

Draft MEMORANDUM FOR MRS. CLINTON

TO From: Shirley Sagawa, Ellen Lovell, Ann O'Leary

Re: Philanthropy tax initiative roll-out

Date: January 19, 2000

cc: Patti Solis Doyle, Melanne Verveer, Lissa Muscatine

In lieu of the event we had been planning for Friday to roll-out the new philanthropy tax initiatives, **we are working with DPC on the idea that you hold a conference call** to brief some of the key organizations interested in the initiative, which we hope will be highlighted in the State of the Union. You could then do a follow-up event in New York at an appropriate time.

The initiative has three parts: a deduction for nonitemizers that starts at 50% for donations above a floor of \$1,000 and scales up in six years to a 50% deduction for donations over \$500; a reduction in the excise tax for foundations; and an increase in the limit on charitable donations of appreciated stock. We have the commitment of Independent Sector (the lead advocate for the deduction for nonitemizers) and the Council on Foundations (regarding the excise tax change) that they will support these proposals enthusiastically.

A conference call would underscore the priority we are placing on this initiative, show the linkage between the initiative and the philanthropy conference, and further associate you with an important values issue. It is true that without your leadership, none of these proposals would have been included in the tax package. In fact, the excise tax change came directly out of the meeting of nonprofits with Treasury that we initiated as a follow-up to the conference.

We would like to have you hold the call for about 30 minutes the day before the State of the Union. We would either open the call to one or two key reporters or leak the initiative and the call to the press immediately after the call. Proposed participants in the call include:

Independent Sector
Council on Foundations
American Red Cross
Salvation Army
Goodwill Industries
United Way
Kellogg Foundation
Carnegie Corp.
Getty Trust

Press:
NYT or Washington Post
philanthropy reporter
Chronicle of Philanthropy

Please let us know if you want to pursue a different strategy.

PHOTOCOPY
HRC HANDWRITING

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INDEPENDENT
SECTOR

PUBLIC POLICY

The Charitable Giving Tax Relief Act

We, the undersigned organizations, representing a cross-section of the charitable sector, write in support of the *Charitable Giving Tax Relief Act* (HR 1310) and urge you to cosponsor it.

The *Charitable Giving Tax Relief Act* is based on generosity and sacrifice, not personal gain. This legislation would allow individuals and families who claim the standard deduction, two-thirds of all taxpayers, to deduct 50 percent of their annual charitable contributions over \$500 each year, as a way to encourage giving above current levels. A PricewaterhouseCoopers study found that charitable giving would increase by more than \$3 billion annually at 1999 income levels as a result of this bill.

The *Charitable Giving Tax Relief Act* has received bipartisan support in the 106th Congress. Introduced by Philip Crane (R-IL), and cosponsored by William Coyne (D-PA), Wally Herger (R-CA) and Karen Thurman (D-FL), the legislation has already attracted 104 cosponsors from both sides of the aisle.

The *Charitable Giving Tax Relief Act* does triple duty: it provides modest tax relief for nonitemizers, who tend to be low and middle income taxpayers; it improves tax fairness by recognizing the generosity of all taxpayers, and; by creating an incentive for giving, it affects the amount an individual gives to charity.

We have enclosed a brochure with additional information and a breakdown of how this bill will increase charitable giving in your state.

We respectfully urge your support of the *Charitable Giving Tax Relief Act*.

To be added to the sign-on letter, please send an email with your name, phone number and how you would like your organization's name to appear to Anne Page. Please respond by DECEMBER 15, 1999.

ACCESS: Networking in the Public Interest
Accounting Aid Society
Action on Smoking & Health (ASH)
Alaska Community Services
Alliance for Children and Families
Alliance for Nonprofit Management
Alliance to End Childhood Poisoning
American Association of Fund-Raising Counsel
American Association of Museums
American Autoimmune Related Diseases Association
American Cancer Society
American Foundation for the Blind
American Friends Service Committee
American Heart Association
American Humane Association
American Institute of Philanthropy
American Jewish Congress
American Library Association
American Network of Community Options and Resources
American Red Cross

