

ROUNDTABLE ON POPULATION HEALTH IMPROVEMENT

Exploring Relevant Policy Domains — Tax Policy and Population Health: A Workshop

September 29th, 2025 | 10:00am–3:00pm EST | Virtual

ATTENDEE PACKET



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Agenda

MONDAY, SEPTEMBER 29TH, 2025

- 10:00am** **Welcome**
Ana Diez Roux, Drexel University, *Roundtable Co-Chair, planning committee member*
- 10:10am** **Introduction**
Moderator: **Philip Alberti**, AAMC, *Roundtable member, planning committee chair*
Speakers:
Jason Fichtner, Alliance for Lifetime Income, *planning committee member*
Cierra Bryant, The Rippel Foundation

Q&A/Discussion
- 11:15am** **Tax Tools for Children's Wellbeing**
Moderator: **Philip Alberti**
Speakers:
Indivar Dutta Gupta, National Academy of Social Insurance
Steven Dean, Boston University
Jacob Bastian, Rutgers University

Q&A/Discussion
- 12:15pm** **BREAK**
- 12:45pm** **Tax Policy for Working Adults**
Moderator: **Philip Alberti**
Speakers:
Kimberly Clausing, UCLA School of Law
Suyapa Miranda, Prepare + Prosper
Ben Harris, The Brookings Institute

Q&A/Discussion
- 1:45pm** **Securing Health and Wealth in Later Life**
Moderator: **Philip Alberti**
Speakers:
Surya Kolluri, TIAA Institute
Teresa Ghilarducci, The New School
Ben Veghte, WA Cares Fund

Q&A/Discussion
- 2:45pm** **Closing Remarks**
Ana Diez Roux
- 3:00pm** **Adjourn**

Roundtable on Population Health Improvement

Vision, Mission and Roster

Vision | A thriving, healthful, and equitable society

Mission | In recognition that health and quality of life for all are shaped by interdependent historical and contemporary social, political, economic, environmental, genetic, behavioral, and health care factors, the Roundtable on Population Health Improvement exists to provoke and catalyze urgently needed multi-sector community engaged collaborative action.

MEMBERS

**Ana V. Diez Roux, MD, PhD,
MPH (co-chair)**

Drexel University
Philadelphia, PA

Mary Pittman, DrPH (co-chair)

Public Health Institute (retired)

