

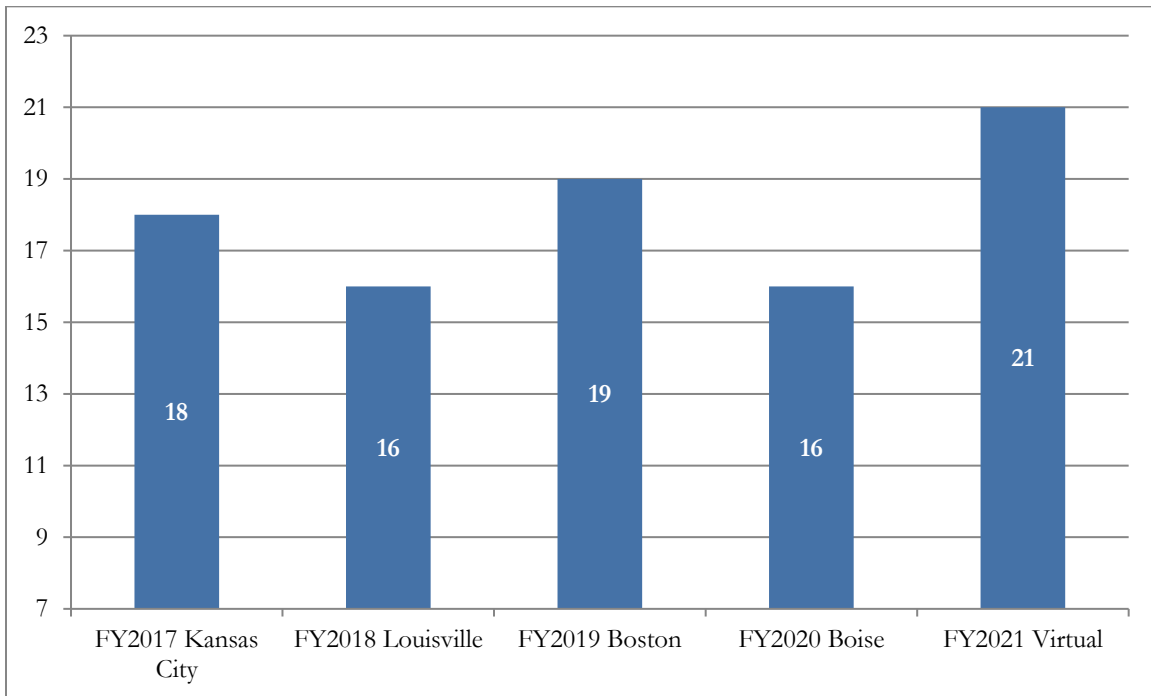


To: Strategic Planning Committee
From: Gregory S. Matson
Date: November 10, 2021
Subject: Performance Measures & Engagement Data Report

OUTCOME MEASURES

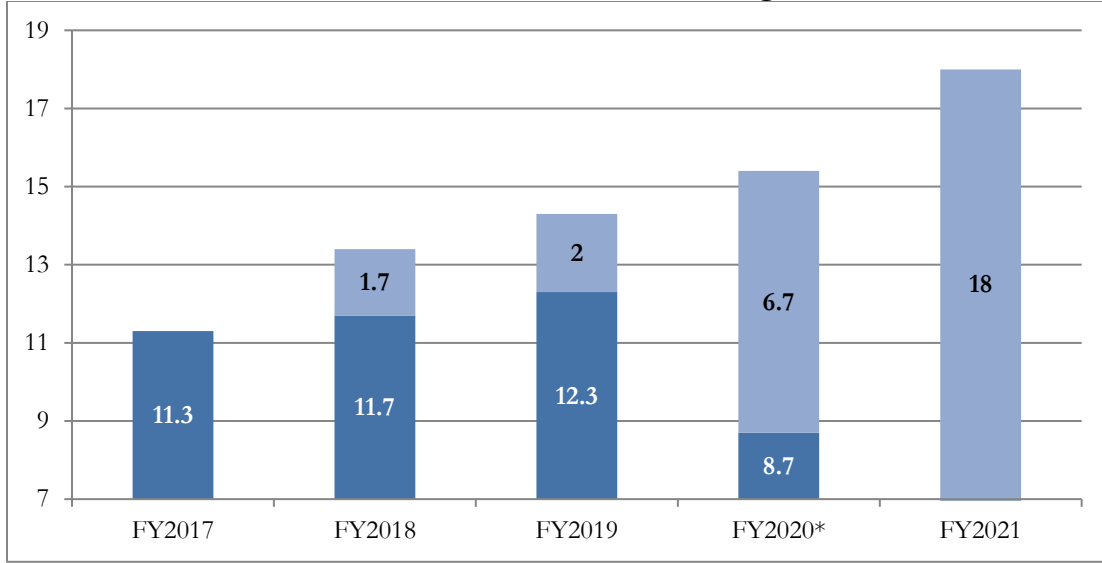
OUTCOME 1. MORE COMPACT AND SOVEREIGNTY STATE PARTICIPATION IN COMMISSION ACTIVITIES.¹

