



## **Democratic Presidential Primary Spending Analysis – Barack Obama**

**Total Annual Spending: \$343.586 billion**

### **Economy, Transportation, and Infrastructure: \$111.603 billion**

#### **A. Broadband:**

“Obama will recommit America to ensuring that our schools, libraries, households and hospitals have access to next generation broadband networks. He will also make sure that there are adequate training and other supplementary resources to allow every school, library and hospital to take full advantage of the broadband connectivity.”

<http://www.barackobama.com/issues/technology/>

Cost: Unknown.

#### **B. Broadband – Public-Private Partnerships:**

“Obama will encourage innovation at the local level through federal support of public/private partnerships that deliver real broadband to communities that currently lack it.”

<http://www.barackobama.com/issues/technology/>

“Obama ... believes national policy should support state, local, and public-private partnerships as well as private efforts to make high speed access to the Internet available to all Americans.”

<http://www.barackobama.com/issues/technology/>

Cost: Unknown.

#### **C. Broadband – Universal Service Fund for Broadband:**

“As President, Barack Obama will ... [d]irect the FCC to propose reforms changing the Universal Service Fund program from one that supports voice communications to one that supports affordable broadband.”

<http://www.barackobama.com/pdf/UrbanPovertyOverview.pdf>

Cost: Unknown.

Source: The Senator says that he would direct the FCC to propose reforms, but it is unknown what the final proposal would be. However, related legislation, H.R. 5252, was introduced in the 109<sup>th</sup> Congress that would create a new program in the Universal Service Fund to support the development of broadband service to unserved areas. The Congressional Budget Office (CBO) estimates this new broadband fund would cost \$488 million annually (\$2.439 billion over five years).

<http://www.cbo.gov/ftpdoc.cfm?index=7565&type=1>

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*Note: An asterisk (\*) appears with proposals that are either new to NTUF's June 3 analysis or are proposals from previous analyses that contain new information.*

D. Commerce – Antitrust Regulation:

“As President, Obama will reinvigorate antitrust enforcement, which is how we ensure that capitalism works for consumers. Thus, he will step up review of merger activity and take effective action to stop or restructure those mergers that are likely to harm consumer welfare, while quickly clearing those that do not. An Obama Administration will look carefully at key industries to ensure that the benefits of competition are fully realized by consumers. Obama will strengthen the antitrust authorities’ competition advocacy programs to ensure that special interests do not use regulation to insulate themselves from the competitive process. Obama will also strengthen competition advocacy in the international community as well as domestically. He will take steps to ensure that antitrust law is not used as a tool to interfere with robust competition or undermine efficiency to the detriment of U.S. consumers and businesses. He will do so by improving the administration of those laws in the U.S. and by working with foreign governments to change unsound competition laws and to avoid needless duplication and conflict in multinational enforcement of those laws. In short, an Obama Administration will take seriously its responsibility to enforce the antitrust laws so that all Americans benefit from a growing and healthy competitive free-market economy.”

<http://www.barackobama.com/issues/technology/>

Cost: Unknown.

E. Commerce – Bank Loans:

“Barack Obama will work with his Secretary of Treasury and the Federal Deposit Insurance Corporation to encourage banks, credit unions and Community Development Financial Institutions to provide affordable short-term and small dollar loans – and to drive the sharks out of business.”

[http://obama.3cdn.net/8f478c5e1bb07ca0b1\\_sh1umv2zy.pdf](http://obama.3cdn.net/8f478c5e1bb07ca0b1_sh1umv2zy.pdf)

Cost: Unknown.

F. Commerce – Credit Card Consumers’ Bill of Rights:

“[Obama] also will establish a Credit Card Bill of Rights to stop credit card companies from exploiting consumers with unfair practices. . . . Barack Obama will require the Federal Trade Commission to analyze credit card company compliance with these basic rights, and provide the Department of Justice with the full authority to investigate and penalize non-compliant companies.”

<http://www.barackobama.com/issues/economy/>

Cost: Unknown.

G. Commerce – Credit Card Rating System:

“Barack Obama will create a credit card rating system, modeled on five-star systems used for other consumer products, to provide consumers an easily identifiable ranking of credit cards.

Under the Obama plan, the Federal Trade Commission (FTC) will assess the degree to which credit cards meet consumer-friendly standards. The FTC will test for a set of credit card features that are deemed the most dangerous for consumers, including the underwriting standards used to issue the card, the card's interest rate spread between the introductory rate and the maximum rate allowed, and transaction fees. The FTC will assign ratings so that consumers can easily understand if a credit card agreement meets or exceeds standards of safety. Credit card companies will be required to display the rating on all application and contract materials, enabling consumers to quickly understand all of the major provisions of a credit card without having to rely exclusively on fine print in lengthy documents. Credit card companies will also be required to disclose in simplified, clear language all of the major features of the card in addition to their FTC rating to provide consumers with additional information to compare credit card products.”

<http://www.barackobama.com/issues/economy/>

Cost: \$10 million (\$50 million over five years).

Source: Senator Obama is a sponsor of S. 2411 (110<sup>th</sup> Congress): A bill to require the establishment of a credit card safety star rating system for the benefit of consumers, and for other purposes. The text authorizes \$10 million annually.

#### H. Commerce – Patent Law:

“Reform the Patent System: A system that produces timely, high-quality patents is essential for global competitiveness in the 21st century. By improving predictability and clarity in our patent system, we will help foster an environment that encourages innovation. Giving the Patent and Trademark Office (PTO) the resources to improve patent quality and opening up the patent process to citizen review will reduce the uncertainty and wasteful litigation that is currently a significant drag on innovation. With better informational resources, the [PTO] could offer patent applicants who know they have significant inventions the option of a rigorous and public peer review that would produce a ‘gold-plated’ patent much less vulnerable to court challenge.”

<http://www.barackobama.com/issues/technology/>

Cost: Unknown.

#### I. Community Development Block Grant (CDBG):

“The important Community Development Block Grant program, which provides urban areas with block grants to innovate and provide a full range of housing, job training, and community development services, has been cut by an astonishing 31 percent since Bush took office. ...

Barack Obama ... will restore funding for the CDBG program.”

<http://www.barackobama.com/pdf/UrbanPovertyOverview.pdf>

Cost: \$1.693 billion (first-year cost).

Source: CDBG formula grant outlays were \$4.955 billion in FY 2000; this amount is equal to \$6.048 billion in constant FY 2007 dollars. FY 2007 CDBG formula grant outlays were estimated at \$4.355 billion.

<http://data.bls.gov/cgi-bin/cpicalc.pl>

J. Community Development – Office of Urban Policy:

“Barack Obama will create a White House Office of Urban Policy to develop a strategy for metropolitan America and to ensure that all federal dollars targeted to urban areas are effectively spent on the highest-impact programs. The Director of Urban Policy will report directly to the President and coordinate all federal urban programs.”

<http://www.barackobama.com/pdf/UrbanPovertyOverview.pdf>

Cost: \$4 million (\$20 million over five years).

Source: This estimate is based on the budget of a related entity within the Executive Office of the President, the Office of Science and Technology Policy, which received \$4 million in 2007. <http://www.whitehouse.gov/omb/budget/fy2008/pdf/appendix/eop.pdf>

K. Community Development – Public-Private Partnerships for Internet Access:

“As President, Barack Obama will ... [e]ncourage public-private partnerships to get low-income communities and resident[s] connected and work with cities and municipalities to distribute information on best practices among those that have deployed citywide free wireless broadband networks and how those lessons learned can be applied in other communities.”

<http://www.barackobama.com/pdf/UrbanPovertyOverview.pdf>

Cost: Unknown.

L. Community Development – Rural Development:

“Barack Obama supports adequate investment in water, sewer and other community ‘backbone’ systems so that rural America will not be left behind. He also supports greater flight access between small city airports and regional hubs, greater federal investment in restoring deteriorating roads and bridges, modernization of locks and dams, and investment in intermodal transportation hubs to help spur business development.”

<http://www.barackobama.com/issues/pdf/PovertyFactSheet.pdf>

Cost: Unknown.

M. Community Development – Rural Information Infrastructure:

“We need a comprehensive federal effort to boost investment in information infrastructure in rural America so that modern farmers have access to modern technologies, residents have access to telemedicine and distance learning for secondary education, and all communities have access to modern emergency communication services like 911 emergency services.”

<http://www.barackobama.com/issues/pdf/PovertyFactSheet.pdf>

Cost: Unknown.

N. Community Development – Urban Development:

“Obama will provide additional resources to the federal Community Development Financial Institution Fund, the Small Business Administration and other federal agencies, especially to their local branch offices, to address the needs identified by the [new] Director of Urban Policy.”  
<http://www.barackobama.com/issues/pdf/PovertyFactSheet.pdf>

Cost: Unknown.

O. Community Development – Urban Promise Neighborhoods:

“Obama will create 20 Promise Neighborhoods in cities that have high levels of poverty and crime and low levels of student academic achievement. The Promise Neighborhoods will model the Harlem Children’s Zone and seek to engage all resident children and their parents into an achievement program based on tangible goals, including college for every participating student, strong physical and mental health outcomes for children as well as retention of meaningful employment and parenting schools for parents. Promise Neighborhood sites will be selected by the federal government after review of applications from cities and their existing non-profit organizations and school districts. Cities and private entities will be required to pay 50 percent of the program costs.”

<http://www.barackobama.com/pdf/UrbanPovertyOverview.pdf>

Cost: \$60 million (\$300 million over five years).

Source: “This year, the Harlem Children’s Zone’s budget will approach \$60 million – most of it coming from wealthy board members, private foundations and other nongovernmental contributors. But it started much smaller – about \$6 million a year a decade ago – and has been able to keep growing because of its rigorous approach to goals and results.”

<http://www.cleveland.com/printer/printer.ssf?/base/cuyahoga/1197134131208520.xml&c>

Note: NTUF assumes the federal government would be required to fund the remaining 50 percent of the program costs.

P. Economic Stimulus Package:

“Barack Obama’s economic plan will inject \$75 billion of stimulus into the economy by getting money in the form of tax cuts and direct spending directly to the people who need it most. Obama’s proposal will immediately provide stimulus using means that do not require lengthy governmental or administrative delays. ...

Obama is calling for providing middle- and low-income seniors – who would not benefit from the workers’ tax credit – an immediate, one-time \$250 supplement to their Social Security benefit. ... These payments would not alter the Social Security program and would not use revenue from the Social Security trust funds. ... Stimulus: \$10 billion. ...

Obama’s plan will provide \$10 billion in immediate relief to the states and localities hardest hit by the housing crisis. ...

Obama is calling for a temporary expansion of the UI [Unemployment Insurance] program for those who have exhausted their current eligibility. Obama also believes that the extension of UI benefits should be coupled with an expansion of UI eligibility to more workers, including many part-time and non-traditional workers who are currently left out of the program. Stimulus: \$10 billion.”

<http://my.barackobama.com/page/-/HQpress/011308%20Stimulus%20fact%20sheet.pdf>

Cost: \$30 billion (first-year cost).

Note: Senator Obama’s \$75 billion economic stimulus package also includes two initiatives that he already proposed earlier in the campaign: The “Making Work Pay” refundable tax credit, and a Foreclosure Prevention Fund. Those items are listed and scored separately below. The plan also includes an “additional \$45 billion of stimulus that can be injected into the economy quickly in the future if the economy continues to deteriorate.”

#### Q. Economy – Advanced Manufacturing Fund\*:

“Obama will create an Advanced Manufacturing Fund to identify and invest in the most compelling advanced manufacturing strategies. The Advanced Manufacturing Fund will provide grant funds to foster greater collaboration between academic scientists and engineers with businesses in their communities, and support early-career innovators who seek to implement their job creation proposals in states that have been hardest hit by the decline of U.S. manufacturing.”

<http://my.barackobama.com/page/-/HQpress/051408%20Fact%20Sheet%20Manufacturing%20Agenda%20FINAL.pdf>

Cost: \$100 million (\$500 million over five years).

Source: State News.

<http://www.statenews.com/index.php/article/2008/05/o-ba-ma>

#### R. Economy – Financial Market Oversight Commission\*:

“Barack Obama believes that we should create a financial market oversight commission which would meet regularly and report to the President, the President’s Financial Working Group and Congress on the state of our financial markets and the systemic risks that face them. They would specifically identify important issues to be addressed before they deteriorated enough to cause a crisis.”

[http://obama.3cdn.net/f9836ef496f75a9be0\\_39gimvt5b.pdf](http://obama.3cdn.net/f9836ef496f75a9be0_39gimvt5b.pdf)

Cost: Unknown.

#### S. Economy – Financial Market Regulation\*:

“End our balkanized framework of overlapping and competing regulatory agencies. ... Barack Obama believes that we need a more streamlined system of oversight – one that reflects 21<sup>st</sup>

century finance markets and that is capable of identifying where risks actually reside in the system.”

[http://obama.3cdn.net/f9836ef496f75a9be0\\_39gimvt5b.pdf](http://obama.3cdn.net/f9836ef496f75a9be0_39gimvt5b.pdf)

Cost: Unknown.

#### T. Economy – Public-Private Business Incubators:

“Obama will invest \$250 million per year to increase the number and size of incubators in disadvantaged communities throughout the country.”

<http://www.barackobama.com/pdf/UrbanPovertyOverview.pdf>

Cost: \$250 million (\$1.25 billion over five years).

#### U. Economy – Small Business Loans:

“... Obama will work to help more entrepreneurs get loans, expand the network of lenders, and simplify the loan approval process.”

<http://www.barackobama.com/issues/economy/>

“Barack Obama will strengthen Small Business Administration programs that provide capital to minority-owned businesses, support outreach programs that help minority business owners apply for loans, and work to encourage the growth and capacity of minority firms.”

<http://www.barackobama.com/issues/pdf/PovertyFactSheet.pdf>

Cost: \$342 million (\$1.712 billion over five years).

Source: Senator Obama cosponsored the Small Business Lending Reauthorization and Improvements Act, S. 1256 (110<sup>th</sup> Congress). A CBO cost estimate is available.

