

Selecting the Next Round of Opportunity Zones: New Evidence and Field Reflections

Speaker Biographies

Sharon Carney is a Principal at HR&A advisers, where she helps local governments create strategies to address housing affordability, leverage their owned assets and advance equitable economic development. Prior to HR&A, Sharon served eight years in economic development leadership roles in the District of Columbia Mayor's Office. As chief of staff of the agency responsible for growing and diversifying tax base, supporting businesses and increasing affordable housing in Washington, DC, Sharon oversaw budgeting, business operations, legislative and program functions and led pivotal interagency initiatives, including Mayor Muriel Bowser's post-pandemic economic development and downtown transformation strategy, the Housing in Downtown program, the District's first upward mobility action plan, and local implementation of the federal Opportunity Zones tax incentive, making Washington, DC the first jurisdiction in the nation to formally align this tax incentive with community priorities.

Jim Casselberry is a Co-Founder and the CEO of Known Holdings LLC, a coalition of leading financial professionals, seasoned investors and deeply experienced operators committed to a global transition towards sustainability and fair distributions of wealth. Jim has over 35 years of experience in investing, impact investing, investment management and investment consulting. Prior to joining Known, Jim served as the Chief Investment Officer at 4S Bay Partners, LLC a single-family office focused on social impact. Jim serves on several boards, including Impact Engine, the Julian Grace Foundation, Arc Chicago, LLC, Mosaic Genius, and American Friends of the Hebrew University. Jim is the board chair of Los Angeles Cleantech Incubator (LACI) and Trustee for Morehouse College and the National Urban League. In addition to his board service, Jim has written several white papers, most recently "Why Not the Best? Capturing Alpha from a Long-Neglected Market."

Andrew Gradman is a tax attorney in Los Angeles. He has written several articles on Opportunity Zones, including "What Good is OZ Reporting if We Don't Agree on the Goals?" (Bloomberg Real Estate Journal, 03/16/2022) and "Incremental OZ Reform Could Be a Step Backward" (Tax Notes Federal, 05/09/2022), available at www.gradmantax.com.

Jacques Logan is the Senior Vice President of New Business Initiatives for the National Equity Fund, where he manages the development of new lines of business for the firm which have included missing middle rental housing, equity investments in related technology companies, agency lending and renewable energy products. Prior to joining NEF in 2011, Mr. Logan was involved with a publicly traded REIT, where he was involved with LIHTC development, asset management and year 15 transactions.

Brady Meixell is a senior research associate in the Housing and Communities Division at the Urban Institute. His work focuses on community and economic development, small businesses, place-based interventions, land use, and financing. Brady previously worked at the Southwest Brooklyn Industrial Development Corporation, where he provided technical assistance to small businesses and worked on industrial policy and planning issues in New York City.

Anne Bovaird Nevins is the Chief of Economic and Community Impact for Accelerator for America (AFA), a nonprofit, nonpartisan "do tank" that delivers solutions, connections, and resources to mayors and other local leaders working to create greater economic mobility in underserved communities. Prior to joining AFA, Anne served as President of PIDC, Philadelphia's official economic development corporation, founded

by the City and Chamber of Commerce more than 65 years ago with the mission to spur investment, support business growth, and foster developments that create jobs, revitalize neighborhoods, and drive inclusive growth to every corner of Philadelphia. Anne held a variety of senior roles over 16 years with the organization, including leading PIDC throughout the COVID-19 pandemic.

Kevin Rogers is the Senior Vice President and Community Development Lending and Investment Manager for PNC Community Development Banking. Kevin manages portfolio risk and product creation, working closely with all markets to help achieve production goals in an effort for PNC to continue receiving an outstanding CRA Rating. Prior to becoming the Lending and Investing Manager, Kevin served a Development Advisor within the line of business. He was the connection between the Bank and the Communities in which it operates. He was responsible for ensuring that the Community Development Customer segment was served through the coordination and development of lending and investment opportunities, service, education and marketing efforts.

Brett Theodos is a senior fellow and leads the Local Finance and Growth Hub at the Urban Institute. His work focuses on economic and community development, neighborhood change, affordable homeownership, consumer finance, and program evaluation and learning. Brett serves on the Board of the Center for Community Progress and the Housing Authority of Prince George's County and was a founding member of the Douglass Community Land Trust.

David Wessel is a senior fellow in Economic Studies and director of the Hutchins Center on Fiscal and Monetary Policy at Brookings Institution. He joined Brookings in 2013 after 30 years on the staff of The Wall Street Journal where, most recently, he was the economics editor and wrote the weekly Capital column. David is the author of two New York Times best-sellers: "In Fed We Trust: Ben Bernanke's War on the Great Panic" (2009) and "Red Ink: Inside the High Stakes Politics of the Federal Budget" (2012). His most recent book, "Only the Rich Can Play: How Washington Works in the New Gilded Age" (2021), tells the story of Opportunity Zones. David has shared two Pulitzer Prizes, one in 1984 for a Boston Globe series on the persistence of racism in Boston and the other in 2003 for Wall Street Journal stories on corporate scandals. He has been a member of the Bureau of Labor Statistics' Data Users Advisory Committee and has taught in the Dartmouth Tuck School of Business Global 2030 executive education program and in the journalism program at Princeton University.