

**Roundtable on Population Health Improvement**

**EXPLORING TAX POLICY TO ADVANCE POPULATION HEALTH,  
HEALTH EQUITY, AND ECONOMIC PROSPERITY: A WORKSHOP**

**December 7, 2017**

**DRAFT AGENDA**

Laurel Room, The California Endowment Oakland Conference Center  
2000 Franklin Street, Oakland, CA

**DRAFT WORKSHOP OBJECTIVES:**

1. Explain how tax policies\* have been used to channel resources and shape economic incentives that affect population health, with attention to the basic features of taxes (such as on tobacco, etc.), as well as tax breaks (such as for low-income housing, etc.);
2. Examine several examples to discuss how tax policies can be designed both to attract willing investors and to advance a range of health and economic goals, while also noting any insights about pitfalls to avoid; and
3. Equip each participant with the basic knowledge and language to further explore how to advance tax policy in favor of health and well-being across sectors (e.g., education, housing, economic development, etc.).

\* To provide a common framework for discussion, a typology of tax policy is offered on the last page of the agenda.

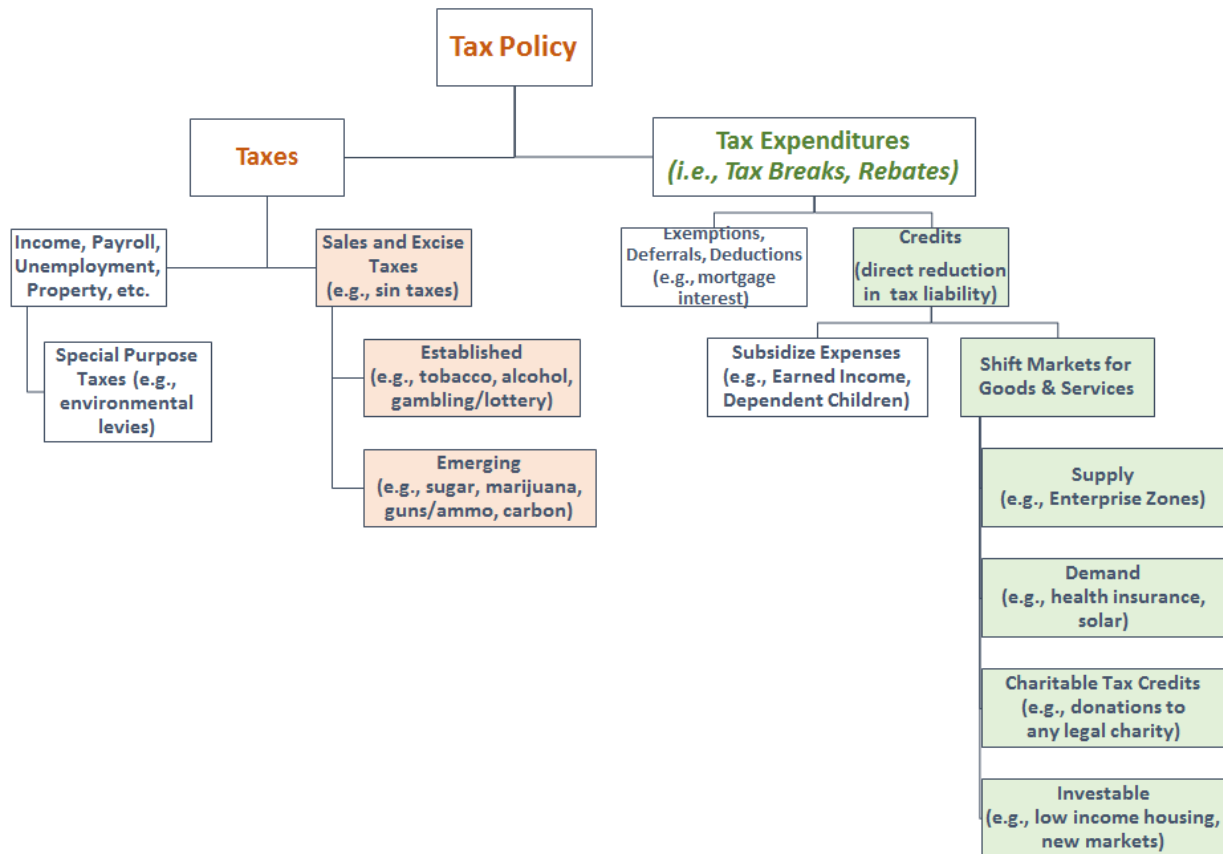
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8:15 am	<b>Welcome</b> <i>Sanne Magnan, adjunct assistant professor, Division of Medicine, University of Minnesota; co-chair, Roundtable on Population Health Improvement</i>
8:25 am	<b>Framing Remarks: Key Points</b> <i>Bobby Milstein, director, ReThink Health; roundtable and planning committee member</i>
8:45 am	<b>Understanding the Basics of Tax Policy: typology, design principles, examples</b> <i>Moderator: Giridhar Mallya, senior policy officer, Robert Wood Johnson Foundation Pete Davis, president, Davis Capital Investment Ideas</i>
9:30 am	<b>Q&amp;A</b>
9:45 am	<b>In-person and Online Participant Polling (PollEverywhere)</b>
9:55 am	<b>Break</b>
10:10 am	<b>Understanding the Fiscal Environment of the State Budgets</b> (current state of state budgets, opportunities in the midst of fiscal challenges) <i>Moderator: TBD Nick Johnson, senior vice president for State Fiscal Policy, Center on Budget and Policy Priorities</i>

10:30 am	<b>Q&amp;A</b>
10:45 am	<p><b>Key Opportunities for Shaping Incentives and Creating a Pipeline of Financing Population Health: Exploring Sin Taxes &amp; Population Health Tax Credits</b>  <i>Moderator: Kathy Gerwig, vice president of Employee Safety, Health and Wellness, and environmental stewardship officer, Kaiser Permanente</i></p>
10:50 am	<p><b>Spotlight on Sin Taxes: Overview, efficacy, opportunity and unintended consequences</b>  <i>Moderator: Kathy Gerwig</i>  <i>Aysha Pamucku, senior staff attorney, ChangeLab Solutions</i>  <i>Xavier Morales, executive director, The Praxis Project</i>  <i>Speaker TBD</i></p>
11:45 am	<b>Q&amp;A</b>
12:00 pm	<b>Lunch (and Twitter Chat)</b>
1:00 pm	<p><b>Spotlight on Tax Credits: A paper presentation, exploring potential tax credits to finance population health investments</b>  <i>Moderator: Jim Hester, principal, Population Health Systems</i>  <i>Stacey Becker, vice president of programs, ReThink Health</i></p>
1:45 pm	<b>Q&amp;A</b>
2:00 pm	<p><b>Designing Sound Population Health Tax Policy: <i>Small Group Work</i> (assigned facilitator/rapporteur at each table)</b>  <i>Moderator: Rose Marie Martinez, senior board director, Board on Population Health and Public Health Practice, Health and Medicine Division, National Academies of Sciences, Engineering, and Medicine</i></p>
2:35 pm	<b>Break</b>
2:45 pm	<p><b>Small Group Report Out and Debrief (Caucus around most promising ideas)</b>  <i>Moderator: Rose Marie Martinez</i></p>
3:15 pm	<p><b>Informing Sound Population Health Tax Policy in the Current Environment (influence strategies)</b>  <i>Moderator: Alan Gilbert, director, Global Government and NGO Strategy, General Electric</i>  <i>Anne DeBiasi, director of policy development, Trust for America's Health</i>  <i>Speaker TBD</i></p>
3:50 pm	<b>Q&amp;A</b>
4:00 pm	<p><b>Reflections on the Day and Closing Remarks</b>  <i>George Isham, senior advisor, HealthPartners; senior fellow, HealthPartners Research Foundation, HealthPartners, Roundtable co-chair</i></p> <p>(Participant polling with Poll Everywhere)</p>
4:30 pm	<b>Adjourn</b>

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FIGURE



NOTE: This simple figure is provided as a practical typology of tax policy in the United States to ensure all workshop participants have at least a basic understanding of the terrain. Government at all levels (federal, state, and local) may impose taxes and offer tax credits and rebates.

Source: Bobby Milstein, ReThink Health