

## **Donald James Boyd**

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### **PROFESSIONAL EXPERIENCE**

***Principal***, Boyd Research  
Cambridge, New York  
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.)

***Senior Fellow***, Nelson A. Rockefeller Institute of Government  
Albany, New York  
May 2006 to present

(The Rockefeller Institute of Government is the public policy research arm of the State University of New York. See below for additional information about the Rockefeller Institute.)

***Deputy Director***, Center for Policy Research  
The Nelson A. Rockefeller College of Public Affairs and Policy  
The University at Albany  
Albany, New York  
November 2002 to present

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. As deputy director I am co-principal investigator and a key contact for most of the Center's education research, which focuses on teacher labor markets and on factors influencing student achievement. My role in this research includes 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.

**Director**, Fiscal Studies Program  
Nelson A. Rockefeller Institute of Government  
Albany, New York  
December 1995 to May 2006

The Rockefeller Institute of Government's Fiscal Studies Program, formerly known as the Center for the Study of the States, produces practical independent research about state and local government programs and finances in the 50 states, including:

- *State Fiscal Briefs* -- short, timely, analyses of state and local fiscal issues. Recent *Briefs* have included analyses and descriptions of criminal justice spending, education spending, tax actions, Medicaid spending, and budgetary assumptions in the states.
- *State Revenue Reports* -- quarterly analyses of trends in state tax revenue.
- Books and full-length reports, including the latest edition of *Significant Features of Fiscal Federalism*, a sourcebook of statistics on government finances in the United States.

In addition, the Fiscal Studies Program has conducted many significant projects under my direction, including analysis of state tax levels and burdens; various separate analyses of state spending on education, Medicaid, welfare, and criminal justice; analysis of local taxes and spending in New York; analysis of teacher preparation at the State University of New York; analysis of student academic preparedness at the State University of New York; and other miscellaneous projects.

**Deputy Director**, Nelson A. Rockefeller Institute of Government  
Albany, New York  
March 2001 to October 2002

The Rockefeller Institute of Government is the public policy research arm of the State University of New York. The Institute studies American state and local governments, with an emphasis on management and finances. It has research programs in federalism, the management of human services, urban and metropolitan studies, fiscal studies, and higher education, and it conducts research in a variety of other important policy areas. As deputy director, I was directly responsible for the Institute's fiscal studies program (described above), much of its education research, and its program of research, policy forums, and technical assistance related to government in New York. I was also actively involved in overall management of the Institute. In October 2002 I stepped down from this position, but remained the director of fiscal studies, so that I could take on responsibilities as Deputy Director of the Center for Policy Research at the State University of New York at Albany.

**Director of Tax Policy and Revenue Analysis**, New York State Division of the Budget  
Albany, New York.  
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.
- 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, and to 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.

***Director of Tax Studies***, New York State Assembly Ways and Means Committee

Albany, New York  
June 1984 to October 1985

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.

***Revenue Analyst***, New York State Assembly Ways and Means Committee

Albany, New York  
September 1979 to June 1984

Responsibilities included revenue forecasting and tax policy analysis relating to New York State's personal income, sales, business, and real estate-related taxes; analysis of tax policy issues relating to local real property taxes; and analysis of revenue sharing aid to local governments. Developed a microsimulation model of New York's personal income tax using a sample of more than 100,000 tax returns. Developed various computer programs to analyze state aid to local governments, for purposes of formulating and evaluating policy options.

***Research Associate***, New York State Division of Equalization and Assessment  
(predecessor to the Office of Real Property Services),

Albany, New York  
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. Experienced with many software packages including SAS, Stata, SPSS, EViews, TSP, GAMS, and Gauss.
- Experienced with many large-scale research and administrative databases, including Census public use microdata, Current Population Survey, Consumer Expenditure Survey, IRS public use income tax samples, and the National Medical Expenditure Survey.
- Have developed many microsimulation models, including income tax models, household tax models, and business tax models.
- Proficient programmer in several languages, including Visual Basic, Visual C++, and FORTRAN.

