

Withdrawal/Redaction Sheet

Clinton Library

DOCUMENT NO. AND TYPE	SUBJECT/TITLE	DATE	RESTRICTION
001. fax	From Claire L Barnett to James Kvaal; RE: phone number [partial] (1 page)	10/12/2000	P6/b(6)
002. letter	From Deborah Jospin to The Honorable William Jefferson Clinton; RE: address/phone number [partial] (1 page)	10/19/2000	P6/b(6)

COLLECTION:

Clinton Presidential Records
Domestic Policy Council
Anna Richter
OA/Box Number: 23737

FOLDER TITLE:

Scheduling Requests---To-Do [1]

2011-0638-S

ms167

RESTRICTION CODES

Presidential Records Act - [44 U.S.C. 2204(a)]

- P1 National Security Classified Information [(a)(1) of the PRA]
- P2 Relating to the appointment to Federal office [(a)(2) of the PRA]
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C. Closed in accordance with restrictions contained in donor's deed of gift.

PRM. Personal record misfile defined in accordance with 44 U.S.C. 2201(3).

RR. Document will be reviewed upon request.

Freedom of Information Act - [5 U.S.C. 552(b)]

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National Government Relations Office
August 25, 2000

Ms. Stephanie S. Streett
Assistant to the President and
Director of Presidential Scheduling
Executive Office of the President
1600 Pennsylvania Ave., NW
Ground Fl., West Wing
Washington, D.C. 20500

Dear Stephanie:

It was great speaking with you a couple of weeks ago. As we discussed, each year it has been a tradition for the President of the United States to bestow the American Cancer Society's Cancer Courage Award on an individual whose experience with the disease is an inspiration to others who are facing a similar battle. This award has been presented every year since the era of Franklin D. Roosevelt. Attached is a summary of the criteria for selection along with a list of past recipients.

Until recently, the ceremony was conducted in early April to mark the start of Cancer Control Month. As our programs and fundraising have become year-round, this event is often scheduled in the summer or fall. On behalf of the American Cancer Society's 2 million volunteers and the more than 16 million supporters, we would very much appreciate it if the President could find time this fall to continue the tradition of presenting this prestigious award.

It is customary to have the American Cancer Society senior officials take part in the White House ceremony. Our current officers are:

John R. Kelly, PhD, *Chairman, Board of Directors*
Gerald L. Woolam, MD, *President*
John R. Seffrin, PhD, *Chief Executive Officer*

As in the past, we are prepared to work closely with your office in arranging attendance, photography, press releases, etc. Thank you, Stephanie, for your consideration of this request. Please let me know if you need additional information. I will follow-up with you after Labor Day.

Sincerely,


Daniel E. Smith
National Vice President
Federal & State Government Relations

*Thanks,
Stephanie!*

cc: Mary Beth Cahill, Asst. to the President and Dir. of Public Liaison
Bruce Reed, Asst. to the President for Domestic Policy ✓

Devorah -
Please advise -
Should we regret this
or suggest a surrogate
accept the award
for the President?



American Cancer Society Courage Award Criteria

The American Cancer Society Courage Award is historically presented by the President of the United States to recognize April as Cancer Control Month. Every sitting President since Franklin D. Roosevelt has so received the Society.

The annual White House Courage Award recipient is decided at the highest levels of the American Cancer Society.

The person we select has displayed valor, courage, and determination in fighting the disease, frequently with a high public profile. Their choice will be an inspiration to others.

A majority of past recipients have been in the public eye, often in the entertainment business, because they have a high profile and can be easily influential with the public. Sometimes the recipient is not selected until the last minute in order to get someone in the current news.

Occasionally, a person from a more everyday walk of life is chosen such as a housewife, businessman, college student, etc., who has displayed extraordinary courage in fighting cancer.



AMERICAN CANCER SOCIETY COURAGE AWARD RECIPIENTS

Year	Recipient	Description
1998	Barry Bostwick	Actor
1997	Brett Butler	Baseball player
1995	Annie McKenzie Jennette Chessin	Breast Cancer Breast Cancer
1994	Norm Stewart Rodney Patterson	Basketball coach Basketball player
1993	Matilda Goodridge Jeremy Fleury	Socioeconomically Disadvantaged Survivors
1992	Senator Connie Mack Priscilla Mack	US Senator & wife
1991	Robert Polhill	Former hostage
1990	Dave Drevecky	Baseball player
1989	Steve Allen	Entertainer
1988	Jill Ireland	Actress
1987	Minnie Pearl	Entertainer
1986	Ann Jillian	Entertainer
1985	Jeff Keith	Marathon runner
1984	Amanda Blake	Actress
1983	Shelly Bruce	Entertainer
1982	Forrest Gregg	NFL Coach
1981	Karen Anderson	Housewife
1980	Otto Graham	NFL football player
1979	Tracy Andrus	Teenager
1978	Tom Harper	Naval Academy Midshipman
1977	Minnie Riperton	Entertainer
1976	Gene Littler	Professional Golfer
1975	Robert Johnson	West Point Cadet
1974	William Gargan	Actor
1973	Jack Pardee	NFL Coach
1972	Mike Finamore	College Student
1971	Marguerite Piazza	Opera Singer

DRAFT

COALITION FOR HEALTHIER SCHOOLS

The President
The White House
Washington, DC 20500

October 12, 2000

Re: SUPPORT FOR
HR 4094, America's Better Classrooms Act, and
HR 3705, Public School Repair and Renovation Act of 2000

Dear President Clinton:

We represent a growing number of national, state, and local groups of concerned parents, pediatric and public health experts, teachers and education support staff, and environmentalists. We are deeply concerned about the environmental conditions of America's schools.

We commend you for your federal executive order promoting children's environmental health and safety and for the multi-agency federal task force that is addressing this priority. We also thank you addressing federal investments in school infrastructure. More must be done.

Asthma is a leading cause of school absenteeism. Federal studies have documented an 'epidemic' of indoor air pollution in school. We believe all children deserve a healthy school environment, indoors and out. No child's educational potential or health status should be undermined by environmental hazards in the school environment, such as lead, pesticides, industrial cleaning chemicals, asbestos, and other pollutants. A recent survey of school nurses in New York State revealed that 71% of 206 nurses from 42 counties across the state knew of students whose learning, health, or behavior was affected by indoor environmental contaminants.

We recently asked Congress to act on legislation to rebuild schools. Today, we are alarmed that there appears to be no priority among congressional leaders to protect children's health and ability to learn at school through targeted, prioritized investments in school construction and repair. A copy of our coalition letter is attached for your information.

With all the challenges our students and their schools now face, can't we at least make sure they have a healthy school environment? Your leadership on this issue now will make a difference to the children and their teachers and other school personnel who daily try to meet new learning standards in substandard, deteriorated, polluted, and/or overcrowded buildings.

Sincerely,

Advocates for Children of New York
American Federation of State, County, and Municipal Employees
American Lung Association of New York State
American Public Health Association

Asthma and Allergy Foundation of America
Beyond Pesticides/National Coalition Against the Misuse of Pesticides
Center for Health, Environment, and Justice
Healthy Schools Network, Inc.
Massachusetts Healthy Schools Network
New York City Schools Chancellor's Parent Advisory Council
New York State Association of School Nurses
West Harlem Environmental Action

For more information:

*c/o HEALTHY SCHOOLS NETWORK, INC.
773 MADISON AVENUE
ALBANY, NY 12208
T-518-462-0632 www.hsnet.org*

Claire L. Barnett, Executive Director

Attachment (letter to Congress of Oct. 5th, updated Oct. 10th)

Withdrawal/Redaction Marker

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HEALTHY SCHOOLS NETWORK, INC.

www.hsnet.org

Tel: 518-462-0632

Claire L. Barnett - *Executive Director*

[001]

To: James Kvaal, Policy Adviser, The White House

From: Claire L. Barnett

Re: Letter to President Clinton, by fax

Date: October 12, 2000

The following is a letter to The President regarding the need to rebuild schools. Attached is our coalition letter delivered to all members of Congress October 5-6, 2000.

A number of other organizations will be given the opportunity add their names to the President's letter tonight and tomorrow.

If you have any questions, please call me at work at the number above, or at home in Saratoga Springs, NY at P6/(b)(6)



Environmentally safe and healthy learning environments for children, for personnel, and for their communities



THE SECRETARY OF EDUCATION
WASHINGTON, D.C. 20202

FAX TRANSMITTAL

TO Bethany Little

PHONE _____

FAX 456-5581

FROM Diane Rossi / Ben T.

PHONE _____

FAX 401-2098

PAGE(S) TO FOLLOW 6

DATE _____

MESSAGE: URGENT - info from today's press conf.
on Hill.

CONFIDENTIALITY NOTICE

THIS TRANSMISSION IS INTENDED FOR AND RESTRICTED TO THE NAMED ADDRESSEE ONLY. IT MAY CONTAIN CONFIDENTIAL AND/OR PRIVILEGED INFORMATION. IF YOU RECEIVE THIS TRANSMISSION IN ERROR, YOU ARE NOTIFIED THAT YOU ARE PROHIBITED FROM READING, COPYING, OR DISSEMINATING THE TRANSMISSION. PLEASE CALL 202-401-3000 TO ARRANGE FOR RETURN OF ANY TRANSMISSION SENT IN ERROR. THANK YOU.



**COMMITTEE ON EDUCATION AND THE WORKFORCE
U.S. HOUSE OF REPRESENTATIVES**

**FOR IMMEDIATE RELEASE
Oct. 11, 2000**

**CONTACT: Becky Campoverde
or Dan Lara
(202) 225-4527**

***Education at a Crossroads 2000 Report
Issued By Oversight Subcommittee
Report Highlights Examples of Excellence in Nation's Schools***

WASHINGTON – The Oversight and Investigations Subcommittee released today the report *Education at a Crossroads 2000: The Road to Excellence*, which examines states, districts, and schools that have emerged as examples of excellence and putting student performance first. The report also highlights the importance of reducing federal bureaucracy on schools; creating charter schools; empowering parents; and stopping waste, fraud, and abuse of education funds at the federal level.

