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PROFESSIONAL EXPERIENCE

Boyd Research

Cambridge, New York
Principal, May 1993 to present

Boyd Research specializes in fiscal and economic research and analysis, with a focus on state and local government policy and planning issues. Clients have included state governments, local governments, the federal government, nonprofit organizations, think tanks, trade associations, labor unions, and private firms including investment banks, investment advisors, and insurance companies. (Previous firm name was Boyd, Barrese & Associates.)

Center for Policy Research

The Nelson A. Rockefeller College of Public Affairs and Policy
Albany, New York
Co-Director, State and Local Government Finance Project, 2019 to present
Senior Research Fellow, February 2018 to 2019

The Center for Policy Research is part of the University at Albany's Rockefeller College, one of the country's leading graduate schools for public affairs. The Center conducts applied research, analysis, and outreach across a broad range of fields including international affairs, political science, public administration, and public policy. I am working with the Center on selected projects related to state and local government finances.

Lincoln Institute of Land Policy

Cambridge, Massachusetts
Visiting Fellow, February 2018 to April 2019

The Lincoln Institute is a nonprofit private operating foundation that researches and recommends creative approaches to land as a solution to economic, social, and environmental challenges. Their interests intersect with mine on issues related to taxation, municipal fiscal distress, public sector pensions, and several other areas. I am working with them on several project development ideas.

Nelson A. Rockefeller Institute of Government

Albany, New York

Nearly continuously, 1995 through November 2017.

Director, Fiscal Studies Program, July 2015 through November 2017; and December 1995 to May 2006

Senior Fellow, May 2006 to June 2015 (on leave to head State Budget Crisis Task Force, June 2011 – September 2012)

Deputy Director, March 2001 to October 2002 (stepped down in October 2002 to be deputy director at Center for Policy Research)

The Rockefeller Institute of Government is the public policy research arm of the State University of New York. While I was employed at the Institute, it studied American state and local governments, with an emphasis on management and finances. It conducted research on federalism, the management of human services, urban and metropolitan studies, fiscal studies, and higher education, and in several other important policy areas.

State Budget Crisis Task Force

New York, New York

Co-Executive Director and Consultant, October 2012 to 2016

Executive Director, June 2011 to September 2012

The State Budget Crisis Task Force, co-chaired by former New York lieutenant governor Richard Ravitch and former Federal Reserve Board chair Paul Volcker, conducted a deep examination of the fiscal condition of six states and of the fiscal decision-making environment. It concluded that states faced major longer-term fiscal threats and some were on an unsustainable fiscal path.

Center for Policy Research

The Nelson A. Rockefeller College of Public Affairs and Policy

The University at Albany

Albany, New York

Deputy Director, November 2002 to May 2010

The Center for Policy Research is a multi-disciplinary center emphasizing research on public policy issues in education, health, environment, and social welfare across all levels of government. I was co-principal investigator and a key contact for most of the Center's education research, which focused on teacher labor markets and on factors influencing student achievement. This work involved extensive analysis and linking of large-scale administrative and survey databases on prospective teachers, actual teachers, their teacher preparation programs, and the schools in which they teach.

New York State Division of the Budget

Albany, New York

Director of Tax Policy and Revenue Analysis, October 1985 to May 1993

Managed a staff of economists and analysts with primary responsibilities for:

- Analyzing, forecasting, and monitoring more than \$30 billion of New York State's revenue. (The current equivalent exceeds \$100 billion.)

- Developing, analyzing, and negotiating legislative and regulatory proposals to restructure New York State's revenue system.

Managed all steps in the revenue forecasting and monitoring process, including analysis of economic and revenue data, development and evaluation of national and New York economic forecasts, and preparation of cash-basis and GAAP-basis revenue forecasts at least four times per year. Presented forecasts and legislative proposals to upper management, investment banks, rating agencies, and legislative fiscal staffs. These forecasts were subject to intense scrutiny during the issuance of New York State bonds and notes, and during annual budget negotiations, in a high-stakes fiscal and political environment.

New York State Assembly Ways and Means Committee

Albany, New York

Director of Tax Studies, June 1984 to October 1985

Revenue Analyst, September 1979 to June 1984

Initially I was an analyst. Later I managed a staff of six revenue analysts responsible for (1) developing, drafting, and analyzing legislative proposals relating to all New York state taxes, and (2) forecasting collections from these revenue sources. Played a major role in analyzing and developing corporate tax reform proposals for the Speaker of the Assembly. Developed a microsimulation model of New York's personal income tax using a sample of about 100,000 tax returns. Developed computer programs to analyze and simulate policy options for state aid to local governments.

New York State Division of Equalization and Assessment

(predecessor to the Office of Real Property Services)

Albany, New York

Research Associate, December 1978 to September 1979

Researched and analyzed New York State's local real property tax system. Author of a report on the impact of property tax certiorari proceedings in New York City. Co-author of a report on the assessment of condominium and cooperative apartments.

EDUCATION

Ph.D., Managerial Economics.

Rensselaer Polytechnic Institute, Troy, New York, 2002

Dissertation: "What Influences Performance on Teacher Licensure Exams?"

- Developed software (TARGET©) to calibrate and extrapolate large microdata files, using a constrained nonlinear optimization solver based on interior-point methods.
- Developed software to estimate economic-impact multipliers for any state or multi-county region in the United States using nonsurvey methods, based on U.S. Input-Output tables and regional economic data.

Master of Business Administration, Specialization in Risk Management.

The College of Insurance, New York, New York, 1992.

- Winner of the MBA Medal for highest grade point average (4.0) in graduating class.
- Developed a stochastic simulation model of the New York State Lotto game.

Associate in Risk Management, Insurance Institute of America, 1992.

- Winner of the National Award for Academic Excellence in the Associate in Risk Management Program awarded to the two top scorers on national examinations, presented by the Society of Risk Management Consultants.

Bachelor of Arts, Economics (Second field: Mathematics).

The State University of New York at Albany, 1977.

TECHNICAL SKILLS

- Data analysis, data management, and econometrics. R is primary language, but have deep experience with many other software packages including EViews, GAMS, Gauss, Julia, Python, SAS, SPSS, Stata, and TSP.
- Experienced with many large-scale research and administrative databases, including American Community Survey, Census public use microdata, Current Population Survey, Consumer Expenditure Survey, IRS public use income tax samples, and the National Medical Expenditure Survey.
- Developed many microsimulation models, including income tax models, household tax models, business tax models, and circuit breaker models.
- Proficient programmer in several languages, including Visual Basic, Visual C++, and FORTRAN. I do not program in these languages much anymore.

PROFESSIONAL AFFILIATIONS

- Association for Public Policy Analysis and Management
- National Tax Association

BOARDS AND PANELS

- Advisory Board to the New York City Independent Budget Office (2014-present and also 2003-2010: vice-chair from 2005-2007; chair from February 2007-2010)
- Economic and Revenue Advisory Board to the New York State Division of the Budget (1999-2019)
- Educational Finance Advisory Group to the New York State Department of Education (1998-2015)
- Cambridge Central School District, New York, Board of Education (December 2013-June 2015; July 2004-June 2010)
- U.S. Government Accountability Office Advisory Committee on Intergovernmental Relations (2004-2005)
- Investment Advisory Committee, Albany County, NY (2004-2005)
- Consensus Revenue Forecasting Board for New York State (2001-2004)

- Governmental Accounting Standards Advisory Council of the Governmental Accounting Standards Board (1998-2002)
- Economic Forecast Committee of the Capital Region Center for Economic Growth (1996-1999)
- New York State Department of Education's "Blue Ribbon Panel on the Administration of the Grade 4 English Language Arts Examination" (1999)
- Economic Advisory Board to New York State Comptroller H. Carl McCall (1996-1998)

**APPENDIX: PUBLICATIONS, PRESENTATIONS, GRANTS,
CONSULTING**

Most of my work has been intended for audiences of policy makers and advisors; public policy analysts; forecasters and data analysts; advocates on all sides of public policy issues; the municipal finance community; academics; and the media.

I have extensive experience in consulting and grant writing; preparing reports and papers for the above audiences; and invited presentations and testimony before these audiences. I have collaborated with many organizations and individuals in much of this work.

Please see the attachment for details.

APPENDIX: DONALD J. BOYD C.V.

- Reports, Papers, Book Chapters, Book (Attachment page 2)
- Presentations and Testimony (Attachment page 22)
- Selected Recent Grants and Contracts (Attachment page 41)
- Selected Consulting Work (Attachment page 43)

Note: Page header indicates attachment section.

Reports, Papers, Book Chapters, Book
(Mostly Non-Refereed)

Boyd, Donald J., Gang Chen, and Yimeng Yin, *Public pension risk-sharing mechanisms and their potential impacts*, Paper prepared for The Brookings Municipal Finance Conference, July 2019.

Boyd, Donald J., *Transforming Governmental Accounting Standards: A Report to the Laura and John Arnold Foundation*, September 2018.

Yin, Yimeng, and Donald J. Boyd, *Developing More-Realistic Analysis of the Interplay Between Public-Pension Finances and Governmental Finances: Lessons from Linking an Economic Model to a Pension Fund Model*, Paper prepared for The Brookings Municipal Finance Conference, July 17, 2018.