## PROFESSIONAL AFFILIATIONS

- American Education Finance Association
- Association for Public Policy Analysis and Management
- National Tax Association

## ADVISORY BOARD MEMBERSHIPS

- Advisory Board to the New York City Independent Budget Office (2003-present; vice-chair from April 2005 to January 2007; chair from February 2007 to present)

- Consensus Revenue Forecasting Board for New York State (2001-2004)
- Economic Advisory Board to New York State Comptroller H. Carl McCall (1996-1998)
- Economic Forecast Committee of the Capital Region Center for Economic Growth (1996-1999)
- Economic and Revenue Advisory Board to the New York State Division of the Budget (1999-present)
- Educational Finance Advisory Group to the New York State Department of Education (1998-present)
- Governmental Accounting Standards Advisory Council of the Governmental Accounting Standards Board (1998-2002)
- Investment Advisory Committee, Albany County, NY (2004-2005)
- New York State Department of Education's "Blue Ribbon Panel on the Administration of the Grade 4 English Language Arts Examination" (1999)
- U.S. Government Accountability Office Advisory Committee on Intergovernmental Relations (2004-2005)

### **SELECTED CONSULTING ENGAGEMENTS**

*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.*

**REPORTS, PAPERS, AND BOOK CHAPTERS  
(Including Non-Reviewed Publications)**

Boyd, Donald and William F. Fox, *Selected Issues in South Carolina's Tax and Education System*, A Report to the Palmetto Institute of South Carolina, forthcoming.

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

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*, forthcoming.

Boyd, Don, "State-Local Tax Slowdown Continues", *State and Local Revenue Alert October-December 2007*, Boyd Research, March 2008

Boyd, Donald, *Layering of Local Governments & City-County Mergers*, A Report to the New York State Commission on Local Government Efficiency and Competitiveness, March 2008.

Boyd, Donald, *Final Evaluation Report, SUNY Teacher Education Program Assessment Project*, Fund for the Improvement of Postsecondary Education (FIPSE) Project P116B030099, March 2008.

Boyd, Donald with the assistance of Lucy Dadayan, "What Will Happen to State Government Finances in a Recession?", *Rockefeller Institute Fiscal Report*, The Nelson A. Rockefeller Institute of Government, January 2008.

Boyd, Don, "Tax Volatility and Stability", Prepared for the Pew Center on the States (used as the basis for a January 2008 article in *Governing* magazine), October 2007.

Boyd, Donald J., Comment on: "Betting on the future with a cloudy crystal ball? Revenue forecasting, financial theory, and budgets – an expanded treatment" by Fred Thompson and Bruce Gates, *Public Administration Review: Theory to Practice*, September/October 2007

Boyd, Don, "How do public pension plan stock investments affect state and local governments, and what can they do about it?", Prepared for the Pew Center on the States, August 2007.

Boyd, Donald, "A Simulation of Business Taxes in New York City and Other Locations: Final Technical Report", Report prepared for the Citizens Budget Commission of New York City, June 2007.

Billen, Patricia and Donald Boyd, *State Funding for Children: Spending in 2003 and How It Changed From Earlier Years*, Report to the Annie E. Casey Foundation, Nelson A. Rockefeller Institute of Government, February 2007.

Boyd, Donald J., *Retiree Pensions and Health Benefits: State and Local Governments Face New Budget Challenges*, Rockefeller Institute of Government, April 2006

Boyd, Don, "State finances: Solid recovery but challenges ahead", *Book of the States 2006*, Volume 38, Council of State Governments, 2006.

Boyd, D., Grossman, P., Michelli, N., Lankford, H., Loeb, S., & Wyckoff, J. (2006). Complex by Design: Investigating Pathways into Teaching in New York City Schools. *Journal of Teacher Education*, 57(2), 155-166.

Forsythe, Dall and Donald J. Boyd, "Budgeting in New York State: The Growth, Waning and Resurgence of Executive Power," in E. Clynych and T. Lauth, eds., *Budgeting in the States: Institutions, Processes, and Politics*, Praeger, 2006.

Boyd, Donald, Pam Grossman, Hamp Lankford, Susanna Loeb, and Jim Wyckoff "How Changes in Entry Requirements Alter the Teacher Workforce and Affect Student Achievement", *Education Finance and Policy* 2006 1(2)

Boyd, Donald J. and William F. Fox, *The New Jersey Property Tax: Issues and Options*, Consultant Report to the New Jersey Association of Realtors®, Government Research Foundation, August 2005.