Manal Aboelata, MPH

The California Endowment
Los Angeles, CA

Philip M. Alberti, PhD

Association of American Medical
Colleges
Washington, DC

Debbie I. Chang, MPH

Blue Shield of California
Foundation
San Francisco, CA

Meg Guerin-Calvert, MPA

FTI Consulting
Washington, DC

Hilary Heishman, MPH

Robert Wood Johnson
Foundation
Princeton, NJ

Dora Hughes, MD, MPH

U. S. Department of Health and
Human Services
Washington, DC

Sheri Johnson, PhD

University of Wisconsin-Madison
Madison, WI

Robert M. Kaplan, PhD

Stanford University
Stanford, CA

Milton J. Little, Jr., MA

United Way of Greater Atlanta
Atlanta, GA

**Tiffany Manuel, PhD, MPP,
MPS**

TheCaseMade

Bobby Milstein, PhD, MPH

ReThink Health
Morristown, NJ

José T. Montero, MD, MHCDS

Centers for Disease Control and
Prevention
Atlanta, GA

Willie (Billy) Oglesby, PhD

Jefferson University
Philadelphia, PA

Kosali Simon, PhD

Indiana University
Bloomington, IN

Lorna Thorpe, MPH, PhD

NYU Grossman School of
Medicine
New York, NY

Monica Valdes Lupi, JD, MPH

The Kresge Foundation

**Kara Odom Walker, MD, MPH,
MSHS**

Nemours
Washington, DC

Biosketches

*denotes planning committee member, †denotes roundtable member



Philip Alberti*†

Philip Alberti, Ph.D., is founding director of the Association of American Medical Colleges (AAMC) Center for Health Justice and senior director of health equity research & policy at AAMC. Dr. Alberti sparks, supports, and contributes to community-driven, multi-sector efforts that build evidence for programs, policies, practices, and partnerships that eliminate unfair and unjust group differences in health. He is a population health scientist whose singular professional commitment to health equity research and action spans nearly 25 years. He is widely published, a frequent public speaker, and has served on advisory boards and expert panels for numerous organizations and federal agencies including the Centers for Disease Control and Prevention (CDC), the National Institutes of Health (NIH), and the Centers for Medicare & Medicaid Services. He is also the current President of the Interdisciplinary Association for Population Health Science. In 2021, Philip founded the AAMC Center for Health Justice as the natural next step in a career focused on building evidence in support of the structural changes needed to ensure all communities have a genuine opportunity to thrive.

Prior to joining AAMC in 2012, Dr. Alberti led research, evaluation, and planning efforts for a Bureau within the New York City Department of Health and Mental Hygiene that worked to promote community health and health equity across NYC neighborhoods. He holds a Ph.D. degree in Sociomedical Sciences from Columbia University's Mailman School of Public Health and was a Fellow in the National Institute of Mental Health's Psychiatric Epidemiology Training program.



Jacob Bastian

Jacob Bastian, Ph.D., M.A., is an assistant professor of economics at Rutgers University, New Brunswick, New Jersey, and a nonresident senior fellow at the Brookings Institution. Prior to joining Rutgers, he completed a two-year postdoc at the University of Chicago's Harris School of Public Policy and a Ph.D. in Economics at the University of Michigan. Bastian's research focuses on how public policy can reduce poverty, increase economic opportunity, and affect social attitudes, while also identifying unintended consequences. Much of his research examines how the Earned Income Tax Credit and Child Tax Credit affects the wellbeing of lower-income families. Bastian served as a senior economist in the Council of Economic Advisers in the White House from 2023 to 2024, where he focused on child poverty, childcare, and increasing the supply of affordable housing.



Cierra Bryant

Cierra Bryant, M.P.H., is the senior learning and impact associate at The Rippel Foundation, where she supports efforts to measure, evaluate, and deepen understanding of efforts aimed at driving effective and equitable systems change. She

also plays a key role in cultivating a strong learning culture within the organization, helping teams turn insights into action. Cierra brings a public health lens and commitment to equity to her work, ensuring that learning and evaluation practices are inclusive, strategic, and impactful. She holds an M.P.H. from Drexel University and a B.S. in behavioral and community health from the University of Maryland, College Park.



Kimberly Clausing

Kimberly Clausing, Ph.D., holds the Eric M. Zolt chair in tax law and policy at the University of California Los Angeles School of Law, and she is a nonresident senior fellow at the Peterson Institute for International Economics. During the first part of the Biden Administration, Dr. Clausing was the deputy assistant secretary for tax analysis in the U.S. Department of the Treasury, serving as the lead economist in the Office of Tax Policy.

Dr. Clausing's research examines how government decisions and corporate behavior interplay in the global economy. She has published numerous articles on taxation, climate policy, and international trade, and she is the author of *Open: The Progressive Case for Free Trade, Immigration, and Global Capital* (Harvard University Press, 2019). Dr. Clausing is a member of the Council on Foreign Relations and a research associate at the National Bureau of Economic Research. She has testified before the U.S. Congress on many occasions, and she has received two Fulbright Research awards as well as many external research grants. Professor Clausing received her Ph.D. in economics from Harvard University in 1996.



Veronique de Rugy*

Veronique de Rugy, Ph.D., M.A., is the George Gibbs chair in political economy and senior research fellow at the Mercatus Center at George Mason University and a nationally syndicated columnist. Her primary research interests include the U.S. economy, the federal budget, taxation, tax competition, and cronyism. Her popular weekly columns address economic issues ranging from lessons on creating sustainable economic growth to the implications of government tax and fiscal policies. She has testified numerous times in front of Congress on the effects of fiscal stimulus, debt and deficits, and regulation on the economy.