American Symphony Orchestra League
Americans for Indian Opportunity
Americans for the Arts
Arrow, Inc./An American Indian Charity
Arthritis Foundation
The Aspen Institute
Association for Healthcare Philanthropy
Association of Art Museum Directors
Association of Governing Boards of Universities and Colleges
Association of Jewish Family & Children's Agencies
Association of Performing Arts Presenters
AVATAR Company
Baptist Health System Foundation of San Antonio
Baptist Joint Committee on Public Affairs
Baptist Metrolina Ministries Endowment
Big Brothers Big Sisters of Greater Oklahoma City, Inc.
The Boys & Girls Clubs of Hancock County
The Boys & Girls Clubs of South Hampton Roads
California Association of Nonprofits
Camp Fire Boys and Girls
Catholic Charities Archdiocese of New Orleans
Catholic Charities Services Corporation
Catholic Charities USA
Catholic Social Services of Central and Northern Arizona
Mabel T. Caverly Senior Center
CDC Foundation
Center for Excellence in Nonprofits
Center for Non-Profit Corporations
Center for Social and Economic Leadership
Charitable and Philanthropic Management Counsel
Child Care Association of Illinois
Child Care Connection, Resource & Referral Agency for Alaska
Chorus America
Christian Church Foundation
Christian Service Organizations of America
Church World Service Inc.
Citizens' Scholarship Foundation of America
Cleveland Neighborhood Development Corporation
Colorado Opera Festival
Colorado Springs All Breed Rescue Inc.
Colorado Springs Choral Society
Committee to Aid Abused Women
Community Anti-Drug Coalitions of America
Community Foundation for Muskegon County
Connecticut Association of Nonprofits
Council of Community Services of NYS, Inc.
Council of Independent Colleges
Council of Michigan Foundations
Cystic Fibrosis Foundation
The Denver Campus for Jewish Education
J. Donovan Associates, Inc.
Donors Forum of Chicago
Easter Seals of Southwestern Michigan
Easter Seals Southwestern Ohio
The Enterprise Foundation
Environmental Defense Fund
Envision

Family Service of Greater New Orleans
Family Service of Milwaukee
Forest Service Employees for Environmental Ethics
Fort Collins Area United Way
The Foundation of Monongalia General Hospital, Inc.
The Foundation of the Pennsylvania Medical Society
Foundation of the National Student Nurses Assoc.
Frederick County Mental Health Association
Friendly House
Furniture Bank - Metro Atlanta
Gaylord Hospital
General Council on Finance and Administration of the United
Methodist Church
General Service Foundation
Generalate-School Sisters of St. Francis, Inc.
Girl Scouts - Bluebonnet Council
Girl Scouts of the USA
The Giraffe Project
Goodwill Industries - Heart of Florida, Inc.
Goodwill Industries International
Goodwill Industries of Southern California
Guadalupe County United Way
Habitat for Humanity International
Hawaii Consortium for the Arts
Hispanics in Philanthropy
Hogg Foundation for Mental Health
Holy Family Institute
Hudson-Webber Foundation
Human Service Charities of America
Humane Society of Missouri
Huntington's Disease Society of America, Inc.
India Association of Metroplex
Inova Health System
Institute for Arts & Humanities Education
International Service Agencies
International Youth Foundation
Iowa 4-H Foundation
Iowa Health Foundation
INDEPENDENT SECTOR
JCC Association of N/A
Joint Center for Political and Economic Studies
Kent State University Foundation
Kidney Cancer Association
Latino Health Institute
Lee's Friends: Helping People Live With Cancer
Leukemia Society of America
Lupus Foundation of America
Lupus Foundation of America, Missouri Chapter
Lutheran Services in America
Lutheran Social Service of Minnesota
Lutheran Social Services of the South, Inc.
Maine Association of Substance Abuse Programs
March of Dimes
Maryland Association of Nonprofit Organizations
Massachusetts Audubon Society
Matagorda County United Way
Mayo Foundation

