MMTCTA E.C. Agenda for each March or April; send expectations sheet to nominees one month in advance; make sure they can commit.

PROFESSIONAL DEVELOPMENT COMMITTEE

Mayo calls meeting of Professional Development Committee ASAP to begin their tasks.

Review and revise the Certification process. These are due by 01/09.

- Requirements for Certification
- Incentives (P.O.L. price break, press release, congratulatory letter to top elected and appointed official.
- Advanced Level Certification
- Trainer Outreach and Recruitment Strategy
- New Courses.

Discussion w/ MMA Liability Pool; Public Officials Liability price break if they have certified Treasurer or Tax Collector.

FINAL

COMMUNICATIONS COMMITTEE

Doyon calls meeting of Communication Committee ASAP to begin their tasks

Write / re-write "Executive Committee Expectations and Commitments." This should include language for By-Law amendments. Due by 01/09.

Draft and send an "Outreach Survey" for membership. Outsource the compilation of the results for Executive Committee review. To be distributed by 03/01/08 and back to compiler by 03/30/08.

Draft and send outreach letter encouraging county meetings of Tax Collectors and Treasurers. Encourage them to start this winter. Encourage them to ask local COGs and RPCs to lend administrative support. Encourage agenda items like:

- Resources Needed
- Uniformity of Processes Breakdowns / Ideas for Improvement
- Ideas for Outreach and Involvement
- New Training Ideas.

As part of newsletter, encourage members to again subscribe to MMTCTA Listserv (see Legislative Action Strategy).

Re-issue "rules" for using the Listserv, including a direct feedback "Reply to Sender" for minor inquiries.

As part of newsletter, encourage members to bookmark web page and list the resources they can find there.

MEMBERSHIP COMMITTEE

Curtis and Parent call meeting of Membership Committee ASAP to begin their tasks.

Ensure MMA breaks down lists into 1) Certified; 2) Soon to need re-certification; 3) Members (and non-members)

Break out non-member list for calls and encourage them to join.

Re-write the Membership Application to include:

- Mission Statement
- Inclusion of Ethics Statement and Sign Off
- Committee of Interest Check-Off Box
- Interest in Being a Trainer Check Off Box
- Need for New Training Ideas Box.

FINAL

MEMBERSHIP COMMITTEE (Continued)

Letter to Jen at MMA: Current and desired included documents in New Members packets; always e-mail co-chairs when new member joins; E-mail co-chairs anytime a member application indicates interest in committee membership.

LEGISLATIVE ADVOCACY COMMITTEE

Little calls meeting of Legislative Advocacy Committee ASAP to begin their tasks.

- Develop Legislative Action Strategy using Listserv and other methods.
- Develop Legislative Monitoring Strategy.
- Develop Legislative Hearing and Testimony Coverage
- Develop method for writing and including "Legislative Corner / Updates " in
- MMTCTA Newsletters.

Committee Restructuring & E.C. Membership (Four Committees Only)

1) Professional Development Committee and Its Roles

- Training Schedule and Courses
- Revise Certification Course and Process
- Approving Certification Applications & Re-Certification
- Finding Instructors for Training
- Scholarship – up to a budgeted cap
- Sending out reminders for Re-Certification

Professional Development EC Members:

Gilberte Mayo - Chair

Gayle Doyon

Vera Parent

Pam Griffith

Kelly Thibodeau

Tracey Hodgdon-Hyson

Paul Labrecque

2) Communications Committee and Its Roles

- Website - Outsource
- Listserv - Rejoin / Limit Chatter
- Newsletter – Schedule Needed
- Public Relations – Letter to Members
- Surveys – What Do We Need to Know? Outsource Development / Results

Communication EC Members

Gayle Doyon - Chair

Vera Parent

Stu Marckoon -

Kelly Thibodeau

3) Membership Committee and Its Roles

Ensure Letters of Welcome to New Members
w/ Newsletter, Resource Guide (Web / Listserv), Ethics Statement
Check Dues List
Check Members Lists for Recruiting
Compile Skills / Interests / Committees Info from Annual Applications
Review and Revise Membership Application (Skills? Trainer? Ethics?)

Membership EC Members

Marilyn Curtis – Co-Chair

Vera Parent – Co-Chair

Gilberte Mayo

Theresa Shaw

Tracey Hodgdon-Hyson

David Little

4) Legislative Advocacy Committee and Its Roles

Monitor Legislation
Communicating with the EC
Draft Testimony & Present to Legislature
Draft Legislation & Find Sponsors
Attend / Speak at LPC Meeting
Use List Serve as Legislative Alarm System

Legislative Advocacy EC Members

David Little - Chair

Gilberte Mayo

Paul Labrecque

GENERAL NOTES

New Member Packet (Revise This)

Welcome Letter
Latest Newsletter
Training Calendar
Ethics Paper (Sign Off)
Committee Interest (?)
Instructor Interest (?)