Boyd, Donald, Hamp Lankford, Susanna Loeb, and Jim Wyckoff, "Explaining the Short Careers of High-Achieving Teachers in Schools with Low-Performing Students", *American Economic Association Proceedings*, May 2005 95(2): 166-171.

Boyd, Donald J., "New Census Data Offer Glimpse of States' Early Responses to the Fiscal Crisis." *State Fiscal Brief #73*, Nelson A. Rockefeller Institute of Government, April 2005.

Boyd, Donald J., *State Fiscal Outlook Update*, Consultant Memorandum to the National Center for Higher Education Management Systems, April 2005.

Boyd, Donald J., Donald J. Bruce , William F. Fox , and Matthew N. Murray , *State and Local Government Finances: Today's Structure and Tomorrow's Challenges*, Consultant Report to the National Center for Real Estate Research, National Association of Realtors, March 2005.



Boyd, Donald J., *State and Local Governments Face Continued Fiscal Pressure*, Nelson A. Rockefeller Institute of Government, January 2005.

Boyd, Donald, Hamp Lankford, Susanna Loeb, and Jim Wyckoff, "The Draw of Home: How Teachers' Preferences for Proximity Disadvantage Urban Schools", *Journal of Policy Analysis and Management*, 2005, 24(1): 113-132.

Boyd, Donald J., "Political Conflict and Intergovernmental Fiscal Relations," in J. Stonecash and R. Pecorella, eds., *Governing New York*, SUNY Press, 2005.

Boyd, Donald J., Hamilton Lankford, Susanna Loeb, and James Wyckoff, "Initial Matches, Transfers, and Quits: Career Decisions and the Disparities in Average Teacher Qualifications Across Schools" paper under review at *Education Evaluation and Policy Analysis*.

Boyd, Donald J., Hamilton Lankford, Susanna Loeb, and James Wyckoff, "Do Mandatory Tests Affect Teachers' Exit and Transfer Decisions? The Case of the 4th Grade Test in New York State," Submitted manuscript, 2003.

Boyd, Donald J., "K-12 Education: Still Growing Strongly". *State Fiscal News* Vol. 4 No. 5, Nelson A. Rockefeller Institute of Government, June 2004.

Boyd, Donald, and Victoria Wachino, *Is the State Fiscal Crisis Over? A 2004 State Budget Update*, Kaiser Commission on Medicaid and the Uninsured, Washington, DC, January 2004.

Boyd, Donald J., "Make Penalty Harsh For Late State Budget," *Poughkeepsie Journal*, Opinion Page (p. A10), Poughkeepsie, New York, January 18, 2004.

Boyd, Donald, Hamilton Lankford, Susanna Loeb, and James Wyckoff "The Preparation of Teachers: A Labor Market Framework" in Frederick M. Hess, Andrew J. Rotherman, and Kate Walsh (eds.). *A Qualified Teacher in Every Classroom: Appraising Old Answers and New Ideas*, Harvard Education Press: 2004.

Nathan, Richard P., Donald J. Boyd, Nicholas W. Jenny, and Patricia L. Billen, *It's Crunch Time for State Budgets*, Nelson A. Rockefeller Institute of Government, November 13, 2003.

Boyd, Donald, *Are Western States' Tax Structures Adequate?*, Consultant report prepared for the Western Interstate Commission on Higher Education (WICHE), supported by a grant from the Ford Foundation, Boulder, Colorado, October 2003.

Boyd, Donald J. "The Current State Fiscal Crisis and Its Aftermath" – *Commissioned Monograph for the Kaiser Commission on Medicaid and the Uninsured*, September 2003.

Boyd, Donald J., Hamilton Lankford, Susanna Loeb, and James Wyckoff, "The Draw of Home: How Teachers' Preferences for Proximity Disadvantage Urban Schools," *Working Paper 9953*, National Bureau of Economic Research, September 2003.