1A. Attendance by Compact & Sovereignty States at Annual Meetings



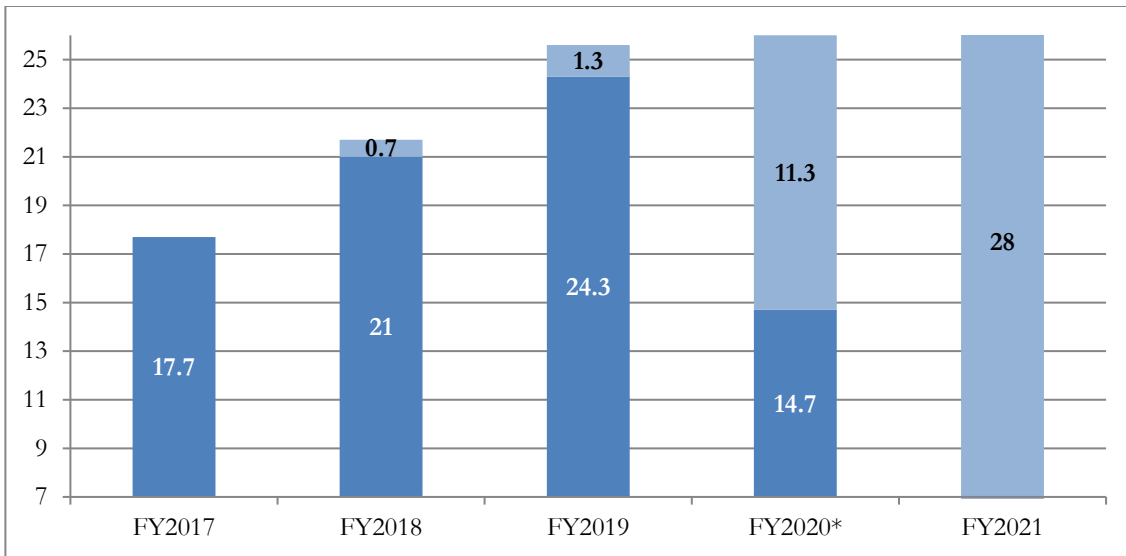
¹ In determining Outcome 1 numbers, attendance lists in published minutes served as the primary source record, unless otherwise indicated. For FY2018 forward, the committee decided that states not otherwise represented in person but on the phone should be indicated (providing a better picture of state participation).

**1B. Average Attendance by Compact & Sovereignty States
at Executive Committee Meetings**



*Note: The COVID-19 pandemic caused the spring meeting 2020 to be entirely by teleconference, meaning all 15 compact and sovereignty states participated by phone. If the spring meeting is removed from the analysis, the average would be 13 in person and 2.5 by phone. The 2021 meetings were all entirely teleconference.