Dr. de Rugy is the author of a weekly opinion column for the Creators Syndicate, writes regular columns for Reason magazine, and she blogs about economics at *National Review Online's The Corner*. Her charts, articles, and commentary have been featured in a wide range of media outlets, including the Reality Check segment on Bloomberg Television's Street Smart, the *New York Times' Room for Debate*, the *Washington Post*, the *Wall Street Journal*, *CNN International*, *Stossel*, *20/20*, *C-SPAN's Washington Journal*, and Fox News. In 2015, she was named in Politico Magazine's Guide to the Top 50 thinkers, doers and visionaries transforming American Politics.

Previously, Dr. de Rugy has been a resident fellow at the American Enterprise Institute, a policy analyst at the Cato Institute, and a research fellow at the Atlas

Economic Research Foundation. Before moving to the United States, she oversaw academic programs in France for the Institute for Humane Studies Europe. She received her M.A. in economics from Paris Dauphine University and her Ph.D. in economics from Panthéon-Sorbonne University.

Steven A. Dean



Steven A. Dean, J.D., is an award-winning author and a professor of law and the Paul Siskind Research Scholar at Boston University. He has spoken at the United Nations and testified in Congress about the impact of racism on tax law. Dean's work forced President Biden to change course on tax havens and forced the leading international tax policymaking organization to withdraw a major marketing brochure. He led the world's foremost graduate tax law program at New York University and practiced tax with leading global law firms. He earned his law degree from Yale and has published five books, including *Racial Capitalism* and *International Tax Law: The Story of Global Jim Crow* (Oxford 2025).



Ana V. Diez Roux*†

Ana V. Diez Roux, MD, PhD, MPH, is distinguished University professor of epidemiology at the Dornsife School of Public Health and director of the Drexel Urban Health Collaborative. Originally trained as a pediatrician in her native Buenos Aires, she completed public health training at the Johns Hopkins University School of Hygiene and Public Health. Before joining Drexel University, she served on the faculties of Columbia University and the University of Michigan, where she was chair of the Department of Epidemiology and director of the center for Social Epidemiology and Population Health. Dr. Diez Roux is internationally known for her research on the social determinants of population health and the study of how neighborhoods affect health. Her work on neighborhood health effects has been highly influential in the policy debate on population health and its determinants.

Dr. Diez Roux has served on numerous editorial boards, review panels and advisory committees including most recently the Clean Air Scientific Advisory Committee of the Environmental Protection Agency (as Chair), the Board of Scientific Counselors of the National Center for Health Statistics, the Committee on Health and Wellbeing in the Changing Urban Environment of the International Council for Science, and CDC's Community Preventive Services Taskforce. She has received the Wade Hampton Frost Award for her contributions to public health from the American Public Health Association and the Award for Outstanding Contributions to Epidemiology from the American College of Epidemiology. She is also an elected member of the American Epidemiological Society and the Academy of Behavioral Medicine Research. She was elected to the National Academy of Medicine of the National Academy of Sciences in 2009.



Indi Dutta-Gupta

Indi Dutta-Gupta, is a policy expert and political advisor whose consulting firm, Blue Lotus Strategies, advances equity and prosperity through strategic counsel to nonprofits, foundations, worker organizations, policymakers, and political candidates on child, family, tax, budget, and economic policy. He has played a leading role in enacting, defending, or defeating major legislation and executive actions, and is recognized for his strategic and substantive insights by elected officials, the media, and cross-ideological initiatives aimed at improving outcomes for working- and middle-class Americans.

