

**From:** [Helen Hecht](#)  
**Bcc:** [Public HRG/MTG Notice-States](#); [Public HRG/MTG Notice-Public](#)  
**Subject:** NOTICE: MTC Partnership Project Work Group Call - Thursday, June 20, 2024 at 3:00 PM  
**Date:** Monday, June 10, 2024 3:33:00 PM  
**Attachments:** [image001.png](#)  
[image003.png](#)  
[image005.png](#)  
[MTC Partnership Work Group Call.msg](#)  
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## Dear MTC Partnership Work Group Participants, Uniformity Committee, and Members of the Public:

**Next work group call is Thursday, June 20, 2024.  
July's call will be Wednesday, July 17, 2024.**

**Dear Members of the Partnership Work Group, MTC Uniformity Committee, and  
Members of the Public:**

Because the third Wednesday in June is a holiday (Juneteenth), the next call for the work group will be Thursday, June 20, 2024. On that call, we will review the status of the project and the state sourcing issues presented by tiered partnership structures and special allocations. The agenda for that meeting, below, is also on the webpage ([here](#)) along with materials and those materials may be updated prior to the call.

**NOTE:** We will be asking the work group about next steps and, in particular, whether they want to focus on “blended apportionment”—the method used by a number of states where there are corporate or tiered partners—and the issues raised by that method.

### **AGENDA**

- I. Welcome and Introductions
- II. Update and Status Report
  - Meeting Slides (PowerPoint) (PDF)
- III. Sourcing Partnership Income in Complex Structures
  - Multistate Research on Tiered Partnerships – June, 2024 ([Word](#)) ([PDF](#))
  - General Framework of State Pass-Through System – October, 2023 ([Word](#)) ([PDF](#))

### **Log-In or Use App to Join ZoomGov Meeting**

<https://www.zoomgov.com/j/1614807575?pwd=aVFrOG5CbFBsTmR0bDdoZFZSY0JlZz09>

Meeting ID: 161 480 7575 – Passcode: 503412

Dial by your location

+1 669 254 5252 US (San Jose)

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If you experience any kind of difficulty participating in the meeting, please contact [events@mtc.gov](mailto:events@mtc.gov).

- IV. Discussion of Next Steps
- V. New Business
- VI. Adjourn

The current version of the research on tiered partnerships as well as the recent report of the work group to the Uniformity Committee is on the project page, here: [Partnership Project Page](#).

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**Work Group – Regular Participants by State**

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- Alabama - Christina Hall, Lynn Schoener, Matt Tidwell, and Melissa Gillis
  - Arkansas – Scott Fryer and Tommy Burns
  - California – Katie Frank and Laurie McElhatton (Chair)
  - Colorado – Ester van Mourik and Josh Pens
  - Connecticut – Crystal Hale
  - District of Columbia – Aaishah Hashmi
  - Idaho – Eric Mahler and Phil Skinner
  - Iowa – Alana Stamas, Michael Mertens, Tiana Slaney, and Zach Waldmeier
  - Kentucky – Sarah Watts and Adam Johnson
  - Louisiana – Krystal Bolton and Teshaun Phoenix-Moore
  - Massachusetts – Michael Fatale
  - Michigan – Angela Matelski
  - Minnesota – Margaret Reisdorf
  - Montana – David Merrien (Vice Chair)
  - New Jersey – Angela Longstreet, Kathleen Haller, Nandini Venkatramani, and Eric Friedmann
  - North Carolina – Tenisha Jacobs
  - Oregon – Daron Prara, Victoria Johnson, and Michael Lucas
  - South Carolina – Dana Taylor
  - Utah – Angie Hillas, Frank Hales, and Shelley Robinson
  - West Virginia – Rebecca Rodak
  - Wisconsin – Alex Wagner and Joseph Wasicak

If I’m missing anyone (or have failed to add someone) or there are others who want to be included in our regular participants, please let me know. Thank you for your participation, and all you do.



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