**Digital Transformation Maturity Model: Self-assessment record sheets**

**Jurisdiction name:**

**Contact person:**

**Process check-list**

Please complete the appropriate boxes related to process:

|  |  |
| --- | --- |
| Appointment of facilitator | Please choose: Yes / No |
| Number of staff in the self-assessment group |  |
| Appropriate distribution of grades | Please choose: Yes / No |
| Involvement of official(s) from different areas of the tax administration | Please choose: Yes / No (please comment) |
| Time taken in hours to complete the self-assessment |  |

**Self-assessment record**

Please complete the following:

* conduct a self-assessment of the maturity of your organisation’s digital transformation approach program using the above Maturity Model;
* complete the tables below by marking the appropriate boxes with an “X” based on your self-assessment. Please only include one “X” per row (the one that best fits your level of maturity);
* send the completed tables to the Forum on Tax Administration Secretariat at [FTA@oecd.org](mailto:FTA@oecd.org).

Please also consider the open questions at the end of the document. Your insights and feedback will be invaluable inputs for enhancing this Maturity Model.

**♦♦♦♦♦**

**Please send the completed Self-Assessment Record Sheet to the Forum on Tax Administration Secretariat at** [**FTA@oecd.org**](mailto:FTA@oecd.org)**.**

***Record sheet***

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Digital Transformation | Emerging | Progressing | Established | Leading | Aspirational |
| **Digital Identity Descriptor** | | | | | |
| *Creation of digital identity and the unlocking of service options* |  |  |  |  |  |
| *Uses of digital identity within the administration and by taxpayers* |  |  |  |  |  |
| **Taxpayer Touchpoints Descriptor** | | | | | |
| *Types and uses of taxpayer touchpoints* |  |  |  |  |  |
| *Accessible services* |  |  |  |  |  |
| **Data Management and Standards Descriptor** | | | | | |
| *Data availability and standards* |  |  |  |  |  |
| *Data security and privacy* |  |  |  |  |  |
| **Tax Rule Management and Application Descriptor** | | | | | |
| *Tax rule development* |  |  |  |  |  |
| *Assurance of application of tax rules* |  |  |  |  |  |
| **New Skill Sets Descriptor** | | | | | |
| *HR strategy and function* |  |  |  |  |  |
| *Skills development* |  |  |  |  |  |
| *Workforce planning* |  |  |  |  |  |
| **Governance Frameworks Descriptor** | | | | | |
| *Strategy setting: context and process* |  |  |  |  |  |
| *Governance models and mechanisms* |  |  |  |  |  |

***Additional Questions***

|  |
| --- |
| **Question 1.** Are there some of the indicative attributes or descriptors which you feel are misplaced or wrong, or are there important indicative attributes that you think are missing? |
|  |
| **Question 2.** Are there areas where you think there is a lack of clarity with regards to the difference between adjacent maturity levels? |
|  |
| **Question 3.** Are there areas where you think the language is unclear or ambiguous? If so, please provide specific recommended changes to language. |
|  |
| **Question 4.** Is there any additional feedback you would like to provide regarding the Digital Transformation Maturity Model, including the usefulness of discussions during the self-assessment? |
|  |