



Comptroller of Maryland Advisory Councils and Workgroups

2024 report



COMPTROLLER of MARYLAND

S E R V I N G T H E P E O P L E



Dear Marylanders,

Throughout my career as a public elected official, I have always looked for ways to ensure that the government is transparent and committed to bringing new, relevant perspectives to its work.

As Comptroller, I am committed to re-imagining our agency to ensure that it is always working in partnership to create a state that is more equitable, more resilient, and more prosperous so that every Marylander can reach their full potential. To achieve this vision, we must listen to Marylanders — and since I was sworn in, we've been doing just that.

In late 2023, we established Advisory Councils through a public nomination process. These groups convene at least quarterly, providing our agency with invaluable input and recommendations to guide our efforts in key areas. These groups comprise advocates, public servants, business owners, union and faith leaders, and other thought leaders who bring expertise to our discussions. Together, they advise us on critical issues such as critical issues related to:

- Business development
- Climate resilience
- Faith-based initiatives
- Information technology
- Financial literacy
- Labor and workers' issues
- Support for new Americans and immigrant communities
- Local government collaboration
- Women's economic empowerment
- Tax practices

I want to extend my gratitude to the members of these groups. Their dedication, leadership, and expertise shape how we approach our work and plan for Maryland's future.

Many of these groups have gone above and beyond, meeting outside their scheduled sessions to discuss specific goals and recommendations. Their efforts have been instrumental in advancing our initiatives. Through these meetings, we've also had the opportunity to share updates on our most important projects and discuss our challenges. Their insights and innovative solutions have been invaluable in helping us better serve and connect with Maryland's diverse communities.

One of our most outstanding achievements has been strengthening partnerships through these collaborations. The recommendations outlined in this report represent transformative opportunities and significant challenges. I recognize that implementing these initiatives requires teamwork — and I am committed to working hand-in-hand with the leaders of our Advisory Councils to ensure success.

Together, we can empower every Maryland community to reach its full potential. This report summarizes accomplishments and provides a roadmap for the future—a starting point for building a better Maryland.

I am excited about the work ahead and confident that, united, we will create lasting change for all Marylanders.

Brooke Lierman



COMPTROLLER of MARYLAND

S E R V I N G T H E P E O P L E

Comptroller of Maryland Advisory Councils and Workgroups

2024 first year report

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BUSINESS ADVISORY COUNCIL

MEMBERS

Obaid Ahmad

Kirsten Allen

Alexander Austin, Prince George's Chamber of Commerce

Cathrin Banks, The Maryland and Delaware Railroad Company

Christine Bergmark, St. Mary's County Chamber of Commerce

Chris Bruch, The Donohoe Companies, Inc.

Kadjolo Coulibaly

Bonnie Crockett, Baltimore Community Lending, Inc.

Larry Frank

Paul Frey, Washington County Chamber of Commerce

Brenda Galgano, Perdue Farms

Michael Galiazzo, Regional Manufacturing Institute of Maryland

Michelle Geiss, Impact Hub Baltimore (org) + Baltimore BASE Network (coalition)

Jonathan Genn

Heather Iliff, Maryland Nonprofits

Mary Kane, Maryland Chamber of Commerce

Matthew Lee, KoBE Government Contracting Alliance (KoBE)

Paul Li

Elise Liberto

Arion Long, Femly

Tammira Lucas

Juli McCoy, Allegany County Chamber of Commerce

Jerry McLaurin, PFC Black Chamber of Commerce Inc

Detra Miller, M&T Bank

Mary Ann Scully

Kristi Simon, Howard County Chamber of Commerce

Jerray Slocum

Tehma Smith Wilson

Jay Steinmetz

Amy Thompson, Greater Ocean City Maryland Chamber of Commerce

Dr. Drena Valentine

Omar Velasco Gomez, Latino Economic Development Center

Jennifer Walsh, Frostburg State University, Division of Regional Development & Engagement & TGCC

Eric Wargotz

Robin Weiman

Kenneth White, Maryland Black Chamber of Commerce

Calvin Young

Bob Zhang, Howard County Economic Development

MISSION STATEMENT

The Business Advisory Council (BAC) includes industry representatives and prominent members of Maryland's business community, including small, minority, and women business owners. These individuals advise the agency on priority and emerging issues and challenges facing the business community and provide perspective on the state of Maryland's economy.

COUNCIL ACTIVITIES AND WHAT THE COUNCIL LEARNED

- **April 4, 2024:** Discussion centered on the Key Bridge collapse and its economic impacts, the State of the Economy series, legislative updates, Maryland TaxConnect, and Board of Public Works updates, including improvements to payment processes for MBE subcontractors.
- **August 8, 2024:** Topics of discussion included: procurement reform, the Child Care Brief, Procurement Economy Playbook, committee reports, and ideas for economic research and analysis.
- **December 5, 2024:** Presentation on the Maryland Community Investment Corporation; preview of 2025 legislative session; MBE Program updates.
- Additionally, members of the Business Advisory Council over the year focused on key partnership engagements, which included;
 - Co-hosting a small business training series with the Prince George's Chamber of Commerce.
 - Developing a pension investment strategy in collaboration with BAC members.
 - Partnering with St. Mary's County Chamber of Commerce to present at the Business Women's Seminar.

FUTURE GOALS

- **Goal #1:** The Business Advisory Council will explore and recommend economic analyses and research topics for the Office of the Comptroller to explore.
- **Goal #2:** Share business community insights and recommendations with the Policy, Public Works, and Investments team.
- **Goal #3:** Recommend methods to improve business access to tax credit information.
- **Goal #4:** Improve outreach to ensure small, underrepresented, and underserved businesses know available resources.
- **Goal #5:** Enhance small business understanding and use of state procurement opportunities.
- **Goal #6:** Review State Certification programs and offer recommendations.

CONCLUSION

In 2024, the Business Advisory Council helped identify business needs for the Office of the Comptroller, including increasing access to tax credit and procurement education. Highlights of this work include training modules being developed in partnership with the Prince George's Chamber of Commerce. Additionally, the Economic Research and Analyses Committee proposed valuable research topics, including ideas tied to Maryland's pension system investment strategies. The group looks forward to continuing to advise the Comptroller of Maryland on issues and areas of interest to Maryland's business community.