Boyd, Donald J., and Yimeng Yin, *Investment Risk and Its Potential Consequences for Teacher Retirement Systems and School Districts*, Paper prepared in relation to Teacher Pension Workshop: Connecting Evidence-based Research to Pension Reform, RAND Corporation, Santa Monica, CA, March 8, 2018.

Boyd, Donald J. and Lucy Dadayan, *Running the Model Backwards: Using Rockefeller Institute Tax Data to Gain Insight Into the Economy*, *By the Numbers*, Nelson A. Rockefeller Institute of Government, October 2017.

Boyd, Donald J. and Lucy Dadayan, *Who Subsidizes Whom? The State and Local Tax Deduction Compared with State Balances of Payments*, *Blog Post*, Nelson A. Rockefeller Institute of Government, October 2017.

Boyd, Donald J., Lucy Dadayan, and Jim DeWan, *Giving or Getting? New York's Balance of Payments with the Federal Government*, Nelson A. Rockefeller Institute of Government, September 2017.

Dadayan, Lucy and Donald Boyd, *Volatility in State Tax Revenues; Mounting Fiscal Uncertainties*, *State Revenue Report* No. 108, Nelson A. Rockefeller Institute of Government, September 2017.

Yin, Yimeng and Donald J. Boyd, *Investment Return Volatility and the Pennsylvania Public School Employees' Retirement System*, Nelson A. Rockefeller Institute of Government, August 2017.

Boyd, Donald J. and Lucy Dadayan, *Shortfalls on States' April Tax Returns: Trump Effect, Weak Economy, or Both?*, *By the Numbers*, Nelson A. Rockefeller Institute of Government, July 2017.

Dadayan, Lucy and Donald Boyd, *State Tax Revenues in Flux*, *State Revenue Report* No. 107, Nelson A. Rockefeller Institute of Government, June 2017.

Dadayan, Lucy and Donald Boyd, Another Lackluster Year for State Tax Revenue, *By the Numbers*, Nelson A. Rockefeller Institute of Government, May 2017.

Boyd, Donald J. and Yimeng Yin, *Investment Return Volatility and the Michigan State Employees Retirement System*, Nelson A. Rockefeller Institute of Government, March 2017.

Dadayan, Lucy and Donald Boyd, Weak Revenue Forecasts, Large Uncertainties Ahead, *By the Numbers*, Nelson A. Rockefeller Institute of Government, March 2017.

Dadayan, Lucy and Donald Boyd, Weak Tax Revenue Growth in the Third and Fourth Quarters of 2016 Amid Uncertainty About Federal Tax Changes, *State Revenue Report* No. 106, Nelson A. Rockefeller Institute of Government, March 2017.

Dadayan, Lucy and Donald Boyd, 235,000 Job Growth in February Is Good News for the Economy, But State and Local Government Job Growth Remains Weak, *By the Numbers*, Nelson A. Rockefeller Institute of Government, March 2017.

Boyd, Donald J. and Yimeng Yin, *Investment Return Volatility and the Los Angeles Fire and Police Pension Plan*, Nelson A. Rockefeller Institute of Government, February 2017.

Boyd, Donald J. and Yimeng Yin, *Appropriateness of Risk-Taking By Public Pension Plans*, Nelson A. Rockefeller Institute of Government, February 2017.

Boyd, Donald J. and Yimeng Yin, *How Public Pension Plan Investment Risk Affects Funding and Contribution Risk*, Policy Brief, Nelson A. Rockefeller Institute of Government, January 2017.

Boyd, Donald J. and Yimeng Yin, *How Public Pension Plan Investment Risk Affects Funding and Contribution Risk*, Report, Nelson A. Rockefeller Institute of Government, January 2017.

Boyd, Donald J. and Yimeng Yin, *How Public Pension Plan Demographic Characteristics Affect Funding And Contribution Risk*, Policy Brief, Nelson A. Rockefeller Institute of Government, December 2016.

Boyd, Donald J. and Yimeng Yin, *How Public Pension Plan Demographic Characteristics Affect Funding And Contribution Risk*, Report, Nelson A. Rockefeller Institute of Government, December 2016.

Dadayan, Lucy and Donald Boyd, Widespread Declines in State Tax Revenues in the Second Quarter of 2016, *State Revenue Report* No. 105, Nelson A. Rockefeller Institute of Government, November 2016.

Boyd, Donald and Lucy Dadayan, *Slow tax revenue growth, rising pension contributions, and Medicaid growth lead state and local governments to reshape their finances*, Paper Prepared for National Tax Association 109th Annual Conference on Taxation, November 2016.

Boyd, Donald J. and Yimeng Yin, *Investment Return Volatility and the University of California Retirement Plan*, Nelson A. Rockefeller Institute of Government, November 2016.

Boyd, Don and Yimeng Yin, *The interplay between retirement plan funding policies, contribution volatility, and funding risk*, Prepared for the Annual Meeting of the National Tax Association, Baltimore, MD, November 10-12, 2016.

Boyd, Donald J., *COMMENT on Proposed ASOP: Assessment and Disclosure of Risk Associated with Measuring Pension Obligations and Determining Pension Plan Contributions – Second Exposure Draft*, Letter to the Actuarial Standards Board, October 2016.

Dadayan, Lucy and Donald Boyd, *Weak Stock Market and Declines in Oil Prices Depressed State Tax Revenues*, *State Revenue Report* No. 104, Nelson A. Rockefeller Institute of Government, September 2016.

Boyd, Don, *Rhode Island Correction Officers: Comparative Pay Analysis*, Consulting Report Prepared for Rhode Island Brotherhood of Correction Officers for Interest Arbitration, July 24, 2016.

Boyd, Donald J. and Yimeng Yin, *Public Pension Funding Practices: How These Practices Can Lead to Significant Underfunding or Significant Contribution Increases When Plans Invest in Risky Assets*, Policy Brief, Nelson A. Rockefeller Institute of Government, June 2016.

Boyd, Donald J. and Yimeng Yin, *Public Pension Funding Practices: How These Practices Can Lead to Significant Underfunding or Significant Contribution Increases When Plans Invest in Risky Assets*, Report, Nelson A. Rockefeller Institute of Government, June 2016.

Dadayan, Lucy and Donald Boyd, *Slowing Growth in State Tax Revenues*, *State Revenue Report* No. 103, Nelson A. Rockefeller Institute of Government, June 2016.

Boyd, Donald and Lucy Dadayan, “Will April Income Tax Returns Surprise States?”, *By the Numbers*, April, 2016.

Dadayan, Lucy and Donald Boyd, *Softening Third-Quarter Growth in State Taxes, Weak Forecasts for Fiscal 2016 and 2017*, *State Revenue Report* No. 102, Nelson A. Rockefeller Institute of Government, March 2016.

Boyd, Don, and Yimeng Yin, *The Interplay Between Retirement Plan Funding Policies, Contribution Volatility, and Funding Risk*, Prepared for the Annual Meeting of the Association for Education Finance and Policy, Session 7.08 - Examining the Assumptions and Parameters of Pension Plans, March, 2016.

Dadayan, Lucy and Donald Boyd, "Double, Double, Oil and Trouble", *By the Numbers*, February, 2016.

Boyd, Donald J. and Yimeng Yin, "State and Local Government Unfunded Pension Liabilities Rise by \$268 billion in the Third Quarter of 2015", *By the Numbers*, January, 2016.

Dadayan, Lucy and Donald Boyd, "Powerball Fever: State Budget Bonanza? Or False Hopes?", *By the Numbers*, January, 2016.

Boyd, Don and Lucy Dadayan. "State and Local Governments Reshape Their Finances." *Book of the States 2016*, Volume 48, Council of State Governments, 2016.

Dadayan, Lucy and Donald Boyd, "States Forecast Slower Tax Growth in 2017 and Beyond", *By the Numbers*, December, 2015.

Dadayan, Lucy and Donald Boyd, "2015 Was a Good Year for State Revenue Forecasters, But the Road Ahead is Uncertain", *By the Numbers*, December 22, 2015.

Dadayan, Lucy and Donald Boyd, Another Strong Tax Quarter for the States, But Less Promising Forecasts for Fiscal 2016, *State Revenue Report* No. 101, Nelson A. Rockefeller Institute of Government, November 2015.

Snyder, Laura and Robin Rudowitz (Kaiser Family Foundation), Lucy Dadayan and Don Boyd (Rockefeller Institute of Government), "Economic and Fiscal Trends in Expansion and NonExpansion States: What We Know Leading Up to 2014", *Issue Brief*, Kaiser Family Foundation, September 2015.

Boyd, Donald, Co-principal investigator, Erika Martin, Co-principal investigator, Lucy Dadayan, Yuchi Young, "Evaluation of New York's Federal-State Health Reform Partnership (F-SHRP) Medicaid Section 1115 Demonstration: Report Submitted to the New York State Department of Health." Medicaid Waiver Evaluation. Rockefeller Institute of Government, September 16, 2015.

Dadayan, Lucy and Donald Boyd, States Enjoy Growth in Tax Revenues in the First Quarter of 2015, *State Revenue Report* No. 100, Nelson A. Rockefeller Institute of Government, September 2015.

Boyd, Donald J., *Public Research Universities: Changes in State Funding*, report prepared for American Academy of Arts & Sciences, The Lincoln Project, Cambridge, MA. 2015.