Medical Research Agencies of America
Michigan Nonprofit Association
Milwaukee Public Museum
Missouri Slope Areawide United Way
Multi-Service Centers of North & East King Counties
Myasthenia Gravis Foundation of America, Inc.
Myositis Association of America, Inc.
NALEO Educational Fund
National Alopecia Areata Foundation
National Associations in Colorado Springs
National Association of Private Schools for Exceptional Children
National Coalition for Homeless Veterans
National Conference for Community and Justice
National Consumers League
National Council of Catholic Women
National Council of La Raza
National Council of Non Profit Associations
National Down Syndrome Society
National FFA Foundation
National 4-H Council
National Health Council
National Hemophilia Foundation
National Interfaith Hospitality Network
National Organization for Women Foundation
National Peace Corps Association
National Society of Fund Raising Executives, Mass. Chapter
Native American Rights Fund
Natural Resources Defense Council (NRDC)
National Sleep Foundation
NJ Association for Biomedical Research
Noble of Indiana
The Nokomis Foundation
Nonprofit Coordinating Committee of New York
Nonprofit Resource Center of AL
North Carolina Wildlife Federation
North Dakota Association of Nonprofit Organizations
NW Regional Facilitators
Ohio United Way
Old Creamery Theatre Co.
Orlando Regional Healthcare
Osteogenesis Imperfecta Foundation
OTHERS International
Ozarks Resource Center
The Park Ridge Center for the Study of Health, Faith and Ethics
Partners in Housing, Inc.
Pennsylvania Association of Nonprofit Organizations
Presbyterian Church (USA)
Project Hope
Providence Foundation, Inc.
Public Education Network
Quinnipiac College
Recording for the Blind & Dyslexic
RESOLVE, the National Infertility Association
Retirement Research Foundation
The Salvation Army
San Antonio Lighthouse
St. John's Cathedral

San Gorgonio Memorial Hospital Foundation
Second Harvest St. Paul Food Bank
Self-Help Enterprises
Share America!
Shawnee Mission Medical Center Foundation
Shelters of Flint, Inc.
Shepherd's Centers of America
Sjogren's Syndrome Foundation
Spring Hill
The Starbucks Foundation
Taconic Foundation
TechnoServe, Inc.
Texas Alliance for Human Needs
Texas Association of Nonprofit Organizations
Texas Development Institute
Texas Network of Youth Services
The Trust for Public Land
Tucson Symphony Orchestra
United Jewish Communities
United Way of America
United Way of Central Missouri
United Way of Central Texas
United Way of Hunt County, Inc.
United Way of Metropolitan Dallas, Inc.
United Way of the Texas Gulf Coast, Houston, Texas
University of Colorado Artist Series
Union Mission, Inc.
Utah Children
Valley of the Sun United Way
Very Special Arts
Volunteer Center of Orange County, California
Volunteer Jacksonville, Inc.
Volunteers of America
Izaak Walton League of America
Warren Village, Inc.
Washington Council of Agencies
Washington Women's Employment & Education
Wayne Memorial Health Foundation
The Wesleyan Church Corporation
Women and Philanthropy
Women's College Coalition
Women's Funding Network
Woodrow Wilson National Fellowship Foundation
YMCA Blue Ridge Assembly
YMCA of Metropolitan Washington
Youth Service America
Youth Volunteer Corps of America
YWCA of Kansas City, Missouri
YWCA of Lancaster
YWCA of the U.S.A.

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Mawleen
Debi

SUGGESTIONS FOR ANNOUNCEMENT ON CHARITABLE DEDUCTION

*indicates part of Independent Sector Coalition

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American Jewish Committee

Jason Isaacson 202-785-4200

American Jewish Congress*

Matt Dorf 202-332-4001

Baptist Join Committee*

J. Brent Walker, Executive Director 202-544-4226

Baptist World Aid

Paul Montacute, Director 703-790-8980

B'nai B'rith

Richard Heideman 202-462-8990

Catholic Charities USA*

- ✓ Rev. Fred Kammer, President 703-549-1390
• Sharon Daly, Deputy to the President for Government Relations

Catholic Relief Services

Ken Hackett, Executive Director 410-625-2220

Christian Children's Fund

John Schultz, President 804-756-2700

Church of Jesus Christ of Latter-day Saints

Theron LaMar Sleight
Government Relations 202-662-7551

Church World Service*

Rodney Page, Executive Director 212-870-2175

OR *Quinn*
Lisa Wright 202-543-6336

Jewish Council for Public Affairs

Reva Price 202-293-1649

Lutheran Services in America*

Joanne Negsted, President 800-664-3848
• Lisa Carr

Government Relations (202) 626-7945

Lutheran World Relief

James Bowman, Director, DC Office 202-543-6336

Na'Amat

Shoshana Reimer 202-362-0923

National Council of Catholic Women*

Joanne Hillebrand, President 202-682-0334X10

♦ Annette Kane, Executive Administrator 202-682-0334X10

National Council of Jewish Women

Sammie Moshenberg 202-296-2588

Presbyterian Church USA*

Rev. Elenora Giddings Ivory, Director

National Ministries Division 202-543-1126

Religious Action Center

Rabbi David Saperstein 202-387-2800

Salvation Army *

Commissioner John Busby, National Commander 703-684-5505

NB: The NY Times recently reported that the Salvation Army has been at the top of the Chronicle of Philanthropy's list of the nation's biggest charities since 1991

