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**California Energy Commission
IEPR Lead Commissioner Workshop**

California's Economic and Demographic Outlook

**January 24, 2017 – 9:30 A.M.
First Floor, Art Rosenfeld Hearing Room**

Panel 1 – California Economy Now and in the Future

Jeffrey Michael, Ph.D., University of Pacific

Dr. Jeffrey Michael is Executive Director of the Center for Business and Policy Research (CBPR) and Professor of Public Policy at the University of the Pacific. He holds a joint appointment in the Eberhardt School of Business and the Public Policy Program at McGeorge School of Law, and is based at Pacific's Sacramento campus.

As Executive Director of CBPR, Jeff leads the development of triannual economic forecasts for California and eight Northern California metro areas in addition to special reports on current business and public policy issues impacting the region. Jeff's areas of expertise include regional economic forecasting and environmental economics including work on water resources, the Endangered Species Act, climate change, and regulation on land use, property values and employment growth. His research has been published in scholarly journals and books such as the *Journal of Law and Economics*, *Energy Policy*, and *Ecological Economics*, and he has been a principal investigator on over \$3 million in grants and contracts.

Jeff received his Ph.D. from North Carolina State University, M.S. from the University of Maine, and B.A. from Hamilton College.

Jim (James) Diffley, IHS Global Insight

Jim Diffley is Senior Director of IHS Economics' Consulting and Industry Services, with responsibility for a variety of advisory services and consulting solutions for clients in the public and private sectors.

Jim was, from 1998 to 2013, the Chief Economist of IHS Global Insight's U.S. Regional Services Group, with overall responsibility for U.S. Regional Services, including the Regional Core Macroeconomic Service and the IHS Global Insight Real Estate and Construction Service. He regularly makes presentations of economic forecasts and analysis to clients, conferences, governmental bodies, and the press. Among the customized consulting projects, Jim has been responsible for are long-term projections of cigarette consumption, analysis of the impact of changing oil prices on local economies, and the economic impacts of the investment and operations of various industries.

Jim has M.A. in Economics, State University of New York at Stony Brook, B.A., Mathematics & Economics, State University of New York at Buffalo, and Ph.D. (ABD) training in Economics, State University of New York at Stony Brook.

Marisa Di Natale, Moody's Analytics

Marisa Di Natale is a senior director at Moody's Analytics, where she oversees forecasts of all states and metropolitan areas and is one of the firm's labor market experts.

Marisa oversees alternative macroeconomic scenario design at the regional level, model development, and validation. Her consulting work has included an analysis of the national unemployment insurance system and its impact on state economies, "what if" analysis of the impact of natural disasters on state and national economies, and detailed forecasts of the New York City economy and the securities industry's profitability. She regularly gives presentations to clients and business groups.

Marissa received a master's degree in applied economics from the Johns Hopkins University and a bachelor's degree in international relations from Boston University.

Jon Haveman, Ph.D., Marin Economic Consulting

Dr. Jon Haveman is widely considered to be one of California's leading experts on the economics of seaports, goods movement, and international trade policy. He is also an expert in regional economies and local economic development.

Dr. Haveman, a prolific author, has published extensively on transportation and security issues at California's seaports, business outsourcing, and trade in technology products. He also has a lengthy record of publishing articles in the areas of labor and international economics and a work history related to private asset accumulation. Dr. Haveman speaks regularly at events across California and has testified at numerous federal and state government hearings on issues related to seaport activity and security, technology trade, and local economic development.

Dr. Haveman holds a Ph.D. and Master of Science in Economics from The University of Michigan and a Bachelor of Science in Economics from the University of Wisconsin.

Jerry Nickelsburg, UCLA Anderson Forecast

Jerry Nickelsburg joined the UCLA Anderson Forecast in 2006 as an economist. At the Anderson Forecast, he plays a key role in the economic modeling and forecasting of the Los Angeles, Southern California, and California economies. He has conducted special studies into the future of manufacturing in Los Angeles, the distribution of income, the economic impact of the writer's strike, the aerospace industry, the undocumented construction and manufacturing labor force, the ports of Los Angeles and Long Beach and the garment industry, focusing on the development of new data and the application of economic theory and statistical methods to sectoral issues. His current academic research is on organizational and individual learning in manufacturing, and the influence of power groups on the balance of trade.

