

## **Exploring Tax Policy to Advance Population Health, Health Equity, and Economic Prosperity: A Workshop**

December 7, 2017

### **AGENDA**

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

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#### **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 page 1 of the attendee packet.

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8:15      **Welcome**  
*Sanne Magnan, University of Minnesota; co-chair, Roundtable on Population Health Improvement*

8:25      **Framing Remarks: Key Points**  
*Bobby Milstein, ReThink Health; roundtable and planning committee member*  
(Participant Polling with PollEverywhere)

8:45      **Understanding the Basics of Tax Policy: typology, design principles, examples**  
Moderator: *Giridhar Mallya, Robert Wood Johnson Foundation*  
*Pete Davis, Davis Capital Investment Ideas*

9:30      **Q&A**

9:55      **Break**

10:10     **Understanding the Fiscal Environment of the State Budgets**  
Moderator: *Christopher M. Brown, PolicyLink*  
*Nick Johnson, Center on Budget and Policy Priorities*

10:30     **Q&A**

- 10:45 **Key Opportunities for Shaping Incentives and Creating a Pipeline of Financing Population Health: Exploring Sin Taxes & Population Health Tax Credits**  
*Moderator: Kathy Gerwig, Kaiser Permanente*
- 10:50 **Spotlight on Sin Taxes: Overview, efficacy, opportunity and unintended consequences**  
*Moderator: Kathy Gerwig  
Aysha Pamukcu, ChangeLab Solutions  
Xavier Morales, The Praxis Project (via web conference)  
Meredith Fowlie and James Sallee, University of California, Berkeley*
- 11:45 **Q&A**
- 12:00 **Lunch (and Twitter Chat)**
- 1:00 **Spotlight on Tax Credits: A paper presentation, exploring potential tax credits to finance population health investments**  
*Moderator: Anne De Biasi, Trust for America's Health  
Stacy Becker, ReThink Health*
- 1:45 **Q&A**
- 2:00 **Designing Sound Population Health Tax Policy: Small Group Work** (assigned facilitator/rapporteur at each table)  
*Moderator: Rose Marie Martinez, Health and Medicine Division, National Academies of Sciences, Engineering, and Medicine*
- 2:35 **Break**
- 2:45 **Small Group Report Out and Debrief**  
*Moderator: Rose Marie Martinez*
- 3:15 **Informing Sound Population Health Tax Policy in the Current Environment**  
*Moderator: Alan Gilbert, General Electric  
Anne De Biasi*
- 3:50 **Q&A**

4:00 **Reflections on the Day and Closing**

**Remarks**

*George Isham, HealthPartners, HealthPartners Research Foundation, roundtable co-chair*  
(Participant polling with Poll Everywhere)

4:30 **Adjourn**

**Workshop Planning Committee**

This workshop was organized by the following experts: **Ella Auchincloss**, ReThink Health; **Kathy Gerwig**, Kaiser Permanente; **Jeremie Greer**, Prosperity Now; **Alan Gilbert**, GE; **James Hester**, Population Health Systems; **Giridhar Mallya**, Robert Wood Johnson Foundation; **Bobby Milstein**, ReThink Health.

Note: The planning committee's role is limited to planning the workshop, and a proceedings based on workshop will be prepared by an independent rapporteur.

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