He currently serves as an economic fellow at Citizens for Responsibility and Ethics in Washington; fellow at the Roosevelt Institute; distinguished visiting fellow and CEO advisor at the National Academy of Social Insurance; senior advisor to the CEO of The Policy Academies; and advisor to Community Change. His past roles include president and executive director of the Center for Law and Social Policy and the Georgetown Center on Poverty and Inequality; senior policy advisor at the Center on Budget and Policy Priorities; project director at Freedman Consulting; and professional staff for the U.S. House Ways and Means Committee. He has served internationally as a member of Canada's Ministerial Advisory Committee on Poverty Reduction, and he is a public member of a National Academies committee and an advisor to the Convergence Center for Policy Resolution. Dutta-Gupta is a former Bill Emerson National Hunger fellow, Harry S. Truman Scholar, and U.S.-Japan Leadership Program fellow (2024–2025).



Jason Fichtner*

Jason Fichtner, Ph.D., M.P.P., is executive director of the Retirement Income Institute, Alliance for Lifetime Income. His research focuses on Social Security, federal tax policy, federal budget policy, retirement security, and policy proposals to increase saving and investment. Dr. Fichtner served in several positions at the Social Security Administration, including deputy commissioner of Social Security (acting), chief economist, and associate commissioner for Retirement Policy. He previously served as chief economist at the Bipartisan Policy Center, a senior research fellow with the Mercatus Center at George Mason University, senior economist with the Joint Economic Committee of the U.S. Congress, economist with the Internal Revenue Service, and as a senior consultant with the Office of Federal Tax Services at Arthur Andersen, LLP. Dr. Fichtner was also senior lecturer of international economics and associate director of the International Economics and Finance program at Johns Hopkins University School of Advanced International Studies. Dr. Fichtner earned his B.A. from the University of Michigan, his M.P.P. from Georgetown University, and his Ph.D. from Virginia Tech.



Teresa Ghilarducci

Teresa Ghilarducci, Ph.D., is an economist and nationally recognized expert in older worker labor markets and retirement security. She is the Bernard and Irene Schwartz chair of economic policy analysis at the New School for Social Research and director of the Schwartz Center of Economic Policy Analysis. Her nationally acclaimed 2024 book – *Work, Retire, Repeat: The Uncertainty of Retirement in the New Economy* – unpacks the economic myths about the positive effects on health, wealth, and

productivity of working longer. She is the author of 5 other books, and coauthor and editor of 3 others. Dr. Ghilarducci has published over 75 refereed journal articles; testified in Congress over 10 times and was appointed by two governors and one President to serve on advisory boards. For 15 years she was a trustee for a \$60B retiree-health plan for 1 million retired auto workers. She advises policy makers to create pension plans – Guaranteed Retirement Plans - for all Americans – 70 million workers have nothing but Social Security. The U.S. Government Accountability Office identified Guaranteed Retirement Accounts (GRA) as one alternative to overhaul the U.S. retirement system. And during the financial crisis of 2008, the New York Times Magazine named the GRA Plan one of the best ideas of the year. She has a Ph.D. from the University of California, Berkeley. Before coming to The New School in 2008, she taught for 25 years at the University of Notre Dame in South Bend Indiana.



Ben Harris

Ben Harris, Ph.D., M.Phil., M.A., is the vice president and director of economic studies at the Brookings Institution, where he also holds the Bruce and Virginia MacLaury chair. As a scholar, Harris focuses on public finance and macroeconomics, and is widely published in academic journals, policy outlets, and the popular press—including the *New York Times*, *Wall Street Journal*, and *Washington Post*—and is a regular guest on cable television. With Martin Baily, he is the author of the book “The Retirement Challenge: What’s Wrong with America’s System and a Sensible Way to Fix It” (Oxford University Press, 2023).

Dr. Harris has extensive experience in senior public sector roles. Most recently, he was assistant secretary for economic policy and chief economist at the Treasury Department. He also served as the chief economist and economic adviser to the Vice President of the United States and as a senior economist with the Council of Economic Advisers during the Obama administration. He was also the senior economist with the U.S. House of Representatives Budget Committee. In 2020, the *New York Times* dubbed him the “Quiet Architect of Biden’s Plan to Rescue the Economy.” For his Treasury Department service, Dr. Harris was awarded the prestigious Alexander Hamilton Award by Secretary Janet Yellen.