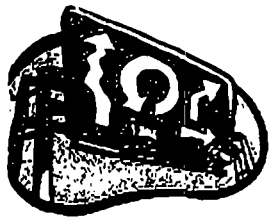
“Education at a Crossroads 2000 clearly shows how putting student performance first can change education in America and help to narrow achievement gaps so that no child is left behind,” said Oversight and Investigations Committee Chairman Pete Hoekstra (R-MI). “From school choice for children in failing schools in Florida, to tax credits and deductions for education in Minnesota, there are states, local schools, and districts that are transforming education so that it is more centered on children. They are succeeding by granting flexibility and accountability to put student performance first.”

“The results are dramatic when states and schools are freed from burdensome federal regulations and when parents have the freedom to control decisions for their children,” said House Education and the Workforce Committee Chairman Bill Goodling (R-PA). “Quality and results increase student achievement much better than quantity and process. Parental empowerment and flexibility are the keys to successful education reform.”

The main focus of the report is to highlight examples of quality reform efforts in America's schools, including public schools in Chicago, Texas, and Florida. For example, Chicago established a charter-school type relationship between itself and the state. Chicago was freed from certain mandates and regulations, and the result under the new system was increased accountability and student achievement.

###

(The report is available on the internet at <http://edworkforce.house.gov/circulation/circulatexroads.htm>.)



The Road to Mediocrity: What Doesn't Work

Millions Lost on Waste, Fraud and Abuse at the U.S. Department of Education

- Failed Audits
- Theft ring
- Embezzlement
- Duplicate Payments
- Incorrect Scholarship Notifications



A Federal Role That Produces Bureaucracy, Not Results

- 38 million hours of paperwork a year - the equivalent of 18,000 employees only filling out forms for one year.
- More than 760 education programs spread across 39 agencies that cost \$122 billion each year (FY 2000).
- Millions wasted on scores of research programs that have produce little knowledge about how to best teach children.



THE ROAD TO EXCELLENCE

...is putting student performance first!



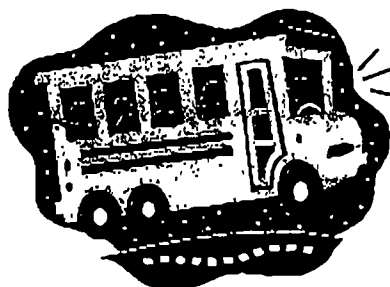
FINDINGS OF THE SUBCOMMITTEE ON OVERSIGHT AND INVESTIGATIONS 1999-2000

CROSSROADS 2000: THE ROAD TO EXCELLENCE

14 Hearings, More than 100 Witnesses

What Works in Education?

- ✓ Charter Schools
- ✓ School Choice
- ✓ Flexibility with Accountability
- ✓ High Standards for All Students
- ✓ Curriculum Grounded in Good Research
- ✓ Tax Credits and Deductions



Crossroads 2000

The Road to Excellence
...is putting student performance first!

Federal Education Funds Should Empower States and School Districts to

-  Raise Academic Achievement
-  Improve Teacher Quality
-  Reduce Class Size
-  Make Schools Safer and Smaller
-  Close the Achievement Gap

Republicans trust parents, teachers and local schools and believe that accountability coupled with flexibility is the best way Congress can help children learn.

We empower quality education with legislation that

- ✓ sends dollars to the classroom
- ✓ encourages basic academics
- ✓ trusts state and school districts empowers parents

Straight A's: Frees States and communities to tailor federal dollars to meet needs of students. (H.R. 2300)

Ed-Flex: Waiver flexibility for Federal programs (P.L. 106-25).

Subcommittee on Oversight and Investigations
Committee on Education and the Workforce
U.S. House of Representatives



The Road to Mediocrity

Inequities in Access to High Quality Education

Stagnant achievement and widening gaps are consequences of failing to put student performance first and to reward results and high standards for all students.

Achievement Gaps Remain Wide

- The reading achievement gap between White and African American 9-year-old students ends the decade the same as it was in 1990. (1999 NAEP)
- The math achievement gap between 17-year-old white and African American students increased 5 points during the 1990s. (1999 NAEP)

Not all Americans Are Satisfied with Their Schools

- A 1999 Poll by the Joint Center for Economic Studies found that while 59 percent consider their local public schools to be excellent or good, only 39.7 percent of African-Americans rated their local schools that highly.
- 58 percent of employers surveyed say that graduates coming from public schools lack the skills needed to succeed in the work world.

EDUCATION REFORM CAUCUS

REPUBLICAN EDUCATION QUIZ #11

Pete Hoekstra and Bob Schaffer, Co-Chairmen

EDUCATION AT A CROSSROADS 2000: PUTTING STUDENTS FIRST

Today, the Crossroads 2000 report was released with updated information and findings. It builds upon the unprecedented findings of the first Crossroads report and lays out the future road to excellence for American students. The following questions are based on Crossroads 2000.

Director:
Doug
Mesecar

Phone: (202)
225-4676

Fax: (202)
225-5870

Mail:
212 Cannon.
Washington.
D.C. 20515

1. **True or False.** For the first time since the National Assessment of Educational Progress (NAEP) began measuring academic achievement 30 years ago, an entire decade has passed without significant and substantial achievement gains.
 - a. True
 - b. False
2. **True or False.** For the last 12 years, most achievement gaps have actually been widening, and the gains made during the 70s and 80s are beginning to evaporate.
 - a. True
 - b. False
3. According to the Congressional Research Service, the number of Congressionally funded programs at the Department of Education has steadily _____ for the last four fiscal years.
 - a. Increased
 - b. Decreased
4. **True or False.** Despite recent reductions, the Department still requires more than 38 million hours of paperwork a year - the equivalent of 18,000 employees only filling out forms for 1 year.
 - a. True
 - b. False
5. Who said, "The [education] department has suffered from mistrust and management neglect, almost from the beginning. To overcome this legacy and to lead the way in national education reform, ED must refashion and revitalize its programs, management and systems."
 - a. Former Education Secretary William Bennett
 - b. Current Education Secretary Richard Riley
 - c. Vice-President Al Gore
 - d. NEA president Bob Chase
6. **True or False.** Over the last 8 years, the Vice-President has succeeded in his stated goals for education.
 - a. True
 - b. False
7. **True or False.** Former Education Secretary William Bennett said, "We must fundamentally change the way the federal government treats public schools. If we continue down the current road -- where responsibility, authority and accountability for American education flow not toward but away from parents, especially poor parents -- then we will continue to see ... too much low performance, too many bad schools, too many wasted lives."
 - a. True
 - b. False

EDUCATION AT A CROSSROADS 2000: PUTTING STUDENTS FIRST

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☒ a. True ☐ b. False

**The White House
Presidential Scheduling**
(1446)

TO: Loretta Ucelli
Minyon Moore
Christine Stanek
Seth Applebaum
✓ Anna Richter
Nancy Hernreich

DATE: 11/07/00

FROM: Carrie Street
Presidential Scheduling
184 OEOB/456-5487

ATTACHED: 1 request

☒ Please advise on
how to respond

☒ For your information

☐ For your action

☐ As you requested

☐ Please call me regarding
the attached

☐ Please prepare
response per
instructions below

☐ For your approval
Consideration

☐ For Surrogate

☐ Please prepare
Scheduling
Proposal

COMMENTS:

Please advise on the attached request from Deborah Jospin inviting the President to attend the kick-off of the Dan Dutko Memorial Foundation on November 27, 2000.

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10-20-00 BC&F
To Cohen for
Reply
cc: scheduling
coord w/ scheduling

Deborah R. Jospin

P6(b)(6)

October 19, 2000

The Honorable William Jefferson Clinton
The President of the United States
The White House
Washington, D.C. 20500

Dear Mr. President:

I want to tell you about something really wonderful that we have created to honor the memory of my late husband, Dan Dutko. The eight partners of the Dutko Group Companies and I have established the Dan Dutko Memorial Foundation, Inc., a 501(c)(3) nonprofit organization. The Foundation will sponsor the Dan Dutko Fellowship Program-- a graduate education program in public policy management. Those of us who knew Dan so well knew that he enjoyed nothing more than mentoring young people as they navigated Washington's sometimes choppy waters. By supporting graduate and post-graduate level students who have demonstrated an interest in gaining a more intimate understanding of, and involvement with, the legislative and political processes, the Dutko Fellowship Program will honor and continue Dan's pursuit of helping others achieve excellence. The Fellowship program will be operated in partnership with the Tufts University College of Citizenship and Public Service.

On November 27, 2000, we are kicking off the Foundation. Our Co-hosts for the event are Kathleen Kennedy Townsend and Jeanne Shaheen, two women who sought Dan's advice early and often, and about whose lives and careers Dan cared deeply. At that time, we will introduce the members of the Advisory Board, friends and colleagues of Dan who have agreed to give or raise \$10,000 for the Foundation. Many of your friends, including Alan Solomon, Garry Mauro, Lukin Gilliland, Eli Segal, and Carol Pensky, were quick to sign on. Many others will be signing on in weeks to come.

The Dutko Group partners and I would be so honored if you would agree to Chair the Foundation's Advisory Board for the first two years of its start-up phase. We also hope that your schedule will allow you to attend the large evening event on the 27th and then a dinner for the Advisory Board immediately following. If that evening does not work for you, then perhaps you could join the members of the Advisory Board for lunch that day or any other day that works. I will follow up with your staff.

Thanks so much for considering this request.

Best,

Deb Jospin

Deborah Jospin

Cc: Minyon Moore

BC & F
per Lisa
coordinate
w/ scheduling
on 10/26



September 11, 2000

Ms. Karin Kullman
Director of Communications & Events
The White House
Old Executive Office Building
1700 Pennsylvania Ave., NW
Washington, DC 20502

Dear Ms. Kullman,

The mission of the Kaiser Family Foundation is to provide timely, reliable, and non-partisan information on national health issues to policymakers, the media, and the general public. As a major next step in advancing that mission, the Foundation will launch the Kaiser Health Information Network at www.kaisernetwork.org in the fall. This new free service will feature HealthCast, Internet broadcasts of briefings, speeches, seminars, press conferences, and congressional hearings. Many events will be live and all will be archived for later viewing. Kaisernetwork.org will also provide three daily news summary reports on health policy, HIV/AIDS, and reproductive health, a national health policy calendar, as well as an online clearinghouse of the latest health policy ads.