<http://www.cbo.gov/ftpdoc.cfm?index=8622&type=1>

#### V. Federal Emergency Management Agency – Eligibility for Benefits:

“The Federal Emergency Management Agency (FEMA) recently changed the insurance requirements that local governments and nonprofits must meet to be eligible for public assistance in times of disaster. Under the new rules, entities would be ineligible to receive help from FEMA to pay an insurance deductible if FEMA has helped them before. This will have a negative impact on governments and nonprofits across the Gulf Coast that have been hit by hurricanes and disasters over the years. As President, Obama would reverse this policy so that local governments and nonprofits do not have to face risks alone.”

<http://my.barackobama.com/page/-/HQpress/020708%20Katrina%20Fact%20Sheet.pdf>

Cost: Unknown.

Note: It is unclear if this rule is still in effect. According to an August 24, 2007 article in *The Times-Picayune*, FEMA rescinded the policy.

[http://blog.nola.com/tpmoney/2007/08/fema\\_reverses\\_controversial\\_po.html](http://blog.nola.com/tpmoney/2007/08/fema_reverses_controversial_po.html)

W. Economy – Manufacturing Extension Partnership (MEP) \*:

“Barack Obama will double funding for the MEP ... .”

<http://my.barackobama.com/page/-/HQpress/051408%20Fact%20Sheet%20Manufacturing%20Agenda%20FINAL.pdf>

Cost: \$90 million (\$450 million over five years).

Source: The Associated Press via MSNBC.

<http://www.msnbc.msn.com/id/24616635/>

X. Housing – Affordable Housing Trust Fund:

“Barack Obama believes we should create an Affordable Housing Trust Fund to develop affordable housing in mixed-income neighborhoods. The Affordable Housing Trust Fund would use a small percentage of the profits of two government-sponsored housing agencies, Fannie Mae and Freddie Mac, to create up to 14,000 new units of affordable housing every year.”

<http://www.barackobama.com/pdf/UrbanPovertyOverview.pdf>

Cost: \$540 million (\$2.698 billion over five years).

Source: H.R. 1427 (110<sup>th</sup> Congress) would require Fannie Mae and Freddie Mac to contribute amounts equal to 1.2 basis points on their average total mortgage portfolios (that is, 1.2 cents per \$100 of the value of their mortgage portfolios) from the previous year to a new affordable housing fund created by the bill. A CBO estimate is available.

<http://www.cbo.gov/ftpdocs/80xx/doc8025/hr1427.pdf>

Y. Housing – Foreclosure Prevention Fund:

“Obama will create a fund to help people refinance their mortgages and provide comprehensive supports to innocent homeowners. The fund will also assist individuals who purchased homes that are simply too expensive for their income levels by helping to sell their homes. The fund will help offset costs of selling a home, including helping low-income borrowers get additional time and support to pay back any losses from the sale of their home and waiving certain federal, state and local income taxes that result from an individual selling their home to avoid foreclosure.”

<http://www.barackobama.com/issues/economy/>

Cost: \$10 billion (first-year cost).

Source: Figure cited by Obama campaign.

<http://my.barackobama.com/page/-/HQpress/011308%20Stimulus%20fact%20sheet.pdf>

Z. Housing – HOME Score:

“Obama will create a Homeowner Obligation Made Explicit (HOME) score, which will provide potential borrowers with a simplified, standardized borrower metric (similar to APR) for home mortgages. The HOME score will allow individuals to easily compare various mortgage products



and understand the full cost of the loan. The HOME score would also help borrowers understand their long-term obligations and would be required to include mandatory taxes and insurance.”  
[http://obama.3cdn.net/8f478c5e1bb07ca0b1\\_sh1umv2zy.pdf](http://obama.3cdn.net/8f478c5e1bb07ca0b1_sh1umv2zy.pdf)

Cost: Unknown.

AA. Housing – Mortgage Revenue Bonds:

“Barack Obama will provide \$10 billion in additional Mortgage Revenue Bonds, at a cost of \$50 million to the federal government, to help families facing foreclosure refinance and to enable low- and moderate-income firsttime homebuyers purchase a home.”  
[http://obama.3cdn.net/8360873d2dbea0ac73\\_4a5rmv8i6.pdf](http://obama.3cdn.net/8360873d2dbea0ac73_4a5rmv8i6.pdf)

Cost: \$50 million (first-year cost).

BB. Housing – New Orleans Rental Property:

“He will also work to increase the supply of rental property, which is particularly important in New Orleans where 57 percent of pre-Katrina residents were renters.”  
<http://my.barackobama.com/page/-/HQpress/020708%20Katrina%20Fact%20Sheet.pdf>

Cost: Unknown.

CC. Housing – Universal Mortgage Refundable Credit:

“Barack Obama will ensure that anyone with a mortgage, not just the well-off, can take advantage of this tax incentive for homeownership by creating a universal mortgage credit. This 10 percent credit will benefit an additional 10 million homeowners, the majority of whom earn less than \$50,000 per year. Non-itemizers will be eligible for this refundable credit, which will provide the average recipient with approximately \$500 per year in tax savings. This tax credit will also help homeowners deal with the uncertain state of the housing market today.”  
<http://www.barackobama.com/issues/economy/>

Cost: \$4.4 billion (\$22 billion over five years).

Source: Based on the statistics from the Senator in the quote above. NTUF assumes that 88 percent of this amount will be refundable in accordance with a recent study by the Brookings Institution regarding the Earned Income Tax Credit (EITC), a related refundable tax credit: “In tax year 2003, roughly 88 percent of EITC dollars were refunded . . . .”

[http://www.brookings.edu/~media/Files/rc/reports/2006/02childrenfamilies\\_holt/20060209\\_Holt.pdf](http://www.brookings.edu/~media/Files/rc/reports/2006/02childrenfamilies_holt/20060209_Holt.pdf)

Note: This item was included in the original NTUF analysis with an unknown cost, but was scored in the March update release.

DD. Infrastructure – National Infrastructure Reinvestment Bank\*:

“Barack Obama will address the infrastructure challenge by creating a National Infrastructure Reinvestment Bank to expand and enhance, not supplant, existing federal transportation investments. This independent entity will be directed to invest in our nation’s most challenging transportation infrastructure needs. The Bank will receive an infusion of federal money, \$60 billion over 10 years, to provide financing to transportation infrastructure projects across the nation.”

[http://obama.3cdn.net/8f478c5e1bb07ca0b1\\_sh1umv2zy.pdf](http://obama.3cdn.net/8f478c5e1bb07ca0b1_sh1umv2zy.pdf)

Cost: Unknown.

Note: Senator Obama is a cosponsor of S. 1926 (110<sup>th</sup> Congress): A bill to establish the National Infrastructure Bank to provide funding for qualified infrastructure projects, and for other purposes. A cost estimate is unavailable, although CBO Director Peter R. Orszag described the financing of the program in testimony before the House Committee on the Budget and the Committee on Transportation and Infrastructure on May 8, 2008:

“The National Infrastructure Bank (NIB) would be an independent federal entity with a five-member board of directors appointed by the President and confirmed by the Senate. The bank would evaluate and finance infrastructure projects ‘of substantial regional and national significance’ with a potential federal investment of at least \$75 million per project. The NIB would serve as a conduit for federal funding. It would be authorized to issue \$60 billion in bonds – the proceeds of which could be used to finance direct subsidies, loans, and loan guarantees – but the Treasury would pay the interest on the bonds. Because the bonds would carry the full faith and credit of the United States, the Treasury also would have ultimate responsibility for paying the principal in the event that the bank’s own funds (for example, from repayments of project loans the bank had made) were insufficient.”

<http://www.cbo.gov/doc.cfm?index=9136&type=1>

Note: This item was previously included in the March update release with a cost of \$6 billion in annual spending.

EE. Infrastructure – New Orleans Hurricane Protection System:

“Obama’s comprehensive program to rebuild New Orleans and the Gulf Coast includes ... [e]nsuring that New Orleans has a levee and pumping system to protect the city from a 100-year storm by 2011, with the ultimate goal of protecting the entire city from a Category 5 storm.”

<http://my.barackobama.com/page/-/HQpress/020708%20Katrina%20Fact%20Sheet.pdf>

Cost: \$1.6 billion (\$32 billion over 20 years).

Source: According to *The Times-Picayune*, “After Katrina hit the New Orleans area in 2005, Congress directed the Corps [of Engineers] to both improve the New Orleans area levee system by 2012 to protect from a hurricane with a 1-in-100 chance of hitting in a given year, and study how to build a Category 5 protection system in the long term.”

[http://blog.nola.com/times-picayune/2007/07/corps\\_not\\_planning\\_category\\_5.html](http://blog.nola.com/times-picayune/2007/07/corps_not_planning_category_5.html)

It is unknown how much it would cost to speed up the target date by one year to 2011. As for protection from a Category 5 storm, Louisiana state officials told *The New York Times* that, “The cost estimates are still fuzzy, but the work would easily cost more than \$32 billion ... and could take decades to complete.”  
<http://www.nytimes.com/2005/11/29/national/nationalspecial/29flood.html?pagewanted=print>

FF. Labor – Energy Efficiency, Environmental Education and Employment Disconnected Youth Service Corps:

“That is why I am also going to create a 5-E Youth Service Corps. The ‘E’s’ stand for energy efficiency, environmental education and employment. This program would directly engage disconnected and disadvantaged young people in energy efficiency and environmental service opportunities to strengthen their communities while also providing them with practical skills and experience in [sic] important and growing career field.”  
[http://www.barackobama.com/2007/06/05/remarks\\_of\\_senator\\_barack\\_obam\\_14.php](http://www.barackobama.com/2007/06/05/remarks_of_senator_barack_obam_14.php)

“Obama will ... create an energy-focused Green Jobs Corps to engage disconnected and disadvantaged youth. This program will provide youth participants with energy efficiency and environmental service opportunities to improve the energy efficiency of homes and buildings in their communities, while also providing them with practical skills and experience in important career fields of expected high-growth employment.”  
<http://www.barackobama.com/issues/economy/>

Cost: \$78 million (\$390 million over five years).  
Source: Related to H.R. 2847 (110<sup>th</sup> Congress): A bill to amend the Workforce Investment Act of 1998 to establish an energy efficiency and renewable energy worker training program. A CBO cost estimate is available.  
<http://www.cbo.gov/ftpdocs/83xx/doc8327/hr2847.pdf>

Notes: This item was previously included in the original analysis with an unknown cost. NTUF assumes these are references to the same program.

GG. Labor – “Making Work Pay” Refundable Tax Credit:

“Barack Obama will restore fairness to the Tax Code and provide 150 million workers the tax relief they deserve. Obama will create a new ‘Making Work Pay’ tax credit of up to \$500 per person, or \$1,000 per working family. This refundable income tax credit will provide direct relief to American families who face the regressive payroll tax system. It will offset the payroll tax on the first \$8,100 of their earnings while still preserving the important principle of a dedicated revenue source for Social Security. The ‘Making Work Pay’ tax credit will completely eliminate income taxes for 10 million Americans. The tax credit will also provide relief to self-employed small business owners who struggle to pay both the employee and employer portion of the payroll tax. The ‘Making Work Pay’ tax credit offsets some of this self-employment tax as well.”  
<http://www.barackobama.com/issues/economy/>

Cost: \$61.6 billion (\$308 billion over five years).

Source: Senator Obama notes that the combined cost of his proposals to create a Universal Mortgage Credit, create a “Making Work Pay” Refundable Tax Credit, and eliminating income taxes for seniors making less than \$50,000 per year at \$80 billion to \$85 billion annually. This cost includes outlays and revenue reductions. Information included with his economic stimulus package puts the total cost (revenue reductions and outlays) for this tax credit at \$70 billion.

<http://my.barackobama.com/page/-/HQpress/011308%20Stimulus%20fact%20sheet.pdf>

Note: NTUF assumes that 88 percent of this amount will be refundable in accordance with a recent study by the Brookings Institution regarding the Earned Income Tax Credit (EITC), a closely related refundable tax credit: “In tax year 2003, roughly 88 percent of EITC dollars were refunded . . . .”

[http://www.brookings.edu/~media/Files/rc/reports/2006/02childrenfamilies\\_holt/20060209\\_Holt.pdf](http://www.brookings.edu/~media/Files/rc/reports/2006/02childrenfamilies_holt/20060209_Holt.pdf)

#### HH. Labor – Paid Leave:

“As President, Obama will initiate a strategy to encourage all 50 states to adopt paid-leave systems. Obama will provide a \$1.5 billion fund to assist states with start-up costs and to help states offset the costs for employees and employers.”

[http://obama.3cdn.net/8f478c5e1bb07ca0b1\\_sh1umv2zy.pdf](http://obama.3cdn.net/8f478c5e1bb07ca0b1_sh1umv2zy.pdf)

“Barack Obama supports efforts to guarantee workers seven days of paid sick leave per year, a proposal that will not impose an onerous burden on employers.”

<http://www.barackobama.com/pdf/seniorsFactSheet.pdf>

Cost: \$300 million (\$1.5 billion over five years).

Note: NTUF assumes this funding will be spread over five years.

#### II. Labor – Partnerships with Organized Labor:

“Obama will direct his Department of Labor to expand its support for and partnership with organized labor on its programs for life-long learning, including successful programs that seek to reach untapped pools of talent among women, people of color, older workers, individuals with disabilities and disadvantaged communities.”

[http://www.barackobama.com/2008/02/16/obama\\_outlines\\_plan\\_to\\_strengt.php](http://www.barackobama.com/2008/02/16/obama_outlines_plan_to_strengt.php)

Cost: Unknown.

#### JJ. Labor – Trade Adjustment Assistance for Service Workers:

“To help all workers adapt to a rapidly changing economy, Barack Obama would update the existing system of trade adjustment assistance by extending it to service industries, creating flexible education accounts that workers could use to retrain, and providing retraining assistance for workers in sectors of the economy vulnerable to dislocation before they lose their jobs.”

<http://www.barackobama.com/issues/economy/>

Cost: \$250 million (\$2.5 billion over 10 years).

Source: CBO cost estimate for S. 1309 (109<sup>th</sup> Congress), the Trade Adjustment Assistance Equity for Service Workers Act of 2005.

<http://www.cbo.gov/ftpdoc.cfm?index=6653&type=1>

KK. Labor – Transitional Jobs and Career Pathways Programs:

“Obama will invest \$1 billion over five years in transitional jobs and career pathways programs that implement proven methods of helping low-income Americans succeed in the workforce.”