**1C-1² Average Attendance by All States
in Uniformity Committee Meetings**

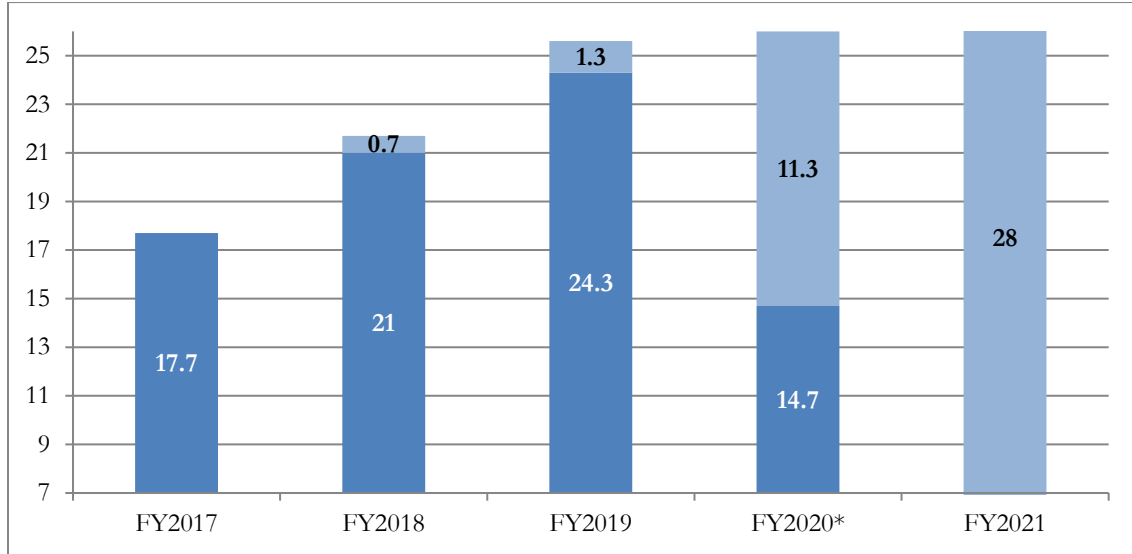


*Note: The COVID-19 pandemic caused the spring 2020 meeting to be entirely by teleconference, meaning all 30 states participated by phone. If the spring meeting is removed

² Throughout this report, separate conjunctive baselines and measures, e.g., "...in Uniformity and Litigation committee meetings ..." use "-1" and "-2" to distinguish them.

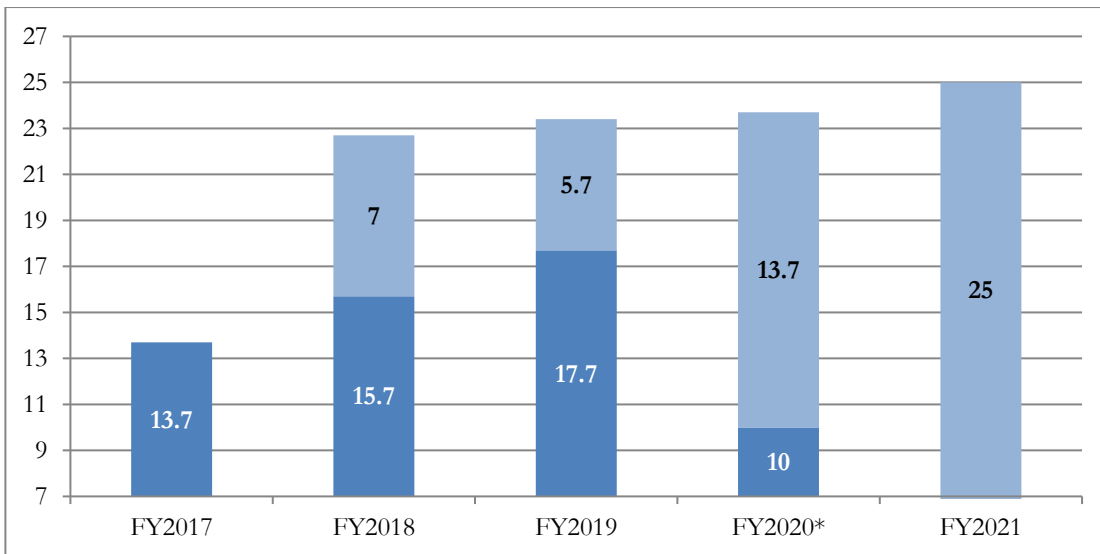
from the analysis, the average would be 22 in person and 2 by phone. The 2021 meetings were all entirely teleconference. The 2021 meetings were all entirely teleconference.