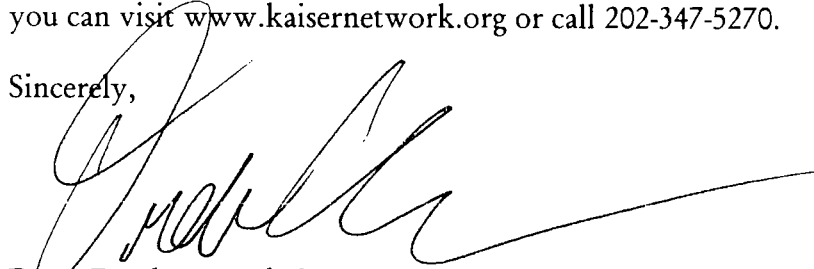
As we prepare to launch, we are seeking the assistance of key members of the audience we hope to serve such as you. Whenever you alert the press about an event, a new ad, or the latest comment on an issue, please inform us as well. We may add your events to our webcasting schedule, include it in the national calendar, or include information from your office in one of the Kaiser Daily Health Reports. Please include the Kaiser Network on any press, fax, mail, and email lists. We can be reached via email at kaisernetwork@kff.org or via fax at 202-347-7302.

To date, the Kaiser Network has produced several pilot webcasts. In June, we offered live coverage of the Academy for Health Services Research and Health Policy annual meeting in Los Angeles. One of the featured sessions was a discussion of the health policy proposals of the two major presidential candidates. This webcast can be found

at www.kff.org/kaisernetwork, along with other archived pilot webcasts. Special resources are included with each webcast, such as speaker biographies, policy reports, and links to useful sites. In the fall, HealthCast will offer a powerful search engine to help you find the part of any event you wish to view. And by year's end, we expect to have covered more than 30 events and archived 100 hours of health policy programming.

If you would like more information about the Kaiser Health Information Network you can visit www.kaisernetwork.org or call 202-347-5270.

Sincerely,

A handwritten signature in black ink, appearing to read 'Drew E. Altman', with a long horizontal flourish extending to the right.

Drew E. Altman, Ph.D.
President

Enclosure



(()) kaisernetwork.org

K a i s e r H e a l t h I n f o r m a t i o n N e t w o r k

*A free
webcasting
and news
summary
service of
the Kaiser
Family
Foundation*

The Kaiser Family Foundation is establishing the Kaiser Health Information Network, a free daily online information service for the health policy community, the news media, and the general public. Launching this fall, the Kaiser Network will provide live broadcasts of health policy events on the Web and other online services at www.kaisernetwork.org.

HealthCast

- Online video and audio coverage of key congressional hearings, meetings, press conferences and other health events in Washington and across the country.
- Background information, links to relevant research and Web sites, interviews, and archives of previous webcasts.
- "Keyword search" enabling users to locate specific audio/video segments from archived webcasts.
- Email reminders of upcoming events.

Calendar

- Comprehensive list of events on health policy, reproductive health, and HIV/AIDS, customized by topic.
- Schedule of upcoming HealthCasts.

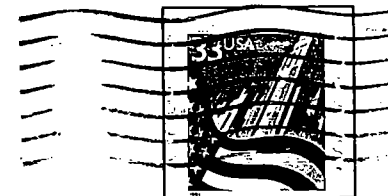
Daily News Summary Reports

- Three daily online reports in health policy, HIV/AIDS, and reproductive health, offering daily summaries of national and regional news and links to the original articles.
- Fully searchable archive.
- Email updates customized by users.

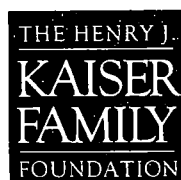
Ad Watch

- Up-to-date video library of national and state level health policy ads.
- Analysis of ad messages, facts about the issues, scope of the "ad buys," and ad sponsorship information.

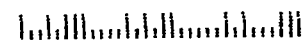
Email press releases, calendar submissions, questions or comments to kaisernetwork@kff.org. Visit www.kff.org/register to register for regular email distribution of the Daily Reports or to obtain information on upcoming webcasts.



Ms. Karin Kullman
Director of Communications & Events
The White House
Old Executive Office Building
1700 Pennsylvania Ave., NW
Washington, DC 20502



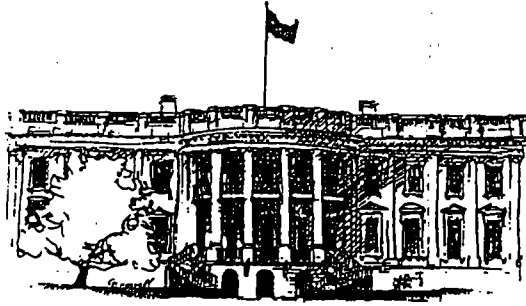
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kaisernetwork.org
Kaiser Health Information Network



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**The White House
Presidential Scheduling**

TO:

Anna

DATE:

9/22

FROM:

Carrie Street
184 OEOB/456-5487

ATTACHED:

☒ Please advise on
how to respond

☐ For your information

☒ For your action

☐ As you requested

☐ Please call me regarding
the attached

☐ Please prepare
response per
instructions below

☐ For your approval

☐ For Surrogate
Consideration

☐ Please prepare
Scheduling
Proposal

COMMENTS:

*Is this something DPC would like to
pursue? If you recommend a regret, please
return to me.*

Thanks!

Carrie

CC:

50-2
ORM
50-2
open



Landmark
Medical Center

August 29, 2000

408057



427942

The President
The White House
1600 Pennsylvania Avenue NW
Washington, DC 20500

Dear Mr. President:

Several weeks ago, I had the honor of sitting next to you at a birthday party in honor of Congressman Patrick Kennedy.

As Congressman Kennedy mentioned when he introduced me to you, I am the CEO of a community hospital in his district. Our hospital serves a very large elderly population as well as a rapidly growing young and underprivileged patient group. Over 70% of the care we provide is funded by federal and state agencies so I know first hand how difficult it is to provide necessary medical treatment in the light of recent severe cuts in federal and state healthcare spending.

Maintaining the staffing levels that are needed to ensure quality care has become a struggle. Our employees are pressing for wage and benefit increases that they truly deserve -- but we simply do not have the resources to provide them. Our patients are rightfully discouraged, and sometimes even suffer setbacks, when we are forced to consolidate or curtail essential programs we can no longer afford.

I know that you are personally committed to restoring many of the deep cuts mandated by the Balanced Budget Act of 1997. And I appreciate the fact that you are also committed to achieving greater efficiency in federal healthcare spending at the community hospital level. I believe that my experience as a community hospital CEO and the ideas I have developed during my tenure could assist you in meeting these goals and improving healthcare delivery for a broad range of Americans.

I realize that you are an extraordinarily busy person, however I would welcome the opportunity to speak with you regarding these vitally important issues.

Thank you for your time and your continued support for quality healthcare for all Americans.

Yours respectfully,

Gary J. Gaube
President

GJG/arp

c: Congressman Patrick Kennedy

Fogarty Unit
Eddie Dowling Highway
North Smithfield, RI 02895

401-769-2200

Woonsocket Unit
115 Cass Avenue
Woonsocket, RI 02895

401-767-3211

Anna

This is Mayor Daley's EITC brochure. Looks pretty meaty to me. They'd be happy to release this with us. Right now they are considering releasing it at a CEOs for cities meeting on 10/19 & 20.

This could really be a great event!

How the City of Chicago helped working residents maximize their tax refund
(and how your city or region can, too)

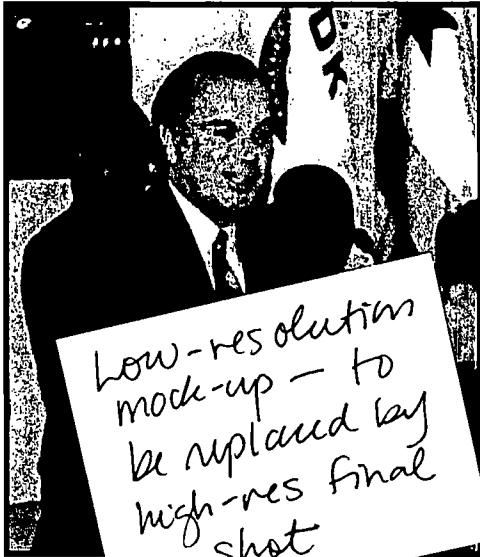
MAYOR DALEY'S
EARNED INCOME
TAX CREDIT
OUTREACH INITIATIVE

It's Money in Your Pocket.

How Chicago helped its residents

capture more of the tax credit

Many working people fail to claim all they are owed under the tax laws. In Illinois alone, hundreds of millions of dollars are left on the table each year by people who fail to claim the federal Earned Income Tax Credit (the "EITC"). We set out to put that money back in the pockets of Chicagoans who worked so hard to earn it.



We launched a citywide outreach campaign to educate taxpayers about the credit and encourage them to apply. We created a partnership that includes the city, the business and foundation communities and non-profit tax preparers to design and implement the initiative.

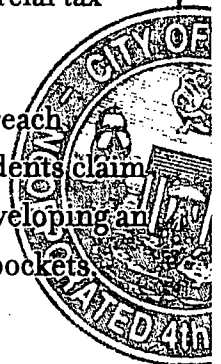
The outreach campaign used television, radio, print media, a website, transit advertising, movie trailers – even 60 million grocery bags – to spread the word about the EITC. Our message was simple: the Earned

Income Tax Credit means "money in your pocket."

Thousands heard that message and applied for the credit, many for the first time. Millions of dollars came to Chicagoans through free volunteer tax preparation sites, with **tens of millions more** going to taxpayers who filed their own taxes or asked about the EITC at commercial tax preparation services. We hope to do even better in 2001.

We want to share what we have learned during our EITC outreach initiative so that other cities and regions can help their residents claim the credit. We hope this booklet will lead you to consider developing an EITC initiative for your area, to put money in *your* citizens' pockets.

Mayor Richard M. Daley
CITY OF CHICAGO



Outreach created record-breaking year at volunteer centers

The tax season that ended on April 15, 2000, was the busiest in the history of our non-profit organizations. Our volunteer

**MAYOR DALEY'S
EARNED INCOME
TAX CREDIT
OUTREACH INITIATIVE**
It's Money in Your Pocket.

tax preparation specialists in and around Chicago helped nearly 12,000 individuals and families

fill out their tax forms. Most went home expecting a refund, usually a large one thanks to the Earned Income Tax Credit.

