



California Budget
& Policy Center

Making the Case for Boosting Revenues:

Strategies for Messaging and Talking About Taxes

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What Your Vision for California's Future?



What You Can Expect to Take Away From This Workshop



Objective 1: Discuss common barriers to building support for new/increased taxes and revenues.

Objective 2: Understand principles of effective messaging on taxes.

Objective 3: Have specific approaches and examples of language to take back to your work.



**There are a number of
fundamental challenges in
making the case for taxes.**



- General mindset that less taxes are good (“tax burden, “tax relief”)
- Complexity of the tax system and, often, of tax proposals
- Perception that higher taxes hurt the economy.



Common media framing of taxes:

Research shows that media coverage reinforces a taxes-versus-the-economy perspective with “an emphasis on taxes as a burden, the need for tax breaks to lure business, and an assumption that it is natural and desirable to minimize taxes.”

- The Topos Partnership



“We must recognize **two competing truths**: that anti-tax sentiments course deeply through the American experience but that people also care about their communities and the common interests that government protects and promotes.”

- Demos



Core Principles for Effective Messaging on Taxes



Place the discussion in a broader economic context.

Taxes and tax increases can be framed in terms of the collective effort and outcomes they make possible and how they contribute to a stronger economy that works for everyone.



- “An economy that works for all Californians”
- “Creating jobs”
- “Building a strong economy”
- “Fostering shared prosperity”
- “Creating a brighter future for California and its children”



The overarching goal: link taxes to things that we care about (jobs, the economy, schools and communities, our children and their future, broadened prosperity)



**Be as specific as possible
about what kinds of things
the new revenues will
support.**



"Taxes are not just a matter of **rates, schedules, and deductions**. They're a means to an end. Yet the presentations by reformers...deal only with the means, not the end. It's never a discussion about **what you're getting for your money.**"

- Jared Bernstein



- “Good schools, top-notch colleges and universities, public safety, and health services”
- “Investments in education, health, and infrastructure”
- “Schools, roads, clinics, police and fire protection, and health inspections”
- “Well-educated workforce”
- “The building blocks of a strong economy”



When Specific Trade-Offs Are Identified, Investment Is Preferred

Poll of likely voters: Which do you think is the best way for the state government to grow the economy: **investing in education and job training** OR **reducing regulations and taxes on business**

Investing in education and job training: **59%**
[48% strongly, 11% somewhat]

Reducing regulations/taxes on business: **32%**
[25% strongly, 7% somewhat]

Source: David Binder Research/Make It Fair California



When Specific Trade-Offs Are Identified, Investment Is Preferred [continued]

**Poll of likely voters: Which is more important to you:
Preventing tax increases OR preventing cuts to education**

Prevention cuts to education: 50%
[39% much more, 11% somewhat]

Prevent tax increases: 44%
[30% much more, 14% somewhat]

Source: David Binder Research/Make It Fair California



Other effective frames help connect taxes to concepts that generally have broad support.



“Fairness,” but used specifically

“Ensure that big corporations and the wealthy pay their fair share”

People are concerned about the income/wealth gap and a tax code that they think favors big business and the very rich.



“Strong middle class”

“Public systems and services that strengthen the middle class and help working Californians”

This builds on the broad understanding that a strong middle-class is key to a equitable, sustainable economy



Avoid common pitfalls when making the case.

Even those who support boosting revenues will at times use phrases that trigger negative frames about taxes.



“Tax burden”: very common phrase, but reinforces negative concept of taxes

“Government services,”

“taxpayers”: puts the public in “consumer” mode outside of government – rather than emphasizing collective effort.

Ineffective/“broken” public systems: plays into negative frame about government and spending



Other Useful Language

Instead of “taxpayers:” “residents,” “voters,” “community members,” “people and families” “Californians.”

More on specific uses/benefits: “world-class education system,” “modern infrastructure,” “healthy environment,” “helping students and their families afford college,” “public safety,” “health care,” “well-educated, well-trained workforce”