**1C-2 Average Attendance by All States
in Litigation Committee Meetings**



*Note: Due to the COVID-19 pandemic, a formal meeting of the Litigation Committee only occurred once during the fiscal year, though multiple attorney training sessions were held throughout.

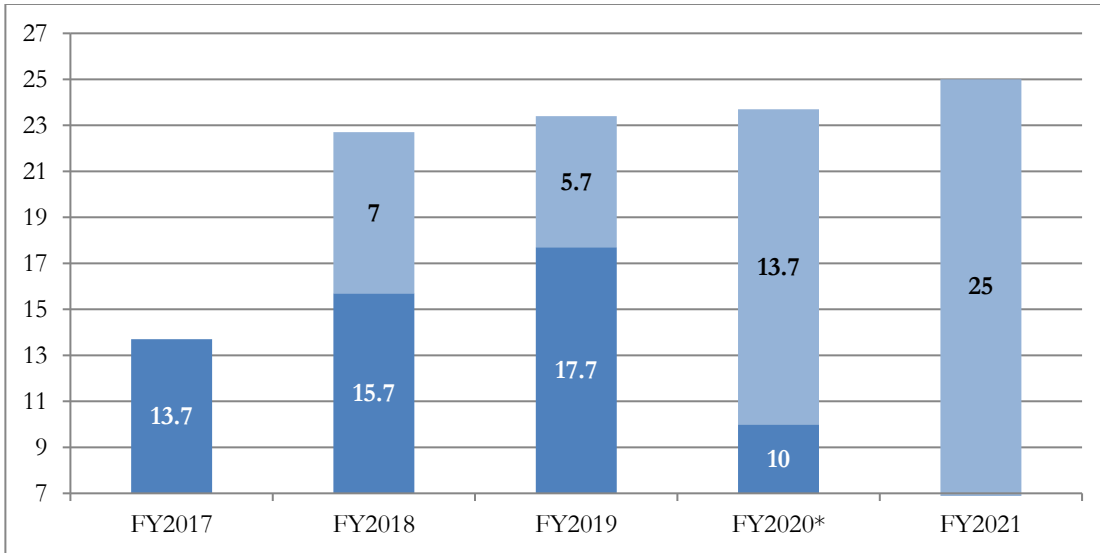
**1D-1 Average In-Person Attendance by Program States
in Audit Committee Meetings**



*Note: The COVID-19 pandemic caused the 2020 spring meeting to be entirely by teleconference, meaning all 22 states participated by phone. If the spring meeting is removed

from the analysis, the average would be 15 in person and 9.5 by phone. The 2021 meetings were all entirely teleconference.

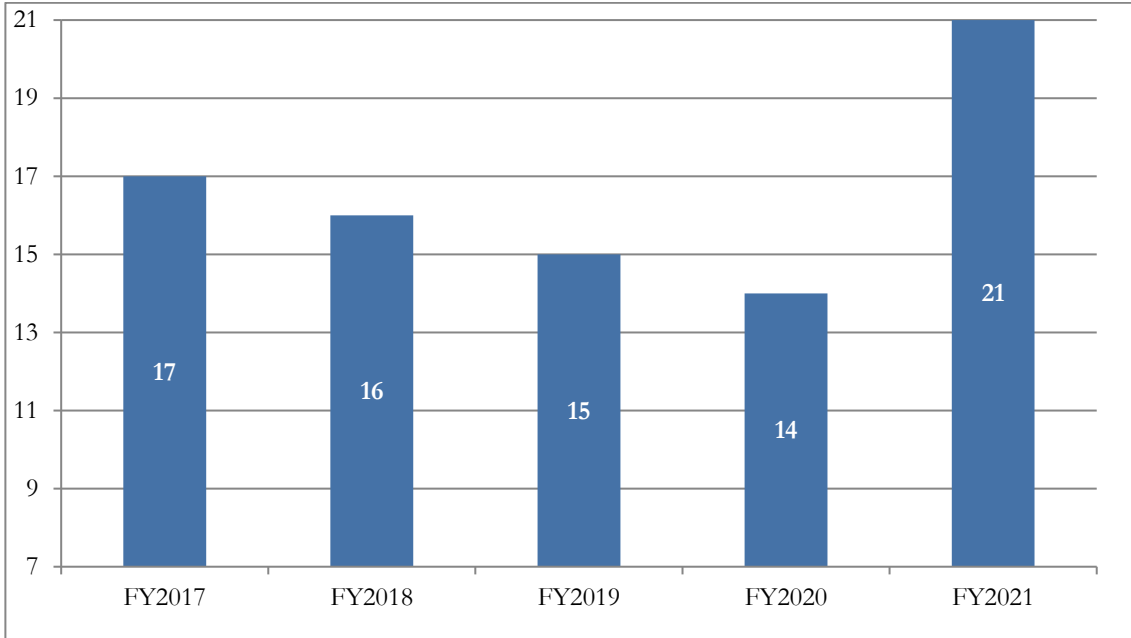
1D-2 Average In-Person Attendance by Program States in Nexus Committee Meetings



