

MEMORANDUM

TO: EITC Funders Network
FROM: Chuck Sheketoff, Executive Director
DATE: June 30, 2009 Conference Call
RE: Oregon EITC Timeline and OCPP Publications

The following outlines the Oregon EIC timeline and OCPP publications on topic:

- 1997** Oregon EIC enacted in bill coupled with a “Working Family Child Care Credit.” The final Oregon EIC was 5 percent of the federal EIC and not “refundable.”
- 1998** Report: [Why Make the Oregon Working Family and Earned Income Credits Refundable](#)
- 1999** Report: [Fixing Oregon's Low-Income Tax Credits: Should They Be Made Refundable?](#)
- 2003** Report: [Making Ends Meet: Improving Oregon’s Earned Income Credit](#)
- 2005** Legislature makes Oregon EIC refundable starting in 2006 (and “sunsets” refundability in 2010) and increases it to 6 percent of federal EIC starting in 2008.
Report: [Investing in Working Families: Improving Oregon’s Earned Income Credit.](#)

- 2007** At request of advocates, legislature takes sunset off refundable portion and puts sunset on entire EIC. Advocates suggest phase out of personal exemption credit for high-income households to raise funds to increase the EIC, but legislature uses that idea to fund other tax expenditures.
- Issue Brief: [Giving Credit Where Credit Is Due](#): How to pay for an improvement in the Earned Income Credit
- Report: [Working, Poor, and Taxed](#): Improving Oregon's Earned Income Credit
- 2008** Non-legislative year. OCPP organizes [Oregonians for Working Families](#) – a coalition that endorses increasing the EIC.
- Report: [Rolling Up Our Sleeves: Building an Oregon That Works for Working Families, State of Working Oregon 2008-2009](#) (p. 50)
- Issue Brief: [No Contest](#): Why expanding the Earned Income Tax Credit is better for working families and Oregon than the Tax Bracket Increase
- Fact Sheet: [Expanding the EIC in 2009](#): Increasing the state Earned Income Credit would add fairness and help low-wage working families and communities across Oregon
- 2009** Efforts to increase EIC fail despite 90+ member Oregonians for Working Families coalition. 2009 presented a tough fiscal climate to add new tax credit, though coalition ultimately pegged EIC improvement as necessary and targeted way to offset regressive transportation tax and fee increases. Sunset on state EIC moved to 1/1/2014.
- Issue Brief: [Will Poor, Working Families Be Roadkill?](#) The Jobs and Transportation Act's Regressive Tax and Fee Increases Will Set Back Low-Income Working Families With Children Unless the Legislature Enacts a Modest EITC Expansion
- Fact Sheet: [Your Constituents Utilize the EITC](#): Improving It Should Be Part of Any Revenue Package
- Next Steps** Raise in special session in 2010, make issue discussed in legislative campaigns in 2010, and build for 2011 session.