CLIMATE ADVISORY COUNCIL

MEMBERS

Debbie Cohn
Jose Coronado-Flores, CASA
Sonia Demiray, Climate Communications Coalition
Tom Dennis
Andrew Der
Dave Feldman, Bethesda Green
Robert Frier, Sierra Club, and Self
Amy Grossi
Kristen Harbeson, Maryland League of Conservation Voters
Brendan Herron, Hannon Armstrong Sustainable Infrastructure Capital, Inc.
Mat Heyman
Evan Isaacson, Chesapeake Legal Alliance
Tracey Lewis, Public Citizen
Benjamin Link
Ken Lord, The Town of Keedysville
Thomas Matzzie
Jennifer Laszlo Mizrahi, Mizrahi Family Charitable Fund (philanthropy sector)
Anna Mudd, Potomac Conservancy
Lisa Nissley
Richard Norling, Sierra Club Maryland Chapter
Chelsea Smith
Ruby Stemmler, ecoLatinos Nonprofit
Tamara Toles O'Laughlin
Maddy Voytek, Orsted
Jeffrey Weisner, 350MoCO
Matthew Wessel, Maryland Building Industry Association (volunteer)
Nikki Wildart

MISSION STATEMENT

The Climate Advisory Council (CAC) is tasked with helping the Comptroller position Maryland as a national leader in climate and sustainability. The Council supports the Comptroller's efforts in measuring and improving the climate impact of state contracts, spending, investments, and economic and fiscal policies. The Council's members consist of subject matter experts, professionals, and advocates in the fields of climate, sustainability, environmental justice, and resilience.

INTRODUCTION

The Climate Resilience Director, Kim Pezza, staffs the CAC. The Council met on December 18, 2023, March 18, June 17, September 16, and December 16, 2024, to discuss key climate-related topics strategies for improving sustainability and provide expert recommendations to support the Comptroller's climate initiatives.

COUNCIL ACTIVITIES AND WHAT THE COUNCIL LEARNED

The Council engaged in several key discussions about Maryland's climate policies, sustainability strategies, and financial implications in 2024.

- **Board of Public Works (BPW):** The Council explored BPW's role in managing contracts and state project funding. The discussion focused on how BPW could integrate climate considerations into the review of proposed agency contracts, including feedback for the Green Purchasing Committee.
- **Pension Risk and Investment Impacts:** The Council examined the climate risks tied to Maryland's pension portfolio, emphasizing the importance of assessing the carbon footprint of public equity investments. Members also reviewed how climate change might affect long-term financial returns and offered input on aligning investments with climate risk mitigation strategies.
- **Tax Incentives & Funding Opportunities:** The Council discussed leveraging tax incentives for clean energy and climate resilience initiatives. It also discussed the Inflation Reduction Act's Direct Pay project, tax-exempt financing for local governments and nonprofits, and the Maryland Climate Catalytic Capital (C3) Fund.

SUBCOMMITTEE WORK

The Council has established committees to address specific climate-related issues and initiatives.

- **Steering Committee:** The Steering Committee, composed of key members including Kim Pezza, Sonia Demiray, Tom Dennis, Andrew Der, Amy Grossi, Mat Heyman, Jennifer Mizrahi, and Rich Norling, sets the strategic direction for the CAC and oversees its operations.
- **Funding/Tax Incentive Committee:** This committee has actively explored climate finance mechanisms and tax incentives. Key recommendations included improving community access to IRA Clean Energy Tax Credits for nonprofits and municipalities, coordinating with the C3 Fund, and exploring Public-Private Partnerships (PPP) to accelerate climate funding.

NEXT STEPS

In 2025, the Council plans to strengthen and expand its committee work, focusing on the following:

- **Steering Committee:** Continue strategic leadership and emphasize the importance of committee roles.
- **Climate Funding/Tax Incentives/Finance Committee:** Deepen research and expand recommendations regarding resilience initiatives and clean energy investments.
- **Climate Current Topics Committee:** Address emerging climate issues such as data center sustainability, offshore wind expansion, and energy developments.

The Council will also explore subcommittee work, as needed, to address specific emerging topics.

GOVERNANCE/ENGAGEMENT

The Council encourages members to leverage their professional networks to understand Marylanders' needs and concerns and support the Comptroller's Office. Members serve in their individual capacities rather than as representatives of organizations and will be encouraged to participate in public meetings of relevant agencies and organizations.

ADDRESSING EMERGING CLIMATE COSTS AND ECONOMIC RESILIENCE

The Council aims to support the Comptroller's efforts to evaluate the economic costs of climate resilience. This work will focus on understanding and adapting to climate-induced challenges, helping to constrain environmental stresses and mitigate rising costs to Maryland's infrastructure and economy.

CONCLUSION

In its inaugural year, the Climate Advisory Council provided expert advice on key issues related to climate risk, sustainability, and financial strategies. The Council's work in 2024 highlighted the importance of integrating climate considerations into state policies, including pension investment strategies and tax incentives. The Council is committed to strengthening its committee efforts, supporting the Comptroller's work, and addressing emerging climate challenges in Maryland.

FAITH LEADERS ADVISORY COUNCIL

MEMBERS

Jameel Aalim-Johnson, Prince George's County Muslim Council
Teslim Alghali, Sierra Leone Muslim Jamaat
Frances "Toni" Draper, The Baltimore Afro, Chairwoman
Joshua Gruenberg, Chizuk Amuno Congregation and Schools
Craig Mathies, Somerset County Government
Deborah Miller, Jewish Community Relations Council of Greater Washington
Mark Montgomery, Baltimore Faith Leaders: Union Baptist Church
Kenneth Nelson, Seneca Community Church, Senior Pastor
Mark Pelavin, Union for Reform Judaism
Shahid Rafiq, United Maryland Muslim Council
Keitha Robinson
Surinder Singh, Sikhs of USA
Chesky Tenenbaum, Jewish Uniformed Service Association of Maryland
Archana Thakker
Jonathan Weaver, African Methodist Episcopal Church
Hermia Shegog Whitlock, Reid Temple A.M.E. Church
Robert Windley
Robert Young

MISSION STATEMENT

The Faith Leaders Advisory Council is charged with helping the Comptroller's Office develop partnerships with Maryland's faith community to ensure that organizations of all denominations have access to agency resources. The Council will also provide guidance on topics of interest to the faith community and identify opportunities for the Comptroller's Office to engage directly with the faith community in Maryland.