In addition to his public service, Harris has worked extensively in think tanks and academia. He has spent much of his career at Brookings, where he has been the director of the Retirement Security Project, policy director for the Hamilton Project, and fellow in Economic Studies—among other roles earlier in his career. He was also a research associate professor and executive director of the Public-Private Initiative at Northwestern University’s Kellogg School of Management and has taught as an adjunct instructor at Georgetown University, Harvard University, and the University of Maryland. In the private sector, Dr. Harris was the founder and president of the economic consulting firm Cherrydale Strategies. He was also the senior economic policy adviser with the hedge fund Rokos Capital.

Dr. Harris holds a Ph.D. in economics from George Washington University, a Master’s degree in Economics from Cornell University, a Master’s degree in Quantitative Methods from Columbia University, and a Bachelor’s degree from Tufts University. He was also a Fulbright Scholar to Namibia in 2000.



Samantha Jacoby*

Samantha Jacoby, J.D., M.P.P., is the deputy director of Federal Tax Policy with the Center on Budget and Policy Priorities. Samantha focuses on U.S. federal income tax issues, including corporate and business taxation, individual income taxation, and climate tax policy. Prior to joining the Center in 2018, she practiced tax law at two international law firms in New York and Washington, D.C. Previously, she worked as a policy and research analyst at the Solar Energy Industries Association, where she focused on the impact of tax incentives on the energy industry.

She earned a J.D. from the University of Pennsylvania Law School. She holds an M.P.P. in public finance from American University and a B.A. in political science from the University of the Incarnate Word.



Surya Kolluri

Surya Kolluri, M.B.A., M.S.M.E., is head of TIAA Institute and is recognized as a thought leader in retirement and healthy aging research. The TIAA Institute is a think-tank celebrating its 25th Anniversary within TIAA and conducts cutting-edge research in the areas of financial and longevity literacy, lifetime income, retirement plan design and behavioral finance for higher education and the broader nonprofit sector.

Kolluri sits on the board of the Wharton Pension Research Council, the advisory councils of Georgetown Center for Retirement Research, the Retirement Research Center of the Defined Contribution Institutional Investment Association, the National Center to Reframe Aging. He also served on the board of the MA/NH Chapter of the U.S. Alzheimer's Association. In 2021, Kolluri received The President's Volunteer Service Award via AmeriCorps for his commitment to strengthen communities. Surya often speaks at high-level forums and is frequently cited in the media. They include the United Nations Silver Economy Forum, the World Economic Forum, Tokyo G20 Summit on Aging and Financial Inclusion, White House Conference on Aging, National Governors Association, Dementia Forum X in Stockholm, World Health Organization Convening on Healthy Aging in Geneva, and the OECD roundtable at Oxford University. He also serves on the World Economic Forum Longevity Economy Initiative and has spoken on these topics at Harvard, MIT, Stanford, Brown, Yale, London Business School and the University of Pennsylvania. Kolluri joined the TIAA Institute from Bank of America, where he spent 16 years, most recently as managing director of the Retirement Research and Insights team. Prior to that, he spent 14 years in corporate strategy consulting, first at A.T. Kearney and then at Bain & Co. Surya holds an M.B.A. from The Wharton School at the University of Pennsylvania and an M.S.M.E. from Drexel University. He lives with his family in Brookline, Massachusetts.