<http://www.barackobama.com/pdf/UrbanPovertyOverview.pdf>

Cost: \$200 million (\$1 billion over five years).

LL. Labor – Workforce Development Funding:

“Obama will ensure that the Perkins Vocational Program is adequately funded. Community colleges depend on workforce development funding from these grants that are used for innovative occupational education curricula; helping students meet challenging academic, vocational, and technical standards; training first responders and public safety officers; purchasing equipment; supporting professional development; and strengthening important links between the institutions and businesses.”

[http://www.barackobama.com/2008/02/16/obama\\_outlines\\_plan\\_to\\_strengt.php](http://www.barackobama.com/2008/02/16/obama_outlines_plan_to_strengt.php)

Cost: Unknown.

Note: Related legislation was introduced in the form of H.R. 3747, the Workforce Investment Improvement Act of 2007 (110<sup>th</sup> Congress). A cost estimate is unavailable.

MM. Labor –Workforce Training:

“The Obama plan will increase funding for federal workforce training programs and direct these programs to incorporate green technologies training, such as advanced manufacturing and weatherization training, into their efforts to help Americans find and retain stable, high-paying jobs.”

<http://www.barackobama.com/issues/economy/>

Cost: Unknown.

NN. Media:

“As President, he will encourage diversity in the ownership of broadcast media, promote the development of new media outlets for expression of diverse viewpoints, and clarify the public interest obligations of broadcasters who occupy the nation’s spectrum.”

<http://www.barackobama.com/issues/technology/>

“An Obama Administration will encourage the creation of Public Media 2.0, the next generation of public media that will create the Sesame Street of the Digital Age and other video and interactive programming that educates and informs. Obama will support the transition of existing public broadcasting entities and help renew their founding vision in the digital world.”  
<http://www.barackobama.com/issues/technology/>

Cost: Unknown.

OO. National Catastrophe Insurance Reserve:

“Barack Obama will create a National Catastrophe Insurance Reserve that would be funded by private insurers contributing a portion of the premiums they collect from policyholders. Such a framework would neither distort the insurance market nor discourage risk avoidance and risk mitigation investments because insurers would not be forced out of high-risk markets for fear of bankruptcy in the event of a disaster. With this program in place, disaster victims would no longer have to depend solely on taxpayer-funded federal disaster aid loans.”  
<http://my.barackobama.com/page/-/HQpress/020708%20Katrina%20Fact%20Sheet.pdf>

Cost: \$15 million (\$75 million over five years).

Source: CBO estimate for H.R. 3355 (110<sup>th</sup> Congress): A bill to ensure the availability and affordability of homeowners’ insurance coverage for catastrophic events. CBO data primarily reflect administrative costs connected with establishing the program.  
<http://www.cbo.gov/ftpdocs/87xx/doc8774/hr3355.pdf>

Note: A catastrophic loan system could potentially cost upwards of billions of dollars if a major catastrophe were to occur, but CBO does not expect that reinsurers would apply for such a program under H.R. 3355 in particular: “Based on information from the states, CBO expects that few, if any, reinsurance programs would apply for a catastrophe loan following a disaster. State insurance commissions and rating agencies often require that primary insurers are able to cover at least a 100-year event to maintain their credit rating. As such, not only would losses exceeding the ceiling coverage level be outside the responsibility of the reinsurer, they likely would be covered through existing reinsurance agreements between the primary insurer and the private market.”

PP. National Parks:

“As President, [Obama] will repair the damage done to our national parks by poor funding.”  
<http://www.barackobama.com/issues/environment/>

Cost: Unknown.

QQ. Spectrum and Airwaves Management:

“As President, Barack Obama will ... [w]ork to manage our wireless spectrum in the public’s interest. Obama would create incentives for more efficient and experimental use of government spectrum and new standards for commercial spectrum so that underserved urban and rural

communities can enjoy affordable broadband and also ensure that we have enough spectrum for police, ambulances and other public safety organizations.”

<http://www.barackobama.com/pdf/UrbanPovertyOverview.pdf>

Cost: Unknown.

#### RR. Trade:

“Barack Obama will work to ensure intellectual property is protected in foreign markets, and promote greater cooperation on international standards that allow our technologies to compete everywhere.”

<http://www.barackobama.com/issues/economy/>

Cost: Unknown.

#### SS. Trade Enforcement:

“He will make enforcement the top priority of the U.S. Trade Representative (USTR) Office, and he will increase resources for the USTR so it can carry out its properly responsibilities [sic].”

[http://www.barackobama.com/issues/economy/Obama\\_Keeping\\_Americas\\_Promise.pdf](http://www.barackobama.com/issues/economy/Obama_Keeping_Americas_Promise.pdf)

Cost: Unknown.

Note: The precise cost increase proposed by Obama is unknown. Related legislation has been introduced; Title V of S. 1919 (110<sup>th</sup> Congress) authorizes \$5 million for trade enforcement activities and for a new Chief Trade Enforcement Officer in the office of the USTR.

The estimated budget for the US Trade Representative is \$40 million for FY 2008.

<http://www.whitehouse.gov/omb/budget/fy2009/pdf/appendix/eop.pdf>

#### TT. Transportation:

“As President, Barack Obama will work to eliminate transportation disparities. Obama will double the federal Jobs Access and Reverse Commute program to ensure that additional federal public transportation dollars flow to the highest-need communities and that urban planning initiatives take this aspect of transportation policy into account.”

<http://www.barackobama.com/pdf/UrbanPovertyOverview.pdf>

Cost: \$21 million (\$103 million over five years).

Source: *Budget of the U.S. Government, FY 2008*, estimated outlays for the Jobs Access and Reverse Commute program: \$103 million.

<http://www.whitehouse.gov/omb/budget/fy2008/pdf/appendix/dot.pdf> (page 829)

Note: NTUF assumes this program would be doubled over five years.

UU. Transportation – New Orleans Regional Transit Partnerships:

“Barack Obama will help the New Orleans area develop regional transit partnerships so that public transit can be integrated across parish lines, providing seamless transportation options, including a possible light rail line to connect New Orleans and Baton Rouge through the petrochemical corridor in between.”

<http://my.barackobama.com/page/-/HQpress/020708%20Katrina%20Fact%20Sheet.pdf>

Cost: Unknown.

**Education, Science, and Research: \$37.088 billion**

A. Early Education and K-12 Plan:

“Barack Obama’s early education and K-12 plan package costs about \$18 billion per year.”

[http://obama.3cdn.net/a8dfc36246b3dcc3cb\\_iem6bxpgh.pdf](http://obama.3cdn.net/a8dfc36246b3dcc3cb_iem6bxpgh.pdf)

Cost: \$18 billion (\$90 billion over five years).

Note: His early education and K-12 package includes the following initiatives (subtotals are provided where available):

1. Accountability:

“Improve Accountability System: Barack Obama believes we need an accountability system that supports schools to improve, rather than focuses on punishments. Obama also believes schools should assess all of our children appropriately – including English language learners and special needs students. Such a system should evaluate continuous progress for students and schools all along the learning continuum and should consider measures beyond reading and math tests. It should also create incentives to keep students in school through graduation, rather than pushing them out to make scores look better.”

[http://obama.3cdn.net/a8dfc36246b3dcc3cb\\_iem6bxpgh.pdf](http://obama.3cdn.net/a8dfc36246b3dcc3cb_iem6bxpgh.pdf)

2. Additional Learning Time:

“Barack Obama will create a \$200 million grant program for states and districts that want to provide additional learning time for students in need.”

[http://obama.3cdn.net/a8dfc36246b3dcc3cb\\_iem6bxpgh.pdf](http://obama.3cdn.net/a8dfc36246b3dcc3cb_iem6bxpgh.pdf)

Cost: \$40 million (\$200 million over five years).

Note: NTUF assumes this funding will be spread over five years.

3. Afterschool Programs:

“Expanding access to high-quality afterschool programs will help children learn and strengthen a broad range of skills and provide relief to working parents who have to



juggle child care and work responsibilities. Barack Obama will double funding for the main federal support for afterschool programs, the 21st Century Learning Centers program, to serve one million more children each year. Obama will include measures to maximize performance and effectiveness across grantees nationwide.”

[http://obama.3cdn.net/a8dfc36246b3dcc3cb\\_iem6bxpgh.pdf](http://obama.3cdn.net/a8dfc36246b3dcc3cb_iem6bxpgh.pdf)

#### 4. Child and Dependent Care Tax Credit:

“Barack Obama will reform the Child and Dependent Care Tax Credit by making it refundable and allowing low-income families to receive up to a 50 percent credit for their child care expenses.”

[http://obama.3cdn.net/a8dfc36246b3dcc3cb\\_iem6bxpgh.pdf](http://obama.3cdn.net/a8dfc36246b3dcc3cb_iem6bxpgh.pdf)

#### 5. Drop Out Prevention Competitive Grants:

“As President, Barack Obama will establish a competitive grant process open to existing or proposed public/private partnerships or entities that are pursuing evidence-based models that work – such as Diploma Plus or Teacher Advisor programs. These grants will decrease the dropout rate by increasing the capacity of state and district leaders as well as outside leaders – foundations, politicians, entrepreneurs, and community leaders – to collaborate on improving graduation rates.”

[http://obama.3cdn.net/a8dfc36246b3dcc3cb\\_iem6bxpgh.pdf](http://obama.3cdn.net/a8dfc36246b3dcc3cb_iem6bxpgh.pdf)

#### 6. Drop Out Prevention in Middle Schools:

“As President, Barack Obama will address these risks at the appropriate time, rather than waiting for ninth grade to start taking action. In the U.S. Senate, Obama has introduced the “Success in the Middle Act,” which will provide federal support to improve the education of middle grades students in low-performing schools by:

- Requiring states to develop a detailed plan to improve middle school student achievement.
- Developing and utilizing early identification data systems to identify those students most at-risk of dropping out.
- Investing in proven strategies such as: (1) providing professional development and coaching to school leaders, teachers and other school personnel in addressing the needs of diverse learners and in using challenging and relevant research-based best practices and curriculum; and (2) developing and implementing comprehensive, school-wide improvement efforts and implementing student supports such as personal academic plans, teaching teams, parent involvement, mentoring, intensive reading and math instruction and extended learning time that enables all students to stay on the path to graduation.”

[http://obama.3cdn.net/a8dfc36246b3dcc3cb\\_iem6bxpgh.pdf](http://obama.3cdn.net/a8dfc36246b3dcc3cb_iem6bxpgh.pdf)

#### 7. Early Learning:

“His comprehensive ‘Zero to Five’ plan will provide critical supports to young children and their parents by investing \$10 billion per year to:

- Create Early Learning Challenge Grants to stimulate and help fund state ‘zero to five’ efforts.
- Quadruple the number of eligible children for Early Head Start, increase Head Start funding and improve quality for both. Work to ensure all children have access to pre-school.
- Provide affordable and high-quality child care that will promote child development and ease the burden on working families. Create a Presidential Early Learning Council to increase collaboration and program coordination across federal, state, and local levels.”

[http://obama.3cdn.net/a8dfc36246b3dcc3cb\\_iem6bxpgh.pdf](http://obama.3cdn.net/a8dfc36246b3dcc3cb_iem6bxpgh.pdf)

Cost: \$10 billion (\$50 billion over five years).

#### 8. Educational Research and Development:

“As President, Barack Obama will double our investment in early education and educational R&D by the end of his first term in office. Part of this investment will involve an R&D program for improving science education. This new program will build knowledge about strategies and mechanism [sic] that can bring lasting improvements to science and math and technology education.”

[http://obama.3cdn.net/a8dfc36246b3dcc3cb\\_iem6bxpgh.pdf](http://obama.3cdn.net/a8dfc36246b3dcc3cb_iem6bxpgh.pdf)

#### 9. Principals’ Professional Development:

“Barack Obama will provide states with funding and guidance to develop multi-tiered credentialing systems that encourage principals to grow professionally over the course of their careers, and particularly within their first few years on the job, when they are most open to and in need of professional development.”

[http://obama.3cdn.net/a8dfc36246b3dcc3cb\\_iem6bxpgh.pdf](http://obama.3cdn.net/a8dfc36246b3dcc3cb_iem6bxpgh.pdf)

#### 10. Quality Assessments:

“He will improve the assessments used to track student progress. He will work to create assessment models that provide educators and students with timely feedback about how to improve student learning, that measure readiness for college and success in an information-age workplace; and that indicate whether individual students are making progress toward reaching high standards. This will include funds for states to implement a broader range of assessments that can evaluate higher-order skills, including students’ abilities to use technology, conduct research, engage in scientific investigation, solve problems, [and] present and defend their ideas. These assessments will provide immediate feedback to so that teachers can begin improving student learning right away.”

[http://obama.3cdn.net/a8dfc36246b3dcc3cb\\_iem6bxpgh.pdf](http://obama.3cdn.net/a8dfc36246b3dcc3cb_iem6bxpgh.pdf)

#### 11. Safe Schools:

“Barack Obama will promote a more effective and just method of addressing behavioral problems in schools. Obama will expand an innovative program, already being used in states like Illinois, that teaches students about positive behavior and expects the adults in our schools to set the same high standards for behavior as they do for achievement. Known as “Positive Behavior Support,” this system is designed to deal with discipline problems in a research-based, experimentally-verified way, based on one simple premise: [S]top problem behavior before it starts.”  
[http://obama.3cdn.net/a8dfc36246b3dcc3cb\\_iem6bxpgh.pdf](http://obama.3cdn.net/a8dfc36246b3dcc3cb_iem6bxpgh.pdf)

#### 12. Science:

“Obama will also support state efforts to make science education a priority at the pre-K level.”  
[http://obama.3cdn.net/a8dfc36246b3dcc3cb\\_iem6bxpgh.pdf](http://obama.3cdn.net/a8dfc36246b3dcc3cb_iem6bxpgh.pdf)

#### 13. State Leadership Academies:

“Barack Obama will provide funding for the creation or enhancement of state leadership academies. These academies, located in universities, state agencies or free-standing organizations will sponsor, host and coordinate professional development opportunities for educational leaders in their respective states. In addition, the academies will serve as centers where each state’s top educational leaders can gather to share practices and help create the professional development requirements and offerings in their states.