Two factors drove this year's success. One was the City's widespread information campaign that alerted taxpayers about the tax credit and our services. The message went out in so many ways and with such consistency that thousands applied for the credit for the first time. The second factor was just as important. Our centers pushed hard to recruit, train and manage a small army of volunteers to help the taxpayers. More than 1,200 were involved at our centers alone. It couldn't have happened without them.

Many things combine to create a successful tax credit initiative, but two are absolutely critical: effective outreach and trained volunteers.

David Marzahl

TAX COUNSELING PROJECT
CENTER FOR LAW AND HUMAN SERVICES

Bob Burke

TAX ASSISTANCE PROGRAM - IT ADDS UP®

She counts on the money

Willie B. Parks earned \$11,700 last year working the overnight shift at a maker of automotive brake parts. Running a household that includes her 19-year-old son LaFraye and 18-year-old niece Shareese, she doesn't have any money to spare.



© Mark Polomaker

Thanks largely to the Earned Income Tax Credit, Parks received a tax refund of \$3,821 in the year 2000 after having her tax returns prepared by a volunteer at the Tax Counseling Project's site at Rudy Lozano Library. "I count on that refund," says Parks, who has received a big check for the last few years. "I use it to pay the light and telephone bills and buy clothing and other things we need."

New home for the outreach effort

The EITC outreach campaign developed by the Mayor's Office has been moved to the Mayor's Office of Workforce Development (MOWD), which provides a range of work-related services including job training and placement. "EITC is a credit, not a deduction or handout," says MOWD Commissioner Jackie Edens, who was a key spokesperson during the outreach initiative. "People who qualify for it work every day to earn a living. They deserve our help in obtaining the money they have earned."

For more information about the initiative, contact Julie Rubins Willen at the Mayor's Office of Workforce Development at 312-744-WORK.

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15 FINANCIAL EDUCATION 16 LESSONS LEARNED 17 RESOURCES

The EITC:

An underused resource for American families

Who is eligible? Working people

A wide range of taxpayers are eligible for the EITC in the year 2000:

- Workers earning less than \$31,152 who have two or more qualifying children can receive up to \$3,888.
- Workers raising one child who earn up to \$27,413 can be eligible for a refund up to \$2,353.
- Individuals without children who earned less than \$10,380 can receive up to \$353.

The largest credits are for families earning less than \$12,690. The IRS can supply additional information. Call 1-800-829-1040 for details.

Every year across the United States, millions of taxpayers miss out on a tax credit specifically designed for them: the Earned Income Tax Credit.

Created by Congress in 1975 and greatly expanded since then, the Earned Income Tax Credit, or EITC, provides a lump-sum payment to working individuals and families below certain income levels. The program puts real "money in the pockets" of workers with modest incomes. And they can use it. Surveys show that recipients use the tax credit to pay utility and credit card bills, buy clothes for children and make long-deferred purchases of furniture and other household needs. Many also use the cash for their upward mobility, paying college tuition or buying a used car to get to work.

The EITC is an economic development tool not just for individuals but also for local economies. The credit brought an estimated \$1.2 billion into the Illinois economy in 1998. As that money was spent in neighborhood stores and deposited at local banks, it was recirculated through the region's economy.

Unfortunately, the EITC and other federal tax credits remain unclaimed by many taxpayers. Studies have shown that as many as 18 to 25 percent of all families eligible for the EITC have failed to apply for the benefit, usually because they don't know about it or don't know how to apply. That's millions of dollars lost to those families and to the communities in which they live, work and shop.

This booklet describes Chicago Mayor Richard M. Daley's Earned Income Tax Credit Outreach Initiative, a public-private partnership launched in 1999-2000 to get the word out to Chicago-area taxpayers about the EITC. The effort worked. Virtually every one of Chicago's 2.7 million residents "got the word" about the EITC:

- 4.2 million notices went out with utility bills.
- 1 million other fliers were distributed.
- Employers reached an estimated 900,000 of their employees.
- Community organizations and government agencies passed the word to about 500,000 people.



© Marc Potempanzer

- Hundreds of radio spots reached millions of listeners.
- Tens of millions of eyes read the EITC message on transit cards, movie trailers and grocery bags.

Thanks to all this publicity, volunteer tax preparation centers in and around Chicago provided free services to 20 percent more individuals and families than the year before. Tax refunds through the centers grew by almost \$3 million. And since the majority of taxpayers either prepared their own taxes or used commercial tax-preparation services, many millions of additional dollars were returned to taxpayers as a result of the campaign.

The Chicago campaign didn't always go as planned, and some components worked better than others. Those lessons, along with the successes and some ideas for next year, are included here so that others can learn from – and replicate – the Chicago experience. As Mayor Daley noted, "This is money that's there for the asking."

How Chicago's initiative helped working residents claim the credit

Chicago's EITC campaign was conceived in the late summer of 1999. It was put together on a tight schedule and with a modest budget, but it had the leadership and program management resources of the Mayor's Office, two non-profit organizations, the foundation community and three local business groups. That was enough to get things started.

1. Planning. The core team began meeting in August to formulate a strategy to put together the initiative. Three elements would be crucial: corporate partners, publicity aimed at businesses and potential filers, and expertise in tax preparation.

2. Partners. The business groups and Mayor Daley put out the word that the City needed partners that could help promote the tax credit. Seven corporations stepped forward as campaign partners, including the gas and electric utilities, a major grocery chain and a major hotel chain. A non-profit service agency joined up. Three foundations made significant contributions to the initiative and four corporations pitched in with funds.

Scores of community groups joined in the outreach efforts.

3. Tax experts. The two volunteer-driven tax-preparation organizations expanded their recruitment and training to accommodate the expected increase in demand for their services. The team worked with the Internal Revenue Service to secure tax forms and set up electronic filing at some sites.

4. Launch. The campaign kicked off with a corporate breakfast in December at LaSalle Bank. Mayor Daley urged attendees to support the campaign through publicity within their companies, volunteer recruitment and participation in community outreach. A first wave of newspaper stories announced the campaign.

5. W-2 season. The initial publicity blitz was timed to coincide with the late January distribution of the federal W-2 tax documents. Hilton Hotels hosted an EITC breakfast for more than 100 community organizations, and the "It's Money In Your Pocket" campaign began in earnest.

CONTINUED ON PAGE 4

Using grocery bags, videos and an employee contest, the Dominick's Finer Foods grocery chain made sure all 19,000 of its employees and millions of customers found out about the Earned Income Tax Credit.

The Safeway-owned chain printed 60 million plastic bags that promoted use of the EITC and began filling the bags with groceries during the third week in January. The chain also prepared a 30-second public service announcement for periodic broadcast in its stores.

Dominick's went all out to educate employees

Dominick's
The Fresh Store

as well, with special attention to the 11,000 who might

qualify for the credit. That outreach included:

- **EITC video.** An IRS spokesperson gave a presentation via Dominick's video communications system, and provided videotapes for viewing in break rooms.

- **Check stubs.** Dominick's put EITC messages on every employee check stub from January through April, referring employees to a City of Chicago information number (311) and the IRS hotline (1-800-829-1040).

- **Employee newsletter.** Dominick's *Fresh Talk* newsletter featured a page one story that included EITC eligibility criteria, application instructions and phone numbers for more information.

- **Filing discount.** Employees were given a discount if they chose to file their taxes at H&R Block.

- **\$1040 contest.** All Dominick's employees could enter a "1040" sweepstakes for a chance to win up to \$1,040 worth of groceries. More than 4,000 participated.

Additional costs were minimal, said Dominick's President Tim Hakin, because the campaign used existing communication resources. The chain periodically provides space on its bags for public service campaigns.

First things first:

Bring together the necessary resources



CONTINUED FROM PAGE 5

6. Outreach, outreach, outreach. Word was spread through radio, TV, community organizations, employers, utility bill inserts, school report cards, fliers and grocery bags. A dedicated website – www.moneyinmypocket.com – made its debut. The goal was for Chicago residents to hear or see the message repeatedly. The message was simple, clear and consistent, and it provided phone numbers to call for more information.

7. Filing the returns. Taxpayers descended by the thousands on the 22 Chicago-area volunteer-operated tax centers advertised as part of the campaign. More than 1,200 volunteers worked with taxpayers to help them claim their tax credits. Thousands more filed for the credit themselves or through a commercial tax service.

8. Publicity blitz. Outreach intensified through February and March with public service announcements, talk shows, ads on buses and trains, movie trailers and features in company newsletters.

9. April 15. The filing deadline provided a final opportunity to promote the credit. The outreach worked so well that some volunteer tax-prep centers were swamped.

10. Success. The 1999-2000 initiative helped increase the number of clients at volunteer tax centers by 20 percent and encouraged thousands more to file for the credit themselves or through their commercial tax preparer.

The deadline clock was already ticking when Chicago leaders got together in late summer to discuss an outreach initiative for the Earned Income Tax Credit. Could a large-scale campaign be organized and launched in only a few months? The answer was yes, but only because the right partners signed on to a fast-track process.

Smaller-scale outreach campaigns had been organized for several years by the Tax Counseling Project (TCP), of the Center for Law and Human Services funded by the Mayor's Office of Workforce Development, but after several briefings between the center's leadership and the Mayor's Office, Mayor Daley made the decision to organize a comprehensive citywide effort.

