MULTISTATE TAX COMMISSION

TO: Strategic Planning Committee

FROM: Greg Matson, Executive Director

DATE: July 22, 2025

SUBJECT: Proposed Engagement Measures

This memorandum provides a baseline dataset 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.

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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, we have pulled statistics to establish a baseline in four areas: meeting attendance, state involvement in uniformity projects, training engagement, and website engagement.

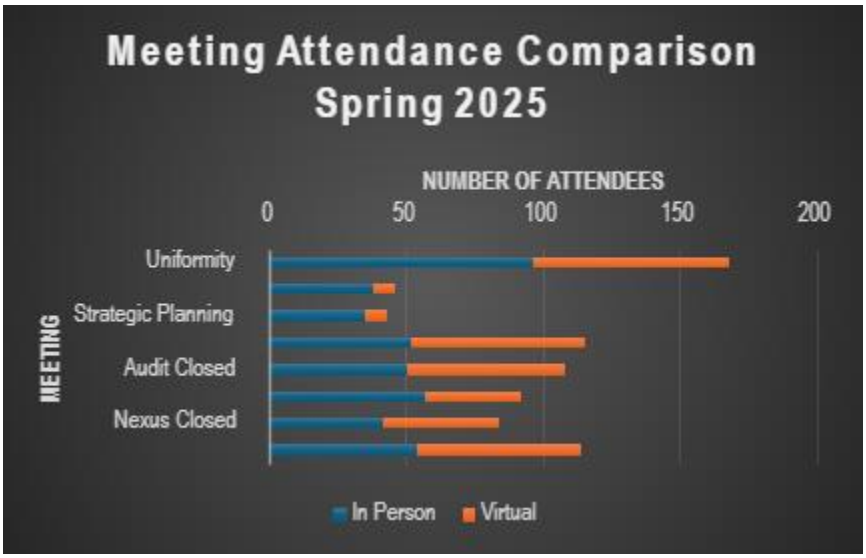
1. Meeting Attendance

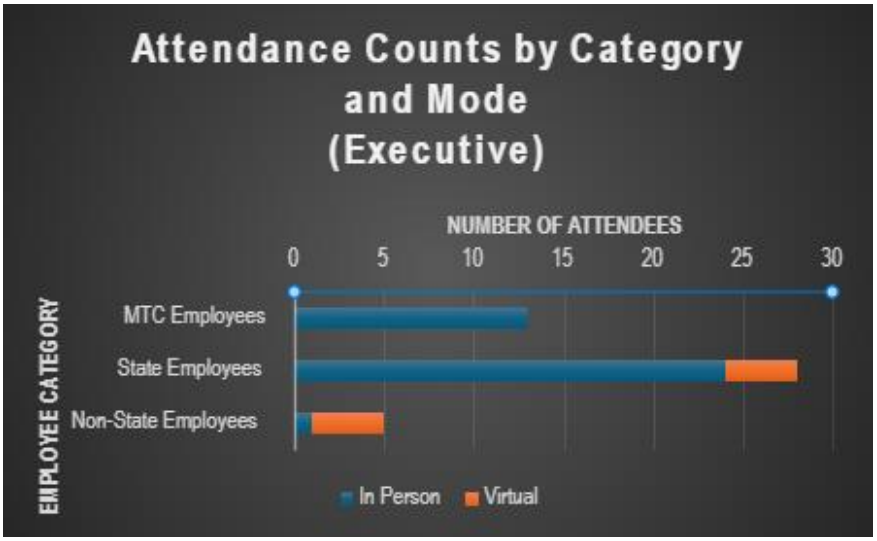
This is essentially what we have historically tracked with Outcome 1 Measures. In addition, we'd like to start comparing unique vs repeat attendees to give us a baseline idea of how often we engage with new people at our meetings.