Boyd, Donald J. and Lucy Dadayan. *The Economy Recovers While State Finances Lag*. The Blinken Report. Nelson A. Rockefeller Institute of Government, June 2015.
http://www.rockinst.org/pdf/government_finance/2015-06-23-Blinken_Report_Two.pdf.

Dadayan, Lucy and Donald Boyd, Windfall “April Surprises”: Strong Growth in Overall Income Tax Revenues Despite Weak Withholding, *Special State Revenue Report*, Nelson A. Rockefeller Institute of Government June 2015.

Mead, Dean Michael, Marcia Van Wagner, Donald J. Boyd, “Staying Afloat in a Sea of Pension Numbers”, *Municipal Finance Journal*, Volume 35, No. 4, Winter 2015.

Dadayan, Lucy and Donald Boyd, Steady Growth for State Tax Revenues; Long Road to Fiscal Recovery, *State Revenue Report* No. 99, Nelson A. Rockefeller Institute of Government, May 2015.

Boyd, Donald and Lucy Dadayan, *Managing Volatile Tax Collections in State Revenue Forecasts*, The Pew Charitable Trusts and Rockefeller Institute, March 2015.

Dadayan, Lucy, and Donald Boyd, “State Revenues from Gambling Show Weakness”, *Data Alert*, March 23, 2015.

Dadayan, Lucy and Donald Boyd, After Weak Performance in the First Half of 2014, Tax Revenues Resume Growth in the Third Quarter, *State Revenue Report* No. 98, Nelson A. Rockefeller Institute of Government, February 2015.

Dadayan, Lucy and Donald Boyd, Good News for Private Sector Jobs, Bad News for State-Local Government Jobs, *Data Alert*, Nelson A. Rockefeller Institute of Government, January 2015.

Boyd, Donald J. and Lucy Dadayan. “The Economic Recovery Continues, but State Finances Remain Weak.” *Book of the States 2015*, Volume 47, Council of State Governments, 2015.

Dadayan, Lucy and Donald Boyd, Sunshine After the Rain: Revenue Collections Resume Growth After Declines in the First Half of 2014, *Data Alert*, Nelson A. Rockefeller Institute of Government, December 2014.

Boyd, Donald and Lucy Dadayan, State Tax Revenue Forecasting, *Technical Report*, Nelson A. Rockefeller Institute of Government, November 2014.

Dadayan, Lucy and Donald Boyd, Steady Growth for State Tax Revenues; Long Road to Fiscal Recovery, *State Revenue Report* No. 97, Nelson A. Rockefeller Institute of Government, September 2014.

Dadayan, Lucy and Donald Boyd, “April Surprises” Left Many States with Bad News, *Data Alert*, Nelson A. Rockefeller Institute of Government, September 2014.

Dadayan, Lucy and Donald Boyd, After Four Years of Uninterrupted Growth, Tax Revenues Decline in the First Quarter, *State Revenue Report* No. 96, Nelson A. Rockefeller Institute of Government, August 2014.

Dadayan, Lucy and Donald Boyd, April “Surprises” More Surprising Than Expected, *Special State Revenue Report*, Nelson A. Rockefeller Institute of Government June 12, 2014.

Dadayan, Lucy and Donald Boyd, How Surprising Will April Surprises Be?, *Data Alert*, Nelson A. Rockefeller Institute of Government, May 6, 2014.

Boyd, Donald, *The Potential Impact of Alternative Health Care Spending Scenarios on Future State and Local Government Budgets*, Report Prepared for The Future of U.S. Health Care Spending Conference, The Brookings Institution, April 2014.

Dadayan, Lucy and Donald Boyd, Personal Income Tax Revenues Show Significant Softening in the Fourth Quarter of 2013, *State Revenue Report* No. 95, Nelson A. Rockefeller Institute of Government, April 29, 2014.

Dadayan, Lucy and Donald Boyd, State Tax Revenues Slow in Fourth Quarter, *Data Alert*, Nelson A. Rockefeller Institute of Government, March 11, 2014.

Boyd, Donald J. and Peter J. Kiernan, *Strengthening the Security of Public Sector Defined Benefit Plans*. The Blinken Report. Nelson A. Rockefeller Institute of Government, January 2014.

Ravitch, Richard. *Final Report of the State Budget Crisis Task Force*, January 2014. (Donald Boyd and Ed DeSeve, Co-Executive Directors of Task Force.)

Dadayan, Lucy and Donald Boyd, December Figures Reveal Weak Growth in Private Jobs and Declines in Government Jobs, *Data Alert*, Nelson A. Rockefeller Institute of Government, January 15, 2014.

Boyd, Don and Lucy Dadayan, *State Tax Revenue Forecasting Accuracy: Technical Report*, A Report to the Pew Charitable Trusts, Nelson A. Rockefeller Institute of Government, December 2013.

Dadayan, Lucy and Donald Boyd, Growth in State Tax Revenues Softened in Third Quarter, *Special State Revenue Report*, No. 94, Nelson A. Rockefeller Institute of Government, December 19, 2013.

Dadayan, Lucy and Donald Boyd, Revenues Likely Nearing the End of Their Robust Growth Phase, *State Revenue Report* No. 93, Nelson A. Rockefeller Institute of Government, December 9, 2013.

Rubin, Marilyn M., and Donald J. Boyd, *New York State Business Tax Credits: Analysis and Evaluation*, A Report Prepared for the New York State Tax Reform and Fairness Commission, H. Carl McCall and Peter J. Solomon, Co-Chairpersons, November 2013.

Dadayan, Lucy and Donald Boyd, Temporary “Bubble” in Income Tax Receipts, *Data Alert*, Nelson A. Rockefeller Institute of Government, September 2013.

Dadayan, Lucy and Donald Boyd, Strong Tax Revenue Growth Heightens State Fiscal Uncertainty, *State Revenue Report* No. 91, Nelson A. Rockefeller Institute of Government, April 2013.

Boyd, Donald and Lucy Dadayan, “The State Budget Crisis Task Force and Fiscal Challenges Ahead”, *Book of the States 2013*, Volume 45, Council of State Governments, 2013.

Dadayan, Lucy and Donald Boyd, State Tax Revenues Continue Slow Rebound, *State Revenue Report* No. 90, Nelson A. Rockefeller Institute of Government, February 2013.

Dadayan, Lucy and Donald Boyd, Big Cuts in State and Local Government Jobs, *Issue Brief*, Nelson A. Rockefeller Institute of Government, January 2013.

Boyd, Don, “Sources and Uses of Data on State and Local Government Taxes”, *Association of Public Data Users Newsletter*, December 2012.

Ravitch, Richard. *State Budget Crisis Task Force: Texas Report*. State Budget Crisis Task Force, November 2012. (Donald Boyd, Executive Director of Task Force.) <http://www.statebudgetcrisis.org/wpcms/report-1>.

Ravitch, Richard. *State Budget Crisis Task Force: Virginia Report*. State Budget Crisis Task Force, November 2012. (Donald Boyd, Executive Director of Task Force.) <http://www.statebudgetcrisis.org/wpcms/report-1>.

Ravitch, Richard. *State Budget Crisis Task Force: Illinois Report*. State Budget Crisis Task Force, October 2012. (Donald Boyd, Executive Director of Task Force.) <http://www.statebudgetcrisis.org/wpcms/report-1>.

Ravitch, Richard. *State Budget Crisis Task Force: New York Report*. State Budget Crisis Task Force, October 2012. (Donald Boyd, Executive Director of Task Force.) <http://www.statebudgetcrisis.org/wpcms/report-1>.

Dadayan, Lucy and Donald Boyd, "Sales Tax Revenues Show Slowest Growth in the Last Two Years", *State Revenue Report* No. 89, Nelson A. Rockefeller Institute of Government, October 2012.

Ravitch, Richard. *State Budget Crisis Task Force: California Report*. State Budget Crisis Task Force, September 2012. (Donald Boyd, Executive Director of Task Force.) <http://www.statebudgetcrisis.org/wpcms/report-1>.

Ravitch, Richard. *State Budget Crisis Task Force: New Jersey Report*. State Budget Crisis Task Force, September 2012. (Donald Boyd, Executive Director of Task Force.) <http://www.statebudgetcrisis.org/wpcms/report-1>.

Forsythe, Dall W., and Donald J. Boyd, *Memos to the Governor: An Introduction to State Budgeting*, Third Edition. Georgetown University Press, 2012.

Gais, Thomas, Donald Boyd, and Lucy Dadayan, "The Social Safety Net, Health Care, and the Great Recession", in Robert D. Ebel and John E. Peterson eds., *The Oxford Handbook of State and Local Government Finance*, Oxford University Press, 2012.

Boyd, Donald J. and Lucy Dadayan, "Political Conflict and Intergovernmental Fiscal Relations," in J. Stonecash and R. Pecorella, eds., *Governing New York*, Sixth Edition, SUNY Press, 2012.

State Budget Crisis Task Force, *Full Report and Summary Report*, New York, July 2012. (Donald Boyd, Executive Director of Task Force.)

Boyd, D., Lankford, H., Loeb, S. & Wyckoff, J.. The Impact of Assessment and Accountability on Teacher Recruitment and Retention: Are There Unintended Consequences?" *Public Finance Review*. 2012.