Jerry received his Ph.D. in economics from the University of Minnesota in 1980, specializing in monetary economics and econometrics.

Walter Schwarm, California Department of Finance

Walter Schwarm joined the Demographic Research Unit of the California Department of Finance in 2006 as an analyst in the city estimates assignment. After assignments in the State Data Center and as lead for the state Population Projections, Walter assumed management of the estimates programs in 2015. From 2003-2006, he was the Post-Doctoral Research Fellow at the Regional Research Institute at West Virginia University, involved in a variety of public and privately funded research projects while maintaining the West Virginia population projections.

Walter earned his Ph.D. in Economics from Colorado State University in 2002.

Frank Wen, Ph.D., Southern California Association of Governments

Dr. Frank Wen is the Acting Director of Land Use and Environmental Planning and also in charge of Research and Analysis with Southern California Association of Governments (SCAG).

He joined SCAG in 1988 and served as Senior Economist between 1993 and 2005. His researches and assignments include: collaborating with universities and research/planning agencies nationally and internationally, producing SCAG region growth forecasts, translating growth and demographic trends into policy implications, conducting economic impact analysis and environmental justice analysis for Regional Transportation Plan/Sustainable Community Strategies (SCS).

Dr. Wen received both M.S. and Ph.D. degrees in Applied Economics from the University of Minnesota, Twin Cities.

Panel 2 – Transportation Fuel Prices

Severin Borenstein, UC Berkeley’s Haas School of Business

Severin Borenstein is E.T. Grether Professor of Business Administration and Public Policy at the Haas School of Business and a Research Associate of the Energy Institute at Haas. He is also Director emeritus of the University of California Energy Institute (1994-2014) and the Energy Institute at Haas (2009-2014).

Severin received his A.B. from U.C. Berkeley and Ph.D. in Economics from M.I.T. His research focuses on business competition, strategy, and regulation. He has published extensively on the airline industry, the oil and gasoline industries, and electricity markets. His current research projects include the economics of renewable energy, economic policies for reducing greenhouse gases, alternative models of retail electricity pricing, and competitive dynamics in the airline industry. Borenstein is also a research associate of the National Bureau of Economic Research in Cambridge, MA.

David Green, Ph.D., University of Tennessee

Dr. David Greene is a Senior Fellow of the Howard H. Baker, Jr. Center for Public Policy and a Research Professor of Civil and Environmental Engineering at the University of Tennessee. In 2013, Dr. Greene retired from Oak Ridge National Laboratory as a Corporate Fellow after 36 years researching transportation and energy issues. Author of over 275 professional publications, he is a Lifetime National Associate of the National Academies and recipient of the Transportation Research Board’s Roy W. Crum Award.

David Hackett, Petroleum Market Advisory Committee Member/Stillwater Associates

David Hackett is the President of Stillwater Associates, LLC and has been a participant in all the recent developments in the transportation fuels industry. Leveraging a Supply and Trading background at Mobil, Dave started Stillwater Associates in 1998. Since then, Stillwater’s work on issues like the gasoline price controls, corn ethanol distribution, biodiesel production, next generation renewable fuels implementation, price gouging, fuels infrastructure constraints, mergers and acquisitions, interstate commerce, Cap & Trade, Crude-by-Rail, and refining technology have helped to make the firm a leading force in the transportation fuels space. With more than 30 years of experience in the downstream oil business, Dave has built a team of industry professionals who are skilled at creating value for our clients.

Dave received his BS in Oceanography from the U.S. Naval Academy in 1971. He earned a Masters in Education from California Lutheran University in 1975 and an MBA from the University of California, Irvine in 1997.

Chris Lafakis, Moody's Analytics

Chris Lafakis is a senior economist at Moody's Analytics. His expertise is in macroeconomics, model development, model validation, and energy economics. Based in West Chester, PA, he also covers the California economy and contributes to the Dismal Scientist website. Mr. Lafakis has been quoted by media outlets including the Wall Street Journal, CNBC, Bloomberg and National Public Radio and often speaks economic conferences and events.

Chris received his bachelor's degree in economics from the Georgia Institute of Technology and his master's degree in economics from the University of Alabama.

