Spring 2019 Symposium
Speaker Bios and Panel Descriptions
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Keynote Address: ***Fiscal Therapy: Curing America's Debt Addiction and Investing in the Future***

- Dr. William Gale, Brookings Institutution
- Introduced by Theresa (Teri) Gullo, CBO

William Gale is the Arjay and Frances Miller Chair in Federal Economic Policy and a senior fellow in the Economic Studies Program at the Brookings Institution. His research focuses on tax policy, fiscal policy, pensions and saving behavior. He is co-director of the Tax Policy Center, a joint venture of the Brookings Institution and the Urban Institute. He is also director of the Retirement Security Project.

Gale is the author of *Fiscal Therapy: Curing America's Debt Addiction and Investing in the Future* (Oxford University Press, 2019).

He is the co-editor of several books, including Automatic: Changing the Way America Saves (Brookings 2009); Aging Gracefully: Ideas to Improve Retirement Security in America (Century Foundation, 2006); The Evolving Pension System: Trends, Effects, and Proposals for Reform (Brookings, 2005); Private Pensions and Public Policy (Brookings, 2004); Rethinking Estate and Gift Taxation (Brookings, 2001), and Economic Effects of Fundamental Tax Reform (Brookings, 1996).

His research has been published in several scholarly journals, including the American Economic Review, Journal of Political Economy, and Quarterly Journal of Economics. In 2007, a paper he co-authored was awarded the TIAA-CREF Paul A. Samuelson Award Certificate of Excellence.

He has also written extensively in policy-related publications and newspapers, including op-eds in CNN, the Financial Times, Los Angeles Times, New York Times, Wall Street Journal, and Washington Post. From 2006 to 2009, he served as Vice President of Brookings and Director of the Economic Studies Program. Prior to joining Brookings in 1992, he was an assistant professor in the Department of Economics at the University of California, Los Angeles, and a senior economist for the Council of Economic Advisers under President George H.W. Bush.

He is a member of the Macroeconomic Advisers Board of Advisors since 2016. Gale has consulted for the MSL Group and in 2017 was a panelist at the Center for Strategic Development's Kingdom of Saudi Arabia Economic Reforms Workshop.

Gale attended Duke University and the London School of Economics and received his Ph.D. from Stanford University in 1987. He lives in Fairfax, Virginia, is an avid tennis player, and is a person who stutters. He is the father of two grown children.

Theresa Gullo is the Assistant Director for Budget Analysis at CBO. She guides and contributes to analyses that are critical to the legislative processes of the Congress—including projections of federal spending for the current year and the next 10 years under current laws and policies for about 1,000 budget accounts covering all federal activities; tallies of federal spending throughout the year; and about 600 formal cost estimates (most of which include estimates of the cost of federal mandates on state, local, and tribal governments) each year for legislation approved by committees and thousands of informal estimates each year for legislation under consideration.

Ms. Gullo has worked at CBO since 1985. She served as an analyst in the Natural and Physical Resources Cost Estimates Unit, where she handled land and water management issues. She also helped create and managed the State and Local Government Cost Estimates Unit until 2007, when she became the division's Deputy Assistant Director.

Before coming to CBO, Ms. Gullo worked at the Urban Institute, conducting research on a variety of public finance issues, including infrastructure investment and state implementation of federal block grants. She graduated from Scripps College with a bachelor's degree in American studies and received a master's degree in public policy from the University of California at Berkeley.

Morning Breakout 1: <u>The Role of Analysis in the Amazon HQ2 Process in Virginia</u>

Panelists:

- Mark Schwartz, County Manager, Arlington County, VA
- Nani Coloretti, Senior Vice President, The Urban Institute
- Moderator: Courtney Timberlake, AABPA; The Craddock Group

Panel Description: The panel discussion will center on the role of analysis at the state and local level in the process that led to Amazon's selection of Arlington, VA for a new headquarters facility. Topics of interest include : What were some of the key analyses and metrics that the County relied upon? What appeared to have been most influential? What are the broader implications for public policy, program analysis and management, and opportunities for both researchers and County/DC metro area analysts inside and outside government to focus on to help ensure that the right questions about impact are being asked, and the data analyzed?

Mark Schwartz was named County Manager by the Arlington County Board in January 2016 after serving as Acting County Manager the previous six months. He was a Deputy County Manager from October 2010 through June 30, 2015, and was named Acting Deputy County Manager in November 2009. Mark joined County government in December 2005, serving as deputy chief financial officer and later as Director of the Department of Management and Finance and Chief Financial Officer before joining the Office of the County Manager.