Boyd, Donald, Pam Grossman, Hamp Lankford, Susanna Loeb, Nicholas Michelli, and Jim Wyckoff, "Complex by design: Investigating Pathways into Teaching in New York City Schools, *Journal of Teacher Education*, 2012.

Boyd, Donald, Pamela Grossman, Hamilton Lankford, Susanna Loeb, Matthew Ronfeldt, and James Wyckoff. "Recruiting effective math teachers: How do math immersion teachers compare? Evidence from New York City", *American Education Research Journal*. 2012.

Boyd, Donald, Hamilton Lankford, Susanna Loeb, and James Wyckoff. "Analyzing determinants of the matching of public school teachers to jobs: Disentangling the preferences of teachers and employers", *Journal of Labor Economics*. 2012.

Boyd, Donald, Pamela Grossman, Marsha Ing, Hamilton Lankford, Susanna Loeb, Rachel H. O'Brien, and James Wyckoff. "The effectiveness and retention of teachers with prior career experience" *Economics of Education Review*, 30, pp. 1229-1241, 2011.

Boyd, Donald, Pamela Grossman, Marsha Ing, Hamilton Lankford, Susanna Loeb, and James Wyckoff. "The influence of school administrators on teacher retention decisions." *American Education Research Journal*, 48(2), pp. 303-333. 2011.

Boyd, Donald. "Land Value Taxation: Theory, Evidence, and Practice, Edited by Richard F. Dye and Richard W. England." *Journal of Regional Science* 51, no. 3 (2011): 640–642.

Boyd, Donald, Hamilton Lankford, Susanna Loeb, and James Wyckoff. "Teacher layoffs: An empirical illustration of seniority v. measures of effectiveness." *Education Finance and Policy*, 6(3), pp. 439–454. 2011

Boyd, Donald, Hamilton Lankford, Susanna Loeb, Matthew Ronfeldt, and James Wyckoff. "The role of teacher quality in retention and hiring: Using applications-to-transfer to uncover preferences of teachers and schools". *Journal of Policy Analysis and Management*, 30(1), pp. 88-110. 2011.

Boyd, Donald, "The Long Road to State Fiscal Recovery", *Land Lines*, Lincoln Institute of Land Policy, October 2011

Boyd, Donald, and Lucy Dadayan, "The State of State Tax Revenues", *Capitol Ideas*, The Council of State Governments, April 2011.

Dadayan, Lucy, and Donald J. Boyd, "State Tax Revenues Rebound Further, Growing For Third Straight Quarter", *State Revenue Flash Report*, Nelson A. Rockefeller Institute of Government, November 30, 2010.

Dadayan, Lucy and Donald Boyd, "Revenue Now Growing in Most States; Sales Tax Gains 5.7 Percent in 2nd Quarter", *State Revenue Report* No. 81, Nelson A. Rockefeller Institute of Government, October 2010.

Dadayan, Lucy, and Donald J. Boyd, "State Tax Revenues Are Slowly Rebounding", *State Revenue Flash Report*, Nelson A. Rockefeller Institute of Government, August 30, 2010.

Dadayan, Lucy and Donald Boyd, "After Disastrous 2009, States Report Modest Revenue Growth in Early 2010", *State Revenue Report* No. 80, Nelson A. Rockefeller Institute of Government, July 2010.

Dadayan, Lucy and Donald Boyd, "Revenue Declines Less Severe, But States' Fiscal Crisis Is Far From Over", *State Revenue Report* No. 79, Nelson A. Rockefeller Institute of Government, April 2010.

Dadayan, Lucy, and Donald J. Boyd, "Final Quarter of 2009 Brought Still More Declines in State Tax Revenue", *State Revenue Flash Report*, Nelson A. Rockefeller Institute of Government, February 23, 2010.

Dadayan, Lucy and Donald Boyd, "Recession or No Recession, State Tax Revenues Remain Negative", *State Revenue Report* No. 78, Nelson A. Rockefeller Institute of Government, January 2010.

Dadayan, Lucy, and Donald J. Boyd, "Old News Is Bad News: Third Quarter Brings More Decline in Tax Revenues", *State Revenue Flash Report*, Nelson A. Rockefeller Institute of Government, November 23, 2009.

Dadayan, Lucy and Donald Boyd, "State Tax Revenues Show Record Drop, For Second Consecutive Quarter", *State Revenue Report* No. 77, Nelson A. Rockefeller Institute of Government, October 2009.

Boyd, Donald J., "State/Local Employment Up Slightly Since Start of Recession, But Cuts Are Now Underway", *Fiscal Studies Report*, Nelson A. Rockefeller Institute of Government, August 20, 2009.

Boyd, Donald J. and Lucy Dadayan, "State Tax Decline in Early 2009 Was the Sharpest on Record", *State Revenue Report* No. 76, Nelson A. Rockefeller Institute of Government, July 2009.

Dadayan, Lucy, and Donald J. Boyd, "April Is the Cruellest Month", *State Revenue Flash Report*, Nelson A. Rockefeller Institute of Government, June 18, 2009.

Dadayan, Lucy, and Donald J. Boyd, "Personal Income Tax Revenue Declined Sharply in the First Quarter", *State Revenue Flash Report*, Nelson A. Rockefeller Institute of Government, May 13, 2009.

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Boyd, Donald, *Can We Analyze Service Consolidations Using the New York State Comptroller's Data? Focus: Police Services*, A Report to the Government Law Center of Albany Law School, April 14, 2009.

Dadayan, Lucy, and Donald J. Boyd, "State Tax Revenue Declined Sharply in Fourth Quarter", *State Revenue Flash Report*, Nelson A. Rockefeller Institute of Government, March 12, 2009.

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State Budget Stress: Pennsylvania in the National Context, Council on Foundations: Pennsylvania Philanthropy Conference, State College, PA, April 26, 2016.

The Interplay Between Retirement Plan Funding Policies, Contribution Volatility, and Funding Risk, With Yimeng Yin, Association for Education Finance and Policy Annual Meeting, Session 7.08 - Examining the Assumptions and Parameters of Pension Plans, Denver, CO, March 18, 2016.

Selected Comments on State & Local Finances, NYS Division of the Budget Economic Advisory Board Meeting, Web Conference, Albany, NY, February 3, 2016.

Forecasting County Sales Tax Revenue, NYSAC 2016 Legislative Conference, The Desmond Hotel, Albany, NY, February 2, 2016.

Pension Fund Investment Risk and Potential Consequences for State and Local Governments, With Yimeng Yin, Programmer & Research Analyst, Research and Practice in Progress Briefing on Local Government in New York, Rockefeller Institute of Government, Albany, NY, November 18, 2015.

The Art and Science of Revenue Forecasting, National Conference of State Legislatures: Fiscal Analysts Seminar, Portland, Maine, October 14, 2015.

State Revenue & Fiscal Trends, With Lucy Dadayan, National Association of State Budget Officers, 2015 Annual Meeting, Stowe, VT, August 12, 2015.

The State of State Finances, (Delivered in absentia by Elliott Dubin), Multistate Tax Commission: 48th Annual Conference, The Davenport Hotel, Spokane, WA, July 29, 2015.

National Economic Forces Affecting State Budgets and Pension Systems, Governors Forum: Pensions, Harris School, University of Chicago, Gleacher Center, Chicago, April 27, 2015.

The Political Budgeting Process: Can Law Solve the Public Pension Problem?, ALI Young Scholars Medal Conference, NYU Law School, New York, NY, April 13, 2015.

State Tax Revenue Trends, New York State Economic Advisory Board, Web Conference, Albany, NY, February 2015.

Public Sector Pension Funding: Big Risks Remain, National Tax Association 44th Annual Spring Symposium 12th Annual State-Local Tax Program, Washington, DC, May 16, 2014.

Staying Afloat in a Sea of Pension Numbers: Risk and Signals, National Federation of Municipal Analysts 31st Annual Conference, Lake Buena Vista, FL, May 7, 2014.

Alternative Health Spending Scenarios and State & Local Government Budgets, The Future of Health Care Spending Conference, The Brookings Institution, Washington, DC, April 11, 2014.

Selected State Fiscal Issues, Boston Municipal Analysts Forum, Boston, MA, February 27, 2014.

The State Budget Crisis Task Force & Connecticut, MetroHartford Alliance Fiscal Sustainability Forum, The Society Room, 31 Pratt Street, Hartford, CT, February 25, 2014.

The State Budget Crisis Task Force, Kevin Jack's Public Finance Class, Siena College, Loudonville, NY, February 20, 2014.

Strengthening the Security of Public Sector Defined Benefit Plans, With Peter Kiernan (Schiff Hardin LLP), National Press Club, Washington, DC, January 16, 2014.

Tax Policy Choices and New York City's Competitive Position, Prepared for: The Most Important Economic and Fiscal Decisions Facing the Next Mayor: A CBC Conference, New York, NY, December 6, 2013.

Revenue Forecasting Accuracy and Bias in the States, With Lucy Dadayan, Thursday Policy Lunch, Rockefeller College, Milne 215, Albany, NY, October 17, 2013.

Bad Incentives and Weak Institutions, Presentation to the Society of Actuaries Blue Ribbon Panel on Underfunding in Public Sector Pension Plans, Intercontinental New York Barclay, 111 East 48th Street, New York, NY, July 9, 2013.

