

# SOI as a World-Class Organization

by James Dalton

To conclude our 90th anniversary celebrations, we will focus on the achievements of our seventh and eighth Directors, Dan Skelly and Tom Petska, who have made the Statistics of Income Division the world-class organization it is today.

**Dan Skelly**, a former economics instructor and pension fund manager, combined both academic and corporate experience when he came to SOI in 1983. He had supervised the Foreign Statistics Branch, now known as the Special Studies Branch, for 10 years and left his mark on international, estate, nonprofit, and excise tax studies before taking the SOI helm in 1993. He believed in the mantra that “people are the organization” and invested in a Divisionwide recruitment effort to attract and hire the best and the brightest. But, as much as a good resume impressed Skelly, he also knew that team spirit moves an organization, and so he picked candidates who could work well together.

Skelly hired many of SOI’s present staff members and conducted many of the interviews himself. He emphasized training in order to keep SOI competitive with other statistical organizations, and he measured success not only in the number of annual studies conducted (60) but also in developing human capital. “The quality of statistics,” he liked to say, “depends on the quality of those you hire.” Toward that end, his recruitment tours and speaking engagements at local colleges and universities were well-known.

Skelly finetuned a number of SOI initiatives on his watch, bolstered the estate and gift audit selection program through estate and gift studies, and facilitated a separate audit program for exempt organizations through nonprofit studies. Perhaps his most tangible human capital achievement, Skelly was instrumental in seeking and filling new senior technical positions throughout SOI, because he strongly believed that many SOI staff perform at a high level. He is remembered for his people skills and the bright optimism he encouraged throughout the Division, as well as for leading SOI into the Internet Age and

the 21st Century. The Skelly Era (1993-2001) set the stage for our present Director.

**Tom Petska**, a former BEA and SSA economist and Chief of SOI’s Special Studies Branch, became Director in 2001. From the beginning, he used his influence to increase SOI standing in the statistical community. He led the way in maintaining high visibility as a world-class organization by encouraging staff to present papers at major conferences: the American Accounting Association (AAA), the American Economic Association (AEA), the American Statistical Association (ASA), and the National Tax Association (NTA). He himself presented papers on tax-exempt organizations, tax shelters, business organizational choice, individual income distributions, interagency data sharing, and the greater use of Master File data, and he was inducted as an American Statistical Association Fellow in 2004.

Petska does not believe that SOI should operate in a Federal statistical vacuum, and he re-established the SOI Advisory Panel Meeting as a semiannual event in 2001. Now in its 22nd year, this meeting provides Government economists and statisticians with much needed outside perspectives and views from academia, nonprofit think tanks, and accounting firms. Under Petska’s leadership, we now report on 130 projects and functions in semiannual reports to Treasury’s Office of Tax Analysis (OTA) and the Congressional Joint Committee on Taxation (JCT). We have finished virtually every one on or ahead of schedule with some of the highest quality levels we have ever achieved.

Petska also advocates the effective management of “white space,” those often overlooked places where areas of expertise intersect and where, as in economic terms, common ground becomes a public good. To share best practices across branches, he commissioned an inhouse team for Web modernization and subject-matter experts for publications improvement. A Johnny Unitas fan, his management philosophy comes straight from the gridiron, “Find out where statistics are going, and get us moving in those directions.”

Petska, who went as a Federal consultant to the Republic of South Africa to help its government

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restructure their revenue agency, is now shaping SOI beyond his own tenure. He is leading efforts to develop a strategic vision, SOI 2016, and is working with RAS Director Mark Mazur, former Treasury Deputy Assistant Secretary Bob Carroll, and OTA Director Don Kiefer to get us there. He has spared no effort to think and act “SOI-global” in our move to Graphical User Interface (GUI) systems, in our deployment of split-screen editing technologies, and in our successful contributions to the Modernized e-

File (MeF) initiatives. When asked where we stop in building bridges to the statistical community and our many customers throughout the world, the Petska answer has always been, “Why stop?”

Petska believes that SOI’s future lies in having more, not fewer, leaders and that when we join the ranks of SOI’s “highest performers”—our “All-Pros”—our starting lineup will be “All Stars” in every sense of the word, and our continued success is thereby assured.