Mark has an extensive background in financial management, strategic planning and administration. Before coming to Arlington in December 2005, Mark served 12 years in the U.S. Office of Management and Budget (OMB), Executive Office of the President. As branch chief, he was responsible for directing and supervising staff in their work with the Department of the Treasury, financial regulators and the District of Columbia. Additionally, Mark was responsible for formulation and execution of portions of the President's budget, legislative proposals, regulations and testimony.

Prior to OMB, Mark served as counsel on the Senate Judiciary Committee, where he helped assess judicial and Justice Department nominees' competence and integrity. His responsibilities also included serving as a liaison with Congressional members, staff, public interest groups and Justice Department officials. He also worked as an attorney with the law firm Akin, Gump, Strauss, Hauer, and Feld, and with the U.S. Department of Agriculture. Mark holds a B.A. from Harvard University, and a J.D. from the University of Pennsylvania School of Law.

Nani A. Coloretti is the senior vice president for financial and business strategy at the Urban Institute. She served the Obama administration for almost eight years, most recently as deputy secretary of the US Department of Housing and Urban Development (HUD). As the second-most senior official at HUD, she managed the department's day-to-day operations and cross-cutting program initiatives, including a $45 billion annual budget and approximately 8,000 employees.

Before joining HUD, Coloretti spent five years at the US Department of the Treasury, most recently as the assistant secretary for management. She oversaw all operational areas including the development and execution of the department's budget, performance, and strategic planning processes; procurement; human resources; information technology; and management of Treasury's headquarters and bureaus. At Treasury, she also helped create the Consumer Financial Protection Bureau as its acting chief operating officer.

Before joining the Obama administration in 2009, Coloretti spent four years as policy adviser and budget director for San Francisco mayor Gavin Newsom. Coloretti's prior experience includes work in San Francisco to improve the lives of children, youth, and families; budget analysis in the Clinton administration's Office of Management and Budget and for the State of Hawaii; and economic consulting.

Coloretti is a director on the board of Bank of the West and on the advisory board for Access Democracy. Coloretti has been independently recognized for her management results and holds a BA in economics and communications from the University of Pennsylvania and an MPP from the University of California, Berkeley.

Morning Breakout 2: The Growth and Evolution of Public Policy Education

Panelists:

- Heather Hamilton, Chief Accreditation Officer, NASPAA
- Dr. Phil Joyce, Professor of Public Policy and Senior Associate Dean, School of Public Policy, UMD
- Dr. Kenneth Rogerson, Director of the Sanford School of Public Policy MPP Program, Duke U
- Patrick Washington, Business Intelligence Analyst, US Patent and Trademark Office; Adjunct Professor, Schar Shool, GMU.
- Moderator: Edward Brigham, AABPA; Federal Consulting Alliance

Panel Description: The panel will discuss the growth and expansion of graduate education for public administration and public policy. How does the changing professional landscape impact academic programs and specializations, as well as public and nonprofit organizations at all levels, supervisors hiring new professionals, and practitioner career flexibility and advancement.

Heather Hamilton is the Chief Accreditation Officer at NASPAA, where she oversees quality assurance for graduate degrees in public service across the globe, including the ongoing implementation and strategic management of NASPAA accreditation. As CAO, Ms. Hamilton provides leadership on policy for the Commission on Peer Review and Accreditation (COPRA), directs volunteer engagement, promotes best practice through education and training, and represents NASPAA externally. She holds a Master of Public Service and Administration degree from the Bush School of Government and Public Service at Texas A&M University.

Philip Joyce is Senior Associate Dean and Professor of Management, Finance and Leadership at the Maryland School of Public Policy. Joyce has also served as Professor of Public Policy and Public Administration and directed the PhD program in Public Policy and Administration at The George Washington University. Dr. Joyce's teaching and research interests include public budgeting, the Congressional budget process, performance measurement, and intergovernmental relations. He is the author of-*The Congressional Budget Office: Honest Numbers, Power, and Policy Making* (Georgetown University Press, 2011). He is also co-author of two other books--*, Government Performance: Why Management Matters* (Johns Hopkins, 2004) and *Public Budgeting Systems, 9th Edition (*Jones and Bartlett, 2013).

Dr. Joyce also has 12 years of public sector work experience, including four years with the Illinois Bureau of the Budget and five years with the United States Congressional Budget Office (CBO). In 1992 he received the CBO Director's Award for Distinguished Service. He is an elected Fellow of the National Academy of Public Administration. In 2009 he received the Elmer Staats Award from the National Association of Schools of Public Affairs and Administration, and in 2012 he received the Aaron Wildavsky Award for lifetime scholarship from the Association for Budgeting and Financial Management.

Kenneth Rogerson is a professor at Duke University's Sanford School of Public Policy. He is currently the Director of Graduate Studies for the Master of Public Policy program as well as the director of the Policy Journalism and Media Studies Certificate program. He received his Ph.D. from the University of South Carolina and currently teaches and researches on technology policy, news media and international communications.