Six Rails of State and Local Finances & Taxes, COST North Atlantic Regional State Tax Seminar, CBS Corporation Headquarters, 51 West 52nd Street, New York, NY, June 18, 2013.

State & Local Tax Cycles as the Recession Ebbs, Regional Economists Network, Edward J. Bloustein School of Planning and Public Policy, Rutgers University, New Brunswick, NJ, June 7, 2013.

State Finances in and After the Great Recession, National Tax Association 43rd Annual Spring Symposium: State and Local Fiscal Conditions and Lessons Learned, Holiday Inn Capitol, Washington, DC, May 17, 2013.

The State Budget Crisis Task Force & Connecticut, MetroHartford Alliance Public Policy Forum, Hartford, CT, May 1, 2013.

The State Budget Crisis Task Force, Kevin Jack's Public Finance Class, Siena College, Loudonville, NY, April 23, 2013.

The Impact of Federal Deficit Reduction on State and Local Governments, New York State Government Finance Officers' Association 34th Annual Conference, The Albany Marriott Hotel, 189 Wolf Road, Albany, NY, April 11, 2013.

The State Budget Crisis Task Force: Economic Perspectives on State and Local Taxes, Lincoln Institute of Land Policy & New England Public Policy Center, Federal Reserve Bank of Boston, Boston, MA, March 8, 2013.

The State Budget Crisis Task Force, U.S. Bureau of the Census, Governments Division Seminar Series 2013, Census Bureau Headquarters, Suitland, MD, February 26, 2013.

The State Budget Crisis Task Force, New York City Independent Budget Office, 110 William Street, New York, NY, January 28, 2013.

The State Budget Crisis Task Force, Federal Reserve Bank of New York, Fiscal Breakfast Meeting, 33 Liberty Street, New York, NY, January 16, 2013.

Recent Trends in State and Local Government Taxes and Finances, New York State Division of the Budget Economic Advisory Board Meeting, Teleconference, January 10, 2013.

State "Fiscal Cliffs" and State Taxes, Tax Analysts Forum, National Press Club, Washington, DC, December 14, 2012.

Fiscal Challenges of Public Sector Pensions, Public Sector Pension Reform: Addressing Pressing Fiscal Realities from a Long-Term Perspective, A Forum of the TIAA-CREF Institute and the Rockefeller Institute of Government, SUNY Global Center, 116 East 55th Street, New York, New York, December 7, 2012.

The Fiscal Cliff (and Beyond) and State Taxes, NCSL Fall Forum 2012, National Conference of State Legislatures, The Washington Hilton, 1919 Connecticut Ave. NW, Washington, DC, December 6, 2012.

State & Local Government Budgets: Not Out of the Woods, Teleconference Presentation, The Marwood Group LLC, November 29, 2012.

State Budget Crisis Task Force Report, National Tax Association, 105th Annual Conference on Taxation, Providence Marriott Downtown Hotel, Providence, RI, November 16, 2012.

Medicaid in the State Budget, The Empire State Fellows Program, Rockefeller Institute of Government, 411 State Street, Albany, NY, November 14, 2012.

The State Budget Crisis Task Force: Release of the Illinois Report, Union League Club of Chicago, Chicago, IL, October 24, 2012.

State Budget Crisis Task Force Report, National Association of State Budget Officers Fall Meeting on Federal & State Issues, Hotel Monaco, Alexandria, VA, October 5, 2012.

State of the States and State Budget Crises, Northeastern States Tax Officers Association Annual Meeting, Sheraton Conference Center, Portsmouth, NH, October 2, 2012.

State Budget Crisis Task Force Report, Governing Cost of Government Summit, The Newseum, Washington, DC, September 18, 2012.

State Budgeting: Introduction, The Empire State Fellows Program, Rockefeller Institute of Government, Albany, NY, September 11, 2012.

State Budget Crisis Task Force Conclusions, Release of the State Budget Crisis Task Force Report, The Newseum, Washington, DC, July 17, 2012.

State Budget Crisis Task Force - Preliminary Conclusions and Next Steps, Presentation to the Board of the Smith Richardson Foundation, Hay Adams Hotel, Washington, DC, June 25, 2012.

Task Force on the State Budget Crisis: Project Update and Outreach Conversation, Presentation to New Jersey Funders, Gibbons Law Firm, Newark, NJ, April 20, 2012.

State and Local Government Fiscal Challenges, National Academy of Public Administration, Federal Systems Panel: Fiscal Outlook for the States, Washington, DC, April 13, 2012.

State and Local Government Fiscal Challenges: A Lightning Tour, Public Finance, Siena College, Loudonville, NY, April 10, 2012.

Economic Recovery and Local Fiscal Stress, The Bond Buyer's Symposium on Distressed Municipalities, Session: Economic Recovery Outlook, Hyatt at the Bellevue, Philadelphia, PA, March 28, 2012.

State & Local government: Selected Fiscal Trends, New York State Division of the Budget Economic Advisory Board Meeting, Telephone Conference, January 5, 2012.

How We Use Census Bureau Data on State & Local Taxes, Presentation to the Association of Public Data Users, Webinar: Statistics of Governments, Taxes: More Than Just Income and Sales, October 26, 2011.

State Finances: Out (?) of the Frying Pan, Into the Pressure Cooker, State of the States and Local Governments, Moody's Municipal Credit Summit: The Shifting Landscape of Public Finance Credit Risk, Roosevelt Hotel, New York, NY September 21, 2011.

State Finances: Out (?) of the Frying Pan, Into the Pressure Cooker, Perspectives on the Future Fall Financial Conference, Sage Advisory Services, Barton Creek Resort & Spa, Austin, TX, September 19, 2011. (Did not attend because bad weather forced cancellation of flights.)

New York State: Current Budget Conditions, Conference: State Budgets: Possible Paths to Sustainability, Hosted by the Federal Reserve Banks of Chicago, New York, and Philadelphia, Chicago, IL, June 24, 2011.

Census Statistics on State and Local Government: How We Do and Do Not Use These Data, Association of Public Data Users Webinar, June 15, 2011.

Recession, Recovery, and State and Local (& Education) Finances, Nomura Global Media New York Field Trip, New York Palace Hotel, NY, June 13, 2011.

Will State Tax Reform (Or Increases) Solve Structural Problems?, With Lucy Dadayan, National Tax Association, State and Local Budgets the Day After the Meltdown: Getting to Sound Fiscal Bases, Holiday Inn Capitol, Washington, DC, May 20, 2011.

State Tax Reform, Tax System Modernization Session, American Association for Budget and Program Analysis, 2011 Spring Symposium, Capital Hilton Hotel, Washington, DC, May 11, 2011.

State of the States, Annual Meeting of the National Federation of Municipal Analysts, Charleston, SC, May 4, 2011.

On the Edge: Are States and School Districts Facing a Funding Cliff?, Annual Meeting of the Education Writers Association, Intercontinental Hotel, New Orleans, LA, April 8, 2011.

State & Local Financial Update, Annual Meeting of the Government Investment Officers Association, Planet Hollywood, Las Vegas, NV, March 18, 2011.

State Tax Issues: Trends and Reform, New England Fiscal Leaders Meeting, National Conference of State Legislatures in Partnership with the Pew Center on the States, Rhode Island State House, Providence, RI, March 4, 2011.

Stop Us Before We Tax Again, New York State Association of Counties: Legislative Conference, Session: Property Tax Caps & State Mandates: A Recipe for Disaster?, Albany, NY, February 8, 2011.

Economic Perspectives on State & Local Taxes, Lincoln Institute of Land Policy and New England Public Policy Center of Federal Reserve Bank of Boston, Session: Fiscal Challenges Facing State and Local Governments, Lincoln House, Cambridge, MA, January 21, 2011.

The Fiscal Environment & State Tax Reform, The New Normal: Government Working More Efficiently, Session: Tough Times: Case Studies of States Doing More With Less, A Conference of the Pew Center on the States, Omni Austin Hotel Downtown, Austin, TX, December 11, 2010.

National Trends in State and Local Government Employment and Finances, Economic Advisory Board Meeting, New York State Division of the Budget Economic Advisory Board, State Capitol, Albany, NY (By Telephone), December 7, 2010.

Recession, Recovery, and State and Local Finances, National Tax Association 103rd Annual Conference on Taxation, Session: Fiscal Responses to Business Cycles, Hyatt Regency McCormick Place, Chicago, IL, November 20, 2010.

Recession, Recovery, and State and Local Finances, Global Macro Investing & Geopolitical Risk Forum, Sheraton New York Hotel & Towers, New York, NY, October 19, 2010.

Recession, Recovery, and School District Finances (and Textbook Demand), Nomura European Media Field Trip, New York Palace Hotel, NY, June 15, 2010.

Recession, Recovery, and State and Local Finances, Effects of the Housing Crisis on State and Local Governments, Urban Institute-Brookings Institution Tax Policy Center and Lincoln Institute of Land Policy, Washington, DC, May 20, 2010.

The State of the States, NABE 2010: The New Normal? Policy Choices After the Great Recession, National Association of Business Economists, Arlington, VA, March 9, 2010.

How We Use the Census Bureau's Governments Division Data, Workshop: Modernization and Re-engineering of the Census of Governments, CNSTAT, Washington, DC, March 3, 2010.

