

From: [Herbold, Lisa](#)
To: john@eionline.org
Subject: RE: Leading our city and state - Thank you!
Date: Friday, July 14, 2017 4:25:00 PM
Attachments: [image001.png](#)
[image003.png](#)

The City Council has unanimously voted to begin addressing the regressive nature of our tax system, and move toward tax fairness. On Monday, July 10 the Council passed legislation that I co-sponsored to establish a [tax on high incomes](#). Thank you for writing me about this.

This vote occurred after a public hearing and discussion over four meetings in the [Affordable Housing, Neighborhoods and Finance Committee](#).

This legislation is an important step for Seattle as well as Washington State. In Seattle, we have an increasing affordability gap between the have and have nots. The middle class is being squeezed as well. And one of the reasons is our outdated, regressive and unfair tax structure. In Washington State, we have the [most regressive](#) tax structure in the nation. Local economist Dick Conway has noted [we finish last](#) when you consider fairness, transparency, adequacy, stability, and economic vitality.

The importance of lowering the property tax burden in Seattle was placed in stark relief by the state legislature's passage of a school funding measure that will increase property taxes by \$460 for a median home in Seattle. 63% of Seattle voters supported Initiative 1098 for a comparable state tax; [a KING 5/KUOW poll](#) in June showed 66% support, with 23% opposed.

The [Institute on Taxation and Economic Policy \(ITEP\) found in 2015](#) that state and local taxes paid by the 20 percent of Washington families with the lowest incomes amounted to 16.8 percent of their income. In contrast, the tax burden for the top one percent of families with the highest incomes was 2.4 percent of their income, [less than ½ the 5.6 percent average](#) of the 41 states with an income tax. A similar dynamic exists for [business taxes](#), with the smallest 20% of businesses paying 4.8%, and the top 1% paying 0.7% in taxes. That's why I supported an amendment to include potential reduction of the B&O tax for smaller businesses.

The Washington State Republican party recently sent out a document full of half-truths and scare tactics, while encouraging Seattle residents to break the law by not paying the tax. [Here is my response](#).

WHO IS TAXED?

The legislation would establish a tax of 2.25% on only the income of Seattle residents over \$250,000 for single filers, or income above \$500,000 for married couples filing jointly. So for a single filer with income of \$300,000, only the \$50,000 over \$250,000 would be taxed, for a total of \$1125, or 0.038 percent of their total income.

Some suggested that instead of taxing Seattle residents we tax income earned in Seattle. This approach would create be significantly more complicated to administer, would require businesses to withhold income, and cost much more to implement. That seemed neither feasible nor desirable.

The Council received late-breaking concerns about the impact of legislation on LLCs, S-Corporations, and Sole-Proprietorships; here's [a link to a document](#) that addresses concern regarding business income. In short, the tax will not be levied against business revenues that are used to offset business expenses or losses.

Further, local income taxes are deductible from federal income taxes, provided you do not deduct sales tax.

WHAT WILL THE INCOME TAX REVENUE FUND?

The legislation restricts the tax revenue used to: (1) lowering the property tax burden and the impact of other regressive taxes, including the business and occupation tax; (2) replacing funding lost through federal cuts or responding to changes in federal policy; (3) providing services, including housing, education, and transit; (4) creating green jobs and meeting carbon reduction goals; and (5) and implementing the tax.

HOW WILL THE TAX BE ADMINISTERED?

Only residents with qualifying incomes will need to file with the City. The legislation was designed to minimize the cost of implementation and reporting requirements. Residents with qualifying incomes will file their income as listed on [line 22](#) on IRS form 1040.

The tax will go into effect on January 1, 2018 with reporting due by April 15, 2019. Extensions for filing granted by the IRS will automatically apply.

Early estimates indicate it will raise approximately \$140 million from about 11,000 tax payers. The Department of Finance and Administrative Services (FAS), which collects city taxes, will be responsible for administration, and developing more detailed rules for implementation. FAS administers taxes for over 50,000 businesses, and is bound by the strict confidentiality requirements included in the legislation. Administrative costs are estimated at \$5-6 million annually, with one time IT costs at \$10-13 million.