Seventh-day Adventist Church

Kenneth Michael Turpen, Director

Philanthropic Services for Institutions

301-680-6130

United Jewish Communities* (they are the parent to the Association of Jewish Family and Children's Agencies, also on the list)

Diana Aviv 202-736-5868

United Methodist Church

General Council on Finance and Administration*

Bishop Felton May 202-546-3110

US Catholic Conference

Frank Monahan, Legislative Director 202-541-3140

World Vision

Serge Duss 202-608-1837

Roll Out Event
PHILANTHROPY CONFERENCE

143

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202/234-5437

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Falls Church, VA 22043
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American Indian College Fund
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Rev. Dr. Andrew Young
President Elect
National Council of Churches of Christ
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*** TX REPORT ***

TRANSMISSION OK

TX/RX NO 1548
CONNECTION TEL 917036837846
CONNECTION ID
ST. TIME 01/27 16:20
USAGE T 01'09
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RESULT OK

Sent
TAX
info

THE WHITE HOUSE

WASHINGTON

Office of the First Lady

Ph: (202) 456-6266

Fax: (202) 456-6244

To: Chris AmundsonPhone Number: 703/836-7100Fax Number: 703/683-7846From: MaryEllen McGuire, Office of the First LadyNumber of pages (including cover): 2Comments: Tax package details.

*** TX REPORT ***

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To: Vartan Gregorian

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Fax Number: 212/223-8831

From: MaryEllen McGuire, Office of the First Lady

Number of pages (including cover): 2

Comments: Tax package details.

*** TX REPORT ***

TRANSMISSION OK

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THE WHITE HOUSE

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Fax: (202) 456-6244

To: Ann Peterson

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Fax Number: 616/969-2118

From: MaryEllen McGuire, Office of the First Lady

Number of pages (including cover): 2

Comments: Tax package details.

*** TX REPORT ***

TRANSMISSION OK

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CONNECTION ID
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To: Bill White

Phone Number: _____

Fax Number: 810 1766-1753

From: MaryEllen McGuire, Office of the First Lady

Number of pages (including cover): 2

Comments: Tax package details.

*** TX REPORT ***

TRANSMISSION OK

TX/RX NO 1546
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CONNECTION ID
ST. TIME 01/27 15:34
USAGE T 01'14
PGS. SENT 2
RESULT OK

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From: MaryEllen McGuire, Office of the First Lady

Number of pages (including cover): 2

Comments: Tax package details.

*** TX REPORT ***

TRANSMISSION OK

TX/RX NO 1545
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CONNECTION ID
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USAGE T 01'08
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From: MaryEllen McGuire, Office of the First Lady

Number of pages (including cover): 2

Comments: Tax package details.

*** TX REPORT ***

TRANSMISSION OK

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CONNECTION ID
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RESULT OK

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From:

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Number of pages (including cover):

2

Comments:

Tax package details.

*** TX REPORT ***

TRANSMISSION OK

TX/RX NO 1543
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CONNECTION ID
ST. TIME 01/27 15:30
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PGS. SENT 2
RESULT OK

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Number of pages (including cover): 2

Comments: Tax package details.

*** TX REPORT ***

TRANSMISSION OK

TX/RX NO 1542
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PGS. SENT 2
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From: MaryEllen McGuire, Office of the First Lady

Number of pages (including cover): 2

Comments: Tax package details.

*** TX REPORT ***

TRANSMISSION OK

TX/RX NO 1549
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CONNECTION ID TRUST PRES OFFIC
ST. TIME 01/27 16:21
USAGE T 01'09
PGS. SENT 2
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Number of pages (including cover): 2

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Ann Peterson

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Getty Trust- John Cooke, Senior Vice President of External Affairs

President, J. Paul Getty Trust

Los Angeles, CA

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fax

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Philanthropy Conference Call Participants

NonProfit Sector (10)

✓ **Independent Sector-** Sarah Melendez, President

✓ **Council on Foundations-** Dorothy Ridings, President

✓ **American Red Cross-** Bernadine Healy, President

✓ **Salvation Army-** Lt. Col Tom Jones, National Community Relations and Development Sec