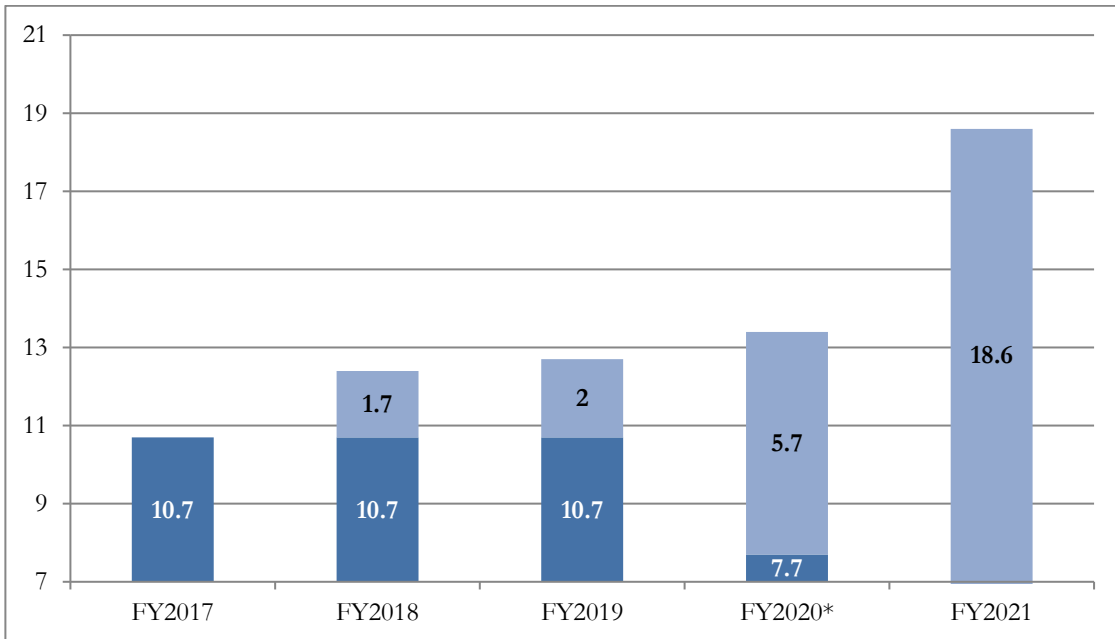
*Note: The COVID-19 pandemic caused the spring meeting to be entirely by teleconference, meaning all 28 states participated by phone. If the spring meeting is removed from the analysis, the average would be 18.5 in person and 6.5 by phone.