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WHAT ABOUT THE LEGAL CHALLENGE?

There has been public discussion of potential legal challenges. The final ordinance, as passed on Monday, stuck to the commitment made in [Resolution 31747](#), passed by the Council in May, promising that legal viability would be the primary consideration in developing and constructing the legislation. [Recently former Washington State Justice Phil Talmadge, said to King-5 News](#), referring to a 5-4 case in 1935 and other old cases, "I thought those older cases should no longer be viable." He went on to say that the current justices must decide whether the principle upheld in those cases "is somehow now actually harmful and contrary to law and therefore something that it should abandon." This was a position he took himself in a dissenting vote on the State Supreme Court.

WON'T THE WEALTHY MOVE OUT OF SEATTLE?

A [13-year tracking study](#) released last year by researchers from Stanford University and the US Treasury Department studied whether income taxes on high incomes resulted in millionaires moving. The study found that 2.4% of millionaires move each year, compared to 2.9% for the general population, and 4.5% for those earning only \$10,000. So, millionaires move less than others, even with income taxes. And remember, every state but seven have State income or investment taxes and more than 4,000 jurisdictions have taxes on local income. With Seattle paving the way, it's possible that other jurisdictions in Washington State may follow suit.

CITY SPENDING HAS GONE UP, WHY DOES SEATTLE NEED MORE TAX REVENUE?

As mentioned above, Washington has one of the most inadequate tax systems in the nation (Table 7). Between FY 1995 and FY 2014, our state and local effective tax rate fell from 11.4 percent (the eleventh highest in the nation) to 9.4 percent (the thirty-sixth highest). **No other state in the nation experienced a greater decline over this period.** If the state and local effective tax rate had equaled the 10.5 percent national norm in each year from FY 2005 to FY 2014, Washington state and local governments would have collected an additional **\$23 billion in tax revenue** (Table 8).

From: John Burbank
To: [Herbold, Lisa](#)
Cc: [Aldrich, Newell](#); [Claire Tonry](#)
Subject: RE: LG Income tax amendment
Date: Friday, July 07, 2017 12:23:00 PM

If you are going to do this, I think it may be best to stick more closely to LG's original amendment, to say, for example,

"A. All receipts from the tax levied in this Chapter 5.65 shall be restricted in use and shall be used only for: (1) lowering the property tax burden and the impact of other regressive taxes; (2) replacing federal funding potentially lost through federal budget cuts; (3) providing public services, including housing, education, ((and)) transit, and **civil legal aid for refugees and immigrants threatened by the changes in federal policy**; (4) creating green jobs and meeting carbon reduction goals; and (5) administering and implementing the tax levied by this Chapter 5.65."

I don't think you need to do this, but having Tim reach out to Lorena would be a nice thing to do. I think she is cool with this as it is.

From: Herbold, Lisa [mailto:Lisa.Herbold@seattle.gov]
Sent: Friday, July 07, 2017 11:16 AM
To: John Burbank <john@eoionline.org>
Cc: Aldrich, Newell <Newell.Aldrich2@seattle.gov>
Subject: FW: LG Income tax amendment

See attached. Per our conversation last night.

From: Aldrich, Newell
Sent: Friday, July 07, 2017 10:54 AM
To: Herbold, Lisa <Lisa.Herbold@seattle.gov>
Subject: RE: LG Income tax amendment

Attached is 1) LG's amendment, and 2) an amendment version adding "or responding to changes in federal policy" to the revised base version.