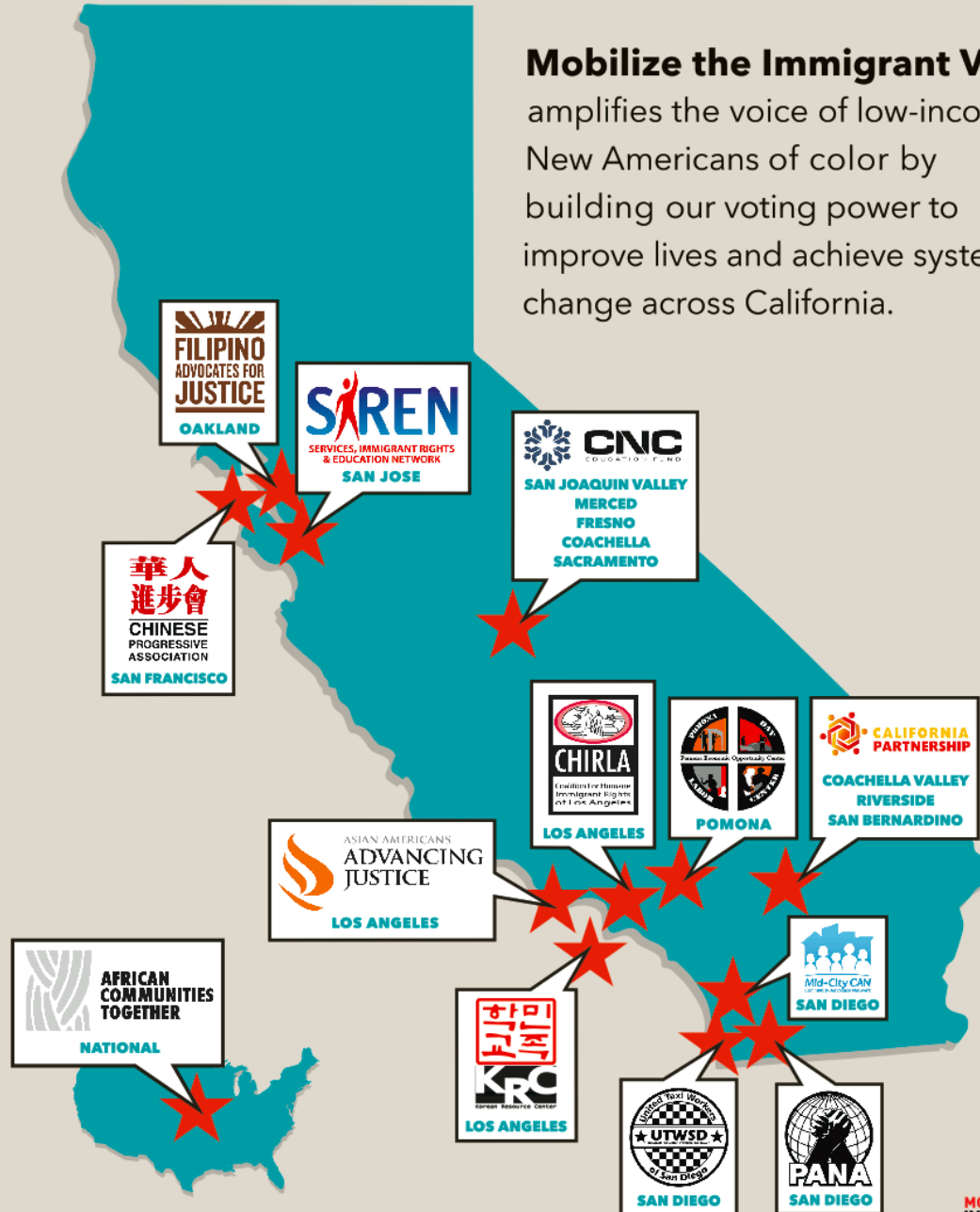
Shared vision: “thriving communities” “broadened economic opportunity,” “safe and healthy neighborhoods,” economic security,” “future prosperity,” “an economy that works for all,” “a high quality of life”



MOBILIZE the IMMIGRANT VOTE

2015 ALLIANCE SISTER ORGANIZATIONS

Mobilize the Immigrant Vote amplifies the voice of low-income New Americans of color by building our voting power to improve lives and achieve systems change across California.



Vision for California

- All Californians have opportunities and access to a healthy, safe, and fulfilling life
- California serves as a model for the nation on progressive policy, particularly for immigrant and refugee integration
- All Californians have full and equal representation



MIV Model

- Culture Strategy to set short-term issue environment and long term narrative shift; build groundwork for political wins
- Coordinated Field Campaigns for progressive state level wins
- Capacity Building to strengthen electoral infrastructure to run effective campaigns and cultural strategy



2011 Take Back The American Dream

- Begin shifting statewide issue environment around a core set of values to build greater support for policy victories. A priority issue for 2011-2012 was fair tax and fiscal reform at the local and state levels.
- Conduct a field and media pilot project to influence immigrant and refugee New American voters and their families to vote in line with the MIV American Dream narrative.
- Develop in language and in culture values campaign tools and best practices to share with allies across the country.
- Build strategic relationships and recruit potential long-term partners interested in working together in 2012 and beyond.



2011 Take Back The American Dream

- Languages: Spanish, Chinese, Vietnamese, Korean, Tagalog, English
- Counties: Alameda, Los Angeles, Orange, Riverside, San Bernardino, San Francisco, Santa Clara
- 16,686 immigrant and refugee New American voters contacted
- **15,270 or 92% of contacted voters supported progressive tax and fiscal policy as a step to take back the American dream**
- 229,436 immigrant and refugee New American households reached through media and art in 6 Languages



2011 Take Back The American Dream Narrative Insights

- Immigrant and refugee communities responded well to the American Dream values narrative and this translated into support for progressive policy proposals. **Targeted voters responded particularly well to the values of opportunity, family and community, and the common good.**
- **Translating a values narrative is more about bridging concepts and cultures rather than traditional translation.**
- Success was even stronger when linking the American Dream narrative with a "We are 99%" message. Midway into the campaign, voters showed a marked increased awareness of the Occupy Movement and increased interest in corporate, economic, and fiscal issues.