✓ **Goodwill Industries-** Sam Cox, Chief Executive Officer

✓ **United Way-** Chris Amundson, Chief Operating Officer

~~**Carnegie Corporation-** Vartan Gregorian, President~~

✓ **Getty Trust-** John Cooke, Senior Vice President of External Affairs

✓ **Mott Foundation-** Bill White, President

✓ **Kellogg Foundation-** Bill Richardson, President **(Tentative)**

Ann Peterson

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Ellen Lovell, Millennium

Ann O'Leary- First Lady's Office, DPC

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spoke term calling back

130-215

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Hama

Mike Grall

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*calling
back*

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MaryEllen C. McGuire
01/26/2000 04:57:00 PM

Record Type: Record

To: Eric W. Woodard/WHO/EOP@EOP

cc:

Subject: EMERGENCY

I just got word to invite the following to a call in with HRC at 8:45 tomorrow. Do you have home numbers for any of them in your rolodex or WHODB. ✓

Sara Melendez, Independent SEctor → ~~529-9292~~ wk (202) 223-8100, ^{home?} (703) 522-7925
Dorothy Ridings, Council on Foundations → wk (202) 466-6512, ~~(202) 785-3428~~, (941) 748-0411
Bernadette Healy, American Red Cross → (202) 737-2300 ✓
John Busby, Salvation Army → (703) 684-5505 ✓
Fred Grandy, Goodwill → (301) 530-1516, (301) 530-6500 ✓
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Barry Munitz, Getty Trust

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(703) 683-7843
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(212) 207-6215
(212) 371-3200
(212) 541-6193

(310) 395-0388
(310) 440-6378
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White House Conference on Philanthropy: Next Steps Meeting January 21, 2000

Underlying Theme: WH has the power to convene and get out the message

Task Force

- Task Force Inventory- do a parallel collection in nonprofit world
- remember as look into best practices have to be able to count/measure the results

CEA Report

- Include a corporate marketing piece in the CEA report
- Have CEA contribute a chapter to the annual Council of Foundations report (trends, forecast)

Day of Giving

- Day of Giving; Thanksgiving week, promo in schools

Convenings

- Tap into universities; programs of nonprofit management (Paul will get Malcolm a working list- is a consortium)
- give a direct charge to the different communities- of color, youth, etc
- hold regional meetings around specific topics to bring people together

Educate/Get Message Out About....

- educate about philanthropy careers
- education mid-aged about planning giving
- Find a way to connect donor stories with the nonprofit community; make available for speaking, etc. (Muther, Fong, Heroes)
- important to not just get excited about big gifts, need to get real about giving, the giving being done 2 or three levels down.

Research

- put together a roadmap of the sector- how to get to nonprofits, a resource guide
- need more research; govt has access to data noone else does- especially as relate to incentive power of tax; can go through IRS *(also brought up at Treasury mtg)*
- SCETV doing a documentary about donors

*- Commission
a documentary
@ giving*

Check into...

Film by the Gil Foundation- documentary on gay and lesbian giving "the Outgiving Project"

Agenda
White House Conference on Philanthropy: Next Steps
January 21, 2000

Have themselves form a working group?

I. Welcome and Introductions

- connect donor stories (horses, fmg, mother) w/ nonprofit community

10 a.m. need to educate early 20's just starting out
educate mid age more planned giving

II. Review of White House follow-up activities to date. [10:15]

Could do an annual chapter in Council of Advisors

Interagency Task Force on Nonprofits and the Federal Government -
Council of Economic Advisers Report include corporate marketing pc (revlon + breast cancer) Nancy Raybin
Treasury follow-up
Videotape distribution
WH website
CNS youth summit planning

Shirley Sagawa do a parallel collection in nonprofits - ed @ pda careers

III. National Initiatives to Promote Philanthropy. [10:45]

Discussion of current efforts, issues:

How do we involve future generations, youth?

Can we do more to reach new wealth, entrepreneurs?

How do we ensure that American philanthropy reflects the diversity and changing demographics of American society?

- will give a challenge to communities to get out there
- not using universities programs of nonprofit management is a contribution
Elan Garonzik

IV. Follow-up planning. [11:30 a.m.]

What kinds of materials would be useful to the field?

Conference Report/CEA Report
Videotapes, CD-Roms.
Printed reports.
Online materials.

... for what audiences?
... by what timeline?

Would follow-up meetings or formal conferences be useful?
Regional meetings? Targeted audiences? Who should convene if held?

