

Biographical Sketch:

Background and Selected Public Policy and Academic Activities

Robert P. Strauss

Professor of Economics and Public Policy
Heinz College, Carnegie Mellon University
www.andrew.cmu.edu/user/rs9f

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I earned my AB with honors in economics from the University of Michigan Honors College after spending my junior year at the London School of Economics, and earned my Phd in economics from the University of Wisconsin-Madison. At Wisconsin, I was a Research Assistant for Professors of Demography Karl and Alma Taeuber at the Poverty Institute, then Research Assistant for Economics Professors W. Lee Hansen and Burton A. Weisbrod, and then Research Fellow at the Poverty Institute. My graduate fields of training are public economics and human resources.

Prior to coming to Carnegie-Mellon in 1979 as a tenured full professor, I was a member of the economics department at the University of North Carolina at Chapel Hill for ten years, rising from Assistant to Associate Professor (with tenure). During 1992-4, I was a Visiting Professor of Economics and Public Policy at the University of Rochester and remain a Senior Research Associate at the Rochester Center for Economic Research. In the Spring of 2014 I was Visiting Professor of Economics at Washington University, St. Louis to complete a course for Murray Weidenbaum who was gravely ill.

My academic career has involved several periods of federal service which resulted in the receipt of presidential pens in recognition of my contributions to legislation signed by President Richard Nixon in 1972, and President Gerald Ford in 1976.

During 1970-1, I was a Brookings Economic Policy Fellow at the U.S. Treasury Department, and served as assistant to Murray L. Weidenbaum, Assistant Secretary for Economic Policy, and then as assistant to Treasury Deputy Secretary Charls S. Walker. In 1972, I received the U.S. Treasury Department's Exceptional Service Award from Treasury Secretary John Connally for the design and legislative enactment of the General Revenue Sharing legislation, and received a presidential pen from President Richard M. Nixon in recognition of my role in its enactment.

Upon invitation of Laurence N. Woodworth, Chief of Staff of the Joint Committee on Taxation, US Congress¹, I joined the Staff of the Joint Committee in 1975, and served as a staff economist for three years.

While at the Staff of Joint Committee, I occasionally led legislative markup for subcommittees and full committees of Congress, routinely participated in legislative drafting sessions in the US House and Senate, wrote explanatory pre-legislative JCT reports used for legislative markup and hearing sessions, wrote committee reports on legislation passed by the committees of Congress, wrote conference reports of the US House and Senate on all matters before legislative committees I worked for, advised the Chief of Staff of the Joint Committee on Taxation, met privately and advised directly Ways and Means Committee Chair Al Ullman and Senate Finance Committee Chair Russell Long, coordinated with the Speaker and Office of the Speaker of the US House of Representatives, and White House Chief of Policy, James Cannon III. Periodically I met under the direction of the Chief of Staff with committee members to advise on legislative matters as well as provide expert support on the floor of the US House and Senate, and assisted the Clerk of the US Senate periodically to edit raw transcripts of proceedings of the US Senate which were subsequently published in *The Congressional Record*.

Among my major responsibilities at the Joint Committee were to:

- design and implement an independent computing facility for the Staff of the Joint Committee on Taxation that was interoperative with the US Treasury and Internal Revenue Service;
- manage and support the Congressional 1976 renewal of the General Revenue Sharing legislation; I received a presidential pen from President Gerald Ford in recognition of my role in the renewal activity;
- to manage and design the 1975 and 1978 Federal tax legislation enabling New York City's municipal pension funds to purchase City and State securities during the City's fiscal crisis and thereby forestall the impending bankruptcy of NYC;
- design, manage and support the enactment of that portion of the 1976 Tax Reform Act broadening state access to optional Federal collection of state income taxes;
- manage and support all energy savings estimates for the House and Senate as the designed Energy Savings Estimator of Congress;
- design and support the enactment of the 1978 residential and industrial energy tax credits in conjunction with President Carter's energy initiatives;
- with Wendell Primus and Randy Weiss, design and support Chairman Ullman's 1978 welfare reform proposal which responded to President Carter's welfare reform proposal. In conjunction with that effort, I designed and enabled enactment of the refundable Earned Income Tax Credit; and,
- to design and support the enactment of the New Jobs Tax Credit which reduced the national unemployment rate by eight tenths of one percentage point.