**OUTCOME 2. MORE TOP TAX ADMINISTRATORS (OR REGULAR ALTERNATES)
PARTICIPATING IN COMMISSION ACTIVITIES.**

**2A. Personal Participation by Top Tax Administrators or Regular Alternates of
Compact & Sovereignty States at Annual Meetings**



**2B. Average Personal Participation by Top Tax Administrators or Regular Alternates
of Compact & Sovereignty States at Executive Committee Meetings**

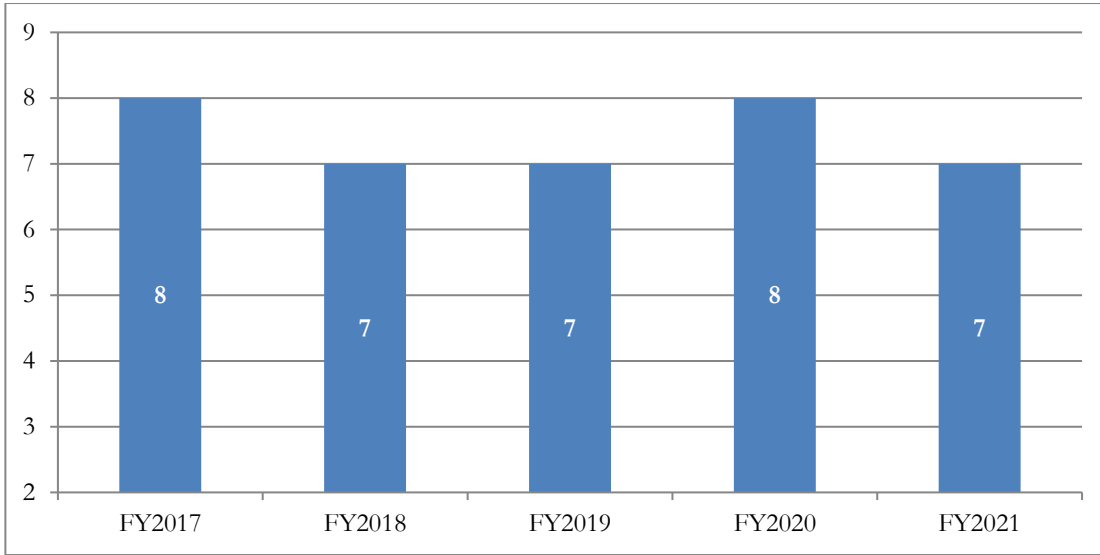


*Note: The COVID-19 pandemic caused the 2020 spring meeting to be entirely by teleconference, meaning all 14 compact and sovereignty states participated by phone. If the

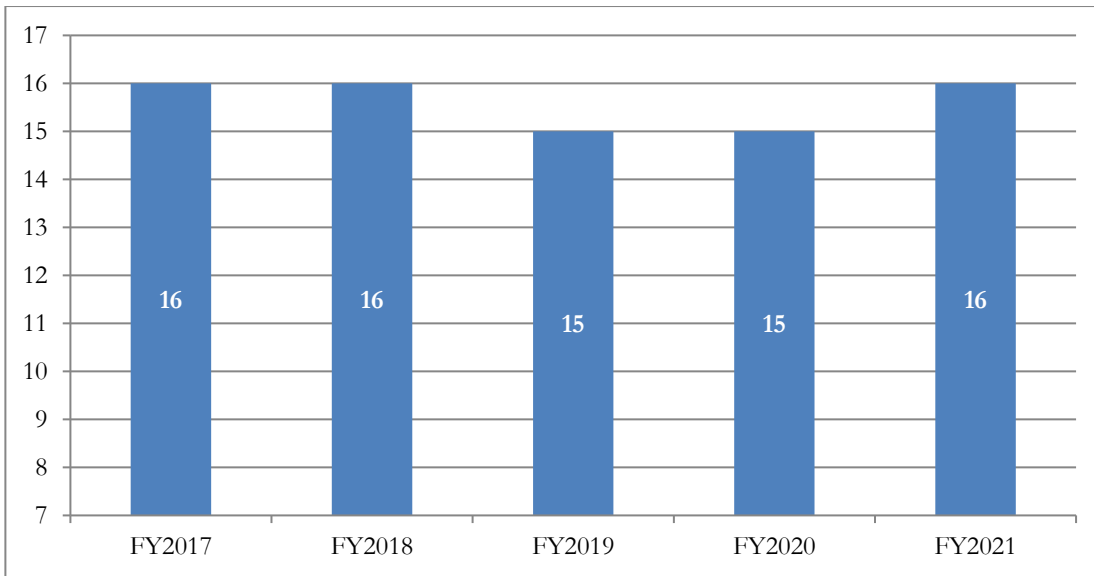
spring meeting is removed from the analysis, the average would be 11.5 in person and 1.5 by phone. The 2021 meetings were all entirely teleconference.