V. Conclusions: What role(s) could the White House play?

[Discussion continues with working lunch, 12:30-1:30 p.m.]

Don't ignore are making candidates/proton in philanthropy - would be helpful to get to others

Horses on Web

Regional Mfg @ center topics to bring people together

SCETV documentary (clone v2) - OUTGOING Project - Gilinder @ Goyalestian (yng)

Will conclude a message
Youth - Time, Talent, Treasure
Ellen Lovell
best practices around promoting giving for best practices to mean anything have to be able to sustain

Road map to Sector
how to get from govt to nonprofits

Thanksgiving week Day of Giving - Promote Schools

VI. Adjournment.

1:30 p.m.

White House Conference on Philanthropy: Next Steps

White House Conference Center

January 21, 2000

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From the White House Millennium Council and Office of the First Lady:

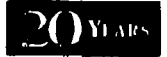
Shirley Sagawa
Ellen McCulloch-Lovell
Malcolm Richardson
MaryEllen McGuire

Eric Gould
Domestic Policy Council

Ann O'Leary
Domestic Policy Council and
Office of the First Lady



INDEPENDENT SECTOR



*of Enhancing
Nonprofit
Initiative*

January 27, 2000

Contact: Carla Bundy (202) 467-6134
Website: www.IndependentSector.org

*A National Leadership
Forum to Encourage
Philanthropy, Volunteering,
Not-for-Profit Initiative
and Citizen Action*

Statement by Sara Meléndez, President and CEO of INDEPENDENT SECTOR, on the President's State of the Union Address

(Washington, D.C.) – INDEPENDENT SECTOR applauds President Clinton's inclusion of the charitable deduction for nonitemizers in the State of the Union address and the FY 2001 budget. The nonitemizer deduction would allow millions of Americans, who so generously give to charities, the opportunity to claim a charitable deduction for their contributions.

More than 84 million Americans cannot deduct any of their charitable contributions because they do not itemize their tax returns. INDEPENDENT SECTOR's recent survey on giving and volunteering in the United States, reports that the number of households reporting contributions rose to more than 70%. It is clearly evident that America is a nation of givers. We give voice to our hearts by giving to nonprofit organizations and charities. The nonitemizer deduction would not only recognize and encourage this giving, but it would also restore some measure of fairness to the tax system.

Inclusion of the nonitemizer deduction in the State of the Union address further strengthens the bipartisan support INDEPENDENT SECTOR has garnered. Legislation pending in the House has received support from both sides of the aisle. We are pleased that the Clinton Administration has endorsed this concept and I look forward to working with the Administration and the leadership in Congress to advance this proposal.

The deduction, which would be phased in, would allow nonitemizers to deduct 50 percent of their annual charitable donations over \$1000 each year until 2006, when the floor would decrease to \$500 a year.

INDEPENDENT SECTOR has strongly promoted this concept throughout its 20-year history and led the effort for its passage in the 1980s. It was removed as part of the Tax Reform Act of 1986.

###

INDEPENDENT SECTOR is a national leadership forum, working to encourage philanthropy, volunteering, not-for-profit initiative and citizen action that help us better serve people and communities. Founded in 1980 and based in Washington, D.C., INDEPENDENT SECTOR is a national coalition of more than 700 voluntary organizations, foundations and corporate giving programs with national interest and impact in philanthropy and voluntary action.

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Briefing Materials

Philanthropy Tax Roll Out Conference Call

- Briefing
- DPC Policy Paper: Philanthropy Tax Incentive Roll Out
- Talking Points

January 26, 2000

Philanthropy Tax Roll Out Conference Call

Date: Thursday, January 27th
Location: Car to Andrews
Time: 1:35pm- 1:50pm
From: MaryEllen McGuire

I. PURPOSE

To underscore the priority you are placing on philanthropic initiatives, show the linkage between this year's budget initiatives and the White House Conference on Philanthropy, and to further associate you with philanthropy among the nonprofit and foundation community.

II. BACKGROUND

Non Itemizer Tax Deduction

Currently, 2/3 of all taxpayers do not itemize and cannot get a tax credit for their charitable giving. This initiative will allow all taxpayers to claim a deduction for charitable contributions above \$500 a year, improving tax fairness by giving households who do not itemize an opportunity to deduct charitable contributions similar to that of higher income itemizers. This proposal will give an incentive to the millions of taxpayers who do not itemize to give or give more.