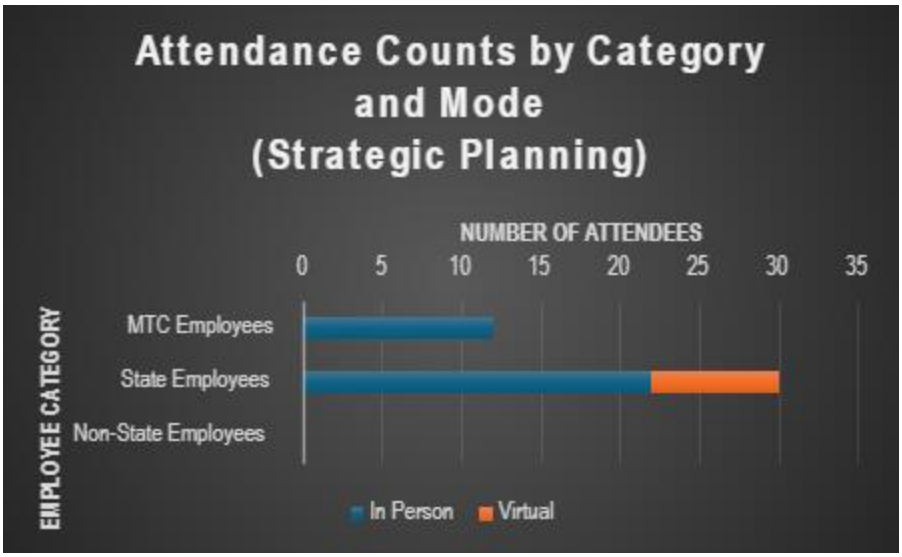
What to Measure:

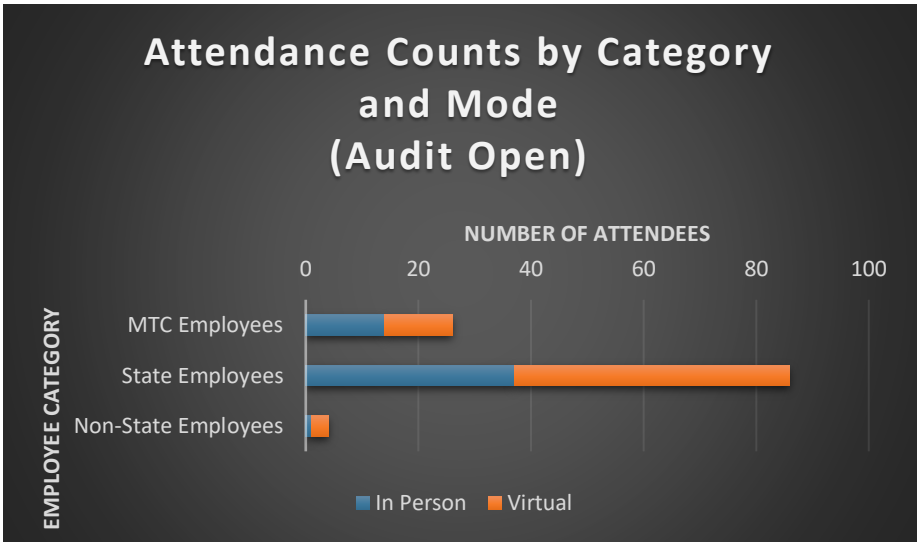
Total attendance per meeting (virtual & in-person)
Attendance trends over time

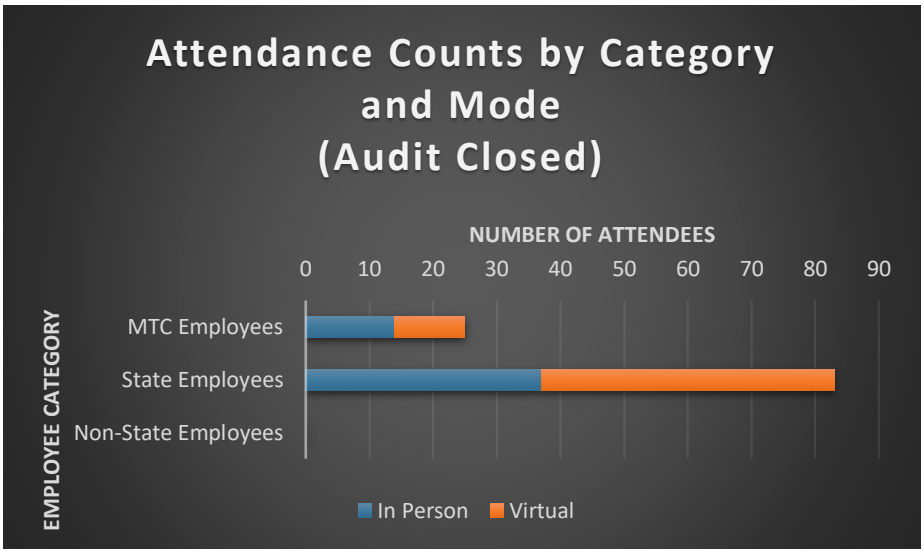
Baseline Measures:

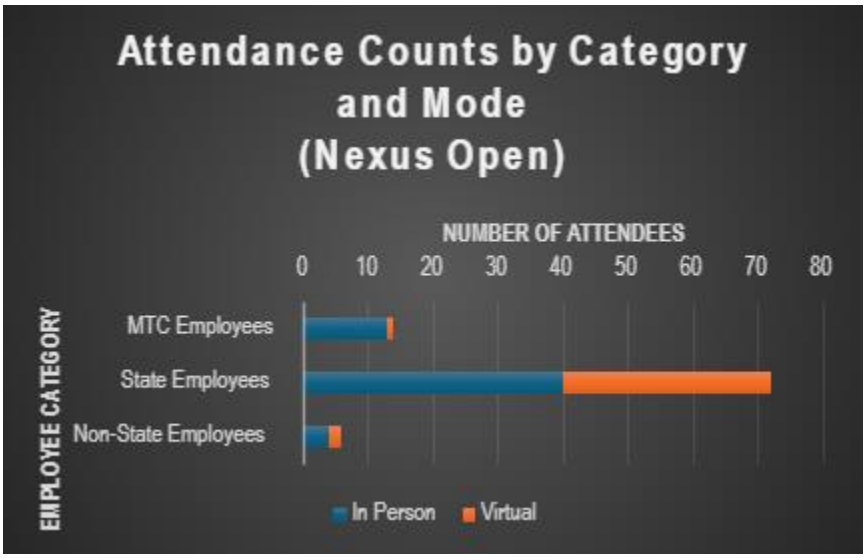


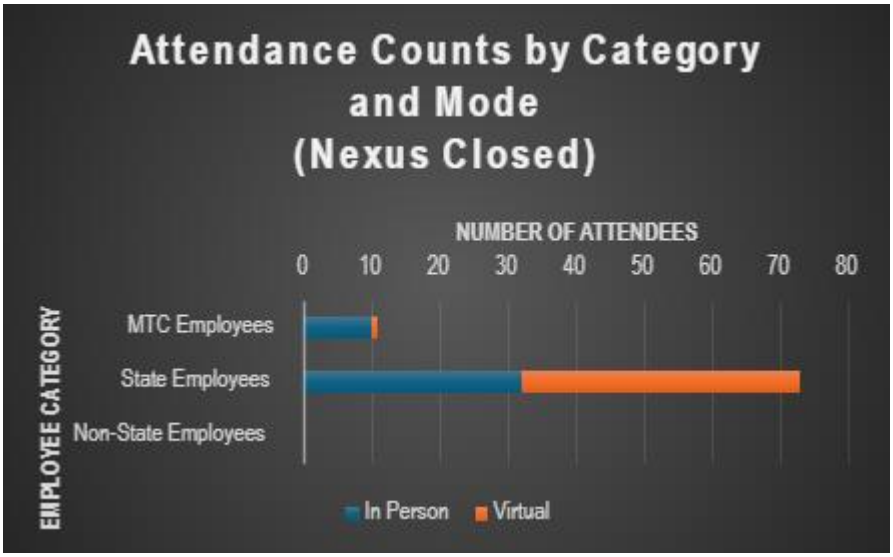



Attendance Counts by Category and Mode (Strategic Planning)
NUMBER OF ATTENDEES
0
5
10
15
20
25
30
35
EMPLOYEE CATEGORY
MTC Employees
State Employees
Non-State Employees
In Person
Virtual


Attendance Counts by Category and Mode (Audit Open)
NUMBER OF ATTENDEES
0
20
40
60
80
100
EMPLOYEE CATEGORY
MTC Employees
State Employees
Non-State Employees
In Person
Virtual


Attendance Counts by Category and Mode (Audit Closed)
NUMBER OF ATTENDEES
0
10
20
30
40
50
60
70
80
90
EMPLOYEE CATEGORY
MTC Employees
State Employees
Non-State Employees
In Person
Virtual


Attendance Counts by Category and Mode (Nexus Open)
NUMBER OF ATTENDEES
0 10 20 30 40 50 60 70 80
EMPLOYEE CATEGORY
MTC Employees
State Employees
Non-State Employees
In Person
Virtual