The core team was assembled by Judy Gold, Chief of Policy in the Mayor's Office, who relates: "It's a policy priority for the City to find ways to reward work, and make work pay. The EITC is a great way to do just that." The core team included the leaders of three top business groups and two non-profit

tax preparation organizations. They reached out to others in the corporate and civic communities to get the commitments and expertise needed to move forward. "We spent a lot of time in detail-oriented meetings,

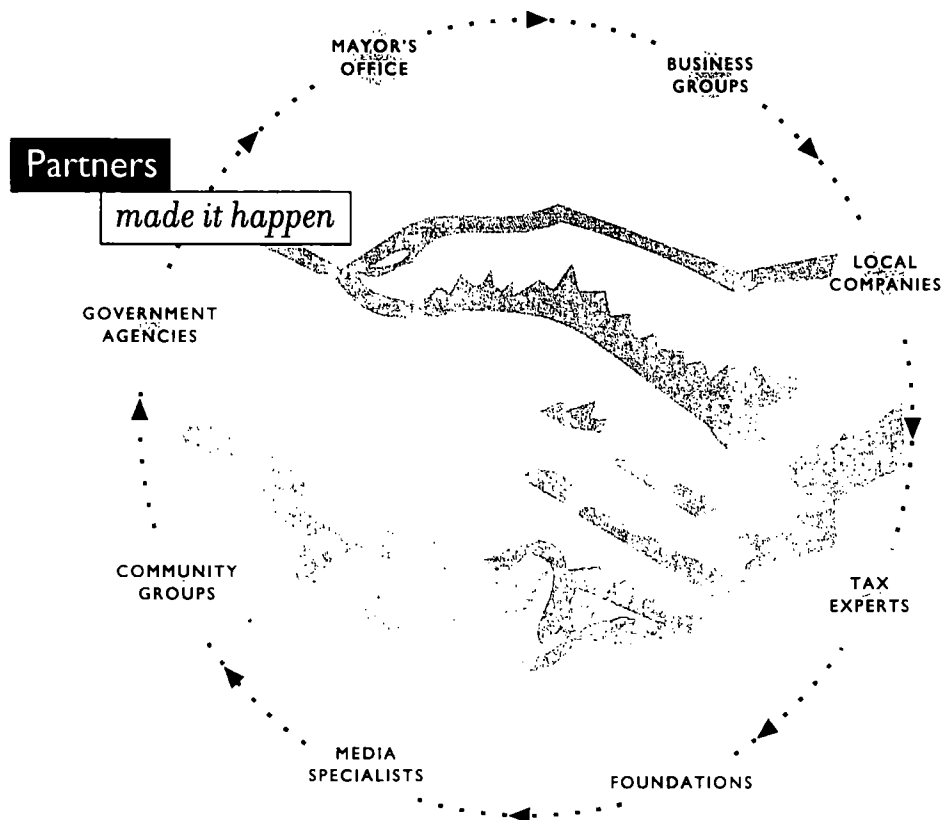
Two objectives were to recruit corporations and to build up the volunteer tax-preparation network.

talking about what resources we would need," remembers Paul O'Connor, executive director of the Chicago Partnership for Economic Development. "One of the biggest things in our favor was the leadership of the Mayor. This really made a difference when we were looking for partners."

The two major objectives were to recruit corporations to help promote the EITC and to build up the volunteer tax-preparation network so that it could handle an influx of new filers. Hundreds of details also had to be addressed: budgets, timelines, event management, media relations, and design, printing and distribution of materials. With so many

partners involved, coordination was key, as was keeping the message direct and consistent. Standard wording was developed, scripts and sample letters were distributed, and a graphic identity was applied to all materials.

Planning shifted to implementation as the outreach campaign kicked off in December. The pace picked up in January and reached a crescendo in February and March, when it seemed the whole city was inundated with the EITC message. Deputy Chief of Policy Rebecca Levine, who managed the initiative for the Mayor's Office, said she knew it was a success while shopping for groceries one day. "On the way to Dominick's, I heard a public service announcement about the EITC on the car radio, and in the store I heard an EITC message over the audio system. When I was handed my groceries in an EITC bag, I knew that a lot of people were being reached."



MAYOR'S OFFICE

Provided leadership, coordination, management support, resources of City departments and use of the City's 311 telephone information service.

BUSINESS GROUPS

Three organizations were full partners: the Chicagoland Chamber of Commerce, Chicago Partnership for Economic Development and Civic Committee of the Commercial Club. Each promoted the EITC to members and signed up businesses as partners.

LOCAL COMPANIES

Seven firms became major partners. Hundreds of others promoted the EITC to their employees through paystub messages, videos, newsletters and other methods. Many made donations and/or recruited volunteer tax preparers.

TAX EXPERTS

Two non-profit groups, the Tax Counseling Project (TCP) of the Center for Law and

Human Services and the Tax Assistance Program – It Adds Up®, provided their expertise of the tax system, as did the Internal Revenue Service. The non-profits recruited volunteers and managed 22 Chicago-area tax preparation centers.

FOUNDATIONS

Three philanthropic organizations provided operational funding: the John D. and Catherine T. MacArthur Foundation, the Steans Family Foundation and the Woods Fund of Chicago. The Annie B. Casey Foundation supported documentation of the campaign.

MEDIA SPECIALISTS

June Rosner Public Relations helped with media strategy, placed news stories and arranged interviews and talk shows. Website developer Zefer created the www.moneyinmypocket.com site.

COMMUNITY GROUPS

Non-profits including the Jewish Federation of Metropolitan Chicago, the United Way

Campaign of Mercy and Catholic Charities distributed information to member agencies. Hundreds of churches, neighborhood organizations and public agencies promoted the EITC to their members, clients and employees.

GOVERNMENT AGENCIES

The Illinois Department of Human Services helped develop and distribute customized outreach materials for target audiences including elderly and disabled taxpayers and women making the transition from welfare to work. The Department of Children and Family Services mailed a tax booklet developed by the Tax Counseling Project to more than 40,000 foster and adoptive parents. The Chicago Park District, Chicago Public Schools, Chicago Housing Authority, Mayor's Office of Workforce Development and other City departments helped with outreach.

Getting the word out:

Start early and repeat often

The goal of the Chicago outreach campaign was to increase the number of people claiming the credit by reaching as many residents as possible with the EITC message. From December to April, Chicago-area residents

LaSalle Bank CEO Norman Bobins and Chicagoland Chamber of Commerce President Jerry Roper explained how the credit could help employees, customers and the local economy. The Mayor's Office staff, Chicagoland Chamber and the Chicago Partnership for Economic Development followed up with letters and phone calls to ask what outreach methods would be used and to offer help with company outreach efforts.

Press notice was triggered by the kickoff, with advance stories in the *Chicago Tribune* and *Chicago Sun-Times*. Supportive editorials and op-eds appeared in the *Tribune* and in *Crain's Chicago Business*, which said "a critical step is to get local employers involved in this worthwhile effort." Articles appeared in specialty newspapers serving teachers, African-Americans, Lithuanian-Americans and public housing residents.

The City's sister agencies also were helpful. The **Chicago Public Schools** arranged for a holiday letter to be sent home with students, urging families to apply for the tax credit. It included phone numbers for the volunteer tax preparation centers, and those phones started ringing. A **briefing for the city's 50 aldermen** was held January 12 and followed up with distribution of 50 information packets and 25,000 fliers. **Paystub messages and inserts** were included in the pay envelopes of 100,000 public-agency employees, and EITC information was sent home with January report cards for nearly half-a-million Chicago school children.

The second major campaign event was a **community organization breakfast** hosted by Hilton Hotel and Towers on January 19. The 150 attendees learned how they could bring EITC



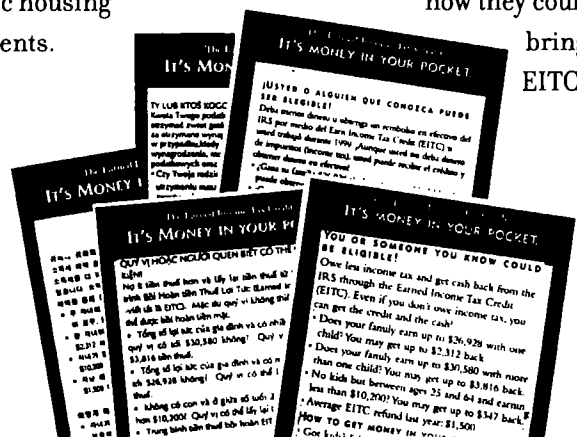
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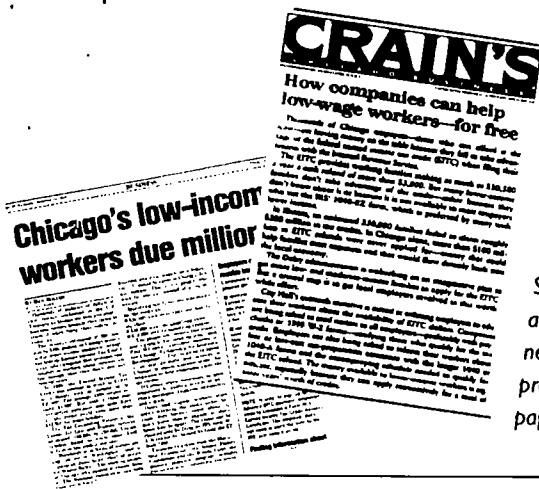
Many of the initiative's leaders were featured in TV and radio spots, including David Marzahl, above, Executive Director of the Center for Law and Human Services, which operates the Tax Counseling Project.

repeatedly heard and saw information about the EITC and how it could mean real money for them or someone they know.

Introducing the EITC

It all started with a **corporate kickoff breakfast** on Dec. 14, 1999 at LaSalle Bank. The standing-room-only crowd of 125 business leaders listened as Mayor Daley,





Stories and editorials appeared in the daily newspapers, business press and community papers.

dollars back into their communities through outreach to their employees and clients. A news conference the next day at the Tax Counseling Project's site at the Rudy Lozano Library featured the Mayor and five of the project's partners. It triggered articles in four newspapers and stories on three television stations, and announced the launch of the initiative's dedicated EITC website, www.moneyinmypocket.com.

Fliers, Talk Shows and More

The campaign continued to gain momentum in February. Corporate partners launched their campaigns to reach an estimated 790,000 employees, using paycheck stubs, video and audio messages, e-mails, newsletters and fliers. Thanks to advance work by a partner at WGN-AM, 21 radio stations began airing EITC public service announcements based on scripts provided by the initiative. Information and program materials were distributed at events such as the Minister's Census

Breakfast, which reached about 300 faith-based organizations.

The largest-scale information vehicles of the campaign made their appearance in February. Millions of Dominick's grocery bags were distributed each week. Distinctive red EITC fliers were included in the electric bills of 3.2 million ComEd customers, and in case that wasn't noticed, ComEd's monthly customer newsletter included a story about the Tax Assistance Program's services. Another million newsletters arrived with Peoples Energy gas bills, featuring a reproduction of the IRS Form EIC and phone numbers for more information.