¹¹ The Joint Committee on Taxation was established in 1913 within the Internal Revenue Code to assist the tax-writing committees of the Congress on all matters relating to the Internal Revenue Code including oversight of the Internal Revenue Service.

Since joining the faculty of the Heinz School in 1979, I have been involved in a number of significant state level tax policy projects. During 1979-81, I was Director of Research of the Pennsylvania Tax Commission. From 1983-5, I worked for the West Virginia Tax Study Commission, the Joint Finance Committee of the Legislature and the West Virginia Tax Department, on ways to restructure West Virginia's tax system. That effort culminated in drafting H.B. 1693 which completely restructured West Virginia's business taxes and took effect in 1987. In June, 1987, I received the Distinguished Service Award from the Pittsburgh Chapter of the Tax Executives Institute.

In July, 1987, I completed a study for the State of Washington Department of Revenue as *National Can* was being decided by the U.S. Supreme Court, and devised a system of personal and business income taxes to replace Washington's structure of sales, excise, and gross receipts taxes which amounted to 40% of the budget.

In August, 1987, I was appointed as a voting member of the Pennsylvania Local Tax Reform Commission to advise Governor Robert Casey on local tax reform prior to the Special Session of the General Assembly which began November 9, 1987, and which resulted in authorizing legislation in 1988 to reform Pennsylvania's system of local taxation.

In 1997-8 I was an invited expert researcher on the DC individual income tax for the DC Tax Reform Commission.

In addition to researching and advising on matters of public financial policy, I have also been involved in several major studies of the supply and demand of highly qualified teachers for the Pennsylvania State Board of Education. A 1998 monograph resulted in the substantial revision of entry, exit, and program approval standards for Pennsylvania's system of private and public teacher preparation.

From 1989-95, I was a member of the Revenue Estimating Advisory Committee of the Joint Committee on Taxation, U.S. Congress, and was elected to the Board of Directors of the National Tax Association in October, 1995.

Upon his election as Majority Leader of the US Senate, I worked informally for Senator William Frist on a variety of intergovernmental, tax, and fiscal issues. In 2010 I assisted the Government Development Bank of Puerto Rico to design and estimate revenues of a limited duration emergency business excise tax which resulted in their successful reentry to the international bond market, and in 2011 developed a monograph on the revenue and employment implications of Pennsylvania taxing internet sales that resulted in a major change in Pennsylvania tax policy. The Pennsylvania House of Representatives passed two resolutions thanking me for this contribution to tax policy.

My research includes better than 100 scholarly papers, and service on the advisory boards of several Federal statistical agencies, including the Internal Revenue Service, Statistics of Income Division and the Governments Division of the Census Bureau. During 2006-2007, I was a member of the National Academies panel on state and local government

statistics and co-authored the report on the condition of publicly collected state and local statistics, *State and Local Statistics at a Crossroads*, which was published in October, 2007.

At Carnegie Mellon, I have served as the elected Secretary of the CMU Faculty, founding Chair of the Faculty Senate Computer Advisory Committee, founding Vice-Chair of the Faculty Senate Committee on the University Budget, and Associate Dean of the School of Urban Affairs.²

Current research projects include:

- Administrative and equity aspects of real property taxes with a focus on Pennsylvania and Allegheny County;
- Analysis of the market for Green Bonds, and financing of public infrastructure investments;
- Readability and complexity of the US Code with a focus on Title XXVI;
- the vertical and horizontal equity analysis of the US individual income tax 1966-2017 through the IRS Joint Statistical Program; testing the conjecture that federal individual income taxes are systemically racist; and,
- measurement and implications for -12 student performance of school misconduct; the econometric investigation of the relationship between teacher quality and student performance in Pennsylvania.

Over the past several years I have also been involved in the application of technology to infrastructure, public education and tax issues. See www.rodasproject.org, www.paeducationquality.net and www.propertytaxestimator.net

More detail about my research, publications and public policy activities can be found in www.andrew.cmu.edu/user/rs9f. There one can find links to my published academic papers, working papers, opinion pieces,, interviews and podcasts.³

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² Now the Heinz College at Carnegie Mellon.

³ See *Recent Professional Activities* within www.andrew.cmu.edu/user/rs9f.