Boyd, Donald J., Hamilton Lankford, Susanna Loeb, and James Wyckoff, "Analyzing the Determinants of the Matching of Public School Teachers to Jobs: Estimating Compensating Differentials in Imperfect Labor Markets," *Working Paper 9878*, National Bureau of Economic Research, July 2003.

Boyd, Donald J. "Health Care Within the Larger State Budget," in J. Holahan, A. Weil, and J. Weiner, eds., *Federalism & Health Policy*, Urban Institute Press, 2003.

Boyd, Donald J. "State Fiscal Conditions: 2003 and Beyond," in *Book of the States 2003*, Volume 35, Council of State Governments, 2003.

Boyd, Donald J., Hamilton Lankford, Susanna Loeb, and James Wyckoff, "Understanding Teacher Labor Markets: Implications for Educational Equity" in *School Finance and Teacher Quality: Exploring the Connections*, David Monk and Margaret Plecki, eds., (American Education Finance Association 2003 Yearbook) Thousand Oaks, CA: Corwin Press.

Boyd, Donald J., Phil Dearborn, Patricia L. Billen, Carol Meyers, and Jane McNeil *The Fiscal Effects of Welfare Reform: State Social Service Spending Before and After Welfare Reform*, Rockefeller Institute of Government and The Brookings Institution, Final Report to the Administration for Children and Families, U.S. Department of Health and Human Services, May 2003.

Boyd, Donald J. "The Bursting State Fiscal Bubble and State Medicaid Budgets," *Health Affairs*, January/February 2003, Volume 22, Number 1.

Boyd, Donald, Hamilton Lankford, Susanna Loeb, and James Wyckoff, "Initial Matches, Transfers, and Quits: Career Decisions and the Disparities in Average Teacher Qualifications Across Schools," *Working Paper*. November 2002

Boyd, Donald, *State Fiscal Outlook – Update to the projections in "State Spending for Higher Education in the Next Decade, July 1999,"* Memorandum prepared for the National Center on Higher Education Management Systems, October 2002.

Boyd, Donald J., Patricia L. Billen, Paul Posner, and Bill J. Keller. "Assessing State Social Service Spending Under Welfare Reform." Paper prepared for the Annual Meeting of the American Political Science Association, Boston, Massachusetts. August 2002.

Boyd, Donald J. and Craig W. Abbey. "The Aging Government Workforce." Nelson A. Rockefeller Institute of Government, July 2002.

Boyd, Donald J., "State Governments Are Not Likely to Cut Employment in the Current Fiscal Crisis". *State Fiscal News* Vol. 2 No. 9, July 2002.

Boyd, Don, Hamp Lankford, Susanna Loeb, and Jim Wyckoff, "Analyzing the Determinants of the Matching of Public School Teachers to Jobs." *Working Paper*. July 2002.

Boyd, Donald, Hamilton Lankford, Susanna Loeb, and James Wyckoff, "Do High-Stakes Tests Affect Teachers' Exit and Transfer Decisions? The Case of the 4<sup>th</sup> Grade Test in New York State." *Working Paper*. July 2002.

Boyd, Donald J. "The Future of State Fiscal Conditions: Fiscal Boom, Fiscal Bust, Then What?" *Spectrum, The Journal of State Government*, Vol. 75, No. 2, Spring 2002.

Boyd, Donald J., Hamilton Lankford, and James Wyckoff. "School District Expenditures and Fiscal Stress." Paper prepared for presentation at the Education Finance Research Consortium Public Forum, Albany, May 15, 2002.

Boyd, Donald, Hamilton Lankford, Susanna Loeb, and James Wyckoff, "Initial Matches, Transfers, and Quits: The Role of Teachers' Career Decisions in the Disparities in Average Teacher Qualifications Across Schools." *Working Paper*. May 2002.

Boyd, Donald J., and Nicholas W. Jenny, "Growth in State Prison Populations Continues to Slow." *State Fiscal News* Vol. 2 No. 5, Nelson A. Rockefeller Institute of Government, April 2002.

Boyd, Donald J., and Nicholas W. Jenny, "States Will Be Raising Their Economic Forecasts But May Lower Their Revenue Forecasts." *State Fiscal News* Vol. 2 No. 3, Nelson A. Rockefeller Institute of Government, March 2002

Boyd, Donald J. "Long Rise in Education Spending Slows as Economy Weakens." *State Fiscal News* Vol. 2 No. 2, Nelson A. Rockefeller Institute of Government, March 2002.

