



# 2016 FTA Revenue Estimation & Tax Research Conference



October 15-19, 2016 \* Berkeley Hotel \* Asbury Park, New Jersey 07712

## Preliminary Program

Program updated: December 14, 2016. Check [http://www.taxadmin.org/rev\\_est/](http://www.taxadmin.org/rev_est/), for latest updates.

### Saturday, October 15, 2016

1:00 pm - 5:00 pm      **Research Roundtable** [Executive Agency Government Only] - Kingsley Ballroom

### Sunday, October 16, 2016

9:00 am - 12:00 pm      **Research Roundtable [continued]** - Kingsley Ballroom

**Research Roundtable** [Legislative Agency] - Continental

2:00 pm - 5:00 pm      **Optional Lighthouse Tour [Canceled]**

3:00 pm - 7:00 pm      **Registration**

6:00 pm - 8:00 pm      **Opening Reception** - Oval Ballroom

### Monday, October 17, 2016

7:30 am - 5:00 pm      **Registration**

8:30 am - 12:00 pm      **Monday Morning General Session** - Kingsley Ballroom

Presiding: Rod Hoheisel, Minnesota Dept. of Revenue and Chair FTA Research Section

#### **Welcome to New Jersey**

Ford M. Scudder, Treasurer of the State of New Jersey

#### **Macroeconomic Outlook**

Sara Johnson, IHS Economics

#### **Regional Economic Outlook**

Steve Cochrane, Moodys Analytics

#### **Question & Answers**

#### **Tax Reform, A Business Perspective**

Deborah Bierbaum, AT&T

#### **What Determines the Level of Business Property Taxes**

David Merriman, University of Illinois at Chicago

12:00 pm - 1:30 pm      **Lunch [with speaker]** - Crystal Ballroom

#### **Speaker: State Coincident & Leading Indexes**

Paul Flora, Senior Economic Analyst, Federal Reserve Bank of Philadelphia



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1:45 pm - 3:30 pm

## Concurrent Sessions

### SECTORIAL OUTLOOK - Kingsley Ballroom

moderator: Rod Hoheisel, Minnesota Dept. of Revenue

#### Automobile Outlook

Kim Hill, HWA Analytics

#### Housing Outlook

Yanling Mayer, CoreLogic

#### Retail Outlook

Daniel Bachman, Deloitte

### Property Taxes and Intergovernmental Issues - Continental

moderator: Eric Willette, Minnesota Dept. of Revenue

#### Cities and State Fiscal Structures

Christiana K. McFarland, National League of Cities

#### Local Government Fiscal Autonomy in Minnesota

Eric Willette, Minnesota Dept. of Revenue

#### California: Governor Jerry Brown and Subsidiarity

Jay Chamberlain, California Dept. of Finance

discussant: David Merriman, University of Illinois at Chicago

3:45 pm - 5:30 pm

## Regional Breakout Sessions [government only]

**Northeastern Region** - Kingsley III

**Southeastern Region** - Kingsley IV

**Midwestern Region** - Continental

**Western Region** - Oval

**Tuesday, October 18, 2016**

8:30 am - 10:30 pm

## Joint FTA-NTA Session - State Tax Reform\* - Kingsley Ballroom

moderator: Ranjana Madhusudhan, New Jersey Dept. of Treasury



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## **How Would Leading Federal Tax Reform Options Affect State and Local Governments?**

Alan Viard, American Enterprise Institute

## **What Can Tax Data Tell Us About the Characteristics of Contingent Workers?**

James Mackie, U.S. Dept. of Treasury

## **A Local Dimension to State Tax Reform**

Sally Wallace, Georgia State University

## **Examining State Tax Commissions: 2006-2016**

Richard Auxier, Urban Institute - Tax Policy Center

discussant: Norton Francis, Urban Institute Tax Policy Center

\* Organized by Ranjana Madhusudhan, New Jersey Dept. of Treasury

10:45 am - 12:30 pm

## **Concurrent Sessions**

### **State Tax Reform - Concurrent Session - Kingsley III**

moderator: David Gunter, Maine Revenue Services

### **NYC Recent Business Tax Reform**

Karen Schlain and David Ho, New York City Dept. of Finance

### **Comprehensive Tax Reform: North Carolina's Recent Experience**

Ed McLenaghan, North Carolina Office of State Budget & Management and Robert Bowles, Dept. of Revenue

### **Kentucky Blue Ribbon Tax Study**

Greg Harkenrider, Kentucky Office of Economic Analysis

### **Revenue Forecasting Models in a Changing Data Environment - FTA/NASBO Session - Continental**

moderator: Brian Sigriz, NASBO

### **Forecasting Income Tax Withholding In Minnesota**

John Peloquin, Minnesota Management & Budget

### **Trends and Cycles in Montana Income Tax Data: Implications for Revenue Forecasting**

Daniel Dodds, Montana Dept. of Revenue

### **Limitations of Economic Data for Fine-Tuning Revenue Projections**

Charles Steindel, Ramapo College

### **SOLUTION SERIES - Kingsley IV**



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10:45-11:30

## **Chainbridge**

### **Pitfalls in Revenue Estimation: A Case Study in Microsimulation Extrapolation**

Eric Cook and Jaime Copenhaver, Chainbridge

11:45-12:30

### **REMI 2.0 - Your Bully Pulpit for Smart Modeling, Smart Analysis & Smart Policy**

Chris Brown and John Bennett, REMI

12:30 pm - 2:15 pm

**Lunch** [on your own]

2:15 pm - 4:00 pm

**Concurrent Sessions**

## **Data Base Development and Tools - Kingsley Ballroom**

moderator: Ranjana Madhusudhan, New Jersey Dept. of Treasury

### **Rapid Revenue Analysis with Modern Business Intelligence**

Roger Cohen, New Jersey Dept. of Treasury

### **Sales Tax Forecasting and Analysis by Industry Type the Florida Model**

Robert Mckee, Florida Dept. of Revenue

### **Sales Tax Data Tracking and Forecasting in Texas**

Tom Currah and Tetyana Melnyk, Texas Comptroller of Public Accounts

### **Data and Information Gathering: Lessons Learned Thus Far in Developing DCs First Tax Expenditure Evaluation Report**

Charlotte Otabor, District of Columbia Office of Revenue Analysis

## **Tax Policy Analysis - Continental**

moderator: Rebecca Sameroff, Vermont Dept. of Taxes

### **Income and Inequality in Montana from 2001 Through 2014**

Aaron McNay, Montana Dept. of Revenue

### **Impact of Raising the Minimum Hourly Rate**

Yi Geng, Fahad Fahimullah, Daniel Muhammad and Jeffrey Wilkins, District of Columbia and Bradley Hardy, American U.

### **Impact of Raising the Minimum Hourly Rate - Illinois Analysis**

Hector Vielma, Illinois Dept. of Revenue

### **Nationwide Tax Rates and Tax Burdens Study**

Lori Metcalf, District of Columbia Office of Revenue Analysis



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6:30 pm - 8:30 pm      **Banquet** - Crystal Ballroom

## Wednesday, October 19, 2016

9:00 am - 12:00 pm      **Wednesday Morning General Session** - Kingsley Ballroom

Presiding: Rod Hoheisel, Minnesota Dept. of Revenue and Chair FTA Research Section

**Migration - An Analysis of California's Proposition 30**

Allen Prohofsky, California Franchise Tax Board and Charles Varner, Stanford University

**The Utah Fiscal Stress Test**

Phil Dean, Utah Office of Management & Budget

**The Revenue Effects of Conformity to Federal Personal Tax Expenditures**

Mark Robyn, Pew Charitable Trusts