Obama’s plan will also support research about the effectiveness of these various approaches to principal training so that future professional development investments can be guided by evidence about what best supports principals’ [sic] in learning essential practices and becoming effective at guiding high-performing school organizations.”  
[http://obama.3cdn.net/a8dfc36246b3dcc3cb\\_iem6bxpgh.pdf](http://obama.3cdn.net/a8dfc36246b3dcc3cb_iem6bxpgh.pdf)

#### 14. Teachers – Career Ladder Initiative:

“Barack Obama’s Career Ladder Initiative will provide funding to districts that are prepared, with the participation of their teachers’ associations, to create opportunities for high-achieving veteran teachers to gain additional compensation for serving as mentors and leading curriculum planning, professional development and school reform efforts. Participating districts will design programs that include equitable and competitive salaries, with compensation systems that recognize knowledge, skills and accomplishment in the classroom as well as willingness to provide leadership in hard-to-staff locations. Where districts are addressing shortages in high-need schools, they will need to address the teaching conditions in those schools – ensuring strong administrative leadership; reasonable class sizes; and the necessary books, materials, and equipment to support learning.”  
[http://obama.3cdn.net/a8dfc36246b3dcc3cb\\_iem6bxpgh.pdf](http://obama.3cdn.net/a8dfc36246b3dcc3cb_iem6bxpgh.pdf)

#### 15. Teachers – Mentoring Programs:

“Obama will provide \$1 billion in funding for grants to create mentoring programs and reward veteran teachers [sic] for becoming mentors. The program will:

- Select mentors based on demonstrated teaching skill and effectiveness.
- [sic] Work in the same subject area as those that they are assisting.
- [sic] Visit, observe and consult with the beginning teachers at least weekly.
- [sic] Meet regularly to develop their skills as mentors and to share resources and ideas.
- [sic] Receive relief from teaching duties as a result of such additional responsibilities.
- Provide underperforming teachers with individual help and support. If after receiving intensive assistance, they are still underperforming, the district will find a quick and fair way to put another teacher in that classroom, as Peer Assistance and Review programs developed by professional teachers’ associations and school boards in a number of districts have shown how to do.”

[http://obama.3cdn.net/a8dfc36246b3dcc3cb\\_lem6bxpgh.pdf](http://obama.3cdn.net/a8dfc36246b3dcc3cb_lem6bxpgh.pdf)

Cost: \$200 million (\$1 billion over five years).

Note: NTUF assumes the funding will be spread over five years.

#### 16. Teachers – Paid Common Planning Time:

“Students do better when teachers get time to collaborate to share best practices, review student work and plan curriculum and lessons together, research shows. Studies also show that collaboration and paid planning time are key to retaining good teachers. Obama’s plan will include incentives for redesigning schools so that they are organized for teacher learning, and funding for paid common planning and professional learning time.”

[http://obama.3cdn.net/a8dfc36246b3dcc3cb\\_lem6bxpgh.pdf](http://obama.3cdn.net/a8dfc36246b3dcc3cb_lem6bxpgh.pdf)

#### 17. Teachers – Performance-Based Teacher Education:

“Most professions besides teaching require preparation programs to be accredited, and use the accrediting process to leverage quality. Professional accreditation in teaching is voluntary in most states, so there is no guarantee of quality. Obama will change this by requiring professional accreditation of all programs preparing teachers, with a focus on evidence regarding how well teachers are prepared. In order to help identify the most successful programs, colleges of education and alternative licensure programs will track their graduates’ entry and retention in teaching and their contributions to growth in student learning. Challenge grants will encourage the adoption of successful practices across the entire enterprise of teacher preparation.

Teacher preparation programs will be further strengthened if they are guided by a high-quality, nationally-available teacher performance assessment that measures actual teaching skill in content areas. Barack Obama will fund the development of such an

assessment, which, unlike current examinations used for licensing, will do more than merely measure basic skills and subject matter knowledge via paper-and-pencil tests. It will collect evidence about how prospective teachers plan and teach in the classroom, evaluate student work, and adapt their teaching to student learning needs. The high-quality, nationally-available teacher performance assessment will:

- Incorporate challenging teaching standards.
- Require evidence of teacher performance and outcomes in promoting student learning.
- Provide data that can be used for the accreditation process.
- Facilitate teacher mobility across states, so that teachers can easily move from states with surpluses to those with shortages.”

[http://obama.3cdn.net/a8dfc36246b3dcc3cb\\_iem6bxbpgh.pdf](http://obama.3cdn.net/a8dfc36246b3dcc3cb_iem6bxbpgh.pdf)

#### 18. Teacher Residency Programs:

“As President, Obama will expand the number of Teacher Residency Programs by providing funding for 200 new programs that would each serve an average of 150 candidates each year. Each year, Obama’s plan will supply 30,000 exceptionally well-prepared recruits to high-need schools to provide long-term commitment and leadership in these districts.”

[http://obama.3cdn.net/a8dfc36246b3dcc3cb\\_iem6bxbpgh.pdf](http://obama.3cdn.net/a8dfc36246b3dcc3cb_iem6bxbpgh.pdf)

#### 19. Teaching Service Scholarships:

“Barack Obama will create substantial, sustained Teaching Service Scholarships that completely cover training costs in high-quality teacher preparation or alternative certification programs at the undergraduate or graduate level for those who are willing to teach in a high-need field or location for at least four years. ... Some Teaching Service Scholarships will be targeted to high-ability candidates who might not otherwise enter teacher preparation and the incentives will also be used proactively to recruit candidates to the fields and locations where they are needed. Nearly all of the vacancies currently filled with emergency teachers could be filled with talented, well-prepared teachers with 40,000 service scholarships of up to \$25,000 each. The scholarships will cover four years of undergraduate or two years of graduate teacher education, including high-quality alternative programs for mid-career recruits in exchange for teaching for at least four years in [a] high-need field or location. The scholarships will be allocated on the basis of academic merit and other indicators of potential success in teaching and will be targeted to areas of teaching shortage as defined nationally and by individual states.”

[http://obama.3cdn.net/a8dfc36246b3dcc3cb\\_iem6bxbpgh.pdf](http://obama.3cdn.net/a8dfc36246b3dcc3cb_iem6bxbpgh.pdf)

Cost: \$1 billion (\$5 billion over five years).

B. Education – Advanced Technological Education:

“Obama will support the authorization of the National Science Foundation's Advanced Technological Education program at \$100 million, a critical program that that has helped support science, technology, engineering, and mathematics programs in community colleges.”  
[http://www.barackobama.com/2008/02/16/obama\\_outlines\\_plan\\_to\\_strengt.php](http://www.barackobama.com/2008/02/16/obama_outlines_plan_to_strengt.php)

Cost: \$48 million (first-year cost).

Source: In FY 2008 this program was authorized at \$52 million, per National Science Foundation's budget.

[http://www.nsf.gov/about/budget/fy2009/pdf/15\\_fy2009.pdf](http://www.nsf.gov/about/budget/fy2009/pdf/15_fy2009.pdf)

C. Education – Early Assessment Programs:

“Barack Obama will provide \$25 million annually in matching funds for states to develop Early Assessment Programs. These funds will also promote state efforts to raise awareness about the availability of federal and state financial aid programs.”

Cost: \$25 million (\$125 million over five years).

D. Education – Community Colleges Computer Facilities:

“Barack Obama will provide federal grants to community colleges to make their on-campus computer facilities into powerful, part-time community resources for training workers who are not their students. ... Under Obama's plan, the federal government will provide funding to help defray costs of keeping labs open and staffed by community college instructors an additional 30 hours each week, on evenings and weekends when these labs are generally closed or little-used. Under this plan, community colleges could provide every worker in America access to training in information and communications technologies.”

[http://obama.3cdn.net/516099fccb1a1574bc\\_4pytmveej.pdf](http://obama.3cdn.net/516099fccb1a1574bc_4pytmveej.pdf)

Cost: Unknown.

E. Education – Community College Partnership:

“Obama will create a Community College Partnership to strengthen community colleges by providing grants to (a) conduct thorough analysis of the types of skills and technical education that are in high demand from students and local industry; (b) implement new associate of arts degree programs that cater to emerging industry and technical career demands; and (c) reward those institutions that graduate more students and increase their numbers of transfer students to four-year institutions.”

[http://www.barackobama.com/2008/02/16/obama\\_outlines\\_plan\\_to\\_strengt.php](http://www.barackobama.com/2008/02/16/obama_outlines_plan_to_strengt.php)

Cost: \$50 million (first-year cost).

Source: Related legislation has been introduced in the form of H.R. 717, the Community College Partnership Act (110<sup>th</sup> Congress): A bill to encourage partnerships between

community colleges and four-year colleges and universities. The text of the bill authorizes \$50 million in the first year and “such sums as necessary” for subsequent years.

F. Education – Gulf Coast School Infrastructure:

“As President, Obama will help communities in the Gulf make necessary school infrastructure investments so all kids from all backgrounds have safe and supportive environments to learn.”  
<http://my.barackobama.com/page/-/HQpress/020708%20Katrina%20Fact%20Sheet.pdf>

Cost: Unknown.

Note: According to a January 2008 White House press release, the federal government has spent \$24 billion over the past year to rebuild the Gulf states. “Federal dollars have been used to build houses and schools, repair damaged infrastructure, and provide victims with a place to live and other essential assistance as the region continues to get back on its feet.”

<http://www.whitehouse.gov/infocus/katrina/>

G. Education – Gulf Coast Teachers:

“... I have called for \$250 million to bring quality teachers back to the Gulf region. Any teacher or principal who commits to come here for three years should receive an annual bonus; and those who teach in subject areas where we face shortages – such as math and science – should receive an additional bonus.”

[http://www.barackobama.com/2008/02/07/barack\\_obama\\_to\\_lay\\_out\\_progra.php](http://www.barackobama.com/2008/02/07/barack_obama_to_lay_out_progra.php)

Cost: \$50 million (\$250 million over five years).

Note: NTUF assumes this funding will be spread over five years.

H. Education – Math and Science:

“Obama also believes that we must strengthen math and science education to help develop a skilled workforce and promote innovation. He will work to increase our number of science and engineering graduates, encourage undergraduates studying math and science to pursue graduate studies, and work to increase the representation of minorities and women in the science and technology pipeline, tapping the diversity of America to meet the increasing demand for a skilled workforce. ... An Obama Administration will invest in human capital to ensure that our young people have the skills to fill the growing number of information technology jobs being created globally and will also support pilot programs that provide incentives for businesses to grow their information technology workforce in inner-cities and rural communities.”

<http://www.barackobama.com/issues/technology/>

Cost: Unknown.

Note: Some of these initiatives at the secondary education level are likely included within the funding for Obama’s Early Education and K-12 Plan listed above. Related legislation has been introduced, in the form of S. 2198 (109<sup>th</sup> Congress): A bill to ensure the United

States successfully competes in the 21<sup>st</sup> century global economy, establishes grants programs for individuals earning baccalaureate or master's degrees (Sections 121, 122, 132). CBO estimates a cost for these programs of \$459 million (\$2.296 billion over five years).

<http://www.cbo.gov/ftpdocs/70xx/doc7052/s2198.pdf>

#### I. Education – Advanced Preparation Courses:

“Give [m]ore [h]igh [s]chool [s]tudents [a]ccess to [r]igorous [c]ollege-level [c]ourses: Students who participate in Advanced Placement programs, which give students the opportunity to take college-level courses in high school, are much more likely to enroll and be successful in college.”

<http://www.barackobama.com/issues/education/>

Cost: \$50 million (\$250 million over five years).

Source: Senator Obama was a cosponsor of S. 3995 (109<sup>th</sup> Congress): A bill to provide education opportunity grants to low-income secondary school students. The bill authorizes grants of \$50 million annually to subsidize the cost of enrolling in college-level courses for low-income secondary school students.

#### J. Education – American Opportunity Tax Credit:

“Barack Obama will make college affordable for all Americans by creating a new American Opportunity Tax Credit. This universal and fully refundable credit will ensure that the first \$4,000 of a college education is completely free for most Americans, and will cover two-thirds the cost of tuition at the average public college or university. And by making the tax credit fully refundable, Obama's credit will help low-income families that need it the most. Obama will also ensure that the tax credit is available to families at the time of enrollment by using prior year's tax data to deliver the credit at the time that tuition is due, rather than a year or more later when tax returns are filed.”

<http://www.barackobama.com/issues/economy/>

Cost: \$5.795 billion (\$28.974 billion over five years) (*partial estimate*).

Source: This proposal expands on the refundable College Opportunity Tax Credit (COTC) proposed by Senator Kerry in his candidacy for the Presidency. The COTC would have established a 100 percent tax credit for the first \$1,000 of eligible expenses; a 50 percent credit would apply to the next \$3,000 of expenses. The Tax Policy Center estimated the outlay portion of the credit.

<http://www.taxpolicycenter.org/numbers/Content/Excel/T04-0155.xls>

#### K. Education – Pell Grants:

“Obama will work to ensure that the maximum Pell Grant award is increased for low income students by ensuring that the award keeps pace with the rising cost of inflation.”

[http://www.barackobama.com/2008/02/16/obama\\_outlines\\_plan\\_to\\_strengt.php](http://www.barackobama.com/2008/02/16/obama_outlines_plan_to_strengt.php)



Cost: \$7.08 billion (\$35.401 billion over five years).

Source: Obama is a cosponsor of S. 359 (110<sup>th</sup> Congress): A bill to amend the Higher Education Act of 1965 to provide additional support to students. Section 2 of the bill increases the maximum Pell Grant award and authorizes additional funds.

Note: A related proposal was previously included in the original analysis with an unknown cost. This item was included in the March update release at the cost listed above.

#### L. Financial Literacy:

“Furthermore, Obama will work to empower more Americans in the fight against predatory lending by supporting initiatives to improve financial literacy and financial planning.”

[http://obama.3cdn.net/8f478c5e1bb07ca0b1\\_sh1umv2zy.pdf](http://obama.3cdn.net/8f478c5e1bb07ca0b1_sh1umv2zy.pdf)

Cost: \$250 million (\$1.25 billion over five years).

