



Brian A. Barreto
07/31/2000 05:53:46 PM

Brian Barreto 6-6218

Andrea/Christina 6-7431

Bethany Little 6-5581

Robert Muller 205-8748

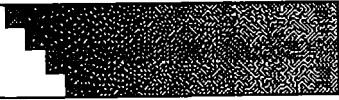
Kelene Moak 205-8973

Record Type: Record

To: Irene Bueno/WHO/EOP@EOP
cc:
bcc:
Subject: Re: Letter from groups in support ESL/Civics Initiative

Thanks.

6-6218
Irene Bueno

 Irene Bueno
07/31/2000 05:52:18 PM 

Record Type: Record

To: See the distribution list at the bottom of this message
cc:
Subject: Letter from groups in support ESL/Civics Initiative

NCLR sent me a copy of a letter dated July 26th signed by over 30 organizations under the letterhead of "Coalition of Adult English Literacy and Civics" in support of the Administration's ESL/Civics initiative FY 2001 budget proposal. If you would like a copy, please e-mail your fax number. Thanks.

Message Sent To: _____

Pleasant Fox

Andrea Kane/OPD/EOP@EOP
Leslie S. Mustain/OMB/EOP@EOP
Wayne Upshaw/OMB/EOP@EOP
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English Literacy and Civics Education Initiative

The President's FY 2001 budget supports a \$105 million increase for adult education and family literacy, including a \$75 million investment for the **English Literacy and Civics Education Initiative**. This initiative will help States and communities provide limited English proficient (LEP) adults with expanded access to high quality English Literacy (EL) programs linked to civics instruction on understanding and navigating American government and public education systems, the workplace, and other key American institutions.

Demand for English Literacy Services and Civics Instruction

The ability to read and communicate effectively in English is critical for LEP students and immigrants who are seeking to participate fully in the American economy and in American institutions. Evidence from immigrant communities demonstrates high levels of enthusiasm for learning English and participating in civic activities; however, the demand for EL instruction outweighs the current supply.

- ◆ Enrollment for English literacy instruction continues to increase. Over the past ten years, enrollment has increased by 105 percent. During the program year 1998, English language instruction accounted for 48 percent or 1.9 million of the four million adults enrolled in adult education programs.
- ◆ Adult education state directors report that increases in enrollment were attributed to: the booming economy; the work of refugee resettlement agencies; and expansion and growth of family or community environments where a language other than English is the dominant language.

Eligible Grantees

- ◆ Grants will be available to States and communities with significant need for adult English Literacy (EL) services.
- ◆ State educational agencies, community based organizations, local educational agencies, colleges (including community and tribal colleges and universities), libraries, unions and other non-profit entities will compete for about in discretionary grants to support EL/civics instruction. Preference will be given to eligible grantees prepared to provide a 25 percent cash or in-kind match for the discretionary grant amount.
- ◆ Each grant will provide the adult education system with additional Federal EL funding to increase access and improve adult education EL services, including capacity building.

How does it work?

- ◆ Grants will allow communities to develop English literacy and civics education projects tailored to their unique needs and populations.
- ◆ Grants could be used for varied purposes related to English literacy/civics instruction including staff, materials, personnel training and support services such as child care and transportation costs for

program participants (if not otherwise available). Grantees will be strongly encouraged to include volunteers groups (such as Literacy Volunteers of America, Americorps and VISTA volunteers, Retired Senior Volunteer Corps and immigrant mentors), and to collaborate with employers or employer groups to improve work and career-related skills.

- ◆ Grant recipients will report annually to the Secretary of Education on the progress of participants toward achieving English and civics proficiency, and how these funds improved and expanded the programs that support teaching LEP students.
- ◆ This will be a competitive grant program run by the Department of Education's Office of Vocational and Adult Education (OVAE).
- ◆ A portion of funds will be set aside for purposes of evaluation, technical assistance and the dissemination of best practices.

Required program components

- ◆ Offer English literacy education that integrates: instruction on the rights and responsibilities of citizenship (civics and U.S. history); navigating various key institutions of American life (health care, child care, education -- including parental involvement in schools, banking, housing and transportation systems); accessing high-skill, high-wage employment; improving work-related skills; understanding legal rights; and paying taxes.
- ◆ Have an underserved population with a significant demand for EL/civics instruction and a demonstrated need for increased funds to provide EL services in the State or community.
- ◆ Demonstrate effective links with existing programs at the State or local educational and community levels including education, employment, housing, and transportation programs.
- ◆ Use flexible approaches (such as evening and weekend hours), employ technology as a tool to expand access, and provide instruction at workplaces and/or community-based sites.
- ◆ Assess program effectiveness using performance measures required by the Adult Education and Family Literacy Act (Title II of the Workforce Investment Act).
- ◆ Meet other selection criteria and considerations related to program quality and effectiveness required for State Adult Education grants under the Workforce Investment Act.

**For more information, please call the U.S. Department of Education,
Office of Vocational and Adult Education at 202-260-9279.**

05/03/00

**English Literacy and Civics Education Program
Grant Award Abstracts - FY 1999**

**BOCES Geneseo Migrant Center
27 Lackawanna Avenue
Mt. Morris, New York 14510**

**Project Director: Robert Lynch
Telephone: 716-658-7960
Grant Award Amount: \$ 675,300**

ABSTRACT: Farmworkers Achieving with Civics Education Services (FACES)

FACES, a partnership of the BOCES Geneseo Migrant Center and five western New York State Migrant Education Outreach Program sites, will develop culturally appropriate English literacy materials for a predominately Latino/a population of migrant farmworkers many of whom are non-schooled or with limited formal education. English literacy materials, *Living in America* will focus on civics education and life skills, implementing them in classes and finally disseminating them via web site, appropriate clearinghouses and by mail to key agencies across the country. FACES will also conduct pre-citizenship classes for migrant farmworkers utilizing materials available commercially and on the Internet.

**Temple University
1601 North Broad Street, USB 206
Philadelphia Pennsylvania 19122**

**Project Director: Nancy Z. Henkin
Telephone: 215-204-6836
Grant Award Amount: \$ 690,000**

ABSTRACT: Project SHINE

Immigrant and refugee adults over the age of 50 constitute the most rapidly growing segment of the foreign-born population. Traditional ESL programs often fail to meet the needs of limited English speaking elders. Unaccustomed to learning in formal settings, many elders who attend classes become frustrated and find it difficult to keep up with the pace of instruction. Those who have limited English and native language literacy skills may also find print-oriented instruction another barrier to participation.

This proposed multi-site initiative will increase opportunities for limited English speaking elders to access English literacy programs that are linked to civics education. SHINE (Students Helping In the Naturalization of Elders) utilizes college students throughout its national network to provide individualized instruction in overcrowded ESL and citizenship classes. Students are also able to meet the needs of elders who cannot attend classes by tutoring one-on-one and in small groups at temples, churches, housing projects and community-based organizations.

**Southern Westchester BOCES
2 Westchester Plaza
Elmsford, New York 10523**

**Project Director: Maria Morgan
Telephone: 914-345-8500
Grant Award Amount: \$ 690,000**

ABSTRACT: Literacy and Civics Education in New York

The Consortium will establish Immigrant Learning Centers in the White Plains and New Rochelle Public Libraries. Each Immigrant Learning Center will consist of a classroom with an adjoining technology lab that consists of five computer workstations. By June 30, 2003, the Immigrant Learning Centers will admit 1,560 mostly Hispanic adult enrollments in content-based learning programs for English as a Second Language (taught at four different proficiency levels), Civics, Citizenship, Life Skills, Job Readiness, and Basic Computer Literacy. Eighty percent of participants who complete a 20-week ESL course will achieve enough literacy to be eligible for the next (higher) level of ESL instruction, as determined by the New York State Placement Test. The Consortium will document and disseminate descriptions of the program's service model, outreach strategies, delivery methods, agency roles, management procedures, programmatic resources, evaluation designs, and intended results, so that the project can be replicated in other settings.

**The Center: Resources for Teaching and Learning
1855 Mt. Prospect Road
Des Plaines, Illinois 60018-1805**

**Project Director: Sue Barauski
Telephone: 847-803-3535
Grant Award Amount: \$ 530,570**

ABSTRACT: Illinois Connections: Civics Education for Involved Communities

Illinois has the fifth largest limited English proficient (LEP) population in the U.S., which is extending rapidly throughout the state outside of Chicago. Opportunities for English Language/Civics Education (EL/CE) are not sufficient to meet the level of need of LEP adults in most Illinois communities. Illinois Connections: Civics Education for Involved Communities ("the Project") encompasses a multi-dimensional approach to EL/CE instruction, collaborative partnerships and capacity building, professional development, and materials production and dissemination on both state and local levels.

The Project has been designed around a single goal, *to build Illinois' capacity to increase statewide the number and quality of EL/CE programs through the development of innovative, pilot-tested EL/CE programs, related curricula and materials.* This goal will be met through five objectives: 1) Develop statewide partnerships; 2) Enhance local community partnerships; 3) Develop and pilot innovative EL/CE programs to be replicated statewide; 4) Develop and field-test EL/CE curricula based on experiential learning and proactive learner advocacy; and 5) Facilitate and support the statewide replication of the newly developed EL/CE programs by designing and conducting a wide range of interactive professional development opportunities.

Bronx Community College of the City University of New York
University Avenue and West 181st Street
Bronx, New York 10453-3102

Project Director: Jean Napper
Telephone: 718-289-5844
Grant Award Amount: \$ 610,000

ABSTRACT: EL/Civics Education Program

Bronx Community College of the City University of New York proposes to conduct a project to carry out the purposes of the English Literacy and Civics Education Demonstration Project. The project will be jointly administered by the Adult Center for Comprehensive Education and Support Services Center (ACCESS) and the Adult Literacy Program. The English Language Civics Education Program will strengthen outcomes for academics, citizenship and employment. Throughout the period of instruction, a Civics component consisting of Citizenship and United States History and Government will be integrated into the entire curriculum of English Literacy instruction.

National Alliance of Vietnamese American Service Agencies
11501 Georgia Avenue
Wheaton, Maryland 20902-1954

Project Director: Minh Day
Telephone: 301-962-7135
Grant Award Amount: \$ 606,600

ABSTRACT: English Literacy and Civics Education Program

The National Alliance of Vietnamese American Service Agencies (NAVASA), along with eight of its affiliates will provide services via a Personal/Virtual English Literacy Program to serve vulnerable Southeast Asian refugees. The populations to be served are former political prisoners, Amerasians who was deprived access to education while in Vietnam, and lastly, elderly refugees who have difficulty accessing services and acquiring a level of English proficiency necessary to pass the Immigration and Naturalization Service (INS) citizenship exam and interview. This will be achieved by e-broadcasts of classes, digitizing video-classes that will be posted on NAVASA's website, and the creation of an interactive web-page. The integration of technology into the curriculum will facilitate teaching of basic computer skills.

PBS Literacy Link
1320 Braddock Place
Alexandria, Virginia 22314-1649

Project Director: Noreen Lopez
Telephone 703-739-8600
Grant Award Amount: \$ 626,250

ABSTRACT: ESL CivicsLink

ESL/CivicsLink will couple two existing federally funded PBS national technology projects, LiteracyLink and Project CONNECT, with new online delivery methods for staff development training in ESL and civics instruction, prototype and test the training, and then launch it nationally. ESL/CivicsLink will draw its force and effectiveness from: the national adult literacy reputation and telecommunications infrastructure of PBS LiteracyLink, CONNECT, and 346 PBS member stations; the leadership of Jefferson County Public Schools in Louisville, Kentucky -- which has been nationally recognized for innovative adult educational programs and curriculum development; and the extensive expertise in ESL, staff development, technology capacity, research, and education of NCAL at the Graduate School of Education of the University of Pennsylvania.

California Literacy, Inc.
2028 East Villa Street
Pasadena, California 91107-2379

Project Director: Matthew Scelza
Telephone: 626-395-9989
Grant Award Amount: \$ 453,100

ABSTRACT: Process of English And Civics Education (PEACE) Curriculum Project

California Literacy, Inc. (Cal Lit) will use its statewide network of over 150 literacy programs and over 300 learning centers to develop, field test, revise and distribute an English and Civics Literacy Curriculum called **Process of English And Civics Education (PEACE)**. The content of the lesson plans will stress English literacy skills and civics education topics to cover the daily rights and responsibilities of active daily participation as a citizen/resident. The curriculum will follow the "Equipped for the Future" agenda developed by the National Institute for Literacy which is a model for adult education in providing instruction for adults as workers, family members and citizens.

After their initial field-test, the curriculum modules will be revised and placed on Cal Lit's (www.caliteracy.org) web-site and web-sites of other appropriate organizations and agencies. At these web-sites, other adult educators may download the modules, utilize the modules in their own unique settings and provide feedback for further revision.

Catholic Social Services of Fall River, Inc.
783 Slade Street
Fall River, Massachusetts 02724

Project Director: Eva dos Santos
Telephone: 508-674-4681
Grant Award Amount: \$ 521,200

ABSTRACT: Basic English for Lifelong Learning and Citizenship

Catholic Social Services (CSS) proposes to expand its innovative English Literacy and Civics Education program to reach 350 immigrants in southeastern Massachusetts, 100 more than are currently learning with CSS. This expansion will have a significant impact on immigrants' literacy and participation in civic life. First, it will open 100 new slots for EL/Civics in the region, reducing the area's long waitlists. Second, CSS's innovative programming model will reach learners for whom instruction has been inaccessible. Third, staff will issue reports twice a year on program strategies and their usefulness with particular populations, widely disseminating these lessons for replication.

Lutheran Social Services of New England, Inc.
600 Worcester Road
Natick, Massachusetts 01760

Project Director: Kathy Shaw
Telephone: 413-787-0725
Grant Award Amount: \$ 685,200

ABSTRACT: Empowerment Voice -A Collaborative Project

Population to be served -- The Central and Western Massachusetts have a share of the foreign-born population having hosted refugees from places such as the former USSR, former Yugoslavia, Vietnam, Laos, Cambodia, Middle East, Africa and Latin America.

Objectives	Activities
Develop staff development plan	Teachers implement civics education
Create a common document	Produce civics curriculum and lesson-plans
Assist citizenship seekers	Provide one-on-one assistance
Integrate civics into classrooms	14 classes will incorporate civics issues
Develop community within classrooms	Create students' support groups
Students involve in advocacy campaign	Speak at legislative and community events
Develop informative materials	Set up <i>Civics Corners</i> at schools and libraries
Students increase their leadership skills	Create and nurture <i>Empowerment Teams</i>
Replicate effective project designs	Facilitate effective Mentoring steps
Disseminate effective teaching materials	Conduct workshops at conferences

The Fortune Society, Inc.
39 West 19th Street
New York, New York 10011

Project Director: Rachel Herzing
Telephone: 212-206-7070
Grant Award Amount: \$ 481,200

ABSTRACT: ESOL & Effective Citizenry Program

The Fortune Society, a non-profit organization that runs one of the country's most successful and intensive service programs for ex-offenders, is requesting funding through this application for its "ESOL and Effective Citizenry" initiative. This innovative model program is designed to improve the English literacy skills and the civics education knowledge of monolingual, Spanish-speaking ex-offenders-a deeply disadvantaged, under-served and rapidly growing population.

Through the proposed ESOL and Effective Citizenry Program, Fortune's objectives are to increase the improve the English literacy skills of monolingual, Spanish-speaking ex-offenders and increase their knowledge of civics education by utilizing the following integrated and innovative strategies: (1) the provision of counseling and case management services based on a 'peer support' model (2) cultural awareness and sensitivity, (3) a student-centered approach to teaching, based on cooperative and contextualized learning approaches, (4) civics instruction, with particular emphasis on "rights & responsibilities" (5) the use of technology to enhance the curriculum and (6) access to a broad array of on-site supportive services.

Coalition of Limited Speaking Elderly
54 West Jackson Blvd.
Chicago, Illinois 60604

Project Director: Rosemary Gemperle
Telephone: 312-461-0812
Grant Award Amount: \$ 326,880

ABSTRACT: Bright Ideas: Providing Effective Ideas to Hard-to-Serve Clients

This project presents a unique collaboration between a coalition of community-based organizations serving various ethnic groups (CLESE) and a minority-owned research and technical assistance firm specializing in hard-to-serve populations (Aguirre International). This collaboration will implement an innovative training model that is based on the specific needs of community teachers with little experience in teaching students the literacy and communication skills needed for self-sufficiency, citizenship and civic engagement. The project is designed to meet the needs of hard-to-serve immigrant populations with special needs who face multiple challenges to learning. At the heart of the training will be the production and implementation of a video and picture based curriculum designed to address learner priority needs: face to face communication skills and basic reading and writing skills, as well as skills needed for community participation. A teacher training video, demonstrating promising practices in serving hard to serve students will also be produced.

PROGRAM MEMORANDUM FY 2000 - 19

TO : State Directors of Adult Education

FROM : Ronald S. Pugsley
Director
Division of Adult Education and Literacy

SUBJECT: Guidelines for State Plan Revisions for EL/Civics Programs

We have prepared guidelines for your use in preparing and processing the State plan revisions, including the EL/Civics program revision. As this is a targeted activity, it is important that information being distributed to eligible applicants concerning proposed activities include the program's purpose and definition.

The purpose of this initiative is not simply to expand English literacy services, but to provide an integrated program of services that incorporates English literacy and civics education. To effectively participate in the education, work, and civic opportunities of this country, immigrants and other limited English proficient persons must not only master English but be able to understand and navigate governmental, educational, and workplace systems and key institutions, such as banking and health care.

Civics education as defined in the November 17, 1999 *Federal Register* means "an educational program that emphasizes contextualized instruction on the rights and responsibilities of citizenship, naturalization procedures, civic participation, and U.S. History and government to help students acquire the skills and knowledge to become active and informed parents, workers, and community members."

Essential information and suggested procedures needed for your State plan revisions and implementation of this activity follows.

1. State plan revisions.

Follow the process your State has created to revise your State plan. Because this is a substantial revision to the plan, it must be submitted to the Governor for review and comment. Any comments by the Governor must be included in the materials submitted to the Secretary.

2. Competition.

If a State has not recently conducted a competition for the provision of “integrated English literacy and civics education services to immigrants and other limited English proficient populations,” it must conduct a new competition for these additional funds. Material for a new competition must describe the application process and the steps the eligible agency will take to ensure direct and equitable access for grants or contracts.

3. Description of activities.

Include the activities that would be implemented with the English literacy and civics allocation.

4. Reporting.

The annual narrative report shall provide a description of EL/Civics activities, population and numbers served, and how these funds have expanded access or program enhancements. The Financial Status Report will include funds that may be expended for administrative expenses (not more than 5 percent) and State leadership activities (not more than 12.5 percent) used to support integrated English literacy and civics education activities and services.

5. Obligation of funds.

Funds may be obligated by the State eligible agency for EL/Civics activities after the revisions are approved. In a situation wherein an eligible State agency has an approved State plan, but not an approved EL/Civics revision plan, the grant will be issued, but it will contain language indicating that funds may not be used for EL/Civics activities until the EL/Civics component has been approved.

5. Submission.

Three copies of the plan revision may be submitted electronically (carroll_towey@ed.gov) or hard-copy to Carroll F. Towey, Acting Branch Chief, at the following address:

Division of Adult Education and Literacy
Office of Vocational and Adult Education
U.S. Department of Education
400 Maryland Ave., SW
Washington, DC 20202-7240

For additional information on the EL/Civics revisions, please contact your Area Coordinator at the following Internet address: joyce_campbell@ed.gov; james_parker@ed.gov; mike_dean@ed.gov; and sarah_newcomb@ed.gov.

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FOR RELEASE
May 10, 2000

Contact: Melinda Ulloa
(202) 205-8811

IMMIGRANTS TO RECEIVE LESSONS IN ENGLISH, CIVICS, UNDER EDUCATION DEPARTMENT GRANTS

The U.S. Department of Education's Office of Vocational and Adult Education has awarded 12 grants, totaling \$6.9 million over two years, to test ways of better combining instruction in English and civics.

Grantees are in the states of California, Illinois, Maryland, Massachusetts, New York, Pennsylvania and Virginia. The winners were selected through an extensive competitive process that generated nearly 170 applications.

"Proficiency in English and some knowledge and appreciation of what it means to be an American are tools that help immigrants enter the mainstream of our community life," said U.S. Secretary of Education Richard W. Riley. "Language and civic life are often joined in the real world and it certainly makes sense that they be joined in the instruction made available to our immigrant neighbors."

Examples include:

- **Project Shine, Philadelphia:** Immigrant and refugee adults over the age of 50 constitute the most rapidly growing segment of the foreign-born population. This proposed, multi-site initiative utilizes college students throughout its national network to provide individualized instruction in overcrowded ESL and citizenship classes. Students are also able to meet the needs of elders who cannot attend classes by tutoring one-on-one and in small groups throughout their communities.
- **Literacy and Civics Education in New York, Elmsford, N.Y.:** A consortium will establish Immigrant Learning Centers in the White Plains and New Rochelle Public Libraries. Each center will consist of a classroom and an adjoining technology lab with five computer workstations. By June 30, 2003, the centers will admit 1,560 mostly Hispanic adults and teach them English as a second language (taught at four different proficiency levels), civics, citizenship, life skills, job readiness and basic computer literacy.

-MORE-

-2-

- **Process of English and Civics Education (PEACE) Curriculum Project, Pasadena, Calif.:** California Literacy, Inc., will use its statewide network of more than 150 literacy programs and more than 300 learning centers to develop, field test, revise and distribute an English and Civics Literacy Curriculum. The content of the lesson plans will stress English literacy skills and civics education topics to cover the daily rights and responsibilities of active daily participation as a resident and citizen.
- **Bright Ideas: Providing Effective Ideas to Hard-to-Serve Clients, Chicago:** This project presents a unique collaboration between a coalition of community-based organizations serving ethnic groups (CLESE) and a minority-owned research and technical assistance firm specializing in hard-to-serve populations (Aguirre International). The collaboration centers on training community teachers how to teach literacy and communication skills needed for self-sufficiency, citizenship and civic engagement.

Also, beginning July 1, under the Adult Education and Literacy Act, 31 states, the District of Columbia and Puerto Rico will share in \$25.5 million to teach English and civics to immigrants and others with limited English proficiency.

The state funding is based on the need for services as shown by Immigration and Naturalization Service data regarding immigrants admitted for legal permanent residence. Half of the funds, \$12.75 million, is allocated to states with the largest absolute need for these services and the other half is directed to states with the largest recent growth in need for the services.

###

NOTE TO EDITORS: Following is a list of grantees and states receiving funds.

Process of English And Civics Education (PEACE) Curriculum Project
California Literacy, Inc., Pasadena, Calif.
Project Director: Matthew Scelza, (626) 395-9989

Providing Effective Ideas to Hard-to-Serve Clients

Coalition of Limited Speaking Elderly, Chicago, Ill.
Project Director: Rosemary Gemperle, (312) 461-0812

-MORE-

-3-

Illinois Connections: Civics Education for Involved Communities
The Center: Resources for Teaching and Learning, Des Plaines, Ill.
Project Director: Sue Barauski, (847) 803-3535

English Literacy and Civics Education Program
National Alliance of Vietnamese American Service Agencies, Wheaton, Md.
Project Director: Minh Day, (301) 962-7135

Basic English for Lifelong Learning and Citizenship
Catholic Social Services of Fall River, Inc., Fall River, Mass.
Project Director: Eva dos Santos, (508) 674-4681

Empowerment Voice -A Collaborative Project
Lutheran Social Services of New England, Inc., Natick, Mass.
Project Director: Kathy Shaw, (413) 787-0725

EL/Civics Education Program
Bronx Community College of the City University of New York, Bronx, N.Y.
Project Director: Jean Napper, (718) 289-5844

Literacy and Civics Education in New York
Southern Westchester BOCES, Elmsford, N.Y.
Project Director: Maria Morgan, (914) 345-8500

Farmworkers Achieving with Civics Education Services (FACES)
BOCES Geneseo Migrant Center, Mt. Morris, N.Y.
Project Director: Robert Lynch, (716) 658-7960

ESOL & Effective Citizenry Program
The Fortune Society, Inc., New York, N.Y.
Project Director: Rachel Herzing, (212) 206-7070

Project SHINE
Temple University, Philadelphia, Penn.
Project Director: Nancy Z. Henkin, 215-204-6836

ESL - CivicsLink
PBS Literacy Link, Alexandria, Va.

Project Director: Noreen Lopez, (703) 739-8600

STATES RECEIVING FUNDS BASED ON NEEDS DETERMINATION

ARIZONA	\$314,380
CALIFORNIA	\$7,595,940
COLORADO	\$231,310
CONNECTICUT	\$285,177
DISTRICT OF COLUMBIA	\$103,743
FLORIDA	\$2,167,788
GEORGIA	\$355,051
HAWAII	\$214,861
ILLINOIS	\$1,285,269
INDIANA	\$118,863
KANSAS	\$102,691
LOUISIANA	\$100,779
MARYLAND	\$523,842
MASSACHUSETTS	\$596,511
MICHIGAN	\$433,975
MINNESOTA	\$229,211
MISSOURI	\$129,426
NEVADA	\$180,279

NEW JERSEY	\$1,385,458
NEW MEXICO	\$127,294
NEW YORK	\$3,961,865
NORTH CAROLINA	\$199,470
OHIO	\$258,654
OKLAHOMA	\$96,828
OREGON	\$225,341
PENNSYLVANIA	\$441,571
TENNESSEE	\$109,433
TEXAS	\$2,234,983
UTAH	\$102,221
VIRGINIA	\$547,537
WASHINGTON	\$539,629
WISCONSIN	\$117,082
PUERTO RICO	\$183,539

###

STATE DIRECTORS OF ADULT EDUCATION

June 13, 2000

ALABAMA

Dr. Naomi Scales
Acting Coordinator
Adult and Community Education Program
Alabama State Department of Education
P.O. Box 302101
Montgomery, AL 36130-2101
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TAX CREDIT FOR EMPLOYER-PROVIDED ENGLISH AS A SECOND LANGUAGE AND CIVICS CLASSES

Current Law

There is no current law pertaining specifically to employer-provided ESL civics classes. However, workplace literacy and basic education expenses are deductible to employers, either as ordinary and necessary business expenses to the extent they are job-related or as employee compensation. If they are deemed to be compensation, the expenses are includable in the worker's gross income unless provided under a section 127 educational assistance plan or treated as a working condition fringe benefit. Under a section 127 plan, educational expenses other than for graduate education are excluded from an employee's gross income for income and employment tax purposes, up to \$5,250 per year. Educational expenses paid by an employer outside of a section 127 plan that are related to the employee's current job may be excludable from the employee's gross income as a working condition fringe benefit, but not if the education relates to certain minimum educational requirements or enables the employee to begin working in a new trade or business.

Reasons for Change

English Literacy instruction is the fastest growing component of Adult Education. Enrollment in these programs has increased 105% over the past ten years. However, there are not enough spaces available for those seeking ESL classes. For example, Los Angeles has a waiting list of 50,000 people for ESL classes, Chicago's ESL programs are filled to capacity as soon as they open their doors, and New York state has resorted to a lottery system to select individuals who wish to learn English.

There is a great need to increase the number of classes available. Providing a credit will encourage employers to provide workplace ESL civics classes to their employees.

Proposal

Employers who provide ESL civics programs for their eligible employees would be allowed to claim a credit against the employer's Federal income taxes. The amount of the credit would equal *[to be determined]* percent of the employer's eligible expenses incurred with respect to qualified education programs, with a maximum credit of *[to be determined]* per participating employee. The credit would be treated as a component of the general business credit, and would be subject to the limitations of that credit.

Qualified education would be limited to ESL civics instruction. Eligible employees -- employees with respect to whom the employer could claim a credit -- would have limited English proficiency. Eligible employees must be citizens or resident aliens aged 18 or older who are employed by the taxpayer in the United States for at least six months.

To be eligible for the credit, the provision of ESL civics by an employer must meet the nondiscrimination requirements for educational assistance programs under current-law section 127. If expenses for a literacy or basic education program are eligible for the credit, then the educational benefits provided to employees under that program would be treated as tax-free working condition fringe benefits under section 132(d).

Expenses eligible for the credit would include payments to third parties and payments made directly to cover instructional costs, including but not limited to salaries of instructors, curriculum development, textbooks, and instructional technology used exclusively to support ESL civics instruction. Wages paid to workers while they participate as students in the program would not be eligible for the credit. The amount of the credit claimed reduces, dollar for dollar, the amount of education expenses that the employer may otherwise deduct in computing its taxable income.

Unless the employer provides ESL civics instruction through an eligible provider, the curriculum must be approved by a State adult education authority, defined as an "eligible agency" in section 203(4) of the Adult Education and Family Literacy Act. An "eligible provider" would be an entity that is receiving Federal funding for English literacy programs under the Adult Education and Family Literacy Act, Title II of the Workforce Investment Act of 1998. Eligible providers include local education agencies, certain community-based or volunteer literacy organizations, institutions of higher education, and other public or private nonprofit agencies.



David Rowe

06/08/2000 06:35:19 PM

Record Type: Record

To: Irene Bueno/OPD/EOP@EOP
cc: See the distribution list at the bottom of this message
Subject: ESL/Civics Tax Credit idea

Irene,

Your email to Barbara re: your ESL/Civics tax credit idea was forwarded to Kathleen FitzGerald and I in OMB's ED branch. The attachment below is a draft proposal that fleshes out your idea. We largely based our draft proposal on the Workplace Literacy Tax Credit, which the Administration proposed in the FY00 Budget and, I believe, previous Budgets. It was never enacted, and the FY01 President's Budget does not include the same proposal. The attachment is, for the most part, a modification of Treasury's description of the proposed Workplace Literacy Tax Credit.

There are a couple things you should be aware of. First, several people had accountability concerns with the Workplace Literacy Tax Credit, which are also relevant here. More specifically, it would be hard to verify whether businesses who take advantage of this tax credit are actually providing quality ESL/Civics courses to their employees.

Second, while the purpose of this program is to encourage businesses to provide ESL/Civics courses to their employees, this proposal may just "buy out the base"; that is, give tax credits to businesses who already offer these courses, and not encourage many more new businesses to participate.

As for cost, we don't have the information over here to do a cost estimate for you. But, the old Workplace Literacy Tax Credit had an estimated cost of \$139 million over five years -- your ESL/Civics proposal's cost should be close to this.

Let us know if you have any questions. Thanks.



ESL Civics Tax Credit -- DRAFT propo

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ESL

There are lots of examples: Marriott, Tysons and Boeing are a few of the larger companies that have offered English and/or civics classes. It's been a couple of years since I've spoken with anyone at the companies so I'm not sure if they are still going. I've come across other types of classes for immigrants in corporations: financial literacy classes (to encourage home ownership and to help immigrants avoid getting into credit problems; naturalization support (ATT in one location persuaded INS to hold interviews on site so its workers wouldn't have to travel long distances to the INS District office); etc. We have a grant from Fannie Mae, which has a large New Americans housing initiative, to work with financial institutions to develop affordable lending programs for immigrants; a few of the best practice models we've identified involve partnerships with companies.

- the credit

When the Commission was finishing up, we began exploring the idea of a White House meeting to bring corporate leaders, ethnic leaders, community colleges and universities, etc. together to discuss public-private partnerships of this type. Since the White House was trying to get companies to hire people coming off of welfare, the idea was pushed aside. It may be a good time to resurrect it. I'd love to discuss the idea further if you think there might be interest.

- Partnerships

By the way, where was the article? I've made this pitch to several journalists but haven't seen it in writing yet.

>>> <Irene_Bueno@opd.eop.gov> 05/25 10:15 AM >>>

I noticed your statement in article earlier this week about the private sector doing more to ease the transition of immigrants into communities. I agree with you and am interested in how we can encourage private sector to do more. Are you aware of any private sector companies that are providing English classes or how we can encourage to do so? Please let me know. Look forward to hearing from you. Thanks.

How can we encourage the private sector to provide these kinds of services.

- How do you think we could encourage business to provide this kind of service?
- What do you know about these programs?
- Are they successful?
- Contact names of people at these companies?

Susan Martin – did site visits during the commission (look at the full reports – in the margins). Fannie Mae Foundation is the biggest business. Immigrants as consumers and workers and targeting them. They have a grant from Fannie Mae – to make them homeowners – cooperation between banks & company –

Financial literacy classes. Walmart in Rogers, Arkansas – Bank President said they had lots of new immigrant – potential customers – Cuban bank worker – he picked up lots of tension b/c workers were transit – Tyson's, IBP – turnover was very high and company were concerned b/c of cost \$7500 per turnover and 100 percent turnover. Need to build ties to community to keep workers in the area. Allowed workers could build produce \$500 borrowed against CD, workers would pay in 6 months, and then have a credit history. Tyson's also had somebody in the human resources office & she talked to the company to provide ESL classes but they found could not find ESL instructors so trained ESL instructors to teach ESL classes. They also realized that managers did not have Spanish skills – provided bonus – to teach English. Provided bonus to workers to learn English, then went on to GED classes to help promote them. Once they get into it, they seemed very interested.

Human Resources Marriott Corp. – they found they had to teach English to provide better customers, GED, civics classes – stabilize work force.

AT&T – talked INS to do ceremonies and testing at the AT&T.

Company interest – high turnover, money, corporate citizenship, tax credits could help.

Some preliminary discussions – White House Conference –ethnic leaders, companies, education leaders, NGOs, state and locals gov't,. colleges, communities, coalitions of small businesses, non-profits, – but during welfare reform decided not to do that. Georgetown may be interested. Need to be a public-private partnerships.

Orange County – Vietnamese Am – could not find a space – schools were concerned with insurance, custodial staff,

Barbara Barry – IBP – will e-mail info.

Foundations – are interested.

Andy Schoenholtz – 687-2185

③ Ann
Shp