Boyd, Donald J., Hamp Lankford, Susanna Loeb, and Jim Wyckoff, "The Geography of Teacher Labor Markets: Implications for Policy." *Working Paper*. February 2002.

Jenny, Nicholas W., and Donald J. Boyd, "Big Drop in July-September 2001 Quarter." *State Fiscal News* Vol. 1 No. 6, Nelson A. Rockefeller Institute of Government, November 2001.

Jenny, Nicholas W., and Donald J. Boyd, "State Sales Tax Growth Continued to Slow in the April-June 2001 Quarter." *State Fiscal News* Vol. 1 No. 5, Nelson A. Rockefeller Institute of Government, October 2001.

Jenny, Nicholas W., and Donald J. Boyd. "State Tax Revenue Growth Weakens Significantly." *State Revenue Report* No. 45. Nelson A. Rockefeller Institute of Government, September 2001.

Jenny, Nicholas W., and Donald J. Boyd, "State Budgets for 2002: Economic Slowdown Led States to Cut Spending and Draw on Reserves, but Tax Increases Were Rare." *State Fiscal News* Vol. 1 No. 4, Nelson A. Rockefeller Institute of Government, August 2001.

Boyd, Donald J., "There is a way for New York to adopt a state budget on time and eliminate the current upheaval." Opinion piece in special "Statehouse of Pain" section in *Newsday*. August 5, 2001.

Jenny, Nicholas W., and Donald J. Boyd, "State Corporate Income Tax Collections Decline Sharply." *State Fiscal News* Vol. 1 No. 3, Nelson A. Rockefeller Institute of Government, July 2001.

Jenny, Nicholas W., and Donald J. Boyd, "State Sales Tax Growth Slumps in 35 States." *State Fiscal News* Vol. 1 No. 2, Nelson A. Rockefeller Institute of Government, July 2001.

Jenny, Nicholas W., and Donald J. Boyd, "Revenue Problems Spread to the Northeast." *State Fiscal News* Vol. 1 No. 1, Nelson A. Rockefeller Institute of Government, June 2001.

Jenny, Nicholas W., and Donald J. Boyd. "A Second Quarter of Slow State Tax Revenue Growth." *State Revenue Report* No 44. Nelson A. Rockefeller Institute of Government, June 2001.

Jenny, Nicholas W., and Donald J. Boyd. "State Budgetary Assumptions in 2001 – States Will Be Lowering Their Economic Forecasts." *State Fiscal Brief* No. 62. Nelson A. Rockefeller Institute of Government. May 2001.

Boyd, Donald J. *State Fiscal Issues and Risks at the Start of a New Century*. Nelson A. Rockefeller Institute of Government. June 2000.

Davis, Elizabeth I., and Donald J. Boyd. "Does December/January Revenue Signal A Strong April 2000?" *State Revenue Report* No. 39. Nelson A. Rockefeller Institute of Government. March 2000.

Jenny, Nicholas J., and Donald Boyd. "1999 Year-End Tax and Budget Summary." *State Fiscal Brief* No. 58. Nelson A. Rockefeller Institute of Government. February 2000.

Ellwood, Deborah A., and Donald J. Boyd. *Changes in State Spending on Social Services Since the Implementation of Welfare Reform: Preliminary Report*. Nelson A. Rockefeller Institute of Government. February 2000.

Davis, Elizabeth I., and Donald J. Boyd. "Revenue Pace Moderates." *State Revenue Report* No. 38. Nelson A. Rockefeller Institute of Government. January 2000.

Boyd, Donald J. *Teacher Preparation at the State University*. Report to the Provost's Office of the State University of New York. Nelson A. Rockefeller Institute of Government. December 1999.

Davis, Elizabeth I., and Donald J. Boyd. "Tax Cuts and Moderating Growth Slowed Fiscal 1999 Revenue." *State Fiscal Brief* No. 57. Nelson A. Rockefeller Institute of Government. December 1999.

