MULTISTATE TAX COMMISSION

TO: Strategic Planning Committee

FROM: Greg Matson, Executive Director

DATE: May 1, 2025

SUBJECT: Proposed Engagement Measures

This memorandum provides recommendations for proposed performance measures with respect to monitoring engagement with the MTC. This information is being provided to assist the Strategic Planning Committee in implementing new engagement tracking metrics—a project the committee decided to undertake at its meeting in November 2024.

BACKGROUND

In 2011, the Executive Committee established this committee (at that time referred to as the Strategic Planning Steering Committee) to begin strategic planning activities. It had been more than five years since any sort of strategic planning had been done by the MTC. After the initial work developing an updated mission, vision, values, and goals, this committee recognized that turnover is an ongoing and routine occurrence within state departments of revenue and that there was a level of disengagement by some current commissioners and member states. So, the first project the committee initiated was the Commissioner Outreach, Recruitment & Education project. This project was directly connected to the strategic goal of engagement of states and other stakeholders. The Commission accordingly tracked this information but over time noted significant changes in meeting processes and access. As a result, some of the engagement measures have proven redundant, some of the measures are regularly monitored by program oversight committees, and many of these measures have been consistent for at least the last five fiscal years.

At the March 20, 2025, meeting of this committee, Greg Matson recommended exploring other, current data that that would better indicate engagement or track engagement in other areas (not already part of program committee oversight) and that can be—thanks to technology—more efficiently used.

GOAL

Whatever areas we want to track with respect to engagement should relate to our strategic engagement goal, "We will maintain a high level of institutional knowledge within the states and among our stakeholders about the MTC." Our strategic goal description for engagement indicates that the achievement of our engagement goal will be reflected by:

- A high level of participation by states in the activities of the MTC.
- A significant number of top tax administrators who are directly involved in the MTC.
- Significant public participation in commission activities.
- Significant public use of MTC services such as voluntary disclosure and alternative dispute resolution.
- Strong relationships and strategic partnerships that help the MTC achieve its mission and vision.

The purpose of this initial engagement tracking would be to establish a baseline for future goals in furtherance of this directive. These may include boosting public participation; increasing LMS awareness and use; and a wider outreach to more junior attorneys and auditors.

With this in mind, it would be reasonable—and fairly doable—to measure and then later establish a baseline in four areas: meeting attendance, state involvement in uniformity projects, training engagement, and website engagement.

1. Meeting Attendance

This is essentially what we already track with Outcome 1 Measures. In addition, we'd like to start comparing unique vs repeat attendees to give us a baseline idea not only of who we're reaching but whether we're engaging new people.

What to Measure:
>   Total attendance per meeting (virtual & in-person)
>   Attendance trends over time

How to Measure:
>   Sign-in sheets
>   Zoom attendance logs (for virtual)

Tools:
>   Meeting platforms
>   Attendance forms
>   Manual tracking with Excel or Google Sheets

Reporting Metrics:
>   Attendance per meeting
>   % growth/decline in participation

2. State Involvement in Uniformity

What to Measure:
>   Average number of states participating in uniformity committee meetings
>   State attendance trends over time at uniformity committee meetings

How to Measure:
>   Log participants and states involved
>   Collect feedback from participants

Tools:
>   Spreadsheet
>   Survey tools (SurveyMonkey)

Reporting Metrics:
>   % growth/decline in participation

3. Training Engagement (LMS, in-person, webinars, attorney training)

This would be the most complex measurement since we have a variety of types of training, including in-person, prerecorded online, webinars, and hybrid. In addition, we would like to measure what we call internal and external engagement – the number of attendees at our training events as well as speakers and presenters from outside the organization. We have also noted that many of our events are capped, so going strictly by attendance may not be the best measure of success. Trainings are one of the ways we can provide significant value to our members, so it's essential to make sure that we're offering optimum learning opportunities.

What to measure:
>   Course enrollment numbers and attendance (and/or whether max was reached)
>   Course completion rates (LMS)
>   User feedback and satisfaction
>   Number of outside speakers participating

How to Measure:
>   Analytics from LMS dashboard
>   Post-course feedback surveys
>   Login frequency and activity logs

Tools:
>   Moodle built-in reports
>   Moodle survey results
>   Online registration reports
>   In-person attendance logs

Reporting Metrics:
>% of users completing training
>Score on assessments
>Unique vs. repeat attendees

4. Website Engagement

We should get an initial idea of who is visiting our website and why. Eventually we may use this information to streamline the structure of the website, maximize search engine optimization, and expand our reach.

What to Measure:
>Website traffic (unique visitors, sessions)
>Page views per section (e.g., Uniformity Projects)
>Average time on site

How to Measure:
>Google Analytics (or alternative)
>Accessibility compliance reports

Tools:
>Google Analytics

Reporting Metrics:
>Monthly active users
>Top 5 pages visited
>Time-on-page per key content