Bobby Milstein**

Bobby Milstein, Ph.D., M.P.H., works with innovators who see themselves -- and others -- as shared stewards in a movement for well-being and justice. He serves as director of system strategy for ReThink Health and the Rippel Foundation, as well as a Visiting Scientist at the MIT Sloan School of Management. With an educational background that combines cultural anthropology, behavioral science, and systems science, he helps organize efforts to spark large-scale institutional and cultural

change. Dr. Milstein combined input from countless contributors to craft the vital conditions framework and was lead editor of the “Thriving Together Springboard”. He is a member of the National Academies Roundtable on Population Health Improvement, co-founder of the Well Being in the Nation Network, and an invited contributor to the National Academies’ consensus study on health equity as well as the Surgeon General’s Report on Community Health and Economic Prosperity. Bobby is a frequent design consultant for new endeavors that advance the dynamic and democratic frontiers of shared stewardship. Previously, Dr. Milstein spent 20 years planning and evaluating system-oriented initiatives at the CDC, where he was the principal architect of CDC’s framework for program evaluation. He received CDC’s Honor Award for Excellence in Innovation, the Applications Award from the System Dynamics Society, the President’s Prize from the American Evaluation Association, as well as Article of the Year awards for papers published in Health Affairs and Health Promotion Practice.



Suyapa Miranda

Suyapa Miranda, M.A.P.L., is the executive director of Prepare + Prosper, a Minnesota-based nonprofit that provides financial and tax services to individuals and families with low to moderate incomes. Since her appointment in March 2021, Miranda has focused on building pathways toward financial equity by addressing both immediate needs and the systemic injustices that create barriers to economic security. Miranda’s career reflects her commitment to dismantling structural inequities and elevating the voices of underserved communities. She holds a B.A. in Modern and Classical Languages from the University of St. Thomas and a Master of Advocacy and Political Leadership from Metropolitan State University.



Benjamin W. Veghte

Benjamin W. Veghte, Ph.D., M.P.A., is the director of the WA Cares Fund, the nation’s first universal long-term care insurance program in Washington State. He is a board member of the American Society on Aging, an MIT CoLab Mel King Community Fellow, and a member of the Care Guild, a group of 125 innovators redesigning care for the 21st century. He holds a Ph.D. from the University of Chicago and an M.P.A. from the Harvard Kennedy School. Dr. Veghte is an expert on U.S. and Organisation for Economic Co-operation and Development social policy with recent publications on the German and Dutch long-term care systems. His research and policy work focus on developing new policies that improve the economic security of families and support them in balancing work and care. He taught comparative social policy and comparative politics as an assistant professor of Political Science at the University of Bremen, Germany, until 2008. He worked as a social policy consultant for the European Union (EU), working on projects which advised EU accession countries on how to harmonize their social policies with EU standards. Dr. Veghte was vice president for policy at the National Academy of Social Insurance from 2015-18. From 2018- 2020, he led the research portfolio at Caring Across Generations.



Diane Whitmore Schanzenbach*

Diane Whitmore Schanzenbach, Ph.D., is McCourt chair in the McCourt School of Public Policy at Georgetown University. She is an economist who studies policies aimed at improving the lives of children in poverty and their families, including education, health, labor market, and income support policies. Her work traces the impact of major public policies such as the Food Stamp Program, school finance reform, and early childhood education on children's long-term outcomes.

She is a research associate at the National Bureau of Economic Research, a nonresident senior fellow at the Brookings Institution, and a research associate at the Institute for Research on Poverty at the University of Wisconsin-Madison. She is an elected member of the National Academy of Education and the National Academy of Social Insurance and serves on the boards of directors of the Greater Chicago Food Depository and Start Early. She has testified to the U.S. Senate and House of Representatives on her research.

She graduated magna cum laude from Wellesley College with a B.A. in economics and religion and received a Ph.D. in economics from Princeton University.

Recommended Readings and Resources

Alderman, Leigh, James Dills, and Michelle Marcus. *Building and Sustaining Collaborative Partnerships to Address Social Determinants of Health and Equity: Insights from an Earned Income Tax Credit Policy Implementation Lab*. Georgia State University (Georgia Health Policy Center). https://nnphi.org/wp-content/uploads/2022/04/Report-EITC-Policy-Lab_FINALdocx.pdf.