Davis, Elizabeth I., and Donald J. Boyd. "Tax Cuts Put Brakes on Revenue Machine." *State Revenue Report* No 37. Nelson A. Rockefeller Institute of Government. October 1999.

Davis, Elizabeth I., and Donald J. Boyd. "State Tax Revenue Slows As Tax Cuts Take Hold." *State Revenue Report* No 36. Nelson A. Rockefeller Institute of Government. August 1999.

Boyd, Donald J., and Karen M. Landers. "Economic Forecasts Underlying State Budgets Are Much More Conservative Than Those of Private Forecasters." *State Fiscal Brief* No. 56. Nelson A. Rockefeller Institute of Government. June 1999.

Jenny, Nicholas W., and Donald J. Boyd. "Early Legislative Activity and Proposals in the States." *State Fiscal Brief* No. 55. Nelson A. Rockefeller Institute of Government. June 1999.

Jenny, Nicholas W., and Donald J. Boyd. "1998 Year End Tax and Budget Summary." *State Fiscal Brief* No. 54. Nelson A. Rockefeller Institute of Government. April 1999.

Landers, Karen M., and Donald J. Boyd. "Yet Another Strong Revenue Quarter." *State Revenue Report* No. 35. Nelson A. Rockefeller Institute of Government. April 1999.

Landers, Karen M., and Donald J. Boyd. "Another Banner Year for State Tax Collections in 1998." *State Fiscal Brief* No. 53. Nelson A. Rockefeller Institute of Government. March 1999.

Ellwood, Deborah A., and Donald J. Boyd. "State and Local Criminal Justice Spending: Recent Trends and Outlook for the Future." *State Fiscal Brief* No. 50. Nelson A. Rockefeller Institute of Government. February 1999.

Boyd, Donald J. "Flat Tax, Sales Tax, and Other Reforms." *Rockefeller Institute of Government Bulletin*. Nelson A. Rockefeller Institute of Government. 1999.

Davis, Elizabeth I., and Donald J. Boyd. "Revenue Growth Continues Apace: How Long Will It Last." *State Revenue Report* No. 34. Nelson A. Rockefeller Institute of Government. December 1998.

Davis, Elizabeth I., and Donald J. Boyd. "Third 'April Surprise' Hits New Highs." *State Revenue Report* No. 33. Nelson A. Rockefeller Institute of Government. August 1998.

Davis, Elizabeth I., and Donald J. Boyd. "The New Year Starts on a High Note." *State Revenue Report* No. 32. Nelson A. Rockefeller Institute of Government. June 1998.

Davis, Elizabeth I., and Donald J. Boyd. "States' Economic Assumptions for 1998 and 1999 Show Cautious Optimism." *State Fiscal Brief* No. 51. Nelson A. Rockefeller Institute of Government. May 1998.

Boyd, Donald J. "Medicaid: Devolved From the Beginning." *Rockefeller Institute of Government Bulletin*. Nelson A. Rockefeller Institute of Government. May 1998.

Boyd, Donald J. "Medicaid Devolution: A Fiscal Perspective," in F. Thompson and J. DiIulio, eds., *Medicaid and Devolution: A View From the States*. The Brookings Institution. May 1998.

Boyd, Donald J., and David S. Liebschutz. "Highlights from the Newest Edition of Significant Features of Fiscal Federalism." *State Fiscal Brief* No. 49. Nelson A. Rockefeller Institute of Government. April 1998.

Davis, Elizabeth I., and Donald J. Boyd. "Revenue Growth Accelerates Again." *State Revenue Report* No. 31. Nelson A. Rockefeller Institute of Government. March 1998.

Boyd, Donald J., and Gregory T. French. "Medicaid Spending Growth Slows." *State Fiscal Brief* No. 47. Nelson A. Rockefeller Institute of Government. January 1998.

Liebschutz, David L., Jeffrey S. Scheider, and Donald J. Boyd. "FY 1997 Year End Budget Summary." *State Fiscal Brief* No. 45. Nelson A. Rockefeller Institute of Government. December 1997.

Davis, Elizabeth I., and Donald J. Boyd. "Breakneck Pace of Revenue Growth Abates" *State Revenue Report* No. 30. Nelson A. Rockefeller Institute of Government. December 1997.