INTRODUCTION

The Faith Leaders Advisory Council is essential to the Comptroller's public outreach efforts. The Council meets quarterly, with regular sessions held in 2024 on March 19, September 12, and December 4. These meetings provide a forum for faith leaders to contribute to the agency's mission and engage with the Comptroller's Office on key topics affecting their communities.

COUNCIL ACTIVITIES AND WHAT THE COUNCIL LEARNED

The council's meetings in 2024 focused on a variety of important topics relevant to Maryland's faith communities and the Comptroller's priorities.

- **March 19, 2024:** The group discussed the upcoming 2024 tax season, including updates on the launch of Compass and Maryland Tax Connect. Legislative priorities for the year and strategies for engaging the faith community were also explored.
- **September 12, 2024:** This meeting focused on Maryland's Direct File program and the integration of Maryland Tax Connect. It also discussed the Public Engagement Team's role in reaching out to the faith community and an update on childcare support.

- **December 4, 2024:** The final meeting of the year addressed preparations for Tax Season 2025. Additionally, the Earned Income Tax Credit (EITC), Direct File updates, and a presentation from the CASH Campaign highlighted key areas for community involvement and outreach.

SUBCOMMITTEE WORK

While the Faith Leaders Advisory Council does not have formal subcommittees, members have contributed significantly through their active involvement in various ad hoc committees. Notably, they participated in the modernization committee, offering feedback on the Comptroller's online portal and website improvements.

FUTURE GOALS

The Council has established several goals for 2025, including:

- Continue fostering partnerships between regional public engagement officers and the faith community to facilitate information exchange.
- Exploring new strategies to leverage faith-based groups for disseminating important tax information and resources to their congregations.

CONCLUSION

In 2024, the Faith Leaders Advisory Council made significant strides in strengthening the relationship between the Comptroller's Office and Maryland's faith communities. By engaging directly with faith leaders, the Council contributed to the success of the Public Engagement Team's efforts, offering support at faith-sponsored events and services. The group also helped support the Comptroller's legislative agenda and provided valuable input on modernizing the agency's digital platforms. The Council is committed to continuing this partnership and expanding its impact across the state.

INFORMATION TECHNOLOGY WORKGROUP

MEMBERS

Peter Anih, Dynanet Corp, Chief Technology Officer
Olatunde Bamgboye, Zhill Systems, PM / Scrum Master
Tasha Cornish, CAMI, Executive Director
Yair Flicker, SmartLogic, President
William Foy
Jason Hardebeck, Meridiam Fiber, VP
Jeffrey Hollingsworth, Univ of Md, CIO
Thomas Iler, Retired
Scott Jampa, COM
Terry Jones, SynCom, Owner
Ram Mohan Konda, American Telangana Association, President
Todd Marks, MindGrub, Owner
Nikki Minor, FlatFile
Nancy Schmid, Tyler Tech, General Manager
Imran Siddiqui, Alliance Global Tech, Senior Architect
Ronald Skotz, Capital Government Contract Services, Procurement Manager
Rob Wray, Johns Hopkins Technology Ventures
Vennard Wright, Wave Welcome, President

INTRODUCTION

The Information Technology Workgroup convenes regularly to provide expertise and guidance on various technology-driven projects for the Comptroller's Office. Meetings were held in 2023 and 2024, including sessions on November 13, 2023, February 13, 2024, May 14, 2024, and November 14, 2024. These discussions have focused on modernization efforts, fraud protection, and improving the overall experience for taxpayers interacting with the agency.

COUNCIL ACTIVITIES AND WHAT THE COUNCIL LEARNED

Over the year, the ITWG has engaged in discussions around improving the efficiency and effectiveness of the Comptroller's technology initiatives, particularly concerning the taxpayer experience and fraud protection.

- **November 13, 2023:** The group discussed the mission and vision of the Comptroller's Collaboration Site and priority options for advisory group involvement.
- **February 13, 2024:** The focus shifted to fraud protection strategies and Senate Bill 0677 while discussing ways to enhance the taxpayer experience.
- **May 14, 2024:** The group established sub-groups to tackle specific challenges and goals for improving technology systems and services.

SUBCOMMITTEE WORK

The workgroup established several sub-groups focused on key areas:

- **Fraud Detection:** This sub-group worked on strategies to improve fraud prevention efforts within the Comptroller's technology infrastructure.
- **Electronic Filing:** Another focus area was encouraging more taxpayers to file electronically, which would streamline processes and reduce errors.
- **Improving the Taxpayer Experience:** A dedicated sub-group contributed to the development of user interfaces and discussions for a new website and customer relationship management (CRM) system.

FUTURE GOALS

Looking ahead, the ITWG has identified several goals for the coming year:

- Continue advancing efforts to improve fraud detection systems.
- Encourage greater adoption of electronic filing to reduce taxpayer burden and increase efficiency.
- Further improve the taxpayer experience by enhancing the CRM and website interfaces.

CONCLUSION

The ITWG made important contributions to the Comptroller's modernization efforts in 2024. While the group faced challenges in maintaining consistent engagement, the team was able to move forward with significant initiatives. In the coming year, the workgroup plans to revisit the technology efforts and assess the impact of the initiatives implemented, ensuring that the Comptroller's technology strategies continue to meet the needs of Maryland taxpayers.