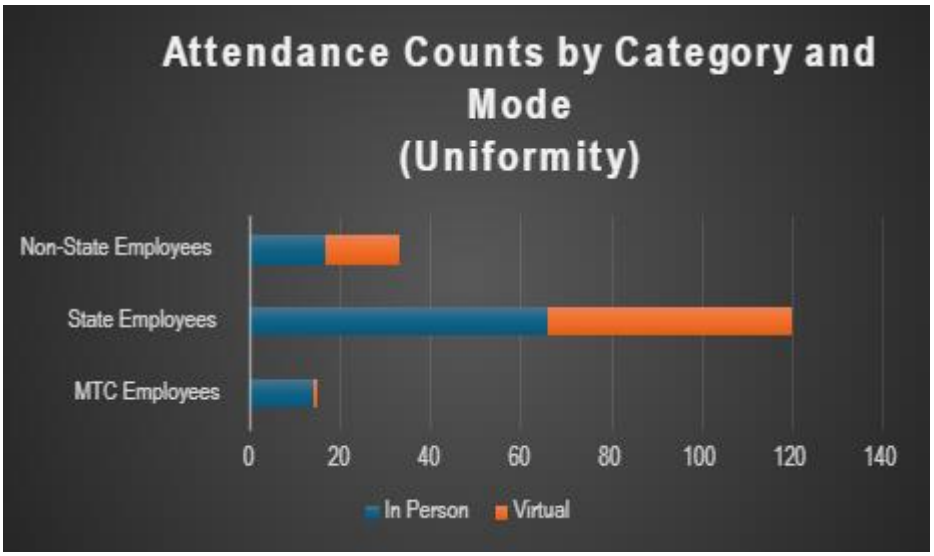

Attendance Counts by Category and Mode (Nexus Closed)
NUMBER OF ATTENDEES
0 10 20 30 40 50 60 70 80
EMPLOYEE CATEGORY
MTC Employees
State Employees
Non-State Employees
In Person
Virtual

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

Baseline Measures:



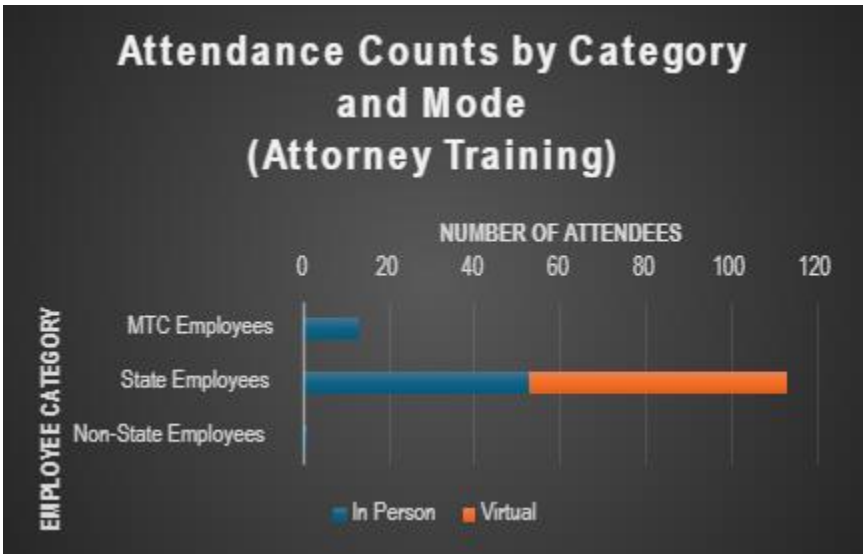
3. Training Engagement (LMS, in-person, webinars, attorney training)

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.