Source: Related legislation has been introduced in the form of S. 2671 (110<sup>th</sup> Congress): A bill to provide grants to promote financial literacy. The text of the bill authorizes \$250 million annually for the next five years.

Note: Obama is not a cosponsor of this bill.

#### M. Science Research:

“Invest in the [s]ciences: Barack Obama supports doubling federal funding for basic research ...”

<http://www.barackobama.com/issues/technology/>

Cost: \$5.64 billion (\$28.2 billion over five years).

Source: A Congressional Research Service (CRS) report regarding federal research and development funding states, “... [T]otal federal basic research funding for FY2007 would be flat at \$28.2 billion.” The report is available via the National Council for Science and the Environment.

<http://www.ncseonline.org/NLE/CRSreports/06Oct/RL33345.pdf>

Note: NTUF assumes this funding would be increased over five years.

#### N. Student Loans:

“Obama would eliminate wasteful subsidies to private student lenders and instead support the Federal Direct Loan Program, invest the savings in additional student aid, and add greater transparency to the student financial aid process.”

<http://www.barackobama.com/issues/education/>

Cost: Unknown.

O. Summer Learning:

“Barack Obama’s ‘STEP UP’ [Summer Term Education Programs for Upward Performance] plan addresses the achievement gaps among grade-school children by supporting summer learning opportunities for disadvantaged children through partnerships between local schools and community organizations.”

<http://www.barackobama.com/issues/pdf/PovertyFactSheet.pdf>

Cost: \$100 million (first-year cost).

Source: Text of S. 116, the Summer Term Education Programs for Upward Performance Act of 2007 (110<sup>th</sup> Congress) as introduced by Senator Obama. The bill authorizes \$100 million for FY 2008 and “such sums as necessary” in subsequent years.

**Energy, Environment, and Agriculture: \$56.489 billion**

A. Coastal Hurricane Protection:

“Obama will also direct revenues from offshore oil and gas drilling to increased coastal hurricane protection.”

<http://my.barackobama.com/page/-/HQpress/020708%20Katrina%20Fact%20Sheet.pdf>

Cost: Unknown.

Note: Receipts from offshore oil and gas drilling are scored by CBO as credits against direct spending. This proposal could reduce offsetting receipts to the federal government.

B. Energy Assistance\*:

“Barack Obama supports imposing a windfall profits penalty on oil selling at or over \$80 per barrel. Revenue from the proposal will be invested in a number of mechanisms to reduce the burden of rising prices, such as expanding resources for the federal Weatherization Assistance Program, increasing federal support for state and local-level efforts to relieve the burden of rising energy prices on low and moderate-income families, and helping permanently expand the Low Income Home Energy Assistance Program . . . .”

<http://my.barackobama.com/page/-/HQpress/042508%20Fact%20Sheet%20Gas%20Prices%20FINAL.pdf>

Cost: Unknown.

Source: An Obama campaign advisor told Bloomberg News that the windfall tax would increase federal revenues by approximately \$15 billion annually. Some of these revenues would be used to finance tax credits the candidate has proposed elsewhere, and an unknown portion would be used for the new spending outlined above.

[http://www.bloomberg.com/apps/news?pid=newsarchive&sid=aP\\_1wrIyt1Nc#](http://www.bloomberg.com/apps/news?pid=newsarchive&sid=aP_1wrIyt1Nc#)

C. Land and Water Conservation Fund:

“As President, Obama will also do more to encourage private citizens to protect the open spaces and forests they own and the endangered species that live there. He will set aside new wilderness areas, establish stronger policies to deter international deforestation and improve domestic timberlands, and encourage communities to enhance local greenspace, wildlife and conservation areas.”

<http://www.barackobama.com/issues/environment/>

Cost: Unknown.

D. Lead Poisoning:

“As President, Barack Obama will continue his fight, begun as a community organizer, to protect our children from health hazards and developmental disabilities caused by environmental toxins, such as lead, mercury, particulate matter, and industrial land waste.”

<http://www.barackobama.com/issues/environment/>

Cost: \$9 million (\$43 million over five years).

Source: Senator Obama has introduced S. 1811 (110<sup>th</sup> Congress): A bill to amend the Toxic Substances Control Act to assess and reduce the levels of lead found in child-occupied facilities in the United States, and for other purposes. The text authorizes \$42.6 million over five years.

E. National Low Carbon Fuel Standard (LCFS):

“Barack Obama will establish a (LCFS) to speed the introduction of low-carbon non-petroleum fuels. The standard, which Obama introduced in the U.S. Senate with Tom Harkin (D-IA), requires fuels suppliers to reduce the carbon their fuel emits by [10] percent by 2020.”

<http://www.barackobama.com/issues/environment/>

Cost: Unknown.

Note: Senator Obama is a sponsor of S. 1324, the National Low-Carbon Fuel Standard Act of 2007 (110<sup>th</sup> Congress). A cost estimate is unavailable.

F. Pollution Cap-and-Trade Program and Clean Energy Research\*:

“We must enact a cap[-]and[-]trade system that will dramatically reduce our carbon emissions.”

<http://my.barackobama.com/page/content/fpccga>

Cost: \$56.48 billion (\$282.4 billion over five years).

Source: Senator Obama is a cosponsor of S. 280 (110<sup>th</sup> Congress), which creates a cap-and-trade system of emission allowances. The proceeds of the auction for the allowances will be used to administer the program, as well as provide funding for other programs that

are established in the bill. A CBO cost estimate is available for a related cap-and-trade bill in the 110<sup>th</sup> Congress, S. 2191, the America's Climate Security Act of 2007. <http://www.cbo.gov/ftpdocs/91xx/doc9120/s2191.pdf>

Note: This item was previously included in the analysis with an unknown cost. Senator Obama discussed his support for a cap-and-trade system in conjunction with his \$150 billion energy plan, detailed below. NTUF believes that Obama's energy plan overlaps with the energy funding contained in S. 280.

- Energy Plan:

“Barack Obama will invest \$150 billion over the next [10] years to enable American engineers, scientists and entrepreneurs to advance the next generation of biofuels and fuel infrastructure, accelerate the commercialization of plug-in hybrids, promote development of commercial-scale renewable energy, and begin the transition to a new digital electricity grid. This investment will transform the economy and create millions of new jobs. Obama will:

- Double federal science and research funding for clean energy projects, relying on the resources and ability of our national laboratories, universities and land grant colleges.
- Invest in the development of the next generation of biofuels, including cellulosic ethanol.
- Increase the resources devoted to the commercialization and deployment of low-carbon coal technologies.
- Create a Clean Technologies Deployment Venture Capital Fund, funded by an annual \$10 billion investment for five years, to ensure that promising technologies move beyond the lab and are commercialized in the U.S.
- Use innovative measures to dramatically improve the energy efficiency and stability of our economy and improve our national energy intensity 50 percent by 2030.
- Invest in a digital smart energy grid.”  
<http://www.barackobama.com/issues/technology/>

Note: The following statements either clarify the above programs or are believed to be included in the \$150 billion funding plan:

1. Building Efficiency:

“Barack Obama will establish a goal of making all new buildings carbon neutral, or produce zero emissions, by 2030. He'll also establish a national goal of improving new building efficiency by 50 percent and existing building efficiency by 25 percent over the next decade to help us meet the 2030 goal. ... Obama will create a competitive grant program to award those states and localities that take the first steps in implementing new building codes that prioritize energy efficiency, and provide a federal match for those states with leading-edge public benefits funds that support energy efficiency retrofits of existing buildings.”

<http://www.barackobama.com/issues/environment/>

## 2. Building Efficiency – Federal Buildings:

“Obama will ensure that all new federal buildings are zero-emissions by 2025, and to help reach that goal, he will ensure that all new federal buildings are 40 percent more efficient within the next five years. Obama will also place retrofitting existing federal buildings at a top priority, and seek to improve their efficiency by 25 percent within [five] years.”

<http://www.barackobama.com/issues/environment/>

## 3. Building Efficiency – State and Local Public Buildings:

“Obama will also expand federal grant programs to help states and localities build more efficient public buildings, including libraries, schools and police stations that adopt aggressive green building provisions like those provided by the Leadership in Energy and Environmental Design program of the U.S. Green Buildings Council. Obama will also partner with the private sector to ensure that more companies and building contractors are aware of the short-term and long-term benefits of building ‘green.’”

<http://www.barackobama.com/issues/environment>

## 4. Carbon Capture Incentives:

“In addition[,] we must develop domestic incentives that reward forest owners, farmers, and ranchers when they plant trees, restore grasslands, or undertake farming practices that capture carbon dioxide from the atmosphere.”

<http://www.barackobama.com/issues/environment/>

## 5. Cellulosic Ethanol:

“Barack Obama will work to ensure that advanced biofuels, including cellulosic ethanol, are developed and incorporated into our national supply as soon as possible. ... Obama will invest federal resources, including tax incentives, cash prizes and government contracts into developing the most promising technologies with the goal of getting the first two billion gallons of cellulosic ethanol into the system by 2013.”

<http://www.barackobama.com/issues/environment/>

## 6. Clean Energy Research:

“Obama will federal double [sic] science and research funding for clean energy projects including those that make use of our biomass, solar and wind resources. At present, the federal government spends over \$3 billion per year on all energy innovation efforts.”

<http://www.barackobama.com/issues/environment/>

7. Clean Technologies Deployment Venture Capital Fund:

“Barack Obama will create a Clean Technologies Deployment Venture Capital Fund to fill a critical gap in U.S. technology development. This Fund will partner with existing investment funds and our National Laboratories to ensure that promising technologies move beyond the lab and are commercialized in the U.S. ... Obama will invest \$10 billion in this fund for five years, and reinvest profits back into the fund.”

<http://www.barackobama.com/issues/environment>

8. Clean Technology Manufacturing Centers\*:

“[Obama’s] plan will ... [c]onvert our manufacturing centers into clean technology leaders through a \$1 billion a year start-up fund for small and mid-size manufacturers.”

[http://www.barackobama.com/2008/05/14/barack\\_obama\\_unveils\\_manufactu.php](http://www.barackobama.com/2008/05/14/barack_obama_unveils_manufactu.php)

“Barack Obama ... will ... [establish] a federal investment program to help manufacturing centers modernize and help Americans learn new skills to produce green products. This federal grant program will allocate money to the states to identify and support local manufacturers with the most compelling plans for modernizing existing or closed manufacturing facilities to produce new advanced clean technologies.”

<http://my.barackobama.com/page/-/HQpress/051408%20Fact%20Sheet%20Manufacturing%20Agenda%20FINAL.pdf>

Cost: \$1 billion (\$5 billion over five years).

9. Economic Transition Assistance, Low Income Home Energy Assistance Program, and Weatherization Grants:

“Some of the revenue generated by auctioning allowances [under the cap-and-trade program] will be used to support the development and deployment of clean energy, invest in energy efficiency improvements and address transition costs, including helping American workers affected by this economic transition and helping lower-income Americans afford their energy bills by expanding the Low Income Home Energy Assistance Program, expanding weatherization grants for low-income individuals to make their homes more energy efficient, and establishing a dedicated fund to assist low-income Americans afford higher electricity and energy bills.”

<http://www.barackobama.com/issues/environment/>

10. Energy Utilities:

“Obama will work to ‘flip’ incentives to state and local utilities by ensuring companies get increased profits for improving energy efficiency, rather than higher energy consumption. Currently, utilities make profits when consumers purchase more energy, and when consumers purchase energy at peak times when energy prices are higher because of greater demands on the system. This decoupling of profits from increased energy usage will incentivize utilities to partner with consumers and the federal government to reduce monthly energy bills for families and businesses.”

<http://www.barackobama.com/issues/environment/>

#### 11. Federal Government’s Use of Renewable Energy:

“Currently, there is a federal goal to obtain 7.5 percent of federal government electricity demands from renewable sources by 2013. Barack Obama believes that the federal government, the nation’s largest consumer of energy, must do better. As President, Obama will ensure that at least 30 percent of the federal government’s electricity comes from renewable sources by 2020.”

<http://www.barackobama.com/issues/environment/>

#### 12. Fuel-Efficient Car Manufacturing Loan Guarantees:

“The Obama plan will invest in America’s highly-skilled manufacturing workforce and manufacturing centers to ensure that American workers have the skills and tools they need to pioneer the first wave of green technologies that will be in high demand throughout the world. Obama will also provide specific tax assistance and loan guarantees to the domestic auto industry to ensure that new fuel-efficient cars and trucks are build [sic] in the U.S. with American workers.”

<http://www.barackobama.com/issues/economy/>

Cost: Unknown.

#### 13. Job Training:

“Barack Obama will use proceeds from the cap-and-trade auction program to invest in job training and transition programs to help workers and industries adapt to clean technology development and production. Obama will increase funding for federal workforce training programs and direct these programs to incorporate green technologies training, such as advanced manufacturing and weatherization training, into their efforts to help Americans find and retain stable jobs.”

<http://www.barackobama.com/issues/environment/>

#### 14. Low Carbon:

“As President Obama will significantly increase the resources devoted to the commercialization and deployment of low carbon coal technologies. Implementing these technologies as soon as possible is vital to the transition to a

clean energy economy and will help other nations dependent on coal reduce their emissions as well. In addition to addressing new facilities, Obama will work to ensure that existing coal facilities are retrofitted with carbon capture and sequestration technology as soon as it is commercially available.”

<http://www.barackobama.com/issues/environment/>

#### 15. Plug-In Hybrids:

“Obama will invest \$150 billion over 10 years to ... accelerate the commercialization of plug-in hybrids, promote development of commercial scale renewable energy, invest in low emissions coal plants, and begin transition to a new digital electricity grid. A principal focus of this fund will be devoted to ensuring that technologies that are developed in the U.S. are rapidly commercialized in the U.S. and deployed around the globe.”

<http://www.barackobama.com/issues/environment/>

#### 16. Smart Grid:

“Barack Obama will pursue a major investment in our national utility grid to enable a tremendous increase in renewable generation and accommodate 21st century energy requirements, such as reliability, smart metering, and distributed storage. Obama will invest federal money to leverage additional state and private sector funds to help create a digitally connected power grid.”