Patrick Washington is a Business Intelligence Analyst at the U.S. Patent and Trademark Office, and Adjunct Professor in the Schar School of Policy and Government at George Mason University. He previously worked at GAO, SBA-OIG and in the private sector. His professional work and research interests include government and not-for-profit financial management, data analytics, performance management, and personnel issues. He has been an AABPA Board member since 2011.

Afternoon Breakout 1: **Enriching the Debate: Insights and Policy Successes from State and Federal Leaders**

Panelists:

- William Glasgall, Senior Vice President and Director, State and Local Initiatives, The Volcker Alliance
- Stephen Bailey, Manager, Fiscal and Economic Policy, State Fiscal Health, The Pew Charitable Trusts
- Natalie Keegan, Analyst in American Federalism and Emergency Management Policy, Congressional Research Service
- Moderator: Justin Theal, AABPA; Officer, Fiscal 50, State Fiscal Health, The Pew Charitable Trusts

Description: The importance of objective, nonpartisan analysis is greater than ever in today's environment. This session will feature experts from key state and federal organizations, all of which represent industry-leading efforts to better inform lawmakers' policy and funding decisions with more data, science, and facts. Panelists will discuss success stories, where high-quality analyses enriched debates and led to greater evidence-based policies or practices, as well as lessons learned for the audience.

William Glasgall is Senior Vice President and Director of State and Local Initiatives at the Volcker Alliance, a New York City-based 501(c)3 nonprofit, nonpartisan organization founded in 2013 by former Federal Reserve Board Chairman Paul A. Volcker. Bill joined the Alliance in January 2014 and has supervised the creation of an 11-university research network and the publication of numerous studies, including three groundbreaking Truth and Integrity in State Budgeting reports in 2015, 2017, and 2018. Previously, he was Managing Editor at Bloomberg News, overseeing coverage of state and local government and financial news across the US. His career also includes almost two decades as a Managing and Senior Editor at BusinessWeek Magazine, where he won two Overseas Press Club Awards for international reporting; and as Vice-President at Standard & Poor's; Editorial Director of Investment Advisor Group; and on-screen member of the This Week in Business team on Public Broadcasting System TV. Mr. Glasgall is a member of the Municipal Fiscal Health Working Group of the Lincoln Institute of Land Policy; a Governor of the Overseas Press Club Foundation; and a former member of the Board of Overseers of the Knight-Bagehot Fellowship Program in Economics and Business Journalism at Columbia University, where he was also a Fellow. He is a graduate of Boston University, recipient of a DAAD Fellowship at the University of Bonn, and lives in New Jersey.

Stephen Bailey is a manager on Pew's state fiscal health project, where he has researched fiscal policy issues since 2013. Bailey leads a team that helps states identify ways to better manage the fiscal pressures resulting from increased economic and revenue uncertainty. His areas of expertise include strategies to mitigate the impact of business cycle fluctuations on the budget and policies to avoid long-term structural imbalances. During his time at Pew, Bailey has provided technical assistance to several states seeking to improve their fiscal policies, including laws related to rainy day funds, nonrecurring revenue, revenue forecasting, and general fund budget stress testing. Additionally, he has developed innovative approaches to measure state revenue volatility and to model rainy day fund deposit scenarios. Bailey holds a master's degree in public policy from Georgetown University and a bachelor's degree in economics and business administration from the University of Mary Washington.

Natalie Keegan is a policy analyst in American Federalism and Emergency Management Policy at the Congressional Research Service in the Library of Congress. Her expertise comes from over 20 years of experience in grants administration, intergovernmental relations, and fiscal federalism. She has worked at the local government level as a grant writer, grant manager, and auditor and at the county government level as a budget analyst and grant manager. She has also worked at the federal level for the Federal Emergency Management Agency (FEMA) in the disaster assistance grant program areas. For the past twelve years, Natalie has been a federalism and fiscal federalism scholar for Congress, serving as a policy analyst with expertise in federalism and federal grant administration, including federal grant oversight and transparency, federal grant program evaluation, and grant financial management issues. She is also the lead analyst on the FEMA Public Assistance grant program.

Natalie completed her doctoral studies in statistics, public policy and public administration at Northern Illinois University. She also holds a Master's Degree in Public Administration from the University of South Florida and has completed several graduate certificates in the areas of education, information technology, and emergency management.