Recession, Recovery, and State-Local Finances, Forecasters Club of New York, New York, NY, January 28, 2010.

The State of State Budgets, Governmental Accounting Standards Board, Norwalk, CT, January 14, 2010.

Coping with Recession: What Have Other States Done?, The Warren M. Anderson Legislative Breakfast Program, Government Law Center of Albany Law School, Assembly Parlor, State Capitol Building, Albany, NY, February 23, 2010.

State Fiscal Challenges, National Association of Business Economists: Regional Roundtable Teleconference, December 15, 2009.

The State of State Budgets, National Conference of State Legislatures: Fiscal Leaders Seminar, San Diego, CA, December 9, 2009.

Challenges in State-Local Revenues (set in fiscal context), Presented at States' Long-Term Budget Gaps: Are There Any Solutions? A Rockefeller Institute Conference, New York, NY, November 30, 2009.

State Budgets, Health Care, and Health Care Reform, National Academy of Public Administration, Washington, DC, November 19, 2009.

Fiscal Sustainability Issues & Options: Discussant Comments, National Tax Association Annual Meeting, Denver, CO, November 14, 2009.

State Fiscal Trends and Outlook, New England Board of Higher Education, Federal Reserve Bank of Boston, Boston, MA, October 26, 2009.

State Revenue Trends and Challenges, National Association of State Budget Officers, Alexandria, VA, October 2, 2009.

Tax Reform Considerations in Vermont, Presentation to the Vermont Blue Ribbon Tax Structure Commission, Montpelier, VT, September 29, 2009.

State Budget and Finance: Trends and Challenges, Pew Center on the States and Capitolbeat, Washington, DC, September 25, 2009.

The Effect of School Neighborhoods on Teachers' Career Decisions, With Pam Grossman, Hamilton Lankford, Susanna Loeb, and James Wyckoff, Presentation to the Social Inequality and Educational Disadvantage (SIED) Project, The Brookings Institution, Washington, DC, September 24, 2009.

Government Employment in the Recession: The Nation and New York, New York State Network for Economic Research: A Focus on Human Capital, Albany, NY, September 14, 2009.

The Economic Crisis and Local Governments in New York, Center for Local Government, Center for Applied Community Research & Development, Binghamton University Manager's Breakfast, Binghamton, NY, September 11, 2009.

Fiscal Cycles, Fiscal Stimulus, and Fiscal Federalism, Council of State Governments - Midwest, 64th Annual Meeting of the Midwestern Legislative Conference, Fiscal Leaders Roundtable, Overland Park, KS, August 10, 2009.

Infrastructure, Federal Stimulus, and State-Local Finances, Session: Our Decaying Infrastructure: Restoring it to Excellence in Financially Troubled Times, American Bar Association Annual Meeting, Chicago, IL, August 1, 2009.

Coping with Effects of Recession in the States, Government Research Association Annual Conference, The Brookings Institution, Washington, DC, July 27, 2009.

State and Local Government Finances in and After the Recession, With Richard Nathan, Robert Ward, and Lusine Dadayan, A Briefing for White House Staff, Executive Office Building, Washington, DC, July 14, 2009.

Expert Testimony in Relation to Finances of the Metropolitan Transportation Authority (MTA), New York City, New York State, and the Federal Government. Interest arbitration proceedings between the MTA and the Transport Workers Union, June 3, 2009.

The World Economic Crisis: Impact on American Local Government Finances, Center for Research, Regional Education and Outreach CRREO/IDC Russian Mayors' Program, SUNY New Paltz, NY, June 17, 2009.

How Deep Is the Hole? - State and Local Finances, Tax Policy and the Economic Recovery 39th Annual Spring Symposium, National Tax Association, Holiday Inn Capitol, Washington, DC, May 22, 2009.

Fiscal Stimulus and State & Local Governments, Assessing the State and Local Sector – Where Will the Money Come from?, Federal Reserve Bank of Chicago, Chicago, IL, May 12, 2009.

Current Assessment of State and Local Finances, Presentation to the Lincoln Institute of Land Policy and New England Public Policy Center, Federal Reserve Bank of Boston, Lincoln Institute, Cambridge, MA, May 8, 2009.

Analyzing Service Consolidations Using the New York State Comptroller's Data: Police Services, Presentation to the New York State Department of State, Albany, NY, April 29, 2009.

Identifying Municipalities with High Police Expenditures, Presentation to the New York State Department of State, Albany, NY, April 29, 2009.

The State and Local Government Fiscal Crisis, The National Association of Business Economists 25th Annual Washington Economic Policy Conference (Delivered in my absence by Dr. Edward Cupoli), Key Bridge Marriott Hotel, Arlington, VA, March 2, 2009.

The State Revenue Outlook, Presentation and conference call with state budget directors, National Association of State Budget Officers, December 15, 2008.

The Fiscal Crisis: New York in the National Context, Public Policy Forum: Tough Times for States and Localities, The Rockefeller Institute of Government, Albany, NY, November 13, 2008.

Implications of the Current Economic Environment for Revenue in NY, Presentation to the Advisory Board of The New York City Independent Budget Office, New York, NY, October 29, 2008.

The State Revenue Outlook, National Association of State Budget Officers Fall 2008 Annual Meeting, The Grand Hyatt Hotel, Washington, DC, October 18, 2008.

Getting a Grip on Our Public Budgets: Can Better Measurement and Planning Help Us Find the Solutions?, National Tax Association Conference on Fiscal Sustainability, Washington, DC, September 26, 2008.

Recessions and State-Local Finances, Council of State Governments West (CSG-WEST) Annual Meeting Fiscal Legislative Leaders Forum, Anchorage, Alaska, July 18, 2008.

Recessions and State and Local Taxes, National Tax Association 38th Annual Spring Symposium, Washington, DC, May 16, 2008.

Recessions and State-Local Finances, Presentation to Fidelity Investments, Merrimack, NH, March 14, 2008.

Layering of Local Governments & City-County Mergers, Presentation to the New York State Commission on Local Government Efficiency and Competitiveness, Albany, NY, March 5, 2008.

Managing State and City Budgets Amidst Rising Retiree Costs, The Bond Buyer's 5th Annual Metro Finance Conference, The Hilton New York, November 15, 2007.

Tax Volatility and Stability, Presentation to the Pew Center on the States Tax Project Advisory Panel, Washington, DC, October 16, 2007.

The South Carolina Tax Structure: Analysis and Prospects, Presentation to the Palmetto Institute, The Inn at Palmetto Bluff, Bluffton, SC, September 16, 2007, Donald J. Boyd and William F. Fox.

Is it a Crisis?, for The Impending Crisis: Preparing a Plan, GASB 45/ Other Post Employment Benefits (OPEB), The Bond Buyer's 4th Annual Metro Finance Conference, New York City, Marriott Financial Center, December 11, 2006.

Funding New York Schools, New York City and New York State XV Annual Institutional Investors' Forum, Merrill Lynch, MBIA, Hawkins Delafield & Wood, and Zicklin School of Business, Baruch College, City University of New York, April 6, 2006.

The New Jersey Property Tax: Issues and Options, Presentation to the New Jersey Association of Realtors, Edison, NJ, February 8, 2006, Donald J. Boyd and William F. Fox.

Examining Teacher Preparation: Does the Pathway Make a Difference?, Presentation to the Committee on Higher Education and Professional Practice, New York State Board of Regents, Albany, NY, December 9, 2005, Don Boyd, Pam Grossman, Hamp Lankford, Susanna Loeb, and Jim Wyckoff.

State Fiscal Trends, New York State Division of the Budget Economic and Revenue Advisory Board Meeting, New York, NY, October 20, 2005.

Evaluating the SUNY Teacher Education Program Assessment Project, Presentation to State University of New York Deans of Teacher Education, Lake Placid, NY, June 2, 2005.

The State Budget Outlook and the Federal Budget, Presentation for a conference call of The Annie E. Casey Foundation's KIDS COUNT Network, March 24, 2005.

State Finances: Improvement, But Pressures and Risks, National Association of Workforce Boards, Washington, DC, March 4, 2005, Don Boyd and Patricia Billen.

State Finances: Improvement, But Pressures and Risks, Advanced Seminar on Tax-Backed Debt, Meeting Sponsored By National Federation of Municipal Analysts, Orlando, FL, January 13, 2005.

New York Taxes In Relation to Other States, For the Session: What Are The Best Statewide Sources of Revenue?, Can New York State Get an 'A' in School Finance Reform? Convened by the Citizens Budget Commission, IBM Palisades Executive Conference Center, Palisades, NY, December 3, 2004.

Federal-State Fiscal Relationships in The United States: Implications for Border States, Border Legislative Conference: IX Legislative Forum; Hermosillo, Sonora, Mexico; November 19, 2004.

Evaluating the SUNY Teacher Education Program Assessment Project, Teacher Education Assessment Symposium, State University of New York, Syracuse, NY, October 7, 2004.

State Finances: Not Out of the Woods Yet, State Street Global Advisors Public Funds Pension Reform Seminar, Boston, MA, September 23, 2004.

State Finances: Not Out of the Woods Yet, Federation of Tax Administrators Annual Meeting, Burlington, VT, September 20, 2004.