FINANCIAL LITERACY ADVISORY COUNCIL

MEMBERS

John Bratsakis, MD & DC Credit Union Association, *President & CEO*

Sonya Caesar

Sandy Comenetz

John Dixon

Tony Hausner

Jayne Hayes, Junior Achievement of the Eastern Shore, *President & Chief Experiential Officer*

Christopher Hill, Maryland Realtors

Nicole Hollywood, University of Maryland Eastern Shore

Francine Hyman, Economic Action Maryland

Sue Livera

Meredith Merchant, MD Department of Labor, Office of Financial Regulation, *Assistant Commissioner, Consumer & External Affairs*

Shannon Mouton, Laurel Advocacy & Referral Services (LARS), *Executive Director*

Sue Rogan, CASH Campaign, *Director of Strategic Partnerships*

William Rovito

Tony Salazar, MD Department of Labor, Office of Financial Regulation, *Commissioner*

John Sanchez, Housing Initiative Partnership, *Program Manager*

Lisa Miller Scott, Literacy Institute for Financial Enrichment (LIFE)

Julie Weaver, Maryland Council on Economic Education (MCEE), *Executive Director*

Brett Weil, WesBanco Bank, Inc., *Vice President, Commercial Banker*

Toni White-McCoy, MD Department of Labor, Office of Financial Regulation, *Director of Outreach & Education*

Doncella Wilson, Minary's Dream Alliance, *Executive Director*

Brie Wooden

MISSION STATEMENT

To support the development of a robust financial literacy agenda that positions the Comptroller of Maryland as a go-to state-wide resource. This includes identifying strategies and opportunities to educate disparate communities about financial literacy, developing new financial literacy resources to meet pressing community needs, promoting the agency's efforts throughout the state, and making the Office of the Comptroller a trusted hub and repository of financial literacy information and data.

INTRODUCTION

The Financial Literacy Advisory Council plays an important role in advising the Comptroller's Office on financial education initiatives that benefit Maryland residents. The Council held meetings throughout the year, including on February 7, 2024, March 20, 2024, May 14, 2024, August 13, 2024, and November 20, 2024. These meetings focused on shaping the Council's goals, engaging with stakeholders, and ensuring that financial literacy resources meet the needs of Maryland's diverse communities.

COUNCIL ACTIVITIES AND WHAT THE COUNCIL LEARNED

The Council's meetings in 2024 provided valuable insights into the needs of Maryland's communities and the steps necessary to enhance financial literacy education. Key activities included:

- **February 7, 2024:** The Council held an introductory meeting to discuss its top priorities, including the role of the Comptroller's Office in financial literacy. The group held goal-setting discussions, which were continued in subsequent sessions.
- **March 20, 2024:** The follow-up meeting finalized the goal-setting discussion and set a clear direction for the Council's work.
- **May 14, 2024:** The Advisory Council reviewed and approved work priorities and developed five goals with corresponding objectives to guide financial education outreach and engagement.
- **August 13, 2024:** A portion of the meeting was dedicated to networking, where members shared important events and priorities from their organizations. The Council also discussed subcommittee leadership and feedback from initial subcommittee meetings.
- **November 20, 2024:** The Council reviewed and approved proposed tactics for the Stakeholder Engagement / Best Practices and Homeowner Education subcommittees. Additional subcommittee tactics will be finalized in January 2025.

SUBCOMMITTEE WORK

The Council established several subcommittees to focus on specific financial literacy topics:

- **Stakeholder Engagement & Best Practices:** This subcommittee developed strategies for engaging stakeholders and implemented best practices for outreach.
- **Homeowner Education:** The focus was on creating essential financial education content related to housing and homeownership, aiming to better equip Marylanders with the knowledge to make informed decisions.

FUTURE GOALS

The Financial Literacy Advisory Council has identified several goals for the upcoming year:

- **Goal #1:** Support financial education statewide by providing resources targeting parents, youth, and college students.
- **Goal #2:** Support financial education for homeowners through resources, support, and incentives.
- **Goal #3:** Promote financial capability training statewide.
- **Goal #4:** Improve stakeholder engagement and best practices for financial education outreach.
- **Goal #5:** Advocate for including financial literacy as a high school graduation requirement, should legislation for this be introduced.

CONCLUSION

In 2024, the Financial Literacy Advisory Council made progress in pursuing strategies to enhance financial literacy across Maryland. The Council developed clear goals and objectives, fostering partnerships with member organizations and supporting outreach initiatives such as tax season engagement. The Council plans to broaden its relationships with community leaders, increase engagement opportunities, and focus on education during National Financial Education Month in April 2025.

LABOR ADVISORY COUNCIL

MEMBERS

Jason Ascher, Mid-Atlantic Pipe Trades Association/United Association of Plumbers and Steamfitters, *Political Director*
John Barber, Carpenters Union, *Representative*
Cheryl Bost, Maryland State Education Association, *Retired President*
Diamonté Brown, BTU, *President*
Jeffrey Buddle, Professional Fire Fighters of Maryland, *President*
Ricardo Campos, SEIU 32BJ, *Political Director*
Tom Clark, International Brotherhood of Electrical Workers Local 26, *Consultant*
Michael Conner, Eastern Atlantic States Regional Council Of Carpenters, *Senior Council Representative*
Donna Edwards, Maryland State and DC AFLCIO, *President*
Joshua Fannon, IAFF Local A-19 Professional Fire Fighters of Maryland, *President*
John Gaines, ATU LOCAL 689, *Assistant Business Agent*
LaBrina Hopkins, AFT- Maryland, *Secretary Treasurer*
Courtney Jenkins, Metropolitan Baltimore Council AFL- CIO Unions, *President*
Ricarra Jones, 1199 SEIU, *Political Director*
Jermaine Jones, Baltimore / DC Building and Construction Trades, *Director*
Tracy Lingo, UNITE HERE, *President*
Larry Luis, Ironworkers Local 5, *Business Agent*
Michael McHale, IBEW Local 24, *Business Manger*
Michael McMillan, Amalgamated Transit Union Local 1300, *President and Business Agent*
Amy Millar, UFCW Local 1994, *Special Assistant to the President, Legislative Affairs*
Patrick Moran, AFSCME Maryland, *President*
James Ward Morrow, OPEIU Local 2, *Member*
David O'Ferrall, IATSE, *Business Agent*
Shannon Opfer, Communications Workers of America Local 2107, *President*
Tiha Richadson, Metropolitan Area of Philadelphia/Baltimore/Washington Laborers' District Council LiUNA!, *Vice President*
Travis Simon, SEIU Local 500, *Executive Director*
Herb Smith, American Federation of Government Employees, *Political and Legislative Representative*

MISSION STATEMENT

The Labor Advisory Council will include Maryland's labor community representatives and national labor leaders/experts. This Council will provide a venue for the Comptroller of Maryland to share information about new ideas and initiatives and solicit feedback on legislative and policy proposals. Labor representatives and other Council members will also be invited to share information about new initiatives, legislative proposals, areas of concern, and opportunities for partnership, coordination, and collaboration.