Excise Tax Modification

The budget will allow more foundation funds to reach those in need by simplifying the current two-tier excise tax on private foundations, increasing funds available for donations to community and faith-based groups.

Appreciated Properties

The budget will also encourage donations of appreciated property by easing current limitations on gifts of appreciated property and stocks.

III. PARTICIPANTS

Nonprofit Partners

TBD: We are in the process of inviting participants. We will fax a complete participant list by noon tomorrow.

White House Staff

Shirley Sagawa, First Lady's Office
Ellen Lovell, Millennium Council
Eric Gould, DPC
Ann O'Leary, DPC

IV. SEQUENCE OF EVENTS

- The First Lady places the call and discusses the tax initiative
- The First Lady takes questions time permitting

V. PRESS PLAN

Closed Press.

VI. REMARKS

Talking Points provided by Shirley Sagawa.

Promoting Philanthropy for All Americans: Philanthropy Tax Incentive Roll Out

On October 22, 1999, the President and First Lady, with the National Endowment of the Humanities (NEH), convened the first-ever "White House Conference on Philanthropy: Gifts to the Future." The conference brought together individuals who are engaged in philanthropy to highlight the unique American tradition of charitable giving; to discuss the diverse and changing face of philanthropy; and at a time of the strongest economy in a generation, to explore how to preserve and expand this tradition for future generations. Eighty-five percent of all charitable contributions are made by individuals and these contributions provide critical resources to nearly half of American hospitals, colleges and universities, to religious organizations, and to the vast majority of the nation's social service agencies and civic and cultural organizations.

Because of the importance of philanthropy and the value of the nonprofit sector, the President's budget includes three proposals that will give charitable organizations needed support, encourage giving and improve tax fairness.

- **Expanding the Tax Deduction for Charitable Contributions to Nonitemizers.** The budget will provide incentives for all taxpayers to contribute to charity. Currently, 2/3 of all taxpayers do not itemize and cannot get a tax incentive for their charitable giving. The budget will allow all taxpayers to claim a deduction for charitable contributions above \$500 a year, giving charitable organizations much needed support, and improving tax fairness by giving households who do not itemize a similar opportunity to deduct charitable contributions as higher income itemizers. **[50% above the line deduction - between FY01-05, the floor is \$1,000 individual / \$2,000 joint; FY06-10, the floor drops to \$500 individual / \$1,000 joint. The proposal cost \$3.9 billion/5; \$13 billion/10]**
- **Making it Easier for Foundations to Give in Times of Need.** The budget will allow more foundation funds to reach those in need by simplifying and reducing the current two-tier excise tax on private foundations thereby increasing funds available for donations to community organizations. Private foundations currently pay an excise tax on their net investment income. However, the current excise tax can be thought of as a combination of two taxes. First, there is a one percent excise tax on investment income for all private foundations. Second, there is an additional one percent tax on those foundations that do not maintain their rate of giving over a five-year average. While the intent of the distinction between a one and two percent tax was to prevent foundation disbursements from falling, the mechanism is unduly complicated and may even reduce foundation giving in certain cases. The budget will simplify this process for foundations by getting rid of the two-tier excise tax and setting the rate at 1.25 percent. Foundations will have the flexibility to increase distributions during times of need without having to worry about increasing their taxes in future years. The result will be more grants to community-based organizations and less tax planning. **[Effective 01 – cost is \$338 million/5 and \$758/10]**
- **Allow Greater Contributions of Appreciated Property to Charities.** In addition, the budget will make it easier for individuals to donate appreciated assets. Existing tax law places limits on the percentage of an individual's income that can be offset with deductions

for charitable contributions. For individuals, deductions for charitable contributions to religious organizations, educational organizations and public charities are generally limited to 50 percent of adjusted gross income (AGI). Deductions for gifts of appreciated property are subject to more stringent limitations of 30 percent AGI and gifts of appreciated property to private foundations are limited to an even more stringent limitation of 20 percent AGI. These multiple limitations are complex and can place burdens on individuals who choose to give substantial portions of their incomes to charity. The President's budget simplifies and eases these limitations to encourage individuals to donate more to charity by increasing the 30 percent AGI limit on appreciated property, and the 20 percent AGI limit for donations of appreciated property to private foundations to 50 percent and 30 percent of AGI respectively. **[Effective FY01 – Cost is \$115 million/5 and \$159 million/10]**