Certification Incentives:

Public Officials Liability Reduction – Contact MMA w/ Questions
Newly Elected Officials Workshop – Request Announcement of Certification
Process / P.O.L. Reduction?
Notification of Manager / Elected Officials
Framed Certificate?
Announcement in Newsletter
Press Release for Local Paper – “John Smith, Certified Treasurer”

AFFILIATE ADMINISTRATIVE TASK: Break up MMTCTA list into:

Members by County – To Membership Committee
Currently Certified – To Prof. Development Committee
Soon To Lose Certification – To Prof. Development Committee

Membership

MMA Staff

**Dues Application to be revised by Membership Committee – Send to Jen
Jen to send a Draft Welcome packet to Theresa Shaw and Marilyn Curtis
for review and revision**

**Always email both when a new member joins to let them know
Jen to email monthly any members that request to be on a committee to
Theresa Shaw and Marilyn Curtis**

Send Theresa & Marilyn Membership Protocol & Timeline

Executive Committee - Roles/Expectations

Amend 3 Consecutive Absences: Change By-Laws to include language about “Unexcused Absences.” At Meetings, determine if a prior call in by an MMTCTA member qualifies as an “Excused Absence” @ roll call. Whole EC votes. Unscheduled / changed meeting times and dates may qualify for “Excused Absence.”.

Commitment: Eight (8) Board Meetings

Read Administrative Guide Fully.

Understand & Agree to Officer Succession.

Understand and Agree to Committee Requirements.

All EC need to be on at least one committee

Appointment to Committee

- 1) By Voluntary at Annual Retreat
- 2) Appointed By V.P., if not otherwise volunteering

FINAL

APPENDICES

Date

Dear MMTCTA Member,

The Executive Committee of the MMTCTA recently held a facilitated retreat to plot the future course of our organization.

Perhaps the most primary goal and effort we will be undertaking is to much more greatly solicit your input, involve our members more, and ask for your ideas and participation in this fine organization.

This letter is intended to share the highlights of that retreat.

Where we once had eight committees that were essentially “one-man shows,” we are combining their tasks into just four committees and asking for greater member involvement.

The new committees are 1) Professional Development (incl. Certification), 2) Membership, 3) Communications and 4) Legislative Advocacy.

We also revisited our mission statement to ensure that our eyes were really on the goals we sought to achieve over the next 18 months.

Mission Statement: Maine Municipal Tax Collectors and Treasurers Association will provide leadership, education and resources to achieve professionalism, uniformity of processes and networking opportunities.

We will soon be sending out a survey to get your views on numerous important initiatives such as 1) the certification process and needed training courses; 2) the expectations of members with regard to the MMTCTA web site and listserv; 3) by-law and administrative guide amendments; and 4) how to involve you in the legislative process, to name but a few.

If you have quit the listserv, please consider signing back on; if you have not been to the web site in a while, please stop by and check our resources <http://www.mmtcta.org>.

Please feel free to contact the Executive Committee with ideas, needs and desires, and look for the membership survey in about February or March.

We value you, and thank you for your support of MMTCTA.

Sincerely,

Gayle Doyon, MMTCTA President

FINAL

Draft

MMTCTA Membership Survey – March 1, 2008

Please take a few minutes and respond to the following question to assist the MMTCTA Executive Committee in better offering a professional organization tailored to your expectations.

Please fax your responses to MMA, c/o Jen at # ___ - ___ by ___ / ___ /2009

On the following questions, please rate your response on a 1 to 10 scale with one (1) being poor and ten (10) being excellent.

1) How useful is the Listserv as a resource to you? _____

Comments: _____

2) How useful is the Web Site as a resource to you? _____

Comments: _____

3) How useful are the “Dollars and Sense” Newsletters as a resource to you? _____

Comments: _____

4) How satisfactory are the recent professional development courses to you? _____

Comments: _____

FINAL

5) How would you rate your interest in becoming “certified” in your profession? _____

Comments: _____

6) How would you rate your interest in serving on an MMTCTA Committee? _____

Comments: _____

7) How would you rate your interest in assisting with affecting legislation that affects Tax Collectors and Treasurers? _____

Comments: _____

8) Please make at least one suggestion regarding training and certification.

Comments: _____

9) Please make at least one suggestion regarding better involving membership in the MMTCTA organization.

Comments: _____

10) Please suggest at least one resource that you wish MMTCTA provided.

Comments: _____

THANK YOU