2011 Take Back The American Dream Tax & Fiscal Policy Insights

- **With the right narrative, immigrants and refugees can be very progressive voters and deliver huge dividends for progressive statewide policy change**
- **It is useful to talk about the concrete social goods and public structures that progressive tax and fiscal reform will deliver**
- Immigrant and refugee voters value “fairness” and the concept of the rich and corporations paying their “fair share”
- Emphasizing family, community, children and seniors is an effective way to win support of progressive tax and fiscal reform within immigrant and refugee communities.



2012 Progressive Revenue Campaign Mailers

Paid for by We Are California,
sponsored committee of Mobilize
the Immigrant Vote Action Fund
4100 Redwood Rd, #140
Oakland, CA 94619

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**Un estado lleno de oportunidad para todos.
A Land of Opportunity. For all of us.**



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우리 모두를 위한 기회의 땅.
A Land of Opportunity. For all of us.



2015 Keeping Families Together and Thriving

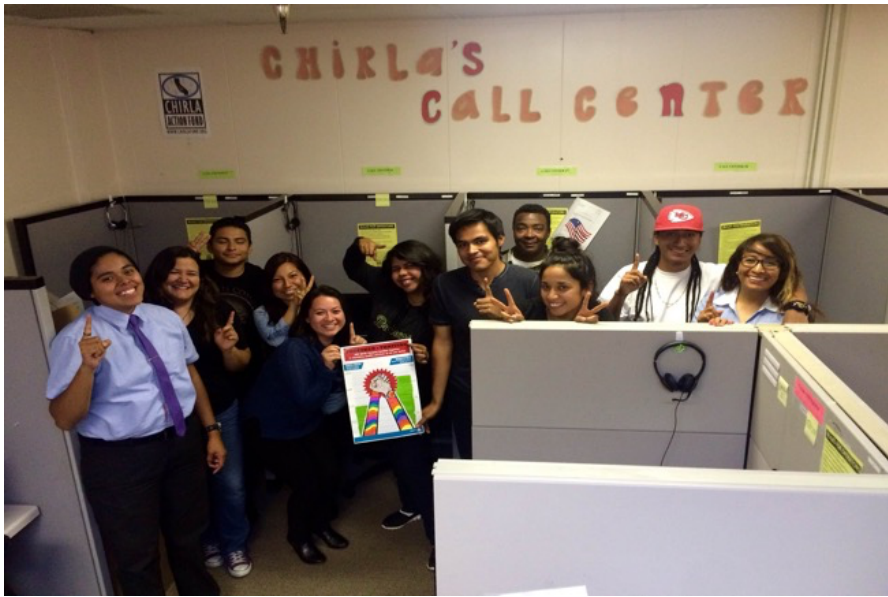
- Rebuild the quality public services that New American and working families rely upon to thrive through mobilizing New American voters to support Commercial Property Tax Reform at the state level.
- Amplify voter engagement efforts through ethnic media outreach in print, television, and radio.
- Continue to engage low propensity New American voters and their families in strategic and traditionally conservative areas of the state to turn demographic change into progressive voting power.



2015 Keeping Families Together and Thriving

- Languages: Spanish, Korean, Chinese, Somali, Amharic, Tagalog, English
- Counties: Los Angeles, Fresno, San Bernardino, Riverside, Orange, San Diego, Alameda, San Francisco, Kern, Sacramento, Tulare, Kings, San Joaquin, Imperial, Merced, Stanislaus
- 20,566 immigrant and refugee New American voters contacted
- 8,630 of contacted voters supported Commercial Property Tax Reform
- 2,800,000 immigrant and refugee New American households reached through ethnic media
- Translated materials: Spanish, Chinese, Korean, Tagalog





2015 Keeping Families Together and Thriving

- Campaign built leadership, political education, and ownership among members and leaders for tax and fiscal reform
- Increased sophistication about values-based messaging & making in language, in culture script changes quickly
- Continue to learn and document lessons around targeting particularly relating to ethnicity and geography
- Engaging local question to prime voters for statewide question





MOBILIZE the IMMIGRANT VOTE  **Making NEW AMERICAN VOICES count**



MOBILIZE the **IMMIGRANT** **VOTE**  **Making NEW AMERICAN VOICES count**

Putting It All Together: An Example

“The future of our state, its families, and its communities depends on all of us working together to create broadly shared prosperity. This means ensuring that all children have the chance to succeed in school and pursue a rewarding career. Helping young people to thrive means enabling them to live in safe, healthy communities and also ensuring California has a world-class system of education from preschool to K-12 schools to public colleges and universities. This will take strong, robust investment by our state, which is why it’s important that we have a revenue system in which large corporations and the very wealthy pay their fair share.”



Small-Group Exercise

You're making the case for a new tax proposal to a potential ally who is reluctant to come on board. (Each group should come up for its own scenario for who the specific audience/organization is for this.)

Craft a brief (five- or six-sentence) "pitch" that is designed to win support, thinking about the issues and goals that are important to your audience.

Identify a member of your group to record and report out the statement you come up with.



Questions/Discussion and Wrap-Up

