

W. Bartley Hildreth

Summary of NTA Accomplishments

*Served as the part-time (~one day per week) Executive Director under a contract entered into between NTA and Georgia State University, with my role formally stated as the contract's "principal investigator" in return for one course release in the fall and spring semesters (11.5% time for each of those semesters).**

Managed two staff members in the DC office, and the Managing Editor of the National Tax Journal.

Made quarterly trips to the DC office per Board instructions.

Supervised the annual conference and spring symposiums.

Started a web site design revision project and worked with the NTA web consultant to institute DOI identifiers.

Instituted changes to correctly reflect paid membership after finding a multi-year inflated membership record-keeping system (with overproduction of the NTJ and the attendant production and mailing costs), and started the process of alerting lapsed members that they were receiving their last issue of NTJ with the goal of gaining paid membership renewals.

Recommended to the President a move to a calendar year membership instead of rolling one-year periods to make membership accountability easier, especially if the website is to have a members-only section.

Achieved more accurate, timely and effective financial information for decision-making by:

- Producing the first comprehensive profit and loss (P&L) statements for the annual conference, spring symposium, and other business segments using QuickBooks data.
- Producing the first dynamic (what-if) budget model ... built using QuickBooks data and based on key P&L assumptions that allow the Board to see how changes in assumptions ripple into expected net income for each business segment and overall finances.
- Recommending to the President and Treasurer that a Finance Committee be appointed to go over the details of the dynamic budget model each year in preparation for the new budget to be presented to the Board.
- Producing detailed comparative financial profiles since 2009 using QuickBooks data.

Recommended and the Board adopted the use of executive sessions to allow the Board to meet first with only the Executive Director and then without any staff.

Implemented an annual compliance certification by individual Board members and officers that is consistent with the adopted NTA Conflict of Interest Policy (2009) and the IRS Form 990.

* Actually devoted in excess of 36 percent more time than the GSU-NTA agreement covered.

Implemented a document retention program in compliance with the adopted NTA board policy (2009) and IRS Form 990 by organizing the files by subject matter, reducing dated correspondence and duplicates, and starting an electronic (off-site) records safe-keeping backup program for organizing documents without removing any from the DC office.

Identified the need and recommended the Board adopt an intellectual assets policy to govern the use of the numerous organizational assets, including journal pages, membership lists, and other valuable assets instead of the past ad hoc deals struck without explicit Board guidance or approval.

Encouraged the Board to consider the value proposition of the agreement with ATPJ.

Instituted measures to comply with the District of Columbia Accrued Sick and Safe Leave Act.

Produced a membership analysis study.

Implemented contracts with the editorial team of the National Tax Journal.

Instituted a standing weekly call with the Executive Assistant to maintain communications and to move issues along.