<http://www.barackobama.com/issues/environment/>

#### G. Renewable Portfolio Standard:

“Barack Obama will establish a 25 percent federal Renewable Portfolio Standard to require that 25 percent of electricity consumed in the U.S. is derived from clean, sustainable energy sources, like solar, wind and geothermal by 2025.”

<http://www.barackobama.com/issues/environment/>

Cost: Unknown.

#### H. Water Conservation:

“He believes we need a commitment at the federal level to a problem-solving initiative that will help manage scarce water resources and develop partnerships to nourish a healthy environment and sustain a vibrant economy. In addition, federal policies are needed to encourage voluntary water banks, wastewater treatment and other market-based measures; improve technology for water conservation and efficiency; and remove institutional barriers to increase cooperation and collaboration among federal, state, tribal, and private organizations. The ‘cash for grass’ program, in which people are paid to remove grass and put in desert landscaping, is an excellent model.”

<http://www.barackobama.com/issues/environment/>



Cost: Unknown.

#### I. Water Pollution:

“As President, he will establish policies to improve the quality of our nation’s lakes, rivers, and drinking water. ... He will help communities by restoring better federal financing for water and wastewater treatment infrastructure, and he will continue his leadership in protecting national treasures such as the Great Lakes from threats such as industrial pollution, water diversion, and invasive species. Obama will establish policies to help high-growth regions with the challenges of managing their water supply.”

<http://www.barackobama.com/issues/environment/>

Cost: Unknown.

### **Health Care: \$100.848 billion**

#### A. Autism\*:

“My administration will not only work to fully fund the ... Combating Autism Act, but will add to that a commitment of \$1 billion dollars [sic] a year in autism-related funding by the end of my first term. And we will work with Congress, parents and experts in the field of autism to determine how to further improve federal and state programs.

As President, I will appoint a Federal [Autism Spectrum Disorders (ASD)] Coordinator, an ‘Autism Czar’ to oversee and coordinate a nationwide effort to deal proactively with ASD. This effort will include diverse but credible research, treatment, personal care/assistance and family support and will work with existing national and state organizations and taskforces. We need to ensure that combating autism, once and for all, receives the recognition and priority it deserves at the highest level of government. This appointee will also have a mandate to eliminate bureaucratic obstacles that may be delaying implementation of important measures and will ensure that all federal funds are being spent in a manner that prioritizes results. We need to build effective communication and collaboration among federal, state and local agencies.”

[http://www.barackobama.com/2008/04/02/obama\\_statement\\_in\\_support\\_of.php](http://www.barackobama.com/2008/04/02/obama_statement_in_support_of.php)

Cost: \$625 million (\$2.5 billion over four years).

Note: Estimate assumes outlays of \$250 million in the first year, \$500 million in the second year, \$750 million in the third, and \$1 billion in the fourth.

#### B. Elder Care:

“He will work to improve the quality of elder care, including by giving our long-term care and geriatric workforce the respect and support they deserve, training more nurses and health care workers in geriatrics, and researching and training health care professionals to better understand and manage pain.”

<http://www.barackobama.com/pdf/seniorsFactSheet.pdf>

Cost: Unknown.

### C. Health Care Plan:

“Specifically, the Obama plan will: (1) establish a new public insurance program, available to Americans who neither qualify for Medicaid or SCHIP nor have access to insurance through their employers, as well as to small businesses that want to offer insurance to their employees; (2) create a National Health Insurance Exchange to help Americans and businesses that want to purchase private health insurance directly; (3) require all employers to contribute towards health coverage for their employees or towards the cost of the public plan; (4) mandate all children have health care coverage; (5) expand eligibility for the Medicaid and SCHIP programs; and (6) allow flexibility for state health reform plans. ... The Obama plan will improve efficiency and lower costs in the health care system by: (1) offering federal reinsurance to employers to help ensure that unexpected or catastrophic illnesses do not make health insurance unaffordable or out of reach for businesses and their employees (2) ensuring that patients receive and providers deliver the best possible care; (3) adopting state-of-the-art health information technology systems; and (4) reforming our market structure to increase competition.”

<http://www.barackobama.com/issues/pdf/HealthCareFullPlan.pdf>

Cost: \$65 billion (\$325 billion over five years).

Source: Blumenthal, David and David Cutler and Jeffrey Liebman. “Final Costs Memo,” May 29, 2007.

<http://www.nytimes.com/packages/pdf/politics/finalcostsmemo.pdf>

Note: The estimate above, prepared by Obama campaign advisors, assumes large annual savings and the figure is what they say would be the net amount of additional federal funds to finance the program. According to the *Washington Post*, without the savings, the costs could be up to \$110 billion annually.

<http://www.washingtonpost.com/wp-dyn/content/article/2008/04/24/AR2008042402917.html>

Note: Senator Obama’s health plan includes the following components (subtotals are provided where available) all of which are from

<http://www.barackobama.com/issues/pdf/HealthCareFullPlan.pdf>:

#### 1. Comparative Effectiveness Institute:

“Obama will establish an independent institute to guide reviews and research on comparative effectiveness, so that Americans and their doctors will have accurate and objective information to make the best decisions for their health and well-being.”

#### 2. Electronic Health Information:

“Obama will invest \$10 billion a year over the next five years to move the U.S. health care system to broad adoption of standards-based electronic health information systems, including electronic health records. He will also phase in requirements for full implementation of health IT and commit the necessary federal resources to make it

happen. Obama will ensure that these systems are developed in coordination with providers and frontline workers, including those in rural and underserved areas. Obama will ensure that patients' privacy is protected."

Cost: \$10 billion (\$50 billion over five years).

### 3. Federal-State Coordination:

"First, working together, governments at all levels should lead the effort to develop a national and regional strategy for public health, and align funding mechanisms to support its implementation. Second, the field of public health would benefit from greater research to optimize organization of the 3,000 health departments in this nation, collaborative arrangements between levels of government and its private partners, performance and accountability indicators, integrated and interoperable communication networks, and disaster preparedness and response. Third, the government must invest in workforce recruitment as well as modernizing our physical structures, particularly our public health laboratories. And finally, the government must examine its own policies, including agricultural, educational, environmental and health policies, to assess and improve their effect on public health in this nation. As President, Barack Obama will prioritize all of these activities, to ensure a 21<sup>st</sup> century public health system and healthy America."

### 4. Generic Drugs:

"His plan will work to increase use of generic drugs in the new public plan, Medicare, Medicaid, FEHBP [Federal Employees Health Benefits Plan] and prohibit large drug companies from keeping generics out of markets."

### 5. Healthy Schools:

"Obama will work with schools to create more healthful environments for children, including assistance with contract policy development for local vendors, grant support for school-based health screening programs and clinical services, increased financial support for physical education, and educational programs for students."

### 6. Healthy Workforce:

"Barack Obama will expand funding – including loan repayment, adequate reimbursement, grants for training curricula, and infrastructure support to improve working conditions – to ensure a strong workforce that will champion prevention and public health activities."

### 7. Insurance Regulation:

"Barack Obama will prevent companies from abusing their monopoly power through unjustified price increases. In markets where the insurance business is not competitive, his plan will force insurers to pay out a reasonable share of their premiums for patient

care instead of keeping exorbitant amounts for profits and administration. Obama's new National Health Insurance Exchange will help increase competition by insurers."

8. Medical Error Reduction:

"Obama will require providers to report preventable medical errors, and support hospital and physician practice improvement to prevent future occurrences."

9. Medicare Advantage:

"Obama believes we need to eliminate the excessive subsidies to Medicare Advantage plans and pay them the same amount it would cost to treat the same patients under regular Medicare."

10. Minority Health:

"Obama will tackle the root causes of health disparities by addressing differences in access to health coverage and promoting prevention and public health (see below), both of which play a major role in addressing disparities. He will also challenge the medical system to eliminate inequities in health care by requiring hospitals and health plans to collect, analyze and report health care quality for disparity populations and holding them accountable for any differences found; diversifying the workforce to ensure culturally effective care; implementing and funding evidence-based interventions, such as patient navigator programs; and supporting and expanding the capacity of safety-net institutions, which provide a disproportionate amount of care for underserved populations with inadequate funding and technical resources."

Cost: Unknown.

Source: Senator Obama is a cosponsor of S. 1576 (110<sup>th</sup> Congress): A bill to amend the Public Health Service Act to improve the health and health care of racial and ethnic minority groups. A cost estimate is unavailable.

11. Negotiation for Medicare Prescription Drugs:

"Obama will repeal the ban on direct negotiation with drug companies and use the resulting savings, which could be as high as \$30 billion, to further invest in improving health care coverage and quality."

Cost: Unknown.

Note: A March 3, 2004 CBO letter to Senator Ron Wyden notes: "CBO has not estimated the effect on federal spending of authorizing the Secretary to negotiate prices for single-source drugs. The extent of any savings would depend significantly on the details of legislative language; a proposal that applied to a broader range of drugs could generate no savings or even increase federal costs. The effect on federal spending would also depend on how the Secretary would

choose to exercise any new authority to negotiate prices.”  
<http://www.cbo.gov/showdoc.cfm?index=5145&sequence=0>

It is not clear from Senator Obama’s plan whether this claim of \$30 billion in savings was used to reduce the total cost of the package to \$65 billion annually.

#### 12. Patient Care:

“Support disease management programs ... Coordinate and integrate care. ... Require full transparency about quality and costs.”

#### 13. Physician Errors and Malpractice:

“Barack Obama will strengthen antitrust laws to prevent insurers from overcharging physicians for their malpractice insurance. Obama will also promote new models for addressing physician errors that improve patient safety, strengthen the doctor-patient relationship, and reduce the need for malpractice suits.”

#### 14. Prevention Programs:

“Individuals and families must have access to essential clinical preventive services such as cancer screenings and smoking cessation programs, and the Obama health plan will require coverage of such services in all federally supported health plans, including Medicare, Medicaid, SCHIP and the new public plan. ... In addition, Obama will increase funding to expand community[-]based preventive interventions to help Americans make better choices to improve their health.”

#### 15. Reimportation of Prescription Drugs:

“Obama will allow Americans to buy their medicines from other developed countries if the drugs are safe and prices are lower outside the U.S.”

Cost: -\$540 million (savings) (-\$2.7 billion over five years).

Source: CBO cost estimate for H.R. 380 (110<sup>th</sup> Congress): A bill to amend the Federal Food, Drug, and Cosmetic Act with respect to the importation of prescription drugs, and for other purposes.

<http://www.cbo.gov/ftpdocs/87xx/doc8729/hr380Ltr.pdf>

#### D. Healthy Communities:

“Barack Obama believes we need to make a real commitment and investment in building healthy communities.”

<http://www.barackobama.com/issues/environment/>

Cost: \$25 million (first-year cost).

Source: Senator Obama is a sponsor of S. 1067 (110<sup>th</sup> Congress): A bill to require federal agencies to support health impact assessments and take other actions to improve health and the environmental quality of communities, and for other purposes. The text of the bill authorizes \$25 million plus “such sums as necessary.”

#### E. Medicaid – Community-Based Attendant Services:

“Barack Obama supports efforts to ensure that this program remains solvent. He believes that the federal government should support state-level reform efforts to constrain Medicaid costs such as negotiating for low drug prices, implementing disease management and quality initiatives, and offering greater support for community-based, long-term care services. Obama would also reverse cuts in benefits or changes in eligibility that prevent low-income patients from seeking care until their medical problems have gotten worse and more expensive to treat.”

<http://www.barackobama.com/pdf/seniorsFactSheet.pdf>

Cost: \$5.4 billion (\$27 billion over five years).

Source: Senator Obama is a cosponsor of S. 799 (110<sup>th</sup> Congress): A bill to amend title XIX of the Social Security Act to provide individuals with disabilities and older Americans with equal access to community-based attendant services and supports, and for other purposes.

Note: In 1997, CBO estimated this program would cost between \$10 billion and \$20 billion annually. A 2007 article in the *Journal of Aging & Social Policy* argues that CBO overestimated the number of participants in the program and that the federal share of the program would be much less, between \$3.7 billion and \$5.4 billion per year. NTUF would normally prefer to use CBO data, but in this case the newer estimate will be used until CBO updates its own data.

<http://www.adapt.org/freeourpeople/download/estimating%20expense.pdf>

#### F. Medicare Prescription Drug Benefit “Doughnut Hole”:

“Barack Obama will ... Fix Medicare’s Prescription Drug ‘Doughnut Hole.’ Barack Obama wants to close the ‘doughnut hole’ in the Medicare Part D Prescription Drug Program that limits benefits for seniors with more than \$2,250 but less than \$5,100 in annual drug costs.”

<http://www.barackobama.com/issues/seniors/>

Cost: \$29.573 billion (\$118.29 billion over five years).

Source: CBO, *Budget Options*, February 2005, page 204.

<http://www.cbo.gov/ftpdocs/60xx/doc6075/570.pdf>

#### G. Medicare Prescription Drug Benefit Plan Comparison:

“As President, Barack Obama will ... [p]rovide [e]asy-to-[u]nderstand [c]omparisons of the Medicare Prescription Drug Plans. Since the creation of the Medicare Prescription Drug Benefit, seniors have been deluged with massive amounts of information about the various plans, but have received little guidance about which plans actually suit their unique needs.”

<http://www.barackobama.com/issues/seniors/>

Cost: Unknown.

#### H. New Orleans Health Care Facilities:

“As President, [Obama] will rebuild broken facilities and provide incentives, such as loan forgiveness, to lure medical professionals back to the region. He will fight to establish a major medical complex in downtown New Orleans that will serve the entire community. He will also push to quickly build a new, state-of-the-art Department of Veterans Affairs hospital in New Orleans so that the city’s veterans can get top quality care.”

<http://my.barackobama.com/page/-/HQpress/020708%20Katrina%20Fact%20Sheet.pdf>

Cost: \$225 million (first-year cost).