Afternoon Breakout 2*:* <u>What's Under the Evidence-based Umbrella?</u>

Panelists:

- Nick Hart, CEO, The Data Coalition
- Jon Baron,Vice President of Evidence-Based Policy, Arnold Ventures
- Erika Liliedahl, Senior Analyst, Evidence Team, Office of Management and Budget
- Moderator: Michael Sieverts, AABPA

Panel Description: This panel aims to build awareness of initiatives to advance the use of evidence in policy making, building on the 2017 report by the Commission on Evidence-Based Policy. That report opens with this statement: "Policymakers need good information on which to base decisions in order to meet the demands of the American people for a government that operates effectively and tackles the problems that face the country. Whether developing regulations, setting funding levels, or determining which policies to advance, policymakers constantly demand that evidence be generated and available to meet this need. But today, too little evidence is produced to satisfy this demand."

Dr. Nick Hart is the Chief Executive Officer of the Data Coalition and the Interim President of the Data Foundation. He helped to craft the milestone Foundations for Evidence-Based Policymaking Act, including the OPEN Government Data Act, and has worked with numerous federal agencies and congressional committees to design effective data, evaluation, and privacy policies over the past decade. Prior to joining the Data Coalition, Hart was Director of the Bipartisan Policy Center's Evidence Project and he previously served as the Policy and Research Director of the U.S. Commission on Evidence-Based Policymaking. He earned a doctorate from George Washington University's Trachtenberg School of Public Policy and Public Administration, specializing in program evaluation.

Jon Baron is the Vice President of Evidence-Based Policy at Arnold Ventures – a nonpartisan philanthropic organization. He leads Arnold Ventures' investments in rigorous research aimed at growing the body of evidence-based social programs, and scaling those shown to produce meaningful improvements in people's lives.

Mr. Baron is the founder and former president of the Coalition for Evidence-Based Policy, a nonprofit, nonpartisan organization that worked with federal policy officials from 2001 to 2015 to advance important evidence-based reforms, many of which were enacted into law and policy.
He was twice nominated by the President and confirmed by the Senate to serve on the National Board for Education Sciences (2004-2011), and was the Board's chairman during the last year of his term. He has also served on the National Academy of Sciences' Committee on Capitalizing on Science, Technology, and Innovation; and is a Fellow of the National Academy of Public Administration, an Honorary Fellow of the Academy of Experimental Criminology, and a recipient of the Society for Prevention Research's Public Service Award.

Mr. Baron holds a law degree from Yale Law School, a Master's degree in Public Affairs from Princeton University, and a Bachelor of Arts degree from Rice University.

Erika Liliedahl is a Senior Analyst on the Evidence Team at the Office of Management and Budget (OMB). Erika has been at OMB since April 2015, first as a budget/program analyst on detail from the U.S. Department of Labor (DOL). Prior to OMB, Erika held several policy analyst and program evaluation roles at DOL, including as a Senior Evaluation Specialist in the Chief Evaluation Office. Before her federal career, Erika had extensive experience working at multiple national non-profits, overseeing funding allocations and performance management of human service and community development programs. Erika has an M.P.P. from Georgetown University and a B.S. in mathematics from Rockhurst University.

Afternoon Plenary: *The Post-Shutdown Budget Landscape*

Presenters:

- Justin Riordan, CBO
- Edward C. Liu, CRS
- James V. Saturno, CRS

Description: Since the 1980s there have been 14 at least full day lapses of appropriations, 4 of which lasted more than 3 days. The longest lapse in appropriation, to date, occurred in fiscal year 2019 for 35 days. Many pieces of legislation have been introduced in the 116th Congress that contain authorities that would be triggered by a Lapse in Appropriations, including changes to federal employee pay, automatic continuing resolutions, and changes to student loan payment schedules, among others. CBO and other legislative support offices provide technical and analytical feedback while the Congress considers these various policy proposals to assess their feasibility and effect on the budget. Experts from the Congressional Budget Office and the Congressional Research Service will discuss these proposals and the status of appropriations beyond September 30, 2019.

Edward C. Liu has been a legislative attorney with the American Law Division at the Congressional Research Service since 2007, and has worked on healthcare, appropriations, national security, and tax issues. He has a J.D. from the Columbus School of Law at the Catholic University of America and is a member of the California bar.

James V. Saturno works for the Congressional Research Service (CRS). He holds an M.A. in history from the University of Rochester and a B.A. in history from the University at Albany (SUNY). He joined CRS in 1986, and currently serves as a Specialist on Congress and the Legislative Process, working in the areas of congressional history and procedure, especially the federal budget process and budget process reform.

Justin R. Riordan serves in the Scorekeeping Unit of the Congressional Budget Office (CBO) tracking and estimating appropriations legislation for the Congress. Previously he has worked for the U.S.Government Accountability Office and the Office of Management and Budget. He holds a B.A. in Economics and Legal Studies from the University of California, Santa Cruz, and a Masters of Public Policy from the George Washington University.