Mindi Farber-DeAnda, U.S. Energy Information Administration

Mindi Farber-DeAnda is the team lead for Biofuels and Emerging Technologies within the Office of Petroleum, Natural Gas, and Biofuels Analysis of the U.S. Energy Information Administration (EIA). Mindi has 35 years of experience in supply/demand analysis of petroleum, natural gas, and biofuels; deployment of renewable energy, electricity storage and smart grid technologies; and assessment of infrastructure assurance and resiliency. She manages a team of engineers who are examining biomass-to-liquids and other emerging technologies for inclusion into EIA's short-term and long-term projections. Her team is developing the energy-by-rail data series incorporated into EIA's petroleum and biofuel statistics.

Mindi holds a M.S. in Systems Engineering from George Washington University and a B.S. in economic development from Vassar College.

Marc Melaina, Ph.D., National Renewable Energy Laboratory

Dr. Marc W. Melaina is a Senior Engineer and Team Lead for Infrastructure Systems Analysis within the Transportation and Hydrogen Systems Center at the U.S. Department of Energy's National Renewable Energy Laboratory (NREL).

His research addresses early market transitions for alternative fuels, with a focus on scenario development, market barriers, and fueling infrastructure. Before joining NREL in 2007, Dr. Melaina was the Policy and Business Strategy research track director at the Institute of Transportation Studies at the University of California at Davis. He has worked for Argonne National Laboratory, the National Academy of Sciences, the Defense Logistics Agency, the City of Ann Arbor Energy Office, and the National Transportation Research Center at Oak Ridge National Laboratory.

Dr. Melaina graduated from the University of Michigan in 2005 with a Ph.D. from the School of Natural Resources and Environment and an M.S.E. in Civil and Environmental Engineering. He has a B.A. in Physics.

Panel 3 – Regional Economic Prospects for Business and Industry

Randall Winston, Strategic Growth Council

Randall Winston is Executive Director of the California Strategic Growth Council, a state agency that brings together multiple agencies and departments to support sustainable communities emphasizing strong economies, social equity and environmental stewardship. Randall previously worked in Governor Jerry Brown's office helping to lead efforts to implement Executive Orders on Green Buildings and Zero Emission Vehicles, as well as international climate policy. Randall has also worked in the areas of architecture, urban development, venture technology and finance, including the integrated architecture and planning firm Foster + Partners before joining Governor Brown's Office. Randall was a founding director at Causes, a venture technology company led by Facebook's founding president.

Randall received a B.A. in Government from Harvard University and a Master of Architecture degree from the University of Virginia.

Dorothy Rothrock, California Manufacturers & Technology Association

Beginning October 2014, Dorothy became President of CMTA, a statewide trade association solely dedicated to advocating on behalf of California's manufacturing and technology companies. Lobbyists at CMTA speak to legislators and regulators about the impact of issues such as energy costs and reliability, workers compensation insurance, labor laws, tax policies, environmental regulations and manufacturers need for skilled workers.

Dorothy regularly speaks to policymakers, media and civic groups about the importance of manufacturing investment and job creation, and how well-designed laws and regulations can promote environmental protection, public health and economic prosperity. Prior to becoming President, Dorothy was the chief lobbyist for CMTA and chaired a coalition of business and taxpayer organizations interested in California's ground-breaking climate change law.

Before joining CMTA in 2000, she consulted on energy and telecommunications regulatory issues for industrial energy users, policy advocates, and economic research firms. She began her career at Portland General Corporation as an attorney, moving to management positions in commercial operations, public affairs and power marketing prior to relocating to California in 1990.

Dorothy graduated from University of Oregon and Lewis and Clark Law School, joining the Oregon Bar in 1980 and the California Bar in 1997.

Silvio Ferrari, California Building Industry Association

Prior to joining Sacramento Advocates Inc., Silvio Ferrari spent seven years with the California Building Industry Association representing thousands of member companies including homebuilders, land developers, trade contractors, architects, manufacturers, engineers, designers, suppliers and industry professionals in the homebuilding, multi-family and mixed-use development markets. Silvio held several positions with CBIA, but he most recently served as the Vice President where he was responsible to oversee all aspects of CBIA's legislative and regulatory priorities and strategy from advocating at local government bodies, to California's State Capitol and Washington, D.C. In this capacity, Silvio was responsible for issue areas that included local government, transportation, water, land use, affordable housing, school facilities, ADA, energy, natural resources, green building, and renewable generation and storage, just to name a few.