- Loan Forgiveness: \$225 million (first-year cost).  
Source: Section 3 of H.R. 1599, the Expanding, Rebuilding, and Improving Access to Qualified Health Care Professionals in Hurricanes Katrina and Rita Affected Areas Act (110<sup>th</sup> Congress) authorizes \$225 million in the first year and “such sums as necessary” subsequent years for the Hurricane Katrina and Rita Public Health Workforce Recovery Loan Repayment Program.
- Major Medical Complex in New Orleans: Cost unknown.  
It is unclear whether Obama would use federal funds to establish a public medical facility in downtown New Orleans.
- VA Hospital: Cost unknown.  
It is unclear whether he is proposing to speed up the VA replacement hospital that is currently under construction, or whether he wants a brand new facility in addition to the one that was authorized in the 109<sup>th</sup> Congress. According to an August 2006 CBO report, “Public Law 109-148 provided \$75 million for the planning of a replacement facility in New Orleans, and Public Law 109-234 provided \$550 million for construction of this project. ...VA’s current estimate of the total construction costs [is] \$636 million ...”  
<http://www.cbo.gov/ftpdoc.cfm?index=7515&type=1>

#### I. Nurse-Family Partnership:

“Barack Obama would expand the highly successful Nurse-Family Partnership to all low-income, first-time mothers. The Nurse-Family Partnership provides home visits by trained registered nurses to low-income expectant mothers and their families. The trained nurses use proven methods to help improve the mental and physical health of the family by providing counseling on substance abuse, creating and achieving personal goals, and effective methods of nurturing children. ... The Obama plan would assist approximately 570,000 first-time mothers each year.”

<http://www.barackobama.com/issues/pdf/PovertyFactSheet.pdf>

Cost: Unknown.

## **Homeland Security and Law Enforcement: \$10.173 billion**

### **A. Border Security and Immigration Reform:**

“Barack Obama wants to preserve the integrity of our borders. He supports additional personnel, infrastructure, and technology on the border and at our ports of entry. Obama believes we need additional Customs and Border Protection agents equipped with better technology and real-time intelligence.”

[http://www.barackobama.com/issues/immigration\\_and\\_the\\_border/](http://www.barackobama.com/issues/immigration_and_the_border/)

“Barack Obama supports comprehensive immigration reform that includes improvement in our visa programs, including our legal permanent resident visa programs and temporary programs including the H-1B program, to attract some of the world’s most talented people to America. We should allow immigrants who earn their degrees in the U.S. to stay, work, and become Americans over time. And we should examine our ability to increase the number of permanent visas we issue to foreign skilled workers. Obama will work to ensure immigrant workers are less dependent on their employers for their right to stay in the country and would hold accountable employers who abuse the system and their workers.”

<http://www.barackobama.com/issues/technology/>

Cost: \$9.8 billion (\$49 billion over five years).

Source: Senator Obama voted in favor of passing S. 2611 (109<sup>th</sup> Congress): A bill to provide for comprehensive immigration reform and for other purposes. A CBO cost estimate is available.

<http://www.cbo.gov/ftpdoc.cfm?index=7501&type=1>

### **B. Child Support Payments Enforcement:**

“Barack Obama has re-introduced the Responsible Fatherhood and Healthy Families Act to remove some of the government penalties on married families, crack down on men avoiding child[-]support payments, and ensure that payments go to families instead of state bureaucracies. The legislation would also fund support services for fathers and their families, including domestic violence prevention efforts. As President, he will sign this bill into law and continue to implement innovative measures to strengthen families.”

<http://www.barackobama.com/issues/pdf/PovertyFactSheet.pdf>

Cost: \$176 million (\$528 million over three years).

Source: U.S. Code and text of S. 1626 (110<sup>th</sup> Congress). Senator Obama is a co-sponsor of S. 1626.

### **C. COPS for Katrina:**

“He will establish a special ‘COPS for Katrina’ program to allow communities impacted by the storm to hire and retain new officers and community prosecutors, develop community-based crime fighting strategies, and rebuild their lost infrastructure.”

<http://my.barackobama.com/page/-/HQpress/020708%20Katrina%20Fact%20Sheet.pdf>



Cost: Unknown.

#### D. Credit Rating Agencies and Financial Institutions Investigation:

“Barack Obama supports an immediate investigation into the ratings agencies and their relationships to securities’ issuers, similar to the investigation the EU has recently announced.”  
<http://www.barackobama.com/issues/economy/>

Cost: Unknown.

#### E. Data Privacy:

“To ensure that powerful databases containing information on Americans that are necessary tools in the fight against terrorism are not misused for other purposes, Barack Obama supports restrictions on how information may be used and technology safeguards to verify how the information has actually been used. ... Obama will also work to provide robust protection against misuses of particularly sensitive kinds of information, such as e-health records and location data that do not fit comfortably within sector-specific privacy laws.”  
<http://www.barackobama.com/issues/technology/>

Cost: Unknown.

Source: Related legislation has been introduced, but it is unknown which policies Senator Obama supports. The legislation is H.R. 3046 (110<sup>th</sup> Congress): A bill to amend the Social Security Act to enhance Social Security account number privacy protections, to prevent fraudulent misuse of the Social Security account number, and to otherwise enhance protection against identity theft, and for other purposes. CBO estimates this proposal would cost \$43 million over five years.  
<http://www.cbo.gov/ftpdocs/85xx/doc8500/hr3046.pdf>

#### F. Disaster Planning:

“As President, Obama will dramatically improve disaster planning. He will work with emergency management officials, emergency responders and other experts from all 50 states to create a real National Response Plan that provides for real cooperation between states, locals and the federal government in the face of a disaster. Obama’s FEMA will provide real training to emergency responders and professionals in states and localities to ensure that all areas of the country have the human resources necessary to respond to disasters.”  
<http://my.barackobama.com/page/-/HQpress/020708%20Katrina%20Fact%20Sheet.pdf>

Cost: \$120 million (\$600 million over five years).

Source: CBO estimate of related legislation, H.R. 5351 (109<sup>th</sup> Congress): A bill to amend the Homeland Security Act of 2002 to establish a Directorate of Emergency Management, to codify certain existing functions of the Department of Homeland Security, and for other purposes. Specifically, the estimate is based on the additional

amounts that state and local governments would receive to “improve emergency preparedness.” <http://www.cbo.gov/ftpdocs/72xx/doc7246/hr5351REV.pdf>

#### G. Drug Gangs:

“Obama will strengthen Drug Enforcement Administration efforts to stop the reestablishment of drug gangs across the region.”

<http://my.barackobama.com/page/-/HQpress/020708%20Katrina%20Fact%20Sheet.pdf>

Cost: Unknown.

#### H. Emergency Response Coordination and Medical Surge Capacity:

“As President, Obama will further improve coordination between all levels of government, create better evacuation plan guidelines, ensure prompt federal assistance to emergency zones, and increase medical surge capacity.”

<http://origin.barackobama.com/issues/pdf/HomelandSecurityFactSheet.pdf>

Cost: Unknown.

Source: Senator Obama sponsored S. 1638 (109<sup>th</sup> Congress): A bill to provide for the establishment of programs and activities to assist in mobilizing an appropriate health care workforce in the event of a health emergency or natural disaster. A cost estimate is unavailable.

#### I. Employer Verification:

“To remove incentives to enter the country illegally, we need to crack down on employers that hire undocumented immigrants.”

[http://www.barackobama.com/issues/immigration\\_and\\_the\\_border/](http://www.barackobama.com/issues/immigration_and_the_border/)

Cost: Unknown.

Source: Senator Obama was a cosponsor of S. 1917 (109<sup>th</sup> Congress): A bill to require employers to verify the employment eligibility of their employees, and for other purposes. A cost estimate is unavailable. According to the bill’s sponsor, “The new fines and fees created by this legislation will fund the new and expanded programs created in it. Fines assessed by this legislation could total as much as \$12 billion. A majority of the funds will come from the \$2,000 fine illegal aliens would pay under the Earned Adjustment Program.”

<http://thomas.loc.gov/cgi-bin/query/R?r109:FLD001:S11826>

#### J. Federal Disaster Coordinator:

“Immediately following a catastrophe, Barack Obama will appoint a Federal Coordinating Officer to direct reconstruction efforts. The job of the FCO and his or her staff will be to cut through bureaucratic obstacles, get federal agencies to work together and to coordinate efforts with local officials.”

<http://my.barackobama.com/page/-/HQpress/020708%20Katrina%20Fact%20Sheet.pdf>

Cost: Unknown.

K. Federal Trade Commission:

“Obama will increase the Federal Trade Commission’s enforcement budget and will step up international cooperation to track down cyber-criminals so that U.S. law enforcement can better prevent and punish spam, spyware, telemarketing and phishing intrusions into the privacy of American homes and computers.”

<http://www.barackobama.com/issues/technology/>

Cost: Unknown.

L. First Responders:

“Barack Obama supports efforts to provide greater technical assistance to local and state first responders and dramatically increase funding for reliable, interoperable communications systems.”

<http://origin.barackobama.com/issues/pdf/HomelandSecurityFactSheet.pdf>

“... Obama will ... [c]atalyze national leadership to spur the development and deployment of new technologies to promote interoperability, broadband access, and more effective communications among first responders and emergency response systems.”

<http://www.barackobama.com/issues/technology/>

“Obama is committed not only to rolling back the funding cuts that have affected first responders, but also to increasing federal resources and logistic support to local emergency planning efforts.”

<http://origin.barackobama.com/issues/pdf/HomelandSecurityFactSheet.pdf>

Cost: Unknown.

Source: H.R. 1 (110<sup>th</sup> Congress), which was passed into law, created a new grant program for states and regions to improve the interoperability of emergency communications systems used by police, firefighters, and other first responders. A CBO cost estimate is available.

<http://www.cbo.gov/ftpdoc.cfm?index=7780&type=1>

M. Infrastructure Security:

“An Obama Administration will ... increase the security of our transit systems, rail lines, and ports; and secure our chemical and nuclear plants, and other critical infrastructure. ... Ensure [s]afe and [s]ecure [d]isposal of [n]uclear [w]aste ... . Improve [a]irline [s]ecurity ... . Protect [l]ocal [w]ater [s]upplies ... .”

<http://origin.barackobama.com/issues/pdf/HomelandSecurityFactSheet.pdf>

Cost: Unknown.

N. National Infrastructure Protection Plan:

“Barack Obama’s Department of Homeland Security will develop a meaningful critical infrastructure protection plan across the nation and will work with the private sector to ensure that all real targets are prepared for disasters both natural and man-made.”

<http://origin.barackobama.com/issues/pdf/HomelandSecurityFactSheet.pdf>

Cost: Unknown.

Source: A related program currently exists, and was funded at \$235 million in FY 2007.

<http://www.whitehouse.gov/omb/expectmore/detail/10003623.2006.html>

<http://www.whitehouse.gov/omb/expectmore/summary/10003623.2006.html>

O. Protecting Children Online:

“To further protect children online, Obama supports tough penalties, increased enforcement resources and forensic tools for law enforcement, and collaboration between law enforcement and the private sector to identify and prosecute people who abuse the Internet to try to exploit children.”

<http://www.barackobama.com/issues/technology/>

Cost: Unknown.

P. Public-Private Partnership for Communications Development:

“... Obama will ... [u]se the authority over spectrum licenses to establish an effective public-private partnership that would facilitate the development of a next generation network for use by public safety agencies on a priority basis.”

<http://www.barackobama.com/issues/technology/>

Cost: Unknown.

Q. Re-entry and Prison-to-Work Programs:

“In the U.S. Senate, Obama has worked to provide job training, substance abuse and mental health counseling, and employment opportunities to ex-offenders. In addition to signing these important programs into law, Obama will create a prison-to-work incentive program, modeled on the successful Welfare-to-Work Partnership to create ties with employers and third-party agencies that provide training and support services to ex-offenders, and to improve ex-offender employment and job retention rates. Obama will also work to reform correctional systems to break down barriers for ex-offenders to find employment.”

<http://www.barackobama.com/issues/pdf/PovertyFactSheet.pdf>

Cost: \$77 million (\$230 million over three years).

Source: Senator Obama is a cosponsor of S. 1060 (110<sup>th</sup> Congress): A bill to reauthorize the grant program for reentry of offenders into the community in the Omnibus Crime

Control and Safe Streets Act of 1968, to improve reentry planning and implementation, and for other purposes. The estimate is based on authorization in the text and information in a related CBO report.

R. Regional Crime Control Partnership:

“He will help local, state, and federal law enforcement agencies come together to establish an integrated regional crime control partnership so that each police chief and sheriff doesn’t have to face these crime problems alone.”

<http://my.barackobama.com/page/-/HQpress/020708%20Katrina%20Fact%20Sheet.pdf>

Cost: Unknown.

**National Defense and International Relations: \$13.808 billion**

A. Armed Forces:

“That’s why I strongly support the expansion of our ground forces by adding 65,000 soldiers to the Army and 27,000 Marines.”

<http://my.barackobama.com/page/content/fpccga>

Cost: \$6.624 billion (\$33.12 billion over five years).

Source: The estimate assumes the troop levels will be increased over five years. In general, force-strength increases annual cost \$1.2 billion per 10,000 troops.

<http://www.washingtonpost.com/wp-dyn/content/article/2006/12/19/AR2006121900880.html>.

B. Armed Forces and National Guard Equipment:

“Barack Obama also will invest in an equipment reset for the Armed Services, including the National Guard, which has seen its readiness for homeland security missions decrease significantly.”

<http://my.barackobama.com/page/-/pdf/Fact%20Sheet%20Foreign%20Policy.pdf>

Cost: Unknown.

Note: The cost of this proposal is not completely clear, but could be significant.

According to an article in *Government Executive*: “In 2007, the service received \$17 billion for equipment reset, a significant jump from the \$8.6 billion it got in 2006. Army officials have said they will need \$12 billion to \$13 billion per year for reset efforts as long as combat continues in Iraq, and up to two years after troops are withdrawn.”

<http://www.govexec.com/dailyfed/1207/122007g1.htm>

### C. Asian Regional Framework:

“As President, I intend to forge a more effective regional framework in Asia that will promote stability, prosperity and help us confront common transnational threats such as tracking down terrorists and responding to global health problems like avian flu.”  
<http://my.barackobama.com/page/content/fpccga>

Cost: Unknown.

### D. Debt Forgiveness to Poor Nations:

“As President, Barack Obama will ... [r]educ[e] [d]ebt of [d]eveloping [n]ations. Developing nations are amassing tremendous amounts of foreign debt that limit their economic development and make investments in public health, education, and infrastructure extremely difficult. ... Obama would work with other developed nations and multilateral institutions to cancel remaining onerous debt while pushing reforms to keep developing nations from slipping into fiscal ruin.”  
<http://my.barackobama.com/page/-/pdf/Fact%20Sheet%20Foreign%20Policy.pdf>

Cost: \$197 million (first-year cost).