This language doesn't read as well with the addition of "including funding for mental health and public health services." It might read better to say "or **to respond** to changes in federal policy"

Thx,
Newell

-----Original Message-----

From: Herbold, Lisa
Sent: Thursday, July 06, 2017 11:51 PM
To: Aldrich, Newell <Newell.Aldrich2@seattle.gov>
Subject: LG Income tax amendment

Can you:

1. Pull for me LG's amendment that didn't get proposed, as she crafted it.
2. Rewrite your version of it (not as a separate, standalone commitment but part of the fed tax cut revenue commitment piece by adding "federal policy") but rewritten with the *new language* as passed out of committee?

That's all I need I think.

John sent LG Claire's analysis re: creating exemptions for S-corps & Katie will check in w Juarez via Bryndel tomorrow.

Thinking of asking Tim to give LG the opening for her new version of her amendment tomorrow to make sure she (& DJ) have skin in the game.

Trying to cover all the bases. Thx!

Sent from my iPhone

From: Louis Lin
To: [Sawant, Kshama](#)
Subject: Literature and Professor Recommendations
Date: Wednesday, July 12, 2017 10:42:12 AM

Hi Councilmember Sawant,

I attended the progressive income tax rally and city council meeting on Monday as a new intern for the EOI, and I was really impressed and inspired by the speech you gave there. I heard that you previously taught economics as a professor, and while studying economics at UCLA I had never met anyone in that discipline who was as militant and revolutionary as you. I want to return to school in the future to do a PhD with ideas for a project on reparation movements and/or universal basic income, and I was wondering if you knew anyone in academia, in economics or otherwise, who you think I should research and possibly connect with. Additionally, would you have recommendations for literature and research I should read that could give me a better understanding of critical, anticapitalist economics and social action? Thank you so much for your help!

Sincerely,
Louis Lin

From: John Burbank
To: [Bagshaw, Sally](mailto:Bagshaw.Sally)
Subject: RE: Local Privilege Tax on the Wealthy
Date: Monday, January 18, 2016 10:50:34 AM

Thanks. Good. Looking forward to talking. We will have poll results by then.

-----Original Message-----

From: Bagshaw, Sally [<mailto:Sally.Bagshaw@seattle.gov>]
Sent: Saturday, January 16, 2016 4:11 PM
To: John Burbank
Subject: RE: Local Privilege Tax on the Wealthy

I'd like to meet with you to discuss this.

I am particularly interested in extended family leave, and am looking for ways to fund it.

I'll ask Alberta Bleck in my office to set up something shortly. I will be out of the office during the week of Jan. 25; we'll make it happen when I return.

Sally Bagshaw
Seattle City Councilmember
206 684 8801

From: John Burbank [john@eoionline.org]
Sent: Wednesday, January 06, 2016 4:49 PM
To: Bagshaw, Sally
Subject: Local Privilege Tax on the Wealthy

Dear Sally,

First, congratulations on your re-election!

So, now that the smoke has cleared, I wanted to follow up from our discussion with Hubert Locke. We are eager to proceed with the idea of a privilege tax on the wealthy. The dedication of funding includes a provision for family leave. We have a good coalition, some funding, and a commitment to moving forward. It would be good to do this through a City Council action to place a referendum on the November ballot.

I am attaching a rough draft for such a referendum. Our group is meeting tomorrow. Polling will be later this month.

I would like to set up a meeting with you ASAP, either on or off campus.

Please let me know what is best for you. Let's work together.

Thanks.

John

John R. Burbank
Executive Director
Economic Opportunity Institute
603 Stewart St., Suite 715
Seattle WA 98101

206-755-5969/cell
206-529-6345/office

"Building an economy that works - for everyone."

From: [Bagshaw, Sally](#)
To: [John Burbank](#)
Subject: RE: Local Privilege Tax on the Wealthy
Date: Saturday, January 16, 2016 4:10:47 PM

I'd like to meet with you to discuss this.

I am particularly interested in extended family leave, and am looking for ways to fund it.

I'll ask Alberta Bleck in my office to set up something shortly. I will be out of the office during the week of Jan. 25; we'll make it happen when I return.