Revenue Forecasting and Cash Flow: A Primer, National Institute for Public Finance 2004, Kellogg Graduate School of Management, Northwestern University. Sponsored by: National Association of State Treasurers Foundation, Chicago, IL, August 9, 2004.

Paying for Standards-Based Reform: Are State Tax Structures Up to the Job?, National Forum on Education Policy, Education Commission of the States, Orlando, FL, July 15, 2004. Presented in absentia.

State Revenue Trends and Issues, Annual Meeting of the National Association of State Treasurers, Norfolk, VA, May 24, 2004.

State and Local Finance: How the Money Flows, State Government Workshop Sponsored by The New York Associated Press Association, Rochester Democrat and Chronicle, and the Center for Governmental Research, Rochester, NY, March 10, 2004.

Out of the Frying Pan, Into the Pressure Cooker: State Finances in the Near and Mid-Term, National Center for Public Policy and Higher Education - Associates Program, San Diego, California, February 21, 2004.

Out of the Frying Pan, Into the Pressure Cooker: State Finances in the Near and Mid-Term, National Conference of State Legislatures Fiscal Leaders Seminar, Washington, DC, December 9, 2003.

State Fiscal Conditions: Tax Structure And Industrial Mix, New York State Division of the Budget Board of Economic Advisors, New York, New York, November 20, 2003.

Primer on NY State Budget And Local Finances, Reporting the New York State Fiscal Crisis: The Impact on Local Governments - A Seminar for Journalists, Sponsored by the Foundation for American Communications in association with The Journal News and The Society of Professional Journalists, White Plains, New York, October 21, 2003.

Asking Good Questions About Teacher Education Assessment: Insights From Teacher Labor Market Research, State University of New York Teacher Education Assessment Symposium, Syracuse, New York, October 3, 2003.

The Precarious State of the States: A Candid Analysis of the Challenges Threatening Municipal Finances, Perspectives on the Future Conference - Sage Advisory Services, Austin, Texas, September 25, 2003.

The Current State Fiscal Crisis And Its Aftermath, Webcast Briefing at the Kaiser Commission on Medicaid and the Uninsured, Washington, D.C., September 22, 2003.

Tax Structure Issues in Western States: Revenue Adequacy and Other Tax Policy Goals, Focus Group Meeting Of The Western Interstate Commission For Higher Education, Boulder, Colorado, September 8-9, 2003.

Medicaid Spending: New York Versus Other States, Meeting of Governor Pataki's New York State Health Care Task Force, Albany, New York, September 5, 2003.

The State Fiscal Crisis – How We Got Here, Where We May Be Going, National Conference of State Legislatures Leadership Staff Seminar, Charleston, West Virginia, September 4, 2003.

The Fiscal State of the States, Annual Meeting of the National Federation of Municipal Analysts, Chicago, Illinois, April 30, 2003.

School District Expenditures and Fiscal Stress, With Hamp Lankford and James Wyckoff, University at Albany, and Susanna Loeb, Stanford University, American Education Finance Association Annual Conference, Orlando, Florida, March 28, 2003.

Fiscal Stress in School Districts: How to Recognize It and How Districts Have Coped With It, With William Duncombe, Syracuse University, Pre-conference Workshop, 2003 American Education Finance Association Annual Conference, Orlando, Florida, March 27, 2003.

Fiscal Conditions in the States, New York State Division of the Budget Training Workshop, Albany, NY, March 14, 2003

Fiscal Trends in the States, New York State Economic and Revenue Consensus Forecasting Conference, Albany, NY, March 5, 2003

State Capacity to Finance Higher Education, The National Center for Public Policy and Higher Education, Annapolis, Maryland, November 21, 2002

Revenue Adequacy And The Western States, Annual Meeting Of The Western Interstate Commission For Higher Education, Broomfield, Colorado, November 11, 2002

The State Fiscal Crisis And Higher Education, The Hechinger Institute on Education and the Media, Teachers College, Columbia University, New York City
October 20, 2002

Overview of The Current State Fiscal Crisis, Presentation at meeting sponsored by The Welfare Reform & Beyond Initiative, The Brookings Institution, Washington, D.C.,
October 15, 2002

School District Expenditures and Fiscal Stress, With Hamilton Lankford and James Wyckoff, The New York State Regents Public Policy Conference, Albany, New York,
October 2, 2002

School District Expenditures and Fiscal Stress, With Hamilton Lankford and James Wyckoff, The Urban Forum: Aligning Financial Resources, The Queensbury Hotel,
Queensbury, New York, September 24, 2002

The Crisis in State Budgets. Presentation to the KIDS COUNT Annual Meeting,
Sponsored by The Annie E. Casey Foundation, Bethesda, Maryland, September 11, 2002.

Assessing State Social Service Spending Under Welfare Reform, With Patricia L. Billen, William Keller, and Paul Posner. Presentation at the Annual Meeting of the American Political Science Association, Boston, Massachusetts, August 30, 2002.

State Budget Blues: Western States in the National Context. Presentation to the Council of State Governments – West. Lake Tahoe, Nevada, July 16, 2002.

School District Expenditures and Fiscal Stress, With James Wyckoff. Presentation to the New York State Board of Regents State Aid Subcommittee, Albany, New York, June 17, 2002.

The Fiscal Effects of Welfare Reform, a presentation to the Administration for Children and Families' Fifth Annual Welfare Reform Evaluation Conference, Arlington, Virginia,
June 12, 2002.

The New York Executive Budget in the National Context, a presentation to the Essentials of Public Administration Annual Seminar. Schenectady, New York, May 22, 2002.

School District Expenditures and Fiscal Stress, Condition Report, With Hamilton Lankford and James Wyckoff. Presentation to the Education Finance Research Consortium Public Forum, State of New York, Albany, New York, May 15, 2002.

State Finances: Recent Trends and Outlook, State Long Term Care Programs: Balancing Cost, Quality and Access: A Workshop for State Executive Branch Health Officials; presentation for The Economic and Fiscal Climate: Impact on State Revenues and Long Term Care Budgets session. Sponsored by the U.S. Department of Health and Human Services, Agency for Healthcare Research and Quality (AHRQ) User Liaison Program and the National Governors Association. Indianapolis, Indiana, May 6 -8, 2002

State Spending Issues and Trends, Presentation to the American Federation of Teachers, Expenditure Task Force, Washington, DC, April 25, 2002.

State Tax Revenue Trends Around the Nation, Presentation to the New York State Consensus Forecasting Conference, Albany, New York, March 6, 2002.

The New York Economy and Town Budgets, Presentation to the Association of Towns of the State of New York, New York City, February 18, 2002.

State Finances in the Current Downturn, Presentation to the Federation of Tax Administrators: Midwinter Commissioner's Seminar, Denver, Colorado, December 4, 2001.

Education Tax Policy: Maine in the National Context, Presentation to the University of Southern Maine's Success for all Children Forum: Equitable Tax Policy In School Funding, Augusta, Maine, November 9, 2001.

State Finances as We Enter the Downturn, Presentation to the National Health Policy Forum: Disappearing State Surpluses (And Emerging Deficits), Washington, D.C., October 30, 2001

Late State Budgets, Presentation to the Educational Conference Board, Albany, New York, October 24, 2001.

Tough Times for State Finances, Presentation to the Annual Meeting of the Economic Analysis and Research Network (EARN). Session: What's Happening with the Economy and What's the Impact on the States? Chicago, Illinois, October 19, 2001.

State Revenue Trends and Outlook, Presentation to the Council of State Governments: Eastern Regional Conference. ERC Budget Chairs Roundtable, Bartlett, New Hampshire, August 28, 2001.

Virginia Fiscal Issues and Trends in the National Context, Presentation to the Virginia Business Council, Washington, DC, May 2, 2001.

State Revenue Structures and Trends, Presentation to the American Federation of Teachers Revenue Task Force, Albany, New York, April 4, 2001.

Louisiana Finances In the National Context, Presentation to the Red Ink Roller Coaster Public Forum, Sponsored by Louisiana Public Broadcasting, Baton Rouge, Louisiana, March 21, 2001.

Economic and Demographic Trends and Higher Education, Presentation to Strategic Planning Meeting of the State University of New York for the system Chancellor, Vice Chancellors, and other SUNY officials, Albany, NY, March 20, 2001.

State Tax Revenue Trends Around the Nation, Presentation to the New York State Consensus Forecasting Conference, Albany, New York, March 5, 2001.

State Revenue Trends, Issues, and Risks, Presentation to the American Federation of Teachers Revenue Task Force, Washington D.C., December 12, 2000.

Western States' Fiscal Trends, Issues, and Risks. Presentation to the Fiscal Affairs Committee of the Council of State Governments-West, San Diego, November 16, 2000,

The State Fiscal Policy Environment for Welfare Reform, Presentation to the Association for Budgeting and Financial Management, Kansas City, October 6, 2000.

Teacher Preparation at the State University, Presentation to the State University's Academic Standards Committee, New York City, November 12, 1999.

State Tax Trends, Presentation to the Federation of Tax Administrators' Revenue Estimating and Tax Research Conference Nashville, Tennessee, September 29, 1999.

Interim Report on Teacher Preparation Issues at the State University, Presentation to the State University's Academic Standards Committee, New York City, August 31, 1999.

Primer on Local Government and Local Taxes in New York, Nelson A. Rockefeller College of Public Affairs, Albany, New York, May 1999.

Property Taxes and Education Finance in the United States, Breakfast Meeting at The Century Foundation, New York City, April 1999.

A Database for Analyzing New York State Spending Trends, Fiscal Policy Institute, Albany, New York, September 1998.

The Fiscal Structure of Local Government in New York and the United States, Presentation to Government Officials from Poland, Rockefeller Institute of Government, Albany, New York, August 1998.

Changes in School Spending Inequality: 1989-90 to 1994-95, 23rd National Center for Education Statistics Data Users Conference, Washington, D.C., July 1998.

State Fiscal Trends, Municipal Analysts Group of New York, New York City, June 1998.

The Coordinated Children's Service Initiative and Residential Placements, New York State Council on Children and Families, Albany, New York, May 1998.

Multi-Year State Financial Planning, New York State Policymaker's Forum, Rockefeller Institute of Government, Albany, New York, May 1998.

Trends in State Tax Policy, Annual Meeting of the National Association of State Budget Officers, Atlanta, Georgia, April 1998.

Electronic Commerce Tax Issues and Electric Utility Tax Issues, Annual Meeting of the National Association of State Budget Officers, Atlanta, Georgia, April 1998.

Changes in School Spending Inequality: 1989-90 to 1993-94, 23rd Annual Conference of the American Education Finance Association, Mobile, Alabama, March 1998.

Fiscal Impact of the Federal Balanced Budget Agreement, Regional Breakfast Workshop of the Federal Reserve Bank of New York, New York City, October 1997.

Welfare, Welfare Reform, Recessions, and State Budgets, With Elizabeth I. Davis, Annual Meeting of the National Tax Association, Chicago, Illinois, September 1997.

Fiscal Trends and Issues in the States, Annual Meeting of Regional Financial Associates, West Chester, Pennsylvania, May 1997.

State Fiscal Trends and Outlook, Meeting of the State University of New York Budget Officers, Colonie, New York, November 1996.

State Tax Revenue Trends, Federation of Tax Administrators Annual Meeting, Boston, Massachusetts, October 1996.

Revenue Trends and Welfare Reform in the Eastern States, Eastern States Legislative Fiscal Officers Association, Colonie, New York, September 1996.

New York State and Local Taxes: Analyzing Representative Taxpayers, Meeting of the Regional Science Association International, Binghamton, New York, April 1996.

Fiscal Planning and Budget Policy, Rockefeller Institute of Government Policy Luncheon, Albany, New York, April 1996.

Selected Recent Grants and Contracts

Notes: Project titles are descriptive and may not correspond exactly with formal project designations. Dollar amounts are rounded.

Grants and contracts obtained at the Rockefeller Institute of Government

Transforming Governmental Accounting Standards, \$50,000, The Laura and John Arnold Foundation, Approved January 2017. Scheduled to begin December 2017.

Analyzing and Modeling Public Pensions in the Context of State and Local Government Fiscal Conditions, \$150,000, The Pew Charitable Trusts. 2017.

Preparing for the Worst: Options for Addressing Public Pension Plans in Deep Distress, \$250,000, The Smith Richardson Foundation, 2017.

Fiscal Position of Medicaid Expansion and Non-Expansion States, \$35,000, The Kaiser Commission on Medicaid and the Uninsured, 2015.

Modeling and Disclosing Public Pension Fund Risk, and Consequences for Pension Funding Security, \$1 million, The Laura and John Arnold Foundation, 2014.

Modeling and Disclosing Public Pension Fund Risk, and Consequences for Pension Funding Security, \$300,000, The Smith Richardson Foundation, 2014.

Modeling and Disclosing Public Pension Fund Risk, and Consequences for Pension Funding Security, \$150,000 over two years, The Pew Charitable Trusts, 2014.

Fiscal Position of Medicaid Expansion and Non-Expansion States under the Affordable Care Act, \$30,000, The Kaiser Commission on Medicaid and the Uninsured, 2014.

Revenue Estimating in the States: An Update and Extension, \$89,000, The Pew Charitable Trusts, 2013.

Assessing the Outlook for Growth in State Education Aid, \$45,000, National Heritage Academies, 2010.

Revenue Estimating in the States, \$48,000, The Pew Charitable Trusts, 2009.

Partial list of grants obtained in support of the State Budget Crisis Task Force

Note: In 2011 and 2012, working with Task Force co-chair Richard Ravitch, the Task Force raised more than \$2 million in funding. Success in raising these funds was primarily attributable to Mr. Ravitch, and secondarily related to my role. Selected large grants are shown below.

The State Budget Crisis Task Force, \$50,000. Ewing Marion Kauffman Foundation.

The State Budget Crisis Task Force, \$250,000. The John D. and Catherine T. MacArthur Foundation.

Donald J. Boyd: Selected Grants

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The State Budget Crisis Task Force, \$100,000. The Nathan Cummings Foundation.
The State Budget Crisis Task Force, \$500,000. The Open Society Foundations.
The State Budget Crisis Task Force, \$500,000. The Peter G. Peterson Foundation.
The State Budget Crisis Task Force, \$300,000. The Smith Richardson Foundation.
The State Budget Crisis Task Force, \$250,000. Individual contributions.

Selected Consulting, Reviews, and Similar Activities

Rhode Island Brotherhood of Correction Officers, Cranston, RI. Comparative pay analysis of Rhode Island correction officer pay in relation to other similar job titles, with adjustments for comparability, in relation to interest arbitration. 2016.

Smith Richardson Foundation, Proposal Review: “Extending the Fiscal Democracy Index to States” (SRF proposal #2016-1075), January 2016.

American Academy of Arts & Sciences, The Lincoln Project, Cambridge, MA. Prepared report: “Public Research Universities: Changes in State Funding”, 2015.

Office of the State Comptroller of New York: advice and research into the balance of payments between states and the federal government, 2014-2015.

Smith Richardson Foundation, Proposal Review: “Measuring the Effects of Rising Teacher-Pension Costs on School District Budgets” (SRF proposal #2015-0861), June 2015.

Reviewer for *Public Budgeting and Finance* in 2016, 2015, 2014, 2013, and selected earlier years.

Reviewer for *Public Administration Review* in 2014, 2013, and selected earlier years.

Citizens Budget Commission of New York, Tax Policy Choices and New York’s Competitive Position, Consultant Report, 2013.

Pew Center on the States, Senior Policy Advisor, 2010 and early 2011. Provided expertise and advice in relation to the PCS state fiscal health project.

American Association of Retired Persons, Consultant, 2010. Provided analysis and advice to AARP on state fiscal issues, particularly in Illinois.

Smith Richardson Foundation, Proposal Review: “Retirement Benefits for State and Local Employees: Impact on Budgets, Public Debt, and the Delivery of Services” (SRF grant #2009-8743), September 22, 2009.

Little Mendelson P.C. Expert Testimony in Relation to Finances of the Metropolitan Transportation Authority (MTA), New York City, New York State, and the Federal Government. Analysis and testimony in relation to interest arbitration proceedings between the MTA and the Transport Workers Union, May-June 2009.

State Senate Select Committee on Budget and Tax Reform, “Stability and Volatility in New York’s Income Tax”, Testimony, March 12, 2009.

State Fiscal Outlook Update, Consultant Memorandum to the National Center for Higher Education Management Systems, January 2009.

American Association of Retired Persons, Review: of “Federal and State Income Tax Incentives for Private Long-Term Care Insurance”, December 2008/ January 2009.

State and Local Government Review, Review of “Credit Ratings, Coupon Rates, and the Ratio of General Long-Term Debt to General Capital Assets”, September 2008.

Public Administration Review, Review of paper, “Sustaining and Enhancing State and Local Fiscal Capacity: The Challenges”, March 2008.

The Palmetto Institute of South Carolina (with William F. Fox): analysis of the South Carolina tax system, 2007-2008.

New York State Commission on Local Government Efficiency and Competitiveness: analysis of local government layering and city-county mergers, 2007-2008.

The Pew Center on the States: analysis of the volatility of state and local government tax systems, 2007-2008.

The Pew Center on the States: analysis of investments by public pension funds, 2007.

Office of the State Comptroller of New York: review and analysis of New York State revenue estimates, 2007.

The National Center on Addiction and Substance Abuse, Columbia University: review of survey of state budgets regarding costs of substance abuse, 2006-2007.

National Academy of Sciences Panel on Research and Development Priorities for the U.S. Census Bureau’s State and Local Government Statistics Programs: review and comment on report concerning Census Bureau data on state and local government finances, 2006-2007.

Citizens Budget Commission of New York: A simulation of business taxes in New York City and other locations, 2006-2007.

Governor-Elect Eliot Spitzer’s Budget Transition: member of team assisting in development of the New York State Executive Budget for 2007-08, 2006-2007.

Union College Professor Hal Fried and the Center for Economic Growth of Albany NY: data analysis relating to the *Benchmarking Tech Valley* project, 2005-2006.

New Jersey Association of Realtors (with William F. Fox): analysis of New Jersey property tax issues and options, 2005-2006.

National Center for Real Estate Research of the National Association of Realtors (with Donald J. Bruce, William F. Fox, and Matthew N. Murray): State and Local Government Finances: Today's Structure and Tomorrow's Challenges, 2004-2005.