OUTCOME 3. MORE ASSOCIATE MEMBER STATES PARTICIPATING IN MTC PROGRAMS.

3A. Number of Associate States Participating in Audit Program



3B. Number of Associate States Participating in Nexus Program



OUTCOME 4. INCREASE AWARENESS AMONG THE STATES OF THE MTC AND THE VALUE OF ITS PROGRAMS.

4. Timely contact by assigned Executive Committee liaison/MTC Executive Director with newly designated or inactive top tax administrators in compact, sovereignty, and associate member states, including sharing of state-specific information with newly designated or inactive top tax administrators.

FY2017 Average: 68 days (14 letters—Oregon, D.C., Vermont, Missouri, Arkansas, Kansas, West Virginia, Tennessee, Indiana, Rhode Island, Delaware, South Carolina, Alabama, North Carolina).

FY2018: No calculated average; attendance by the executive director or deputy executive director at the FTA annual conference and all regional conferences (MSATA, NESTOA, SEATA, WSATA) as well as support for any FTA new commissioner's seminar or networking sessions held in conjunction with board meetings. And at the beginning of June, I sent a personal letter to all compact and sovereignty state tax administrators inviting them to our annual meeting in Boston, July 23-26.

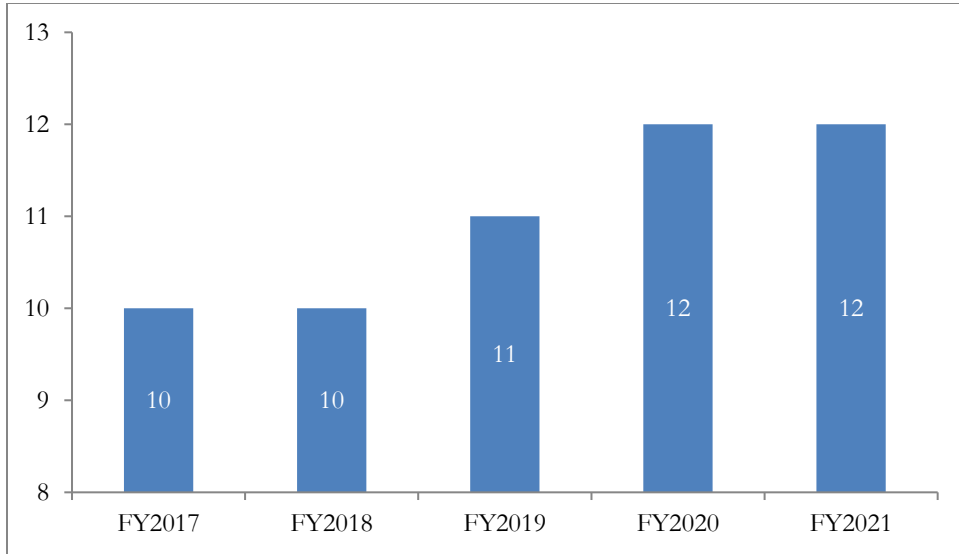
FY2019: Attendance by the executive director or deputy executive director at the FTA annual conference and all regional conferences (MSATA, NESTOA, SEATA, WSATA) as well as support for any FTA new commissioner's seminar or networking sessions held in conjunction with board meetings.

FY2020: Attendance by the executive director or deputy executive director at the FTA annual conference and all regional conferences (MSATA, NESTOA, SEATA, WSATA) as well as support for any FTA new commissioner's seminar or networking sessions held in conjunction with board meetings. In addition, coordinated with FTA regarding their new position of manager for member relations, including taking advantage of visits to specific states.