Boyd, Donald J., and Elizabeth I. Davis. "Welfare Reform and Expenditure Pressures in the Next Recession." *National Tax Association Proceedings*. November 1997.

Boyd, Donald J. "Comments: How Have Changes in Demographic and Industrial Structure Influenced Sales Tax Revenues?" *National Tax Association Proceedings*. National Tax Association. November 1997.

Liebschutz, David S., Jeffrey S. Scheider, and Donald J. Boyd. "States' FY 1998 Education Budgets Increase 7.2%." *State Fiscal Brief* No. 44. Nelson A. Rockefeller Institute of Government. October 1997.

Davis, Elizabeth I., and Donald J. Boyd. "Second 'April Surprise' Pushes FY '97 State Revenue Even Higher" *State Revenue Report* No. 29. Nelson A. Rockefeller Institute of Government. August 1997.

Boyd, Donald J., and Elizabeth I. Davis. "States Rack Up Fourth Straight Quarter of Strong Revenue Growth." *State Revenue Report* No. 28. Nelson A. Rockefeller Institute of Government. June 1997.

Liebschutz, David L., Jeffrey S. Scheider, and Donald J. Boyd. "Governors' FY 1998 Education Budgets Focus on Property Tax Cuts and Enrollment Changes." *State Fiscal Brief* No. 43. Nelson A. Rockefeller Institute of Government. May 1997.

Boyd, Donald J., and Elizabeth I. Davis. "State Budgetary Assumptions for 1997 and 1998: States Predict Continued Moderate Growth." *State Fiscal Brief* No. 42. Nelson A. Rockefeller Institute of Government. April 1997.

Boyd, Donald J., and Elizabeth I. Davis. "Robust Revenue Trend Continues." *State Revenue Report* No. 27. Nelson A. Rockefeller Institute of Government. March 1997.

Boyd, Donald J. "The Balanced Budget Amendment: Making Informed Choices." *State Fiscal Brief* No. 41. Nelson A. Rockefeller Institute of Government. February 1997.

Davis, Elizabeth I., and Donald J. Boyd. "Tax Cuts Slowed Healthy Revenue Growth in 1996." *State Fiscal Brief* No. 40. Nelson A. Rockefeller Institute of Government. January 1997.

Liebschutz, David S., and Donald J. Boyd. "Education Spending Faces Demographic and Other Pressures." *State Fiscal Brief* No. 38. Nelson A. Rockefeller Institute of Government. December 1996.

Boyd, Donald J., and Elizabeth I. Davis. "Revenue Growth Remains Strong." *State Revenue Report* No. 26. Nelson A. Rockefeller Institute of Government. December 1996.

Boyd, Donald J., and Elizabeth I. Davis. "Spurred By '95 Market, Tax Revenue Shoots Up." *State Revenue Report* No. 25. Nelson A. Rockefeller Institute of Government. August 1996.

Boyd, Donald J., and Elizabeth I. Davis. "Corporate Tax Revenue Down, But Employment and 1995 Final Tax Payments Stronger Than Expected." *State Revenue Report* No. 24. Nelson A. Rockefeller Institute of Government. May 1996.

Boyd, Donald J., and Elizabeth I. Davis. "State Budgetary Assumptions." *State Fiscal Brief* No. 36. Nelson A. Rockefeller Institute of Government. April 1996.

Ellwood, Deborah A., and Donald J. Boyd. "State Spending on Children: Past Patterns and Outlook for the Future." *State Fiscal Brief* No. 35. Nelson A. Rockefeller Institute of Government. March 1996.

Boyd, Donald J., and Elizabeth I. Davis. "Sales Tax Slowdown and Tax Cuts Reduce Revenue Growth." *State Revenue Report* No. 23. Nelson A. Rockefeller Institute of Government. February 1996.

Boyd, Donald J. "How Would A Recession Affect Welfare Spending?" *Rockefeller Institute of Government Bulletin*. Nelson A. Rockefeller Institute of Government. 1996.



**PRESENTATIONS**

“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,” 23<sup>rd</sup> 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,” 23<sup>rd</sup> 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.