

**JULIE MARGETTA MORGAN, J.D., PH.D.**

(b)(6)

**PROFESSIONAL EXPERIENCE**

**Policy Deputy, COVID Domestic Team, Biden Readiness Project** August 2020-present

- Lead policy development and planning on issues related to reopening critical economic and social infrastructure during the pandemic, securing pandemic supply chains, and protecting at-risk populations.
- Develop and maintain a budget for domestic spending priorities to address the spread of COVID-19.
- Advise senior staff to support decision making on executive orders, legislation, and strategy related to COVID-19.
- Manage cross-agency working groups comprised of agency review team members to answer key policy questions.

**Vice President of Research, Roosevelt Institute** March 2020-August 2020 (currently on leave)

- Led the Roosevelt Institute's think tank to produce research and policy proposals aimed at ensuring broad based economic growth.
- Managed a team of 30 in-house experts and external fellows to conduct macroeconomic analyses, research on corporate practices and social and economic conditions, and policy analyses.
- Represented the Roosevelt Institute at various policy tables and worked with Roosevelt's advocacy team to push for regulatory and legislative changes supported by the think tank's research.

**Senior Policy Advisor, Elizabeth Warren for President** 2019-2020

- As a senior member of the campaign's policy team, advised on campaign strategy and wrote policy plans and supporting materials related to a variety of areas of domestic and economic policy. Oversaw junior staff's development of policy proposals and related products.
- Worked with the campaign's communications and mobilization teams to promote and defend Senator Warren's policy positions.
- Coordinated with outside experts and represented the campaign in meetings with key constituencies.

**Executive Director and Founder, Great Democracy Initiative** 2018-2019

- Founded and managed the Great Democracy Initiative, a project that produces detailed, progressive policy proposals on key issues. GDI has produced several influential policy proposals, including Mehrsa Baradaran's 21<sup>st</sup> Century Homestead Act, Morgan Ricks' "Fed Accounts" public option for banking, and Luke Herrine's proposal for student debt cancellation through executive action.
- Identified and recruited authors to write papers for GDI and shepherded them through writing and release processes. Managed junior staff who supported GDI's work.
- Engaged in advocacy at the federal and state level to encourage adoption of GDI's policy proposals – several of which were ultimately adopted into legislative proposals and presidential campaign policy plans.
- Coauthored GDI's anti-corruption proposal, which included several ideas that were ultimately incorporated into the For the People Act in the House and the Anti-Corruption and Public Integrity Act in the Senate.

**Fellow, Roosevelt Institute** 2018-2019

- Engaged in research, policy analysis, and advocacy related to ensuring broad-based economic growth and implementing structural changes to the American economy.
- Coauthored Roosevelt Institute's *New Rules for the 21<sup>st</sup> Century*, the Roosevelt Institute's blueprint for the future of the American economy.
- Conducted research and authored reports on the labor market conditions, trends in public investment, and

regulatory capture that led to the country's overwhelming student debt burden, detailing the effects of outstanding student loan debt on individuals and the economy, as well as corruption and mismanagement in the oversight and administration of the federal student loan program.

- Increased the visibility of Roosevelt's work in the media through interviews, op eds, and social media.

#### **Senior Officer, Strategic Data, Bill and Melinda Gates Foundation 2015-2017**

- Designed grant-making strategies toward improving the quality and availability of data on postsecondary education outcomes, finance and financial aid at the federal, state, and institution level.
- Managed a cross-team effort to redesign the foundation's approach to investing in improvements to state data systems; managed a portfolio of national and state-based investments aimed at improving states' access to postsecondary education data.

#### **Senior Education Counsel, Senator Elizabeth Warren 2013-2015**

Prior position: Education Counsel

- Served as Senator Warren's senior adviser on education issues ranging from early learning through postsecondary education.
- Drafted legislative proposals and amendments on a variety of issues, including lowering student loan interest rates and offering loan refinancing for millions of borrowers.
- Coordinated oversight and investigations into the extent of delinquencies and defaults in the student loan program and the oversight of student loan servicers and debt collectors. These efforts resulted in the Department of Education overhauling student loan servicing, making a broad range of student loan data available to the public, and terminating contracts with several debt collectors.
- Pushed for expanded access to student loan relief for both federal and private student loans, including loan modifications, bankruptcy protections, and administrative cancellation options. As a result of Senator Warren's efforts, the Department of Education implemented a "borrower defense" process that opened up a pathway to debt cancellation for thousands of borrowers.

#### **Director of Postsecondary Access and Success, Center for American Progress 2010-2013**

Prior positions: Associate Director of Postsecondary Education; Policy Analyst

- Led Postsecondary Education team, developing and executing strategic plan to conduct research and draft policy proposals related to improving higher education accessibility and affordability.

#### **Adjunct Professor/Teaching Fellow, Boston College 2008-2010**

- Taught Education Law and Public Policy, an interdisciplinary course for law students and graduate students in education that was cross-listed at the Boston College Law School and Lynch School of Education.
- Received the Donald J. White Teaching Excellence Award from the Boston College Lynch School of Education.

#### **EDUCATION**

Boston College, Ph.D., higher education, August 2010, *with distinction*, Chestnut Hill, MA

Dissertation: The Role of Financial Information in College Decision-Making: Implications for Federal Higher Education Policy

Boston College Law School, J.D., 2006, *cum laude*, Newton, MA

College of William and Mary, B.A., Philosophy, 2002, Williamsburg, VA

#### **LICENSURE:**

Massachusetts Bar (2006 - present; currently inactive status)