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206 684 8801

From: John Burbank [john@eoionline.org]
Sent: Wednesday, January 06, 2016 4:49 PM
To: Bagshaw, Sally
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From: John Burbank
To: [Tim Burgess](#)
Cc: [Tim Burgess](#); [Burgess, Tim](#); [Michael DeBell](#); [Watkins, Marilyn](#)
Subject: RE: Local Privilege Tax on the Wealthy
Date: Monday, January 11, 2016 8:35:28 AM

Thanks for the timely response. I am looking forward to our meeting. Here are some preliminary thoughts on your thoughts.

1. Please note that the draft is just that – a draft. So this is not something that has been vetted by Pacifica and not something we or the city attorney should consider for hanging our hats on.
2. We do want a ballot proposition for November, so the timing is important.
3. We agree that the grab-bag approach is not the best. Certainly with competitive or even complementary proposals on transit, housing etc. So don't take that list as given. It is not. The Mayor was not enthusiastic about using this approach to fund the pre-K program. He did not think it had enough traction or critical mass to sustain support (this was when we met with him in May or June). He may have changed.
4. Invariably the low income programs that are most vulnerable to cuts in future funding are those programs that are only for low-income people. The low income programs that sustain and grow support are those that are universal (think Social Security, K-12, Medicare, etc.). So it is important to have programs (not “interventions”) that sustain majority support by providing majority benefits. We have to consider the working poor, low income families, working class, middle class, and the voters as overlapping and crucial circles for success, both in policy and in moving policy forward.
5. Along these lines, the pre-K program appears to be intentionally constructed to include a mix of children going up and down the income ladder. Family leave is also such a program and foundation for success, and one benefitting people all along the income gradient and sustaining political support. You may remember that Seattle-King County Public Health had a program for nurses to visit the homes of all newborns and just make sure things were ok, the family was doing well, the baby was being taken care of, etc. A nurse came to our house right after Megan was born. That was defunded after I-747 passed. There is no compelling reason to restrict such visits to low-income households. Each family has its own set of challenges and opportunities. And the wider the universe, the more sustainable the support. So we might want to consider that.
6. As to child care, I agree, high quality is crucial. That depends on the compensation, education, and professionalization of the child care teachers and caregivers, as you have certainly recognized and designed into the pre-K program. Now we have to figure out how to extend these standards for 0-3 child care, especially as the financing for these programs is jeopardized by losing the cross-subsidies of the older kids going to separate pre-K programs. We have a successful program, called the Early Childhood Education Career and Wage Ladder, which was funded by the state and shown in three evaluations to be very effective in both increasing the professionalism of the teacher and the quality of care (no surprise!). This may be something we want to include in this measure.
7. We will have a poll in the field on January 19-21. We have met with the polling firm to discuss parameters. Michael was in on the last meeting. If you would like to test certain ideas, please let me know. This is gathering momentum and acceleration.

Thanks for your thoughtful and good response. Looking forward to partnering together as effectively and constructively as possible.

John

From: Tim Burgess [mailto:councilmantim@gmail.com]

Sent: Monday, January 11, 2016 8:02 AM

To: John Burbank

Cc: Tim Burgess; Tim Burgess; Michael DeBell

Subject: Re: Local Privilege Tax on the Wealthy

Morning, John.

I wanted to get back to you after some homework on this end related to your proposal. Here's some of my preliminary thoughts . . .

- The City Attorney's office is reviewing your draft ordinance and will give me their preliminary read later this week; their opinion/perspective is crucial here for obvious reasons.
- I have concerns about timing here. If you want the Council to place this matter on the November ballot (and I assume you want November over August), we need to build a timeline that allows for the refinement of the core proposition; realistically, that will take several months, likely through May or even June. This has obvious implications for polling.
- I am very disappointed that the whole primary purpose of funding expansion of preschool is now gone from this proposal. Instead, it now includes a grab bag of possible programs, including Metro transit passes for youth and seniors. Are you aware that the Council just allocated \$1 million for youth passes, a first for Seattle in direct funding of youth passes.
- I can only support a measure that is highly targeted to fund evidence-based programs for those lowest on the socioeconomic scale where we have a massive equality of opportunity gap. New research just published in the past few weeks documents this gap and identifies proven interventions that have been shown to reduce this gap. These programs include, as examples, high-quality preschool for 3 and 4 year olds, early Head Start, home visitation programs tied to reading and health, such as Nurse Family Partnership (health and parenting) and the Parent Child Home Program (literacy), and quality child care. A ballot measure that represents a menu of options is not prudent.
- A few conversations about timing surfaced very real competition concerns related to Sound Transit 3.