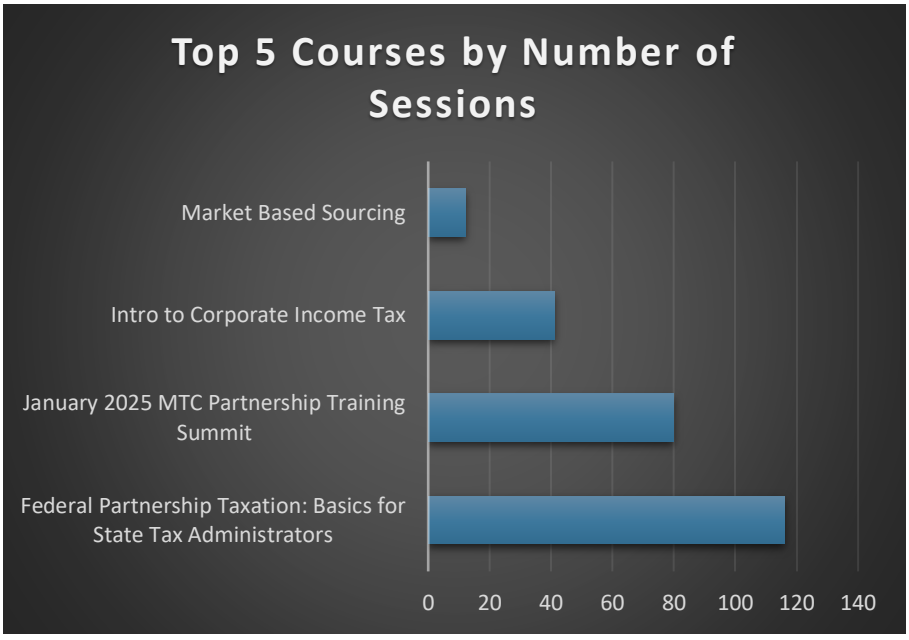
What to measure:

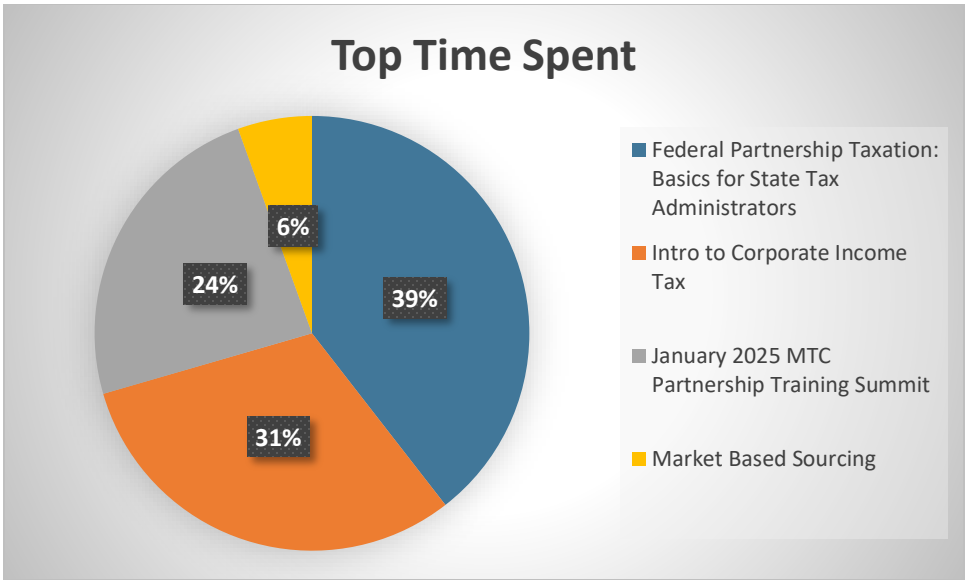
Course enrollment numbers and attendance (and/or whether max was reached)
Course completion rates (LMS)
User feedback and satisfaction
Number of outside speakers participating

Baseline Measures:

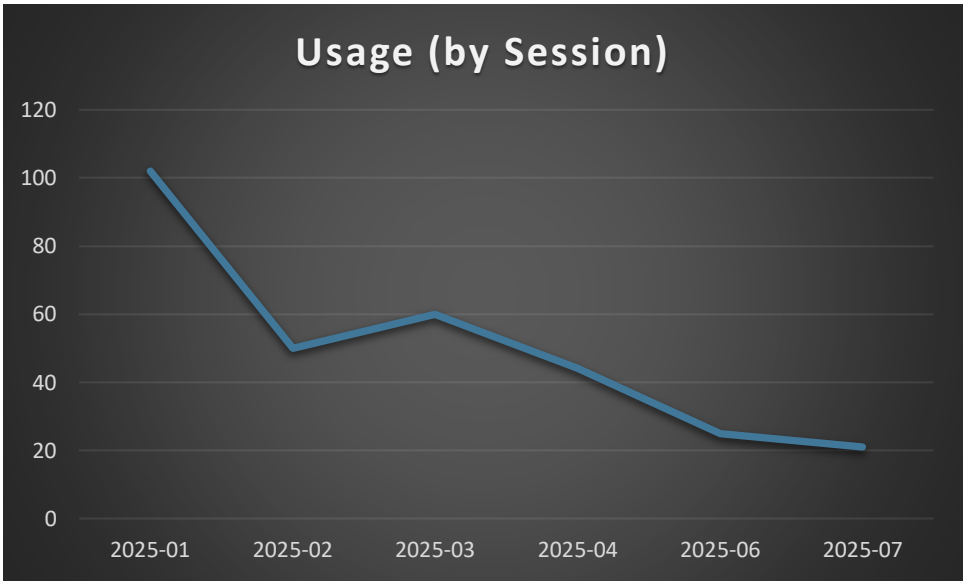


We also analyzed 2025 Learning Management System (LMS) usage data (visits) to establish an engagement baseline. We reviewed **536 session records** (after excluding internal/admin users). These sessions were logged by **123 unique users** from our target audience, all participating in continuing education training programs. This baseline will help identify current engagement patterns so we can work on improving future engagement and offering trainings that are responsive to our audience's needs.



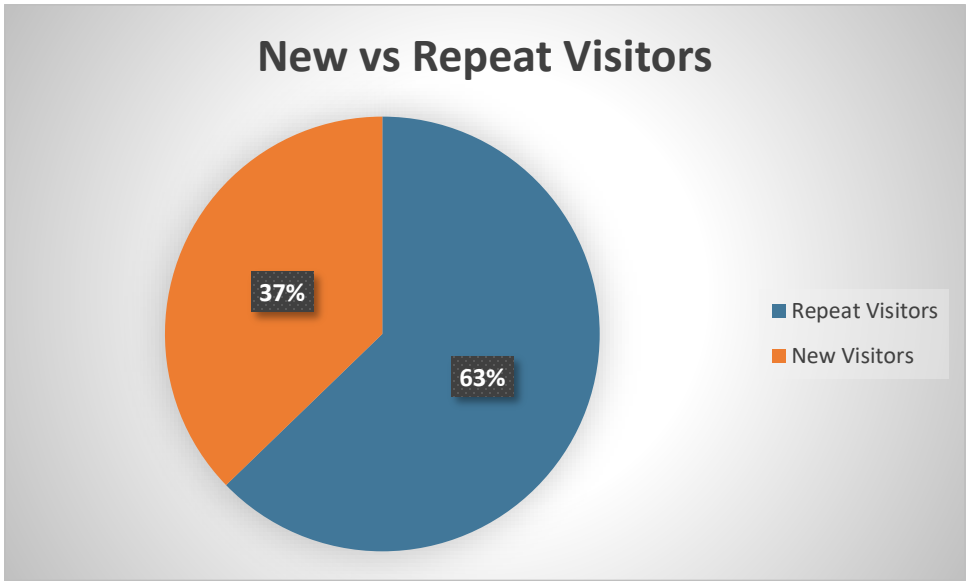


Beyond visit counts, we examined which courses users spent the most total time in, as this reflects depth of engagement. As expected, the courses with the most sessions are generally where learners spent the most time, but there are notable differences. The *"Federal Partnership Taxation"* course also leads in total time spent: users accumulated about 97 hours of active session time in this course alone (which aligns with its large number of visits). However, the *"Intro to Corporate Income Tax"* course, despite only 50 sessions, showed the second-highest total time at roughly 75 hours in aggregate – meaning those who did use this course tended to spend a lot of time per session. In fact, an average session in *Intro to Corporate Income Tax* lasted ~90 minutes, significantly longer than sessions in other courses. The January 2025 Summit course ranked third in total time (~61 hours). This suggests that certain courses (like the Corporate Income Tax course) provided more in-depth content that required longer engagement per visit, even if they attracted fewer distinct sessions.



Usage of the LMS was not steady; instead, it spiked around specific periods, particularly the one correlated with the January Partnership Training Summit. January saw 273 sessions, a peak far above any other month. Following January, engagement declined gradually, indicating that that engagement is highly event driven. This pattern shows the need to sustain learner interest outside of major events.

We noticed that few people accessed the attorney trainings, which we generally post about a month after the event. After intense consideration, we have concluded that people probably don't know about them. To remedy that situation, we plan to publicize them more, including in our re-invigorated monthly newsletter. If this doesn't prompt more engagement, we should launch more specific post-session survey questions to figure out why.