Source: Senator Obama is a cosponsor of S. 2166, the Jubilee Act (110<sup>th</sup> Congress): A bill to provide for greater responsibility in lending and expanded cancellation of debts owed to the United States and the international financial institutions by low-income countries, and for other purposes. The Jubilee USA Network estimates a one-time cost of \$119 million to \$197 million for debts owed to the United Nations (excluding debts owed to international institutions).

[http://www.jubileeusa.org/fileadmin/user\\_upload/Resources/JUBILEE\\_Act/Jubilee\\_Act\\_Cost\\_and\\_Financing\\_Fact\\_Sheet\\_0807\\_-\\_ks\\_edits.doc](http://www.jubileeusa.org/fileadmin/user_upload/Resources/JUBILEE_Act/Jubilee_Act_Cost_and_Financing_Fact_Sheet_0807_-_ks_edits.doc)

Note: It is not clear from the source document whether this is included in or is in addition to his proposal to double foreign aid.

### E. Foreign Aid:

“As President, I will double our annual [foreign aid] investments in meeting these challenges to \$50 billion by 2012. ... Doubling our foreign assistance spending by 2012 will help meet the challenge laid out by Tony Blair at the 2005 G-8 conference at Gleneagles, and it will help push the rest of the developed world to invest in security and opportunity.”  
[http://www.tpmcafe.com/blog/electioncentral/2007/apr/23/heres\\_full\\_text\\_of\\_obamas\\_big\\_foreign\\_policy\\_speech](http://www.tpmcafe.com/blog/electioncentral/2007/apr/23/heres_full_text_of_obamas_big_foreign_policy_speech)

“Part of this new funding will also establish a two billion dollar Global Education Fund that calls on the world to join together in eliminating the global education deficit, similar to what the 9/11 commission proposed.”  
<http://my.barackobama.com/page/content/fpccga>

Cost: \$5 billion (\$25 billion over five years).

F. Foreign Aid – Energy Assistance:

“Barack Obama would work towards binding, enforceable commitments from developed nations to reduce carbon emissions and provide more assistance to developing countries to help them fuel their growth with greener energy.”

<http://my.barackobama.com/page/-/pdf/Fact%20Sheet%20Foreign%20Policy.pdf>

Cost: Unknown.

Source: It is not clear from the source document whether this is included in or is in addition to his proposal to double foreign aid.

G. Genocide Prevention:

“Barack Obama would work with the international community to hold the perpetrators of potential war crimes, crimes against humanity, and genocide accountable for their crimes. If necessary, he would work with the United Nations to establish an independent war crimes commission or a special investigator who can gather testimonies of survivors and investigate war crimes. Obama would supply armed escorts to civilians who voluntarily choose to move from religiously heterogeneous areas to communities where they feel they will be more secure.”

<http://my.barackobama.com/page/-/pdf/Fact%20Sheet%20Iraq%20Final.pdf>

Cost: Unknown.

H. Global Energy Forum:

“Obama will create a Global Energy Forum – based on the G8+5, which included all G-8 members plus Brazil, China, India, Mexico and South Africa – of the world’s largest emitters to focus exclusively on global energy and environmental issues.”

<http://www.barackobama.com/issues/environment/>

Cost: Unknown.

Note: The presidency of the G8 rotates each year to a different member country and that country is responsible for hosting and planning the annual G8 summit. According to *Time*, the most recent summit in Germany cost \$134 million (mostly for security).

<http://www.time.com/time/world/article/0,8599,1630838,00.html>

I. International Fuel Bank:

“Countries should not be able to build a weapons program under the auspices of developing peaceful nuclear power. That’s why we should create an international fuel bank to back up commercial fuel supplies so there’s an assured supply and no more excuses for nations like Iran to build their own enrichment plants. ... It should be a central component of our national security, and that’s why we should provide \$50 million to get this fuel bank started and urge other nations, starting with Russia, to join us.”

[http://www.tpmcafe.com/blog/electioncentral/2007/apr/23/heres\\_full\\_text\\_of\\_obamas\\_big\\_foreign\\_policy\\_speech](http://www.tpmcafe.com/blog/electioncentral/2007/apr/23/heres_full_text_of_obamas_big_foreign_policy_speech)

Cost: \$50 million (first-year cost).

J. International Nuclear Security:

“As President, I will lead a global effort to secure all nuclear weapons and material at vulnerable sites within four years . . . .”

<http://my.barackobama.com/page/content/fpccga>

Cost: \$8 million (\$40 million over five years).

Source: Senator Obama has introduced S. 1977 (110<sup>th</sup> Congress): A bill to provide for sustained United States leadership in a cooperative global effort to prevent nuclear terrorism, reduce global nuclear arsenals, stop the spread of nuclear weapons and related material and technology, and support the responsible and peaceful use of nuclear technology. In addition to other funding, the bill authorizes \$15 million annually through the International Atomic Energy Agency to improve security and safeguards at international nuclear facilities and \$20 million annually for three years to the Global Threat Reduction Initiative “to expand the scope of facilities covered under the initiative, encourage countries and sites to relinquish vulnerable nuclear material, accelerate security upgrades at research reactors, and encourage the conversion of civilian reactors from the use of highly enriched uranium fuel to low enriched uranium fuel.”

K. International Tax Evasion Watch List:

“Obama will create an International Tax Evasion Watch List to monitor [offshore tax havens] and will use economic pressure to make them comply.”

<http://www.barackobama.com/issues/economy/>

Cost: Unknown.

L. Iraq – Aid for Refugees:

“The State Department says it has invested \$183 million on displaced Iraqis this year – but that is not nearly enough. We can and must do more. We should up our share to at least \$2 billion to support this effort; to expand access to social services for refugees in neighboring countries; and to ensure that Iraqis displaced inside their own country can find safe-haven.”

[http://www.barackobama.com/2007/09/12/remarks\\_of\\_senator\\_barack\\_obam\\_23.php](http://www.barackobama.com/2007/09/12/remarks_of_senator_barack_obam_23.php)

Cost: \$1.817 billion (first-year cost).

M. Iraq – Withdrawal:

“All Combat Troops Redeployed by 2009: Barack Obama would immediately begin redeploying American troops from Iraq. The withdrawal would be strategic and phased, directed by military



commanders on the ground and done in consultation with the Iraqi government. Troops would be removed from secure areas first, with troops remaining longer in more volatile areas. The drawdown would begin immediately with one to two combat brigades redeploying each month and all troops engaged in combat operations out by the end of next year.”

<http://my.barackobama.com/page/-/pdf/Fact%20Sheet%20Iraq%20Final.pdf>

Cost: Unknown.

Note: Depending on how long it will take to complete the demobilization, and where and how the troops are re-deployed, this may or may not have significant savings.

#### N. Middle East:

“Obama’s plan ... [e]mphasizes [r]egional [d]iplomacy. Launches a comprehensive regional and international diplomatic initiative – that includes key nations in the region – to help achieve a political settlement among the Iraqi people, end the civil war in Iraq, and prevent a humanitarian catastrophe and regional conflict.”

<http://my.barackobama.com/page/-/pdf/Fact%20Sheet%20Foreign%20Policy.pdf>

Cost: Unknown.

#### O. Nuclear Posture and Arsenal:

“Barack Obama would work with Russia to take as many nuclear weapons off Cold War hair-trigger alert as possible and negotiate reductions in United States and Russian nuclear arsenals.”

<http://my.barackobama.com/page/-/pdf/Fact%20Sheet%20Foreign%20Policy.pdf>

Cost: Unknown.

#### P. Nuclear Smuggling:

“Barack Obama would fully implement the Lugar-Obama legislation to help our allies detect and stop the smuggling of weapons of mass destruction throughout the world.”

<http://my.barackobama.com/page/-/pdf/Fact%20Sheet%20Foreign%20Policy.pdf>

Cost: \$112 million (\$560 million over five years).

Source: The Lugar-Obama bill was S. 2566 (109<sup>th</sup> Congress): A bill to provide for coordination of proliferation interdiction activities and conventional arms disarmament, and for other purposes. A CBO cost estimate is available.

[http://obama.senate.gov/press/060523-lugar-obama\\_bil/](http://obama.senate.gov/press/060523-lugar-obama_bil/)

<http://www.cbo.gov/ftpdocs/72xx/doc7247/s2566.pdf>

#### Q. Technology Transfer:

“Obama will create a Technology Transfer program within the Department of Energy dedicated to exporting climate-friendly technologies, including green buildings, clean coal and advanced automobiles, to developing countries to help them combat climate change.”

<http://www.barackobama.com/issues/environment/>

Cost: Unknown.

### **Veterans: \$2.76 billion**

#### A. Employment Discrimination:

“As President, Barack Obama will invest additional resources into enforcement and investigation in order to crack down on employers who are not following the letter and spirit of the law. He will also require the Pentagon [and] Labor and Justice Departments to work together more closely to ensure the rights of our troops are being protected.”

<http://my.barackobama.com/page/-/Press/Fact%20Sheet%20VFW%20Speech%20Final.pdf.pdf>

Cost: Unknown.

#### B. Health Care, Interoperable Records, and Traumatic Brain Injury (TBI):

“As the nation’s largest integrated health system, the Veterans Health Administration has already been a national leader in reform, particularly with electronic health records and prevention initiatives. Obama will continue this trend to make the VA a leader of national health care reform so that veterans get the best care possible. This includes efforts to improve electronic records interoperability, expand effectiveness research, promote wellness programs, and instill more accountability for performance and quality improvement initiatives. ... As president, Obama will transform the paper benefit claims process to an electronic system that will be interoperable with the VA’s health network as well as military records. This will reduce error rates, improve timeliness, and enhance the overall quality of the claims decisions.”

<http://my.barackobama.com/page/-/Press/Fact%20Sheet%20VFW%20Speech%20Final.pdf.pdf>

“To ensure that veterans get the best care possible, he will improve electronic records interoperability between the Pentagon and VA, expand effectiveness research, promote wellness programs, and use technology to improve the accountability for performance and quality.”

<http://www.barackobama.com/issues/technology/>

“As President, Obama will establish standards of care for TBI treatment, require pre- and post-deployment screenings and improve case management so that service members get the best possible care.”

<http://my.barackobama.com/page/-/Press/Fact%20Sheet%20VFW%20Speech%20Final.pdf.pdf>

Cost: \$60 million (\$300 million over five years) (*partial estimate*).

Source: Senator Obama is a cosponsor of S. 1606 (110<sup>th</sup> Congress): A bill to provide for the establishment of a comprehensive policy on the care and management of wounded warriors in order to facilitate and enhance their care, rehabilitation, physical evaluation, transition from care by the Department of Defense to care by the Department of Veterans Affairs, and transition from military service to civilian life, and for other purposes. CBO

has a cost estimate for the companion bill in the House, H.R. 1538: “The bill also would require DoD and VA to establish a single medical information system between the two departments. CBO does not have sufficient information about how DoD and VA might implement this requirement to estimate the cost, but we expect that cost could amount to billions of dollars, subject to appropriation of the necessary funds. CBO estimates that implementing the remainder of H.R. 1538 would incur discretionary costs of \$66 million in 2008 and about \$300 million over the 2008-2012 period ... .”  
<http://www.cbo.gov/ftpdocs/79xx/doc7905/hr1538.pdf>

#### C. Homeless Veterans:

“As President, he will establish a national ‘zero tolerance’ policy for veterans falling into homelessness. Obama will improve existing services; expand proven homeless veteran housing vouchers to assist those already on the streets; and launch an innovative supportive services-housing program to prevent at-risk veterans and veteran families from falling into homelessness in the first place.”

<http://my.barackobama.com/page/-/Press/Fact%20Sheet%20VFW%20Speech%20Final.pdf.pdf>

Cost: \$823 million (\$4.115 billion over five years).

Source: Senator Obama has sponsored S. 1084 (110<sup>th</sup> Congress): A bill to provide housing assistance for very low-income veterans. The bill authorizes funding and provides at least 20,000 housing assistance vouchers at a cost of \$818 million annually. He has also introduced S. 2330 (110<sup>th</sup> Congress): A bill to authorize a pilot program within the Departments of Veterans Affairs and Housing and Urban Development with the goal of preventing at-risk veterans and veteran families from falling into homelessness, and for other purposes. The bill authorizes \$25 million in the first year, and “such sums as necessary” in subsequent years.

#### D. Mental Health Care:

“Barack Obama will improve mental health care at every stage of military service – recruitment, deployment, and reentry into civilian life:

- Recruitment: Recruiting more mental health professionals; improving screening; and instituting fairness by guaranteeing that if the military determines on the front end that an individual is fit to serve, that individual will not be denied benefits on the back end on the grounds of a ‘preexisting’ condition.
- Active Duty, Training, and Deployment: Placing more mental health professionals with troops as they train, deploy, and return; fighting the stigma of psychological injury by enhancing training; and helping military families by offering more counseling and support to family members.
- Return to Civilian Life: Requiring individual, face-to-face post-deployment mental health screenings; increasing the VA budget to recruit and retain more mental health professionals; making PTSD benefits claims fairer and more accurate by providing better training and guidance to personnel; and expanding Vet Centers in rural areas so that veterans and their families can get the care they need where they live.”

<http://my.barackobama.com/page/-/Press/Fact%20Sheet%20VFW%20Speech%20Final.pdf.pdf>

Cost: Unknown.

Source: Senator Obama is a sponsor of S. 38 (110<sup>th</sup> Congress): A bill to require the Secretary of Veterans Affairs to establish a program for the provision of readjustment and mental health services to veterans who served in Operation Iraqi Freedom and Operation Enduring Freedom, and for other purposes. The bill authorizes “such sums as necessary.”

#### E. Priority 8 Veterans:

“Barack Obama is committed to ending the unfair ban on healthcare [sic] enrollment of certain groups of veterans, including ‘Priority 8’ veterans who often earn modest incomes. He has voted to end this unfair policy, which has resulted in the VA turning away nearly one million veterans since 2003. As President, one of Barack Obama’s