Just a few starting thoughts. All solvable but rushing on this is not our friend.

Tim Burgess
Seattle City Council

On Wed, Jan 6, 2016 at 4:29 PM, John Burbank <john@eoionline.org> wrote:

Dear Tim,

First, congratulations. What a long, drawn out and unnecessarily angry campaign!

So, now that the smoke has cleared, we are eager to proceed with this idea. We have a good coalition, some funding, and a commitment to moving forward. It would be good to do this through a City Council action to place a referendum on the November ballot.

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Please let me know what is best for you. Let's work together.

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[206-529-6345](tel:206-529-6345)/office

"Building an economy that works - for everyone."

From: Tim Burgess
To: [John Burbank](#)
Cc: [Tim Burgess](#); [Burgess, Tim](#); [Michael DeBell](#)
Subject: Re: Local Privilege Tax on the Wealthy
Date: Monday, January 11, 2016 8:01:54 AM

Morning, John.

I wanted to get back to you after some homework on this end related to your proposal. Here's some of my preliminary thoughts . . .

- The City Attorney's office is reviewing your draft ordinance and will give me their preliminary read later this week; their opinion/perspective is crucial here for obvious reasons.
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From: [Arestad, Kirstan](#)
To: [Burgess, Tim](#)
Cc: [Van Duzer, Nate](#); [Day, Seferiana](#)
Subject: RE: Local Privilege Tax on the Wealthy
Date: Friday, January 08, 2016 12:59:32 PM

Hi Tim,

Erik Sund is on paternity leave until late February so I've asked Dan Eder to lead. However, if you aren't in any hurry and can wait until after February, then Erik would be lead. Let me know your preference on timing (early or later). Kirstan

From: Burgess, Tim
Sent: Thursday, January 07, 2016 4:05 PM
To: Arestad, Kirstan
Cc: Van Duzer, Nate; Day, Seferiana
Subject: FW: Local Privilege Tax on the Wealthy

Note below and the attachment.

These discussions began last year and were stopped when the Mayor and I made it clear that we would not consider any additional ballot measures in 2015. The advocates have now opened up discussions again.

Putting aside the specifics in the proposed ordinance which is attached, I am interested in digging a little deeper into this issue. Is there an analysts that can be assigned to this work, please?

Councilmember Tim Burgess

[Seattle City Council](#)

Chair, [Affordable Housing, Neighborhoods and Finance Committee](#)

206-684-8806

tim.burgess@seattle.gov

From: John Burbank [<mailto:john@eoionline.org>]
Sent: Wednesday, January 06, 2016 4:30 PM
To: timothy_burgess@msn.com; Tim Burgess; Burgess, Tim
Cc: michael.debell@comcast.net
Subject: Local Privilege Tax on the Wealthy

Dear Tim,

First, congratulations. What a long, drawn out and unnecessarily angry campaign!

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From: John Burbank
To: [Bagshaw, Sally](#)
Subject: Local Privilege Tax on the Wealthy
Date: Wednesday, January 06, 2016 4:54:55 PM
Attachments: [Seattle privilege tax on unearned income.docx](#)

Dear Sally,

First, congratulations on your re-election!