INTRODUCTION

The Labor Advisory Council meets quarterly to provide input and advice on workplace fraud issues and labor-related legislative matters. In 2024, the Council held meetings on January 16, June 2024, September 5, and December 4. These sessions facilitated discussions on enforcement work related to workplace fraud, data sharing, and compliance, focusing on improving collaboration with labor unions.

COUNCIL ACTIVITIES AND WHAT THE COUNCIL LEARNED

The Council's meetings in 2024 revolved around key topics related to workplace fraud enforcement, data sharing, and labor rights.

- **January 16, 2024:** The meeting introduced the creation of the Joint Enforcement Task Force (JETF) for Workplace Fraud. Members provided updates on online filing, education, and outreach for tax credits, as well as developing a whistleblower program.
- **June 2024:** The Council reviewed updates on the JETF's work and discussed the importance of data sharing between agencies. They also focused on potential collaborations with labor unions to identify workplace fraud and educate workers and businesses.
- **September 5, 2024:** This meeting provided an update on workplace fraud work, including information on best practices from other states. Discussions focused on improving coordination with unions to educate workers on fraud prevention and enhance enforcement efforts.
- **December 4, 2024:** The Council reviewed the JETF's progress, including updates on the MOU with the Maryland Department of Labor and the launch of the JETF portal. Discussions also centered on best practices in combating workplace fraud and the potential for future investigations.

SUBCOMMITTEE WORK

Although the Labor Advisory Council does not have formal subcommittees, it regularly collaborates with various stakeholders, including labor unions and the Comptroller's Compliance Division, to address issues related to workplace fraud. These efforts have significantly informed the Council's advice and recommendations on improving enforcement and identifying fraud in the workplace.

FUTURE GOALS

The Labor Advisory Council does not set specific goals for the upcoming year but remains an advisory body for the Comptroller's Office, particularly regarding workplace fraud and labor legislation. However, discussions about addressing wage theft in the public sector have highlighted a gap in enforcement mechanisms for local government employees. While the Council has no jurisdiction over this issue, it has facilitated connections with the Maryland Department of Labor to explore potential solutions.

CONCLUSION

In 2024, the Labor Advisory Council was pivotal in advising the Comptroller's Office on workplace fraud issues, particularly within the construction and public sectors. The Council's collaboration with labor unions has been instrumental in identifying misclassification and tax non-compliance. Moving forward, the Council will continue to support the Comptroller's work in holding employers accountable and addressing labor-related issues through the Joint Enforcement Task Force.

NEW AMERICANS WORKGROUP

MEMBERS

Kemi Adetola, Lighthouse Life Solutions, *Director, Policy Acquisition and Trading*
Rustam Biswas, Student at UMD College Park
Pablo Blank, CASA, *Director, Immigrant Integration*
Anissa Caldwell Washington, *Event Coordinator, Laurel Advocacy & Referral Services*
Elizabeth Chung, Asian American Center of Frederick, *Executive Director*
Annette Karanja, *Executive Assistant, Charmed FS*
Sylvia Dasi, Prince George's County Government, *African Diaspora Liaison*
Remi Duyile, *Adjunct Professor, Bowie State University*
Thai Nguyen, New Hampshire Car Wash, *Owner*
Gabriel Rodriguez, Guitars for Change, *CEO*
Linda Thorton Thomas, *President, NAACP Prince George's County Maryland Chapter*
Elena Fowlkes, *Assistant Director of Operations, DC Office of the Chief Financial Officer*
Cris Oviedo, *Owner and CEO, CO Communications*
Giovanni A Delfino, DelfinoCo, *CEO & Founder*

MISSION STATEMENT

The New Americans Workgroup will include Maryland's new American community members, including refugees, immigrants, and community advocates. The Council will work closely with the Comptroller of Maryland to improve the agency's quality of services and address gaps in services provided to new Americans in the state. They will also advise the agency on emerging topics/issues within the new American community and identify partnership opportunities throughout the state.

INTRODUCTION

The New Americans Workgroup meets quarterly and serves as a key advisor to the Comptroller's Office regarding the needs and challenges immigrant and refugee communities in Maryland face. In 2024, the Workgroup held meetings on December 2, 2023, March 13, 2024, June 12, 2024, September 11, 2024, and December 2, 2024. These sessions have focused on improving outreach and identifying ways to address language barriers, increase collaboration, and ensure new Americans can access resources.

COUNCIL ACTIVITIES AND WHAT THE COUNCIL LEARNED

Throughout 2024, the Workgroup discussed key issues related to the immigrant community's experience with the Comptroller's Office and other state services.

- **December 2, 2023:** The Workgroup held its introductory meeting and began defining its mission and focus areas.
- **March 13, 2024:** The group provided feedback to the Department of Policy, Public Works, and Investments regarding the State of the Economy Report, focusing on the economic impact of immigration.
- **June 12, 2024:** The Workgroup announced subcommittee members and established goals, meeting cadence, and expectations for the year.

- **September 11, 2024:** Staff provided an overview of the DirectFile Program, and subcommittee work continued.
- **December 2, 2024:** The Workgroup broke into subcommittees to brainstorm specific tactics to meet established goals.