TALKING POINTS FOR PHILANTHROPY CALL

Thank you for joining me today. We set this call up so I could give you the good news that tonight's State of the Union Address will include a mention of proposed changes to the tax code that will encourage philanthropy and benefit nonprofit organizations. Of course, the speech can't go into a lot of detail – we will fax you a page that describes the policy. But in brief, here are the components:

- **We are Expanding the Tax Deduction for Charitable Contributions to Nonitemizers.** The budget will provide incentives for all taxpayers to contribute to charity. Currently, 2/3 of taxpayers do not itemize and cannot get a tax incentive for their charitable giving. The budget will allow all taxpayers to claim a deduction for charitable contributions above \$500 a year, giving charitable organizations much needed support, and improving tax fairness by giving households who do not itemize a similar opportunity to deduct charitable contributions as higher income itemizers. This provision will be phased in over a period of six years.
- **We are Making it Easier for Foundations to Give in Times of Need.** The budget will allow more foundation funds to reach those in need by simplifying and reducing the current two-tier excise tax on private foundations to 1.25 percent thereby increasing funds available for donations to community organizations.
- **We are Allowing Greater Contributions of Appreciated Property to Charities.** In addition, the budget will make it easier for individuals to donate appreciated assets. Existing tax law places limits on the percentage of an individual's income that can be offset with deductions for charitable contributions. Deductions for gifts of appreciated property are subject to even more stringent limitations. The President's budget simplifies and eases these limitations to encourage individuals to donate more to charity by increasing the percent AGI limit on appreciated property, and the percent AGI limit for donations of appreciated property.

Rather than use our time on this call to go into a lot of specifics, I hope you will review the material we send and if you have questions, talk to one of the staff who have been working on these provisions and can give you more details. [Ann O'Leary at DPC]

I am particularly pleased about the inclusion of these provisions because they build on the White House Conference on Philanthropy and meetings that were set up following the conference with the Treasury Department. Of course, some of you have been advocating these changes for many years – your leadership brought them to the top of the policy agenda, and your efforts will help make sure they become law this year.

We know how important the nonprofit sector is to achieving the goals we share for the country – a stronger sense of community and greater opportunity for all our people,

including those left behind in this unprecedented economy boom. And we know how important individual giving is to the health of the nonprofit organizations that carry out this important work. If we are able to make these tax changes law, I think they will encourage many people to consider giving more to the causes they care about.

We look forward to working with you on other parts of our philanthropy agenda to build on the White House conference, including looking at the research agenda. Our interagency task force is being organized, and the Council of Economic Advisors report on the role of philanthropy in the economy will be issued this spring if all goes as planned. Thank you for working with us on this important agenda and I hope you will spread the word to your colleagues about the administration's policy proposals.

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INTERNET ADDRESS: <http://wsj.com>

Tax Report

A Special Summary and Forecast Of Federal and State Tax Developments

SUPPORT GROWS for allowing more people to deduct charitable gifts.

Under current law, only those who itemize their deductions may deduct charitable contributions on their federal returns. But about 70% of taxpayers don't itemize; instead, they take the standard deduction. President Clinton, joining with some Republican leaders, backs legislation to allow nonitemizers to deduct some contributions. Advocates say this would promote fairness and increase charitable giving.

Here's how the Clinton plan would work: Each year from 2001 through 2005, married couples filing jointly who don't itemize could deduct 50% of charitable gifts exceeding \$2,000, a Treasury official says. For singles, the threshold would be \$1,000. After 2005, the thresholds would drop to \$1,000 for married couples, \$500 for singles. The Treasury estimates these changes would cost about \$13 billion over 10 years.

Texas Gov. George W. Bush also favors the idea of allowing people who don't itemize to deduct their gifts.

CHARITIES CHEER Clinton plans to boost philanthropy.

Another administration proposal would encourage donors to increase gifts of appreciated stocks, art, real estate and other assets to charity. Under existing law, taxpayers making such gifts can't deduct an amount greater than 30% of their adjusted gross income, or AGI. For gifts to many private foundations, the limit is 20%. Clinton proposes raising the 30% AGI limit on gifts of appreciated property to 50%, and proposes boosting the 20% limit to 30%.

The president also supports simplifying and reducing an excise tax on foundations' net investment income. Clinton's proposals represent "the most comprehensive and significant package I've seen for promoting charitable giving," says Dorothy S. Ridings of the Council on Foundations.