At the same time, the public relations partner was lining up EITC speaker appearances on more than a dozen TV and radio talk shows. Key members of the team appeared on the 30-minute People to People show on super-station WGN-TV, reaching across the Midwest and beyond. They also

CONTINUED ON PAGE 8

Budget leverage: a 14 to 1 return

Thanks to corporate sponsors and in-kind donations, the Chicago outreach effort was accomplished with a cash budget of under \$200,000. That amount brought a documented increase of nearly \$3 million in tax refunds to working citizens, providing a minimum return of more than 14 to 1. Because the volunteer tax preparation centers represent only about 3 percent of all tax filers, the total impact of the campaign is estimated in the tens of millions of dollars.

CASH • The largest cash expenses were for radio advertising, printing and installation of transit cards, public relations and operation of tax preparation centers.

IN-KIND • Donations included large contributions of printed fliers by Blue Cross-Blue Shield of Illinois and ComEd; creation of the website by Zefer; and informational breakfasts sponsored by LaSalle Bank and Hilton Hotels. June Rosner Public Relations provided vastly more services than covered by its fee.

LABOR • Hundreds of hours of executive-level work were contributed to the project by all the partners. Three interns in the Mayor's Office devoted substantial time to the project for four months. Most of the overhead and operational costs of the tax preparation sites were covered by grants and contracts that preceded the outreach effort.

SOURCES OF FUNDS • The John D. and Catherine T. MacArthur Foundation provided a major grant. The Woods Fund of Chicago supported outreach expenses. Bank One, Dominick's, United Airlines and JMB Realty provided substantial cash donations. The Steans Family Foundation supported creation of a new tax preparation center and related community outreach.



Mayor Daley and others promoted the tax credit at a Ministers Breakfast.

CONTINUED FROM PAGE 7

pitched the EITC on a **drive-time segment** on Moody Broadcasting's Prime Time America. One of the biggest hits was an interview with a tax assistance partner on the **call-in show Carina: Su Mejor Amiga**. Listeners on two Spanish-language radio stations lit up the program's phone lines and prompted a one-hour extension of the show so the tax assistance expert could answer more EITC questions.

Fliers and information packets were distributed to business and non-profit partners. DePaul University

used 18,000 fliers for distribution on its campuses. City Colleges of Chicago handed out 72,000 fliers, Chicago State University needed 9,000 and University of Illinois at Chicago used 18,000. Community agencies and ethnic organizations distributed hundreds of thousands of fliers in **more than a dozen languages**, including Polish, Vietnamese, Korean, Laotian and Spanish.

The Final Push

A campaign expansion was launched in March. **Paid advertisements** aired on four radio stations and appeared in newspapers with community or ethnic audiences. Transit advertisements were posted on 3,000 buses and trains, exposing **1.2 million riders per day** to the campaign slogans of "Money In Your Pocket" and "It Makes Dollars and Sense." The same slogans were projected on the screens at **73 movie theaters**.

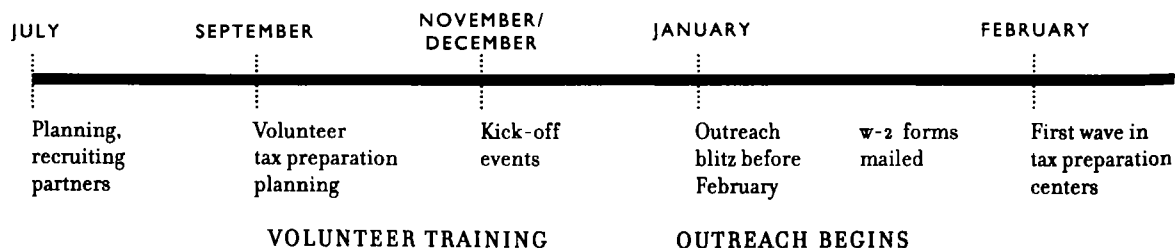
The initiative's website, **www.moneyinmypocket.com**, saw a surge in traffic in March, with more than 80,000 "hits." The attractive, easy-to-use site offered potential filers a quick way to check on eligibility and provided employers with information on how they could promote the credit.

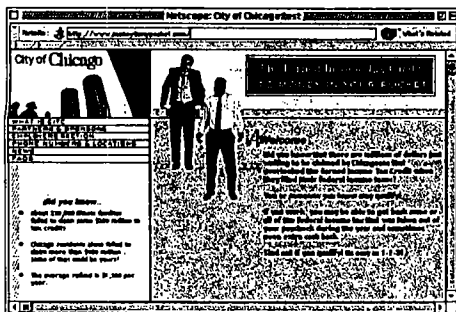
Building on this multimedia blitz, campaign partners made presentations at another series of community meetings, including a **ministers breakfast** sponsored by Dominick's, several meetings of local business councils and a gathering of human resources professionals in the **hotel industry**, which has many employees who would qualify for the credit.

Newly-Created State EITC

In the final days of the campaign, the tax credit got another boost as the **Illinois state legislature** considered and passed a bill to create

The EITC project requires year-round activity





The EITC website helped residents determine if they might qualify for the credit.

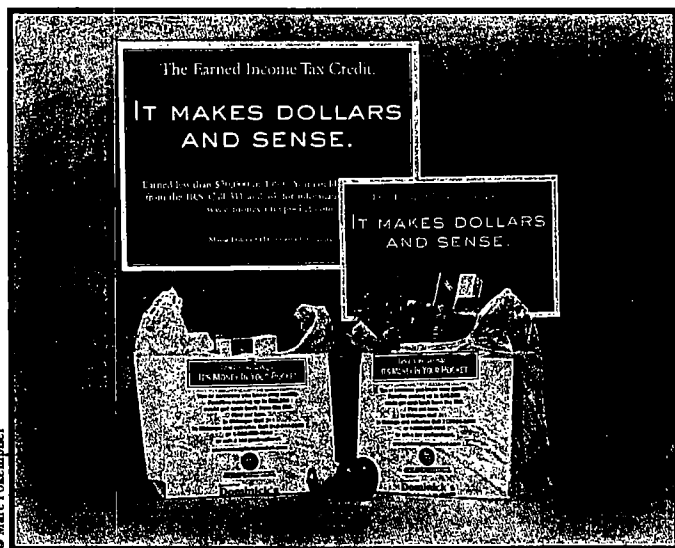
a new state Earned Income Tax Credit, which will provide about \$35 million to low-income Illinois taxpayers beginning in 2001.

Results

Outreach results showed that virtually every one of Chicago's 2.7 million residents "got the word" about the EITC:

- 4.2 million notices went out with utility bills.
- 1 million other fliers were distributed.

- Employers reached an estimated 900,000 of their employees.
- Community organizations and government agencies passed the word to about 500,000 people.
- Hundreds of radio spots reached millions of listeners.
- Tens of millions of eyes read the EITC message on transit cards, movie trailers and grocery bags.



© Marc Potemplier

There aren't many

ways to bring information into virtually every household in a region, but the EITC campaign did it, thanks to a partnership with two Illinois utilities.

Energy delivery provider

ComEd

ComEd® and natural gas provider Peoples Energy Corp. featured EITC stories in their monthly newsletters, which are sent to all residential customers with their bills. ComEd also printed 3.5 million copies of the basic EITC flier, which was included with each of 3.2 million residential customer bills. The rest

were donated to the campaign for bulk distribution to community groups, businesses and other outreach participants.

Both companies also did outreach to their own employees. Peoples Energy included stories about the EITC in two issues of its employee

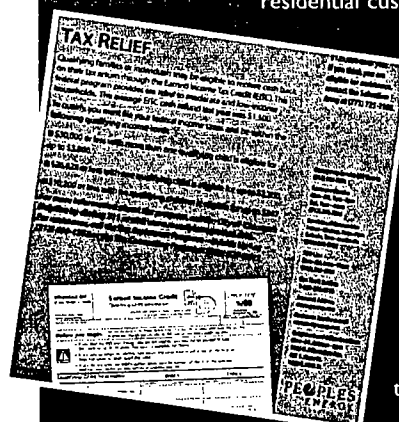
newsletter. ComEd included the EITC insert in the March 9, 2000, paychecks of its 15,000 employees.

FREE SERVICE MAKES TAX TIME LESS TAXING.

If you make less than \$30,000 per year, The Tax Assistance Program will help you prepare and file your taxes absolutely FREE. The average tax refund for those helped is \$1,000.

THE TAX ASSISTANCE PROGRAM — IT ADDS UP!

The Tax Assistance Program is a partner to Mayor Daley's Outreach Initiative. For more information look for the EITC insert in this month's bill.



PEOPLES ENERGY

MARCH APRIL April 15 MAY JUNE

Follow up outreach efforts

Second wave at tax preparation centers

Thank you events

Evaluation and data analysis

Outline plans for next year

Final and crucial step:

Preparing tax returns

No matter how good the outreach, an EITC campaign won't be effective if taxpayers don't file for the credit. That's why coordination with tax preparation service providers is crucial to any outreach campaign.

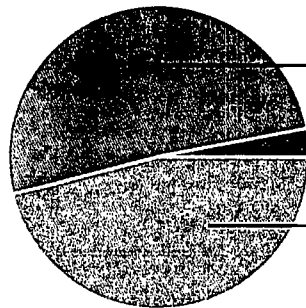
is that most sites have limited hours and the busier ones usually have a line that can mean waiting an hour or more for service.

Do-it-yourself and friends – This method is used by almost half of all taxpayers, who pay no fees



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Taxpayers file for the EITC in many different ways. The method chosen depends on the taxpayer's needs and resources.



51% USE COMMERCIAL (PAID) TAX PREPARERS.

3% USE VOLUNTEER TAX PREPARATION SERVICES.

46% PREPARE THEIR OWN TAXES OR GET HELP FROM FRIENDS OR RELATIVES.

Free services – The Internal Revenue Service supports thousands of Volunteer Income Tax Assistance projects (called VITA sites) sponsored by churches, organizations and local governments. The Chicago initiative partners, TCP and the Tax Assistance Program, are large-scale VITA programs, and dozens of smaller VITA projects provide services in Illinois. The main advantage of VITA programs is they provide a free service by trained tax preparers. A disadvantage

and have the satisfaction of preparing their own taxes and learning about the tax system in the process. Many now use computer tax-preparation software that asks the filer a series of questions to determine if the taxpayer qualifies for various credits including the EITC. A disadvantage to self-prepared forms is that the complexity of the tax system can lead to mistakes or unclaimed credits.