SUBCOMMITTEE WORK

The New Americans Workgroup organized into several subcommittees focused on key issues:

- **Research and Collaboration Subcommittee**
- **Data Analytics and Metrics Subcommittee**
- **Addressing Language Barriers / Public Information Subcommittee**

These subcommittees have been instrumental in shaping the Workgroup's overall strategy and goals for the coming year.

FUTURE GOALS

The New Americans Workgroup has identified several important goals for the upcoming year:

- **Data Capture:** Capture metrics related to new Americans' experiences with taxes, including tracking the use of income tax credits.
- **Scorecard Creation:** Develop a scorecard to evaluate the access to benefits and taxes paid by the immigrant community, highlighting their contributions to the state.
- **Advocacy for Translation Services:** Advocate for the availability of translation services to address language barriers for new Americans when filing taxes.
- **Collaboration with Other Advisory Councils:** Engage with other Comptroller Advisory Councils to collaborate on issues affecting new Americans.
- **Inclusive Policies:** Continuously provide advice to ensure the development of inclusive policies that address the needs of new Americans and immigrants.
- **Financial Literacy Education:** Assist groups serving new Americans by providing financial literacy education to empower immigrant communities.
- **Cultural Awareness Training:** Train Comptroller's Office staff who interact with the public to enhance cultural awareness of immigrant communities.
- **Entrepreneurship Support:** Partner with the Governor's Office of Small, Minority & Women Business Affairs (GOSBA) and other agencies to educate new Americans on procurement processes and help them become entrepreneurs, furthering the state's MBE goals.
- **Outreach Efforts:** Increase outreach to new American communities to raise awareness about available tax credits and help them claim them.

CONCLUSION

In 2024, the New Americans Workgroup made significant contributions to the Comptroller's Office by offering feedback on key reports and working on initiatives to improve the experience of immigrant communities in Maryland. The Workgroup's efforts to address language barriers, advocate for cultural awareness, and promote financial literacy have been important in ensuring new Americans have access to the necessary resources. The Workgroup will continue to focus on data collection, advocacy, and outreach, ensuring that Maryland's immigrant communities are well-represented and supported in state initiatives.

LOCAL GOVERNMENT ADVISORY COUNCIL

MEMBERS

Neil Harris, City of Gaithersburg, Council-member
Dia Costello, Town of Glen Echo, Mayor
Justin Fiore, MML, Deputy Director of Legislative Affairs
Stephen Kelley, Garrett County, Director of Planning and Community Development
Cashenna Cross, City of Glenarden, Mayor
Michael Coveyou, Montgomery County, Director of Finance
David Weiskopf, St. Mary's County, County Administrator
James Reilly, Harford County, Council-member
Laurie Marchini, Town of Cumberland, Former Council-member
Nathan Brown, Town of Brunswick, Mayor
Megan Cook, Town of Easton, Mayor
Travis Marion, Town of Rising Sun, Mayor
McNeal Brown, Howard County
Alexis Burrell-Rohde, Baltimore County, Register of Wills
Scott Nicewarner, City of Hagerstown, Council-member
Robert Sandlass, Harford County, Chief Financial Officer
David Foster, City of Chestertown, Mayor
Michael O'Connor, City of Frederick, Mayor/President of MML
Denise Mitchell, City of College Park, Mayor Pro Tem
Eric Costello, Baltimore City, Former Council-member
Myneca Ojo, City of Seat Pleasant, Former City Manager
Melinda Kelleher, Town of Cumberland, Economic Development Director
Phillip Thompson, Worcester County, Finance Officer
Stephen Rideout, City of Cambridge, Former Mayor
Emily Newman-Edwards, Grantsville, Mayor
Shon McCollum, Cecil County, Director of Finance
Deb Effingham, Carroll County, Deputy County Administrator
Kevin Kinnally, MACo, Legislative Director
Don Mohler, Baltimore County, Former County Executive/CAO
Pat Murray, Frederick County, Chief of Staff to County Executive

INTRODUCTION

The Local Government Advisory Council (LGAC) includes local government leaders, officials, and experts who provide input to the Comptroller's Office regarding policies and initiatives that impact local governments. The group meets several times a year to discuss key issues and priorities, including legislation, local budgets, and collaboration opportunities between the Comptroller's Office and local governments.

COUNCIL ACTIVITIES AND WHAT THE COUNCIL LEARNED

The Council held two meetings in 2024, during which it discussed several important topics related to the Comptroller's work and local government priorities.

- **August 12, 2024:** The group reviewed highlights from the local budget season and discussed items that could impact the Comptroller's Office. They also discussed preparations for the 2025 legislative session and identified local government issues to watch for.
- **October 30, 2024:** The Council focused on the Direct File program and the 2025 tax season outreach plan. The group also discussed opportunities for partnering with local governments.

SUBCOMMITTEE WORK

The Local Government Advisory Council did not establish formal subcommittees during 2024 but has continued to work collaboratively on issues impacting local government operations and policies.

FUTURE GOALS

While the Council did not establish formal goals for 2024, the following objectives have been identified for the upcoming year:

- **Regular Meetings:** Establish a calendar for quarterly meetings to ensure consistent engagement and advance the Council's objectives.
- **Ongoing Collaboration:** Work with organizations like MML and MACo to discuss legislative proposals that could impact the Comptroller's Office.

CONCLUSION

In 2024, the Local Government Advisory Council provided valuable feedback on local government issues affecting the Comptroller's Office, such as budget considerations, legislative priorities, and collaboration opportunities. Although the Council faced minimal challenges and did not establish specific goals for the year, plans for regular meetings in 2025 will provide more structure and focus for future work. Additionally, the Council is adapting to recent changes in membership due to the outcomes of local elections and is considering how to address membership parameters moving forward.