His unique educational background, private sector experience, and time running one of the most successful and well respected Government Affairs programs in the state make him a unique member of the Sacramento Advocates team.

He has a M.S. in Green Building, a B.S. in Civil and Structural Engineering from UC Davis, is a LEED accredited professional, and holds a certificate in Green Building and Sustainable Design.

Tyson Eckerle, Governor's Office of Business and Economic Development (GO-Biz)

Tyson Eckerle serves as the Deputy Director of Zero Emission Vehicle Infrastructure in the Governor's Office of Business and Economic Development (Go Biz). In this role, he focuses on streamlining and the development and success of the hydrogen and plug-in electric vehicle station ecosystem. Prior to joining Go Biz, Tyson served as Executive Director of Energy Independence Now, a non-profit dedicated to action oriented solutions to petroleum dependence and climate change.

Tyson holds a B.A. in Biology from the University of California, Davis and a Master of Environmental Science and Management (MESM) from the Bren School of Environmental Science and Management from the University of California, Santa Barbara.

Betty Jo Toccoli, California Small Business Association

Betty Jo Toccoli is a corporate leader in sales and management development for large and small companies and nationally recognized in the corporate and financial services industry. Her company, Total

One Development and Marketing Centers, provides sales systems, human resource development and retirement benefit programs throughout the nation in both the private and public sectors.

Before forming her own business, Mrs. Toccoli was Vice President of Sales in the Diversified Companies Division of a Fortune 100 company. She has also been an administrator for the U.S. Bureau of Indian Affairs. Mrs. Toccoli is extremely active in community and small business organizations.

Wallace Walrod, Ph.D., Orange County Business Council

Dr. Wallace Walrod has been in charge of research at the Orange County Business Council for the last 20 years. Dr. Walrod is also the Founding President of the Center for a New California, which plays a key role in shaping the state's economic future by focusing on emerging economic trends. His work includes designing innovative program, strategy, and policy solutions for private industry, government, and private foundations, including the *Orange County Community Indicators*, *Workforce Assessment Indicators*, *Orange County Comprehensive Economic Development Strategy (CEDS)*, the first ever *Sustainable Communities Strategy* addressing climate change issues at the local and regional levels, *Workforce Housing Scorecard*, *Workforce Housing Toolkit*, and *Public Officials 101*. Additionally, he is a lead economist and economic advisor to the Southern California Association of Governments economic strategy initiative, directs research and policy for Fueling California, a coalition of major California fuel consumers, an Expert in Residence at UC Irvine's Institute for Innovation, and on the Advisory Boards of 2-1-1- OC and the Social Science Research Center at Cal State Fullerton.

Dr. Walrod graduated with a Ph.D. in Regional Economics from UC Irvine. His dissertation studied successful strategic management practices in high-tech firms, including advanced electronics and biotechnology.

Karen Mills, California Farm Bureau

Karen Mills is the Director of the Public Utilities Department for the California Farm Bureau Federation and is an associate counsel on their legal staff. She has worked for Farm Bureau since 1988, representing its members' interests during that time on myriad energy issues, which arise in the course of proceedings at the California Public Utilities Commission, the California Energy Commission as well as the Legislature.

The current focus on renewable energy has created impacts to and opportunities for farmers and ranchers in California. On behalf of Farm Bureau, she is working on ensuring laws and regulations facilitate the ability of farmers and ranchers to generate and utilize electricity in their operations.

Tim McRae, Silicon Valley Leadership Group

Tim McRae is the Vice President for Energy who helps the Leadership Group's members and partners define and carry out energy-related policy, programs and events. Tim issues areas including clean energy supply, grid modernization and reliability, and demand side solutions. He is responsible for lobbying, fundraising, and managing large events. He has 20+ years' experience working for the private and public sectors on clean energy and environmental issues, with an emphasis on efforts to combat global climate change.

Jeff Bellisario, Bay Area Council

Jeff Bellisario is Vice President for the Bay Area Council Economic Institute. He manages a wide range of Institute research through project design, analysis, and document development. His research interests lie at the intersection of community development and finance, and his past projects include analyses of Bay Area housing programs, 21st century energy infrastructure in California, public-private partnerships for infrastructure, and the economic impacts of transportation investments.