Paid tax preparers –

The majority of taxpayers go to paid tax-preparation experts such as accountants, attorneys or national companies like H&R Block. Costs for a basic return at H&R Block are about \$85 and can be higher if additional forms are required. The main disadvantage to using paid preparers, especially for lower-income taxpayers, is that a substantial percentage of the refund can be forfeited in fees. This is especially true if filers choose a "quick or rapid refund" from the preparer (see "Warning"). Surprisingly, the error rate for paid-preparation returns by non-professional, unfiliated preparers is actually higher than self-prepared returns, though the error rate for national firms is somewhat better.

Looking in on the volunteer tax preparation services

About 12,000 people took advantage of free tax preparation services provided by the initiative's two partners, the Tax Counseling Project (TCP) and the Tax Assistance Program -- It Adds Up. They stopped in at one of 22 Chicago-area sites staffed by more than 1,200 volunteers.

Most volunteer tax preparation sites are in a school or community center, but Chicago also had one at a police station and another at a bank. The most common hours of operation were Saturday mornings -- the times most convenient for both volunteers and taxpayers -- from late January to April 15. But many of TCP's sites operated on weekday

evenings as well and drew large crowds. Staffed by anywhere from three to 30

No matter how good the outreach, an EITC campaign won't be effective if taxpayers don't claim the credit. Getting involved with tax preparation is crucial to any outreach campaign.

volunteers and always with at least one site manager or tax expert on hand, the sites served from 30 to 150 taxpayers in a session. Often people were already lined up

CONTINUED ON PAGE 12



Free tax preparation services are especially important for residents with low incomes, because fees at commercial tax preparers will reduce their tax refund.

Warning: "Quick" refunds cost a lot -- for very little benefit

Since an EITC initiative is all about boosting income, it pays to warn taxpayers about the high costs of "rapid refund" services offered by commercial tax preparers.

Advertised as a fast way to get refund cash in hand, these programs are actually short-term, high-interest loans that take money away from taxpayers. And because electronic filing and direct deposit have sped up the delivery of refunds, to about two weeks, the value of the service is low and the cost is high.

Here's an example provided by the Center on Budget and Policy Priorities in Washington: A taxpayer expecting a \$750 EITC refund pays a \$65 fee to a national tax-preparation service for filing the return, plus an additional \$50 to get that cash in two days. She signs some papers about a "refund anticipation loan," but might not realize that the \$50 "fee" is actually an interest payment that equals 173 percent per year.

The \$115 spent at the tax preparer -- which reduces the refund to \$635 -- is enough to pay a few months of electric bills or buy some summer clothes for the children.

An analysis by the *New York Times* (July 2, 2000) found that rapid-refund loan rates are often even higher than this example, with an effective annual interest rate of 500 to 1,500 percent. **The moral of the story: In most cases, the quick-refund loans are a waste of money.**

CONTINUED FROM PAGE 11



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Volunteers for the Tax Assistance Program travel to tax preparation sites on chartered buses.

when the doors opened, and a wait of an hour or more was not uncommon.

A lot needs to happen before anyone arrives at a volunteer tax center.

Recruitment starts months before a site opens, often as early as the previous summer. Corporations are the major source of volunteers because they can use their internal networks to promote participation in the program. Since the volunteers typically enjoy the experience, the program can grow from one year to the next with little promotional effort. Other sources of volunteers are community organizations, government agencies, schools and colleges, and taxpayers who have used the service themselves and come back to volunteer.

Training is necessary even for experienced accountants

because the tax law is always changing and most accountants have little experience with EITC claims. Also, each volunteer program has its own methods of serving taxpayers and must provide training on internal procedures. The Tax Assistance Project offers 90-minute beginner and intermediate training sessions taught by volunteer tax professionals on 27 different dates. The Tax Counseling Project provides an average of 10 hours of training per volunteer, spread across three- and four-hour sessions in January. The Internal Revenue Service offers up to 40 hours of training for VITA volunteers, though it allows experienced practitioners to "test out" of the basic training.

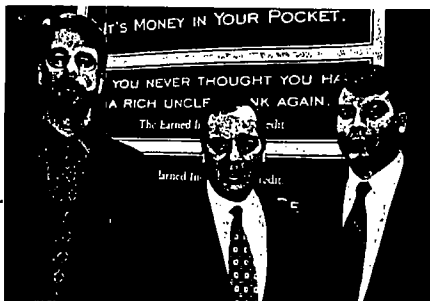
Management of the centers is crucial to smooth operation. It includes arranging for space in the chosen sites; bringing in or borrowing equipment such as copiers, computers, printers and calculators; creating sign-in sheets, intake forms and satisfaction surveys; allocating volunteers to each site to meet expected demand; providing oversight, line control and expert help at each center; tabulating results and analyzing the data; and provid-

ing volunteer support and appreciation events.

The Chicago tax preparation partners are two of the larger and more experienced volunteer tax programs in the country. The Tax Counseling

Training is necessary even for experienced accountants because the tax law is always changing and most accountants have little experience with EITC claims.

Project was founded by the Center for Law and Human Services in 1994, serving 70 taxpayers in the first year and growing to 1,500 one year later. Since its inception, TCP volunteers have prepared more than 29,000 tax returns for workers and their families. The Tax Assistance Program was founded in 1994 as a non-profit organization with initial sponsorship from the accounting firm Arthur Andersen. It also grew rapidly, serving 1,000 taxpayers in its second year and more than 3,300 clients in 1999. Both programs limit their free services to households earning less than \$30,000 per year, and the average income of clients is much



Appearing together at a press conference were, from left, David Marzahl of the Center for Law and Human Services, Mayor Richard M. Daley and Bob Burke of the Tax Assistance Project.

lower, in the range of \$11,000 to \$13,000. "These are the most important people to serve because their incomes are so low that paying a fee can be a real hardship," says Mike O'Connor, founder of the Tax Counseling Project. "To avoid paying a fee, they might not file at all, losing out on thousands of dollars in refunds."

Tax Assistance Program – It Adds Up

With only one paid staff member and about 750 volunteers, the Tax Assistance Program runs a highly cost-effective, entrepreneurial program that served 3,300 families in 2000. It has a Leadership Team and

a core group of "All Star Volunteers" that provide tax experience and management oversight at eight centers that are open for four hours on eight Saturday mornings. About 250 to 300 volunteers on each of the Saturdays gather at 7:30 a.m. in the lobby of Arthur Andersen in downtown Chicago, then board eight buses that take them to tax preparation centers that open at 8:15. The program benefits from large groups of volunteers from sponsors including Arthur Andersen, Bank One, American National Bank, Ernst & Young, KPMG and Wildman, Harold, Allen & Dixon. About half are senior

CONTINUED ON PAGE 14



Many volunteers come back year after year because they enjoy the time working with taxpayers.

Until three years ago, when Yolanda Gonzalez first claimed the Earned Income Tax Credit, she didn't know the federal government would send low-income working people big tax refunds. But then the check for more than

\$1,000 arrived in her mailbox. "I said, 'Wow, that's a lot of money.'"

Working as a lobby attendant for Marriott Hotels on Chicago's Michigan Avenue, Gonzalez made about \$17,000 in 1999, an increase from previous years because she

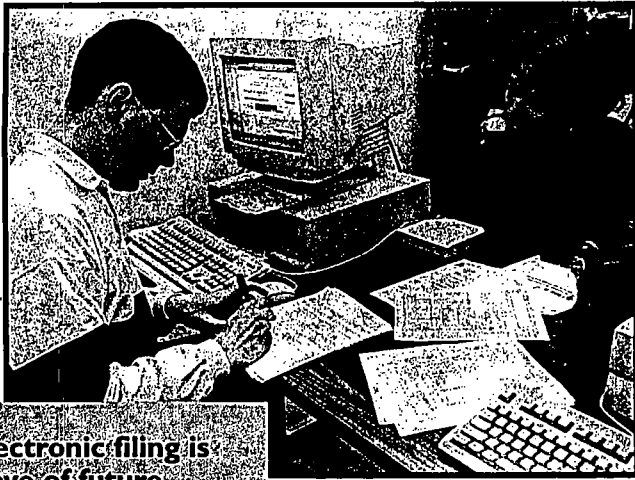
worked more hours. This year's refund, including the Earned Income Tax Credit and overpayments, was for \$4,136.

Gonzalez learned about the credit at the Tax Counseling Project's free tax preparation site at Truman College. "I was with my nephew helping him register for English classes, and I saw a sign about getting help with your taxes. I used to pay about \$150 to have them done at H&R Block, so I went and they were very nice. They were helping all sorts of people there."

This year, Gonzalez used some of the money to take her three children to visit relatives near Mexico City. "It's the only way I could get the money together on what I earn," she says.

Gonzalez has told friends and family members about the credit and the tax preparation site at Truman, but some have been reluctant to use the volunteer services or file for the credit. "Some people don't trust the government or don't believe they will get a refund," she says. "But then I show them the check and tell them to go. It is good for them and for our community."





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Electronic filing is wave of future

The Internal Revenue Service is heavily promoting electronic filing of income tax returns because the computerized method reduces keyboarding costs and errors. Taxpayers like it as well because it speeds delivery of refunds to about two weeks and negates the need for a "rapid refund."

Three sites in Chicago offered e-filing in 2000, with about 675 taxpayers filing their returns electronically through TCP's site at Harold Washington College.

But while the new method provides advantages to the IRS and taxpayers, it requires extra effort at volunteer tax preparation sites. More time is required to process electronic returns because detailed employer information must be entered into the computer (rather than just clipping the W-2 form to the return) and if the IRS detects any errors on the electronic filing, such as inaccurate Social Security numbers, it sends the return back to the tax preparation site for follow-up work. Because e-filing can actually reduce the number of returns a site can prepare, some volunteer programs will stick with paper returns for now.

CONTINUED FROM PAGE 13

accountants or have other tax experience. "We believe that the sites should be managed and run completely by volunteers," says program CEO Bob Burke, a volunteer himself. Central to keeping the program healthy, he says, are relationships, both with the sponsoring companies and the volunteers themselves. "We're all out there working together as volunteers. We know each other and have a lot of fun working with the taxpayers. And we send thank you notes to every volunteer, every year."