WOMEN'S ECONOMIC EMPOWERMENT COUNCIL

MEMBERS

Sandy Angello, Pohanka Automotive Group of Salisbury *Left Council November 2024, Vice President

Laura Bacon, The 3rd, Founder

Judy Carbone, AAUW-Garrett Branch, President

Rhonda Crawford

Karen Czapanskiy

Deanna Gamber

Hava Ganguly

Ann Gilbert, Westminster City Council, Council-member

Smitha Gopal

Quandra Greene, Precious Ones Early Learning Center, Owner

L. Lynne Hall, Management Counsel LTG/LLC and Francis Family Foundation

Karen Heyward-West, Alpha Kappa Alpha Sorority Inc. UEO chapter

Tia Hooks, Zeta Phi Beta Sorority Inc. Amicae of Glen Burnie

Sonya Hopson

Meredith Jacobs, Jewish Women International (JWI), CEO

Cori Lathan

Kim Lightfoot

Gracelyn McDermott, Maryland Chamber of Commerce, Board Member

Dr. Gina Merritt, MBA, Northern Real Estate Urban Ventures, LLC, Principal

Sarah Miicke, Baltimore Jewish Council, Deputy Director

Mary Miller, Mt. Washington Pediatric Hospital, CFO

Jamesa Moone- Hunter, Colston Properties

Tonaeya Moore, CASH Campaign of Maryland, Director of Policy

Falisa Peoples-Tittle

Barbara Quaye, BGE Advisory Council and VAAAC Civil Rights Advisory Group

Cynthia Rivarde, Rockville Economic Development/Maryland Women's Business Center, CEO

Aida Rivera-Dobson

Nicole Rogers, Two Scoops Ice Cream, Owner *joined November 2024

Betty Romero

Patricia Ruppert, Children's Opportunity Alliance, Board Member

Dee Strum, National Coalition of 100 Black Women - Anne Arundel County Chapter, Inc., Former national president

Randi Williams

MISSION STATEMENT

The Women's Economic Empowerment Council is charged with advising the Comptroller of Maryland on financial challenges facing women in Maryland and identifying potential opportunities to strengthen and promote women's financial resilience through financial education, addressing financial abuse (in domestic violence, for instance), starting and growing businesses, and improving access to state resources, contracts, and grants. Council members will provide feedback on proposals and new initiatives, brainstorm ways to educate women about finances and develop new partnerships to help build prosperity among women in Maryland.

INTRODUCTION

The Women's Economic Empowerment Council meets quarterly to provide valuable insights and recommendations to the Comptroller's Office. In 2024, the Council convened on December 14, 2023, March 8, 2024, June 21, 2024, and August 20, 2024. These meetings focused on key topics such as the state of the economy, legislative updates, and the care economy. The Council also formed subcommittees to address areas like the workforce, care economy, and women's economic growth.

COUNCIL ACTIVITIES AND WHAT THE COUNCIL LEARNED

Throughout 2024, the Council engaged in a variety of discussions regarding the economic challenges and opportunities for women in Maryland. Topics covered included:

- **December 14, 2023:** The introductory meeting discussed the Council's purpose, the creation of subcommittees, and focus areas such as Women in the Workforce and the Care Economy.
- **March 8, 2024:** The Council received legislative updates and discussed the impact of tax policies, including the Tax Connect system. Staff provided information regarding a report on women and the economy, and committee assignments were made.
- **June 21, 2024:** The Council received updates on the nonprofit conference, the state of the economy with a focus on immigration, and the procurement economy. Stephanie Bagley, CEO of SCB Management Solutions, presented, and committee updates were provided.
- **August 20, 2024:** The Council reviewed the state of the economy concerning child care and discussed its impacts on women's economic empowerment.

SUBCOMMITTEE WORK

The Council established subcommittees to address specific challenges faced by women in the workforce and care economy. The subcommittees included:

- Women in the Workforce Subcommittee
- Transforming the Care Economy Subcommittee
- Boosting Women's Economic Growth Subcommittee

These subcommittees provided valuable feedback and developed recommendations for improving Maryland's care economy and its economic impact on women.

FUTURE GOALS

The Women's Economic Empowerment Council will set new goals at its January 2025 meeting. One suggested goal is to identify ways the Comptroller's Office can better support small women-owned businesses in Maryland by providing them with more resources and opportunities.

CONCLUSION

The Women's Economic Empowerment Council made significant contributions in 2024 by offering continuous feedback on key reports, such as the State of the Economy: Child Care and the Economy series, focusing on women's issues. The Council's work, particularly through the Care Economy subcommittee, helped shape the Comptroller's Office's initiatives and ensured that the needs of Maryland's women were well represented. Moving forward, the Council aims to continue supporting small women-owned businesses and advocating for policies that promote financial resilience and empowerment for women in Maryland.

TAX PRACTITIONERS WORKGROUP

MEMBERS

Brandon Angell, BSC Group, LLC, Partner
Rob Bader, CASH Campaign of Maryland, Director of Tax Operations
Andrew Bareham, Bareham CPA, P.A., CPA
Tiffany Davis, Washington & Co Inc, President & CEO
Stephanie Drane, Jones Advisory, LLC., CPA, MT
Michael Ginski Citrin, Cooperman, Managing Partner
Debora Gorman, Comptroller of Maryland, Director of Legal Division
Giavante' Hawkins, The Maryland Society of Accounting and Tax Professionals, Executive Director
Victoria Kelly, Victoria Eve Kelly, LLC , Owner
Robin McKinney, CASH Campaign of Maryland, CEO
Megan McKnew, Maryland Association of Certified Public Accountants, Inc., CohnReznick LLP, Senior Manager
Heather Posey, Frost Law, Associate
Kimberly Royster, Kimberly Services, LLC, Founder, Owner and CFO
Andrew Schaufele, Comptroller of Maryland, Chief Deputy Comptroller
Krista Sermon, Comptroller of Maryland, Deputy Director of Legal Division
Rachel Sessa, Comptroller of Maryland, Deputy Comptroller of Law & Oversight
Rebecca Sheppard, Frost Law, Tax attorney and Partner
Catherine Wright, Wright Way Tax Solutions LLC, Owner and Enrolled Agent

MISSION STATEMENT

To build a collaborative relationship between the Comptroller's office and practitioners, enhancing service delivery through shared expertise and mutual support.