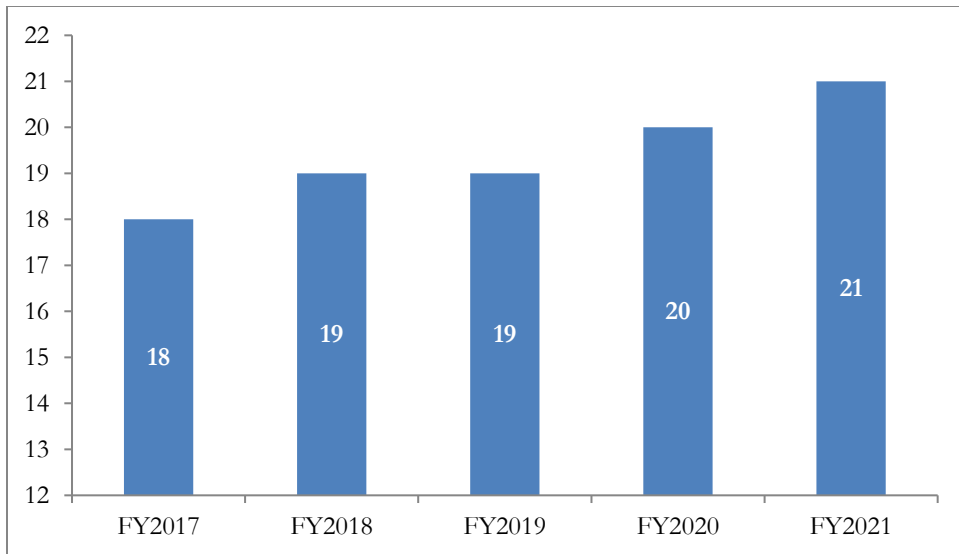
FY2021: Attendance by the executive director and the deputy executive director at all of the FTA regional conferences, most of which were virtual (MSATA, NESTOA, SEATA, WSATA). Executive Director virtual meetings or calls with new Commissioners to congratulate them and brief them on the MTC. Senior leadership or MTC participation in virtual programs with senior staff of state tax departments.

OUTCOME 5. INCREASE PARTICIPATION BY AUDIT PROGRAM STATES IN MULTISTATE AUDITS.

5A-1 Average Number of Audit Program States Participating in Sales & Use Tax Audits



5A-2 Average Number of Audit Program States Participating in Income Tax Audits



**5B-1 Average Annual Number of Sales & Use Tax Audits
Participated in by Each Program State**

STATE	FY2017	FY2018	FY2019	FY2020	FY2021
AL	20	17	19	25	24
AR	33	26	26	30	26
CO	26	24	25	29	27
DC	26	24	23	26	22
GA	18	17	20	22	19
HI	27	19	20	30	30
ID	27	25	24	29	27
IA			8	21	25
IL					
KS	37	30	30	36	32
KY	33	27	25	32	31
LA	33	26	26	29	27
MD				11	15
MA	1				
MI	3	2	1	1	1
MN					
NJ	17	14	17	21	35
ND	31	26	28	36	22
SC	1	1			
TN	20	17	17	23	23
UT	31	23	24	32	32
WI	22	16	15	7	5
Total Audits	40	33	33	39	36

**5B-2 Average Annual Number of Income Tax Audits
Participated in by Each Program State**

STATE	FY2017	FY2018	FY2019	FY2020	FY2021
AK	21	20	22	20	25
AL	21	20	21	18	22
AR	22	22	22	19	24
CO	17	14	15	14	20
DC	20	19	19	16	19
DE	8	10	10	15	19
HI	7	10	12	12	17
ID	14	18	19	17	19
IA	14	15	16	16	21
KS	18	19	20	17	22
KY	19	19	19	17	22
LA				7	11
MD				5	10
MA	3	2	2	1	1
MI	1	1	1	1	1
MO	10	11	12	9	12
MT	21	21	21	17	22
NE	20	20	20	19	24
NH	5	9	8	11	12
NJ	9	12	12	13	19
NM	23	22	22	19	22
ND	23	23	23	19	24
PA	13	14	15	14	20
RI	13	12	13	13	18
OR	17	17	18	18	23
SC	1	1	1		
TN	17	18	17	16	20
UT	22	22	22	19	24
WV	21	21	20	18	22
WI	12	15	14	7	6
Total Audits	23	23	23	20	25