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From: John Burbank
To: kshamavsawant@gmail.com; [Sawant, Kshama](mailto:Sawant,Kshama)
Cc: spbl7097@yahoo.com
Subject: Local Privilege Tax on the Wealthy
Date: Wednesday, January 06, 2016 4:45:10 PM
Attachments: [Seattle privilege tax on unearned income.docx](#)

Dear Kshama,

First, congratulations. You are the best! It is great to have you re-elected in our city. Hurray!

So, now that the smoke has cleared, we are eager to proceed with the idea of a privilege tax on the wealthy. We have a good coalition, some funding, and a commitment to moving forward. It would be good to do this through a City Council action to place a referendum on the November ballot.

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"Building an economy that works - for everyone."

From: John Burbank
To: [Lisa Herbold](#); [Herbold, Lisa](#)
Cc: [Nick Licata](#); [Nick Licata](#)
Subject: Local Privilege Tax on the Wealthy
Date: Wednesday, January 06, 2016 4:39:11 PM
Attachments: [Seattle privilege tax on unearned income.docx](#)

Dear Lisa,

First, congratulations. What a long, drawn out and ultimately victorious campaign! Hurray!

So, now that the smoke has cleared, we are eager to proceed with the idea of a privilege tax on the wealthy. We have a good coalition, some funding, and a commitment to moving forward. It would be good to do this through a City Council action to place a referendum on the November ballot.

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From: John Burbank
To: timothy_burgess@msn.com; [Tim Burgess](#); [Burgess, Tim](#)
Cc: michael.debell@comcast.net
Subject: Local Privilege Tax on the Wealthy
Date: Wednesday, January 06, 2016 4:35:08 PM
Attachments: [Seattle privilege tax on unearned income.docx](#)

Dear Tim,

First, congratulations. What a long, drawn out and unnecessarily angry campaign!

So, now that the smoke has cleared, we are eager to proceed with this idea. We have a good coalition, some funding, and a commitment to moving forward. It would be good to do this through a City Council action to place a referendum on the November ballot.

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From: John Burbank
To: [Johnson, Rob](#)
Cc: [Katie Wilson](#); [Herbold, Lisa](#); [Michael Tamayo \(mtamayo@washingtonea.org\)](mailto:mtamayo@washingtonea.org)
Subject: Materials from our discussion this morning
Date: Friday, April 21, 2017 10:19:54 PM
Attachments: [image001.png](#)
[Memo Seattle Taxation Authority 170331.pdf](#)
[Calculator as of February 17 2017 based on 2014 IRS Income Data by zip. 021617.xlsx](#)

Dear Rob,

Thanks for the great discussion this morning. I am attaching two things: the public legal brief about the pathway upon which we would be embarking with a city council ordinance and a calculator with which you can determine revenues as a result of different taxing schema, such as our preferred tax on adjusted gross income and the capital gains tax you suggested.

Here also for your reading pleasure is my [column](#) earlier this week in the Everett Herald regarding the Legislature and Sound Transit 3.

Take care. Let's keep working together to advance a city income tax!

John

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Executive Director
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From: John Burbank
To: [Juarez, Debora](#)
Cc: [Nick Licata](#); [Swift, BrynDel](#); [Katie Wilson](#); [Greg Wong](#)
Subject: materials on city excise tax on income
Date: Thursday, February 09, 2017 7:26:43 PM
Attachments: [Seattle Exploratory Brief February 9 2017.docx](#)
[ATT00001.htm](#)
[ProgressiveTax1-pager JRB edits accepted.docx](#)
[ATT00002.htm](#)
[Copy of Full WA 2014 IRS Income Data by zip 011017 JRB calculation.xlsx](#)
[ATT00003.htm](#)

Dear Debora,

Thanks so much for meeting with Katie and me and Transit Riders Union members today. I thought that was a good discussion regarding a city income tax. Here are some more materials, including a calculator.

We have a draft ordinance for Olympia. As we polish that up for Seattle, I will get that to you. I also want to encourage you to reach out to Greg Wong for further discussions of the legal pathway.

Thanks again for the great meeting.

John

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