INTRODUCTION

The Tax Practitioners Workgroup meets quarterly to provide feedback and collaborate with the Comptroller's Office on various tax-related initiatives and challenges. In 2024, the Workgroup met on November 29, 2023, March 14, 2024, May 23, 2024, and September 25, 2024, discussing critical issues related to tax policy, legislative updates, technology improvements, and service enhancements for practitioners and taxpayers.

COUNCIL ACTIVITIES AND WHAT THE COUNCIL LEARNED

Throughout 2024, the Workgroup addressed various issues impacting tax professionals and their clients and ways to improve the overall tax process in Maryland.

- **November 29, 2023:** The workgroup held its first meeting, discussing the group's organizational structure, ongoing system modernization projects, and creating a mission statement. The workgroup also learned about current operations and agency highlights.
- **March 14, 2024:** The meeting included a legislative update covering bills related to tax compliance, data agreements, electronic filing requirements, and tax assistance for low-income Marylanders. The Workgroup also received updates on the PTE election and Maryland TaxConnect portal.

- **May 23, 2024:** Discussions focused on additional legislative changes, including the Budget Reconciliation Act, cannabis reform, and a new behavioral health crisis response fund. The Workgroup provided feedback on Maryland TaxConnect and participated in focus groups for the new website design.
- **September 25, 2024:** The meeting focused on the website redesign, PTE updates, and implementing the new Customer Relations Management (CRM) system. Staff provided updates on the status of PTE returns and the progress of various technology improvements.

SUBCOMMITTEE WORK

The Tax Practitioners Workgroup has not formally established subcommittees but has focused its efforts on key areas, including modernizing tax systems, improving communication with practitioners, and enhancing the PTE election process.

FUTURE GOALS

For the upcoming year, the Workgroup has identified several key areas to address:

- **Improving Access to Support:** Streamline access to support for tax practitioners, such as dedicated hotlines and quicker response times for inquiries.
- **Enhancing Technology:** Continue discussions on how the Comptroller's Office can enhance its digital tools and platforms to improve filing and processing efficiency.
- **Workshops on New Technologies:** Hold workshops on the practical use of new technologies like the CRM system.
- **Support for Smaller Tax Firms:** Discuss ways to provide more resources for smaller tax firms to navigate the evolving tax landscape.
- **Improved Notification Systems:** Explore better ways to notify taxpayers when their accounts are updated, particularly regarding estimated payments.

CONCLUSION

In 2024, the Tax Practitioners Workgroup played an important role in improving communication between the Comptroller's Office and the tax practitioner community. Key achievements included fostering collaboration on legislative updates, providing valuable feedback on the Maryland TaxConnect portal, and supporting efforts to improve the PTE election process. The Workgroup's recommendations on issues such as enhancing communication, modernizing systems, and improving taxpayer experiences have been instrumental in shaping the direction of Maryland's tax system. Moving forward, the Workgroup will continue to focus on enhancing support for tax professionals and ensuring that Maryland's tax ecosystem remains efficient, transparent, and accessible.

STAFF ADVISORY COUNCIL

MISSION STATEMENT

The Staff Advisory Council will work closely with the Equity and Transformation Office and Public Engagement to develop and implement new staff-focused initiatives and engagement opportunities and advise the Comptroller of Maryland on potential proposals and areas of concern for staff. This Council will comprise agency staff and include labor representatives and staff throughout each agency division – from contractual employees and more entry-level staff to management and leadership. Council members will also help volunteer at division and agency-wide events, promote agency efforts in their units and divisions, and regularly share information with their colleagues.

VISION STATEMENT

The SAC envisions a collaborative and inclusive environment where every staff member's voice is valued, and their contributions are celebrated. This environment would foster empowerment, equity, and continuous professional growth, ensuring a workplace characterized by mutual respect and opportunity.

PURPOSE

To positively impact the agency's culture by highlighting successes and seeking innovative ways to move toward a brighter, more inclusive future.

COUNCIL ACTIVITIES AND WHAT THE COUNCIL LEARNED

The Staff Advisory Council met quarterly in 2024, focusing on initiatives to enhance staff engagement, communication, and workplace culture.

- **February 7, 2024:** The meeting discussed policy suggestions and reviewed the insider threat and nursing/pumping policies for clarity and staff relevance. The SAC also discussed how they can assist in reviewing policies that affect employees and ensure they make sense for the agency.
- **July 10, 2024:** SAC members reviewed the iSuggest report and prioritized issues based on their severity. The meeting also included feedback on the staff summer social, addressing concerns such as parking, food lines, and heat. A potential idea for a staff potluck tailgate at a stadium in 2025 was also proposed.
- **October 9, 2024:** Membership expansion was discussed, with plans to add 4-7 new members, ensuring equitable representation across the agency. The SAC explored improving internal communications through platforms like Everbridge SnapComms and discussed the need for better exit and retention interview practices. Staff reviewed the iSuggest report and the SAC's mission statement.

SUBCOMMITTEE WORK

While no formal subcommittees were established, the Council focused on policy reviews, communication improvements, and event planning. Staff feedback helped inform key recommendations for enhancing the agency's internal culture.

FUTURE GOALS

The Staff Advisory Council identified several future goals for 2025:

- **Open Recruitment Process:** Establish a more formal and inclusive recruitment process for new SAC members. The application process will open in January, with two weeks for staff to complete applications. This process will require approval from direct managers and division directors.
- **Enhancing Communications:** SAC plans to continue improving communication and investigating the use of digital tools like SnapComms, ensuring important messages reach all staff members efficiently and timely.
- **Exit/Retention Interviews:** The SAC has recommended revisiting exit/retention interviews, potentially in collaboration with divisional leadership, to ensure more meaningful feedback is gathered from departing staff.
- **Staff Engagement and Representation:** The SAC will continue working to represent a diverse set of divisions within the agency, ensuring that all staff voices are heard and considered.

CONCLUSION

In 2024, the Staff Advisory Council was critical in shaping the agency's internal engagement and policies. Their efforts improved staff social events, communication strategies, and policy reviews. The SAC will focus on ensuring better representation, improving communication, and enhancing engagement opportunities for all staff. Their continued work will help foster a more inclusive and responsive workplace, positively impacting the agency's overall culture and operational effectiveness.