We also looked at **new vs. repeat usage** among the learners. Out of the 123 total unique users in this period, a majority came back to use the LMS multiple times. **Approximately 67%** of users (83 individuals) had **more than one session**, meaning they returned for additional learning after their first visit. On the other hand, **about 33%** (40 individuals) used the LMS for only a single session in the entire period (one-time visitors who did not return). This is a promising sign that over two-thirds of the learners found enough value to re-engage with further sessions or courses. However, having one-third of users not return for any follow-up session suggests there is room to improve the initial experience or follow-up with those first-time users. It's possible that some one-time users came only for a specific one-off event (like the January Summit) and didn't explore further content. Lila is currently rocking back and forth muttering, "A one-time user is just a repeat user who isn't back yet." Accordingly, moving forward, we will focus on converting these one-time visitors into repeat learners.

CIT Evaluations

Were the stated learning objectives met?	We did not have any prerequisites. Should we have had prerequisites for this course?	Were program materials relevant and did they contribute to the achievement of the learning objectives?	Was the time allotted to this learning activity appropriate?	How can we improve? We welcome any and all suggestions.
Yes	No	Yes	Just right	
Yes	Yes	Yes	Just right	
Yes	Yes	Yes	Just right	1. Provide all Resources listed out on the slides in PDF form 2. Provide all Relevant Terms in 1 PDF in addition to the the tabbed Relevant Terms 3. Touch base on what a 51-state breakdown is where when state's request the 51-state apportionment factor details, it should include the factors made to each state. The method for State A should be mirrored (or close there to) in the method applied in the 51-state breakdown, even though other states may have different statutes.
Yes	No	Yes	Just right	
Somewhat	No	Yes	Just right	The videos broke up and stalled often
Yes	No	Yes	Just right	I really liked the setup of this training. I attended this training in person 14 or so years ago as a brand new auditor and I thought this refresher course would be a waste of my time but I actually found it relatively enjoyable. Easy to follow and a great course for the newer auditors. I hope that the MTC plans to

				put together more of these types of trainings so that they are available to us. Thank you.
Yes	No	Yes	Just right	

In survey feedback, people's main complaints concerned technical issues. We've scheduled a meeting with Moodle to request a fix. Other feedback – like requests for more PDF materials – is easy to address and we're working on it.

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

Baseline Measures:

Please note that we use MonsterInsights Lite so our access to data is somewhat limited. This report reflects the last 30 days.

Sessions	Pageviews	Avg. Session Duration	Bounce Rate
19,412 ↓ 4% vs. Previous 30 Days	28,698 ↓ 3% vs. Previous 30 Days	26s ↑ 4% vs. Previous 30 Days	52.6% ↑ 5% vs. Previous 30 Days

New vs. Returning Visitors

New	89%
Returning	11%

Top 10 Referrals

1.	tax.colorado.gov	470
2.	avalara.com	340
3.	chatgpt.com	323
4.	statics.teams.cdn.office.net	281
5.	670e.educdn.net	117
6.	help.whatnot.com	80
7.	taxjar.com	77
8.	nj.gov	61
9.	tax.idaho.gov	61
10.	ebay.com	32

Top Posts/Pages	
1. Uniform Sales & Use Tax Resale Certificate - MTC	6,607
2. Uniform Sales & Use Tax Resale Certificate - MTC	5,548
3. Home - MTC	4,775
4. 58th Annual Meetings - MTC	1,208
5. Uniform Sales and Use Tax Certificate – Multijurisdictional - MTC	821
6. Member States - MTC	565
7. State Taxation of Partnerships - MTC	417
8. Multistate Voluntary Disclosure Program - MTC	408
9. Member States - MTC	343
10. Multistate Tax Compact - MTC	332

Note: we are aware that some pages are listed twice. We do not know why. We queried and Google Analytics proposed that we pay for access to more insights. We decided, for the time being, to stick to our current insights.

CONCLUSIONS

The intent of this initial report was just to gather baseline data, which we have done. But in the process, we noticed that there is probably a lack of awareness of MTC activities and resources. This is partly because our content has not traditionally been viewed as "interesting," but it's worth considering how better to reach our target audience. Current action items include reinvigorating the MTC Newsletter; better publicizing LMS offerings; and seeking state involvement in creating LMS trainings. As requested by CIT learners, we are also expanding the amount and type of downloadable materials we offer.