Bastian, Jacob. "How the EITC and CTC Work Together - and Why That Matters in 2025." (July 22, 2025). <https://www.rstreet.org/commentary/how-the-eitc-and-ctc-work-together-and-why-that-matters-in-2025/>.

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Hernandez, Frederick, and Andrew Lautz. "The 2025 Tax Debate: Who Benefits from Tax Cuts?". (April 7, 2025). <https://bipartisanpolicy.org/explainer/the-2025-tax-debate-who-benefits-from-tax-cuts/>.

National Academies of Sciences, Engineering, and Medicine. *Exploring Tax Policy to Advance Population Health, Health Equity, and Economic Prosperity: Proceedings of a Workshop*. The National Academies Press, 2019. doi:10.17226/25237. <https://nap.nationalacademies.org/catalog/25237/exploring-tax-policy-to-advance-population-health-health-equity-and-economic-prosperity>.

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NYU School of Law. The Tax Maven. Podcast audio. Investing in Children's Potential with a Tax Credit (Diane Whitmore Schanzenbach) 22 minutes, 2020. <https://www.podchaser.com/podcasts/the-tax-maven-1067202/episodes/investing-in-childrens-potenti-80152962>.

NYU School of Law. The Tax Maven. Podcast audio. Thank God for Tax Day (Sara Greene) 17 minutes, 2020. <https://www.podchaser.com/podcasts/the-tax-maven-1067202/episodes/thank-god-for-tax-day-sara-gre-75106559>.

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Preventing Discrimination, Harassment, and Bullying Expectations for Participants in NASEM Activities

The National Academies of Sciences, Engineering, and Medicine (NASEM) are committed to the principles of diversity, integrity, civility, and respect in all of our activities. We look to you to be a partner in this commitment by helping us to maintain a professional and cordial environment. All forms of discrimination, harassment, and bullying are prohibited in any NASEM activity. This commitment applies to all participants in all settings and locations in which NASEM work and activities are conducted, including committee meetings, workshops, conferences, and other work and social functions where employees, volunteers, sponsors, vendors, or guests are present.

Discrimination is prejudicial treatment of individuals or groups of people based on their race, ethnicity, color, national origin, sex, sexual orientation, gender identity, age, religion, disability, veteran status, or any other characteristic protected by applicable laws.

Sexual harassment is unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature that creates an intimidating, hostile, or offensive environment.

Other types of harassment include any verbal or physical conduct directed at individuals or groups of people because of their race, ethnicity, color, national origin, sex, sexual orientation, gender identity, age, religion, disability, veteran status, or any other characteristic protected by applicable laws, that creates an intimidating, hostile, or offensive environment.

Bullying is unwelcome, aggressive behavior involving the use of influence, threat, intimidation, or coercion to dominate others in the professional environment.

REPORTING AND RESOLUTION

Any violation of this policy should be reported. If you experience or witness discrimination, harassment, or bullying, you are encouraged to make your unease or disapproval known to the individual, if you are comfortable doing so. You are also urged to report any incident by:

- Filing a complaint with the Office of Human Resources at 202-334-3400, or
- Reporting the incident to an employee involved in the activity in which the member or volunteer is participating, who will then file a complaint with the Office of Human Resources.

Complaints should be filed as soon as possible after an incident. To ensure the prompt and thorough investigation of the complaint, the complainant should provide as much information as is possible, such as names, dates, locations, and steps taken. The Office of Human Resources will investigate the alleged violation in consultation with the Office of the General Counsel.

If an investigation results in a finding that an individual has committed a violation, NASEM will take the actions necessary to protect those involved in its activities from any future discrimination, harassment, or bullying, including in appropriate circumstances the removal of an individual from current NASEM activities and a ban on participation in future activities.

CONFIDENTIALITY

Information contained in a complaint is kept confidential, and information is revealed only on a need-to-know basis. NASEM will not retaliate or tolerate retaliation against anyone who makes a good faith report of discrimination, harassment, or bullying.