Tax Counseling Project

The Tax Counseling Project is the largest program of the Center for Law and Human Services, which has a 10-year history of providing service, outreach, training and advocacy for low-income individuals, families and children. With 14 sites to

manage in the Chicago area and seven more in downstate Illinois, TCP hires part-time site managers (all with tax experience) to oversee operations at each site and has three full-time staff devoted to overall management, training, data collection and analysis, taxpayer education and volunteer support. Hours and days of operation vary at each site, with most open one or two weekday evenings plus Saturday mornings. The volunteer base consists of 450 people from a wide range of sources including community organizations and businesses, with more than 300 volunteers working regularly. Traffic at TCP sites varies considerably. The busiest in 2000 was Truman College, where

volunteers prepared 1,500 federal returns, while other sites typically serve about 300 clients per year. Three sites offered electronic filing and one, at South Shore Bank, provided the opportunity to open a bank account with the direct-deposited refund (see "Next step"). During the 2000 tax season, the TCP sites were extremely busy because of the outreach campaign, with hundreds of people turned away because of lack of capacity. "Next year," said TCP director Efrain Soto, "we will be doing more volunteer recruitment early in the campaign. Getting the corporate leaders on board to help us with that will be very important."



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A "greeter" instructs arriving taxpayers about what documents they will need to file their tax returns.

Next step:

Financial education and literacy

When thousands of taxpayers sit down with volunteers to talk about money, there is an opportunity to introduce other tools and ideas that can help build personal wealth and contribute to community economic development. Next year in Chicago, the partners that launched the EITC outreach campaign plan to do more by boosting the financial literacy of low-income taxpayers. Their innovative plans include:

Banking plus – While many low-income taxpayers have lived for years without bank accounts, the large size of the EITC refunds provides an excellent opportunity to put some money aside for the future. In 2000, the Tax Counseling Project worked with South Shore Bank to help taxpayers open bank accounts with their tax refunds. At the TCP site at the bank's Chatham branch, customer service representatives invited taxpayers to open an "Extra Credit Savings Account" with no fees, no minimum balance and an interest rate of 2.5 percent. The accounts include an ATM card, access to free money-management

seminars and as an added incentive to save, a one-time 10 percent bonus paid by the bank (up to \$100) based on the account balance at the end of the year. Expanded programs are planned for 2001, both with South Shore Bank and in partnership with the Steans Family Foundation and Community Bank of Lawndale. These new accounts, called Individual Development Accounts, will include a two-for-one match on savings deposited and held for a certain length of time.

Steps to financial independence – The Tax Assistance Program hopes to expand the services it provides taxpayers to offer a "360-degree full-service evaluation" for low-income families. The program could help taxpayers develop strategies for 1) reducing the interest rate paid on credit card debt, 2) filing the Free Application for Federal Student Aid (FAFSA) to help with college tuition, 3) buying U.S. Savings Bonds to begin a savings plan and 4) developing a basic financial plan for the family.

CONTINUED ON PAGE 16

Why Hilton Hotels helped? Good for employees – and the region

When the Mayor's Office asked the Chicago Hilton and Towers to help with the EITC initiative, general manager Gary Seibert responded with an enthusiastic yes. "It's my responsibility as an employer to let employees know about something like the Earned Income Tax Credit," says Seibert. "It's good for employee morale."



"I like the idea of bringing as many tax dollars as possible back to the local economy," says Gary Seibert, general manager of the Chicago Hilton and Towers.

The Hilton hosted the breakfast for 150 community leaders, donating the banquet room, the breakfast itself and the expense of banquet service. It followed up with a campaign to reach its 3,000 EITC-eligible employees with information about the credit.

Employees at three Chicago Hilton hotels learned about the EITC via their newsletter, paycheck stubs and posters. The notices explained what the credit was and what income levels could qualify. Employees were instructed to contact department heads or the human resources department for more information. Phone numbers of the Tax Counseling Project and the Tax Assistance Program were provided.

The posters were placed in employee meeting areas on each guest floor and smaller reproductions were distributed at pre-shift meetings. The controller at each hotel used payroll records to determine who might qualify based on income, then department heads were asked to give each of those employees a notice about the EITC personally. "It's very easy for any company to do this kind of outreach," said Seibert, "provided it already has an internal communication system in place. The time commitment is minimal."



An employee of South Shore Bank works with a taxpayer to open a savings account for direct deposit of the tax refund.

CONTINUED FROM PAGE 15

Taxpayer representation – The Center for Law and Human Services is one of 34 organizations nationwide chosen to create a federally funded Low Income Taxpayer Clinic, which can assist taxpayers with any tax-related issue. The Midwest Tax Clinic, a partnership with Valparaiso (Indiana) School of Law, assists taxpayers who have been denied an EITC claim who would like to appeal the decision; those who owe back taxes and need assistance developing a repayment plan with the IRS; and those who have not received proper wage documentation from their employer. The volunteer-supported clinic relies on the services of several dozen pro-bono attorneys and law students.

Lessons learned:

Focus on recruiting, accuracy

Pulled together quickly and on a limited budget, Mayor Daley's Earned Income Tax Credit Outreach Initiative was a clear success. But that doesn't mean there wasn't room for improvement. Here are some of the lessons learned.

Start early. The August start for planning didn't leave as much time as desired to recruit business partners, raise funds and plan a comprehensive outreach campaign. The work got done under tight deadline pressure, but some components of the initiative could have benefitted from longer lead times. A serious program requires year-round commitment.

Line up partners. Many more Chicago businesses might have participated in the initiative if they had been approached early in the fall, rather than in December or January on the approach of the tax season. The schedule didn't leave much time for businesses to allocate funds, conduct outreach and line up the human resources needed to design and implement a campaign.

Recruit volunteers.

Because the outreach was so successful, some tax preparation centers in Chicago were overwhelmed during the two big rush periods in early February and late March/early April. There was little time for business groups and individual companies to recruit and send volunteers to the program. Since training is required for all volunteers, recruitment should start in the summer, allowing volunteers to be trained in the fall.

Get the message right.

Millions of fliers and other material accurately communicated EITC information to taxpayers, but a few mistakes slipped through. An overstated dollar figure for refunds on one notice caused much excitement and subsequent disappointment, and incorrectly stated hours of operation at some volunteer tax sites meant some taxpayers wasted a trip. The tax law changes every year, so last year's material is likely to be inaccurate. Get the IRS and tax professionals to review tax-related information before going to press.



Resources and contacts for taking the next step

EITC Starter Kit

This comprehensive how-to kit describes Mayor Daley's EITC Outreach Initiative in more detail and provides exhibits, sample letters, fliers, radio scripts and program descriptions to give suggestions for mounting an outreach campaign. Information is also included on establishing a volunteer tax preparation program. **Contact:** Mayor's Office of Workforce Development, 1615 West Chicago Ave., 4th & 5th Floors, Chicago, IL 60622. Jackie Edens, Commissioner, 312-746-7770. Julie Rubins Wilen, Director, 312-744-WORK.

Help Workers Boost Their Paychecks! Promote the Earned Income Credit

This free kit is an excellent resource for learning about the EITC and designing an outreach initiative. It includes posters and fliers in English and Spanish, fact sheets and EITC tax forms. A booklet on outreach strategies describes efforts around the country and provides ideas for reaching out to different audiences. The materials can be viewed at www.cbpp.org and are available by mail.

Contact: Center on Budget and Policy Priorities, 820 First St. NE, Suite 510, Washington, DC 20002, 204-408-1080, or ecckit@cbpp.org.

Internal Revenue Service Earned Income Credit Outreach Kit

The IRS Taxpayer Education Coordinator in every region can supply a kit including posters, fliers, instruction booklets and forms. The IRS can also supply forms in bulk to VITA centers along with tax preparation training and, in some cases, loaned computers for electronic filing. For more information, call 800-829-1040 and ask for the number of your local Taxpayer Education Coordinator.

www.moneyinmypocket.com is the general website used by the campaign in 1999-2000, including information about the campaign and its partners, and how-to information for potential filers.

www.chicago-eltc.org

is an electronic version of this booklet and the EITC Starter Kit, including downloadable text and graphics that can be adapted for local outreach initiatives.

Tax Counseling Project

Center for Law and Human Services
312-341-1666

www.centerforlaw.org

Tax Assistance Program-It Adds Up

312-822-0595
www.taxassistance.com

Internal Revenue Service

800-829-1040
www.irs.gov



For more information on Mayor Daley's Earned Income Tax Credit Outreach Initiative, contact Julie Rubins Wilen at the Mayor's Office of Workforce Development at 312-744-WORK.





http://www.itgonline.com/ - Microsoft Internet Explorer

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Address www.chicago-eltc.org/outreach-action.asp Go



**MAYOR DALEY'S
EARNED INCOME
TAX CREDIT
OUTREACH INITIATIVE**

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2 Planning and partners

3 Outreach

4 Tax preparation

5 Evaluation/next year

Resources

Links

Chicago Experience **ACTION PLAN**

OUTREACH

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RESOURCES

-  **Radio script**
(MS Word document)
-  **Flyer**
(MS Word document)
-  **EITC logo**
(TIFF file)
-  **Clipart**
(TIFF file)
-  **Movie trailer**
(Streaming video file)

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INTRODUCTION

We created a partnership to help working residents



Mayor Richard M. Daley
City of Chicago

HUNDREDS OF MILLIONS of dollars are left on the table each year by people who fail to claim the federal Earned Income Tax Credit (the "EITC"). We set out to bring that money back to the people who worked hard to earn it.

We launched a citywide outreach campaign to educate taxpayers about the EITC and encourage them to apply. We created a partnership that includes the city, the business and foundation communities and non-profit tax preparers.

Money in your pocket

The campaign used television, radio, print media, a website, transit advertising—even 60 million grocery bags—to spread the word about the EITC. Our message was simple: the Earned Income Tax Credit means "money in your pocket."

This website will help you learn about our outreach initiative and give ideas for how your area can help residents claim the credit.

Who is eligible?

- Workers earning less than \$31,152 who have two or more qualifying children can receive up to \$3,888.
- Workers raising one child who earn up to \$27,413 can get a refund up to \$2,353.
- Individuals without children who earned less than \$10,380 can receive up to \$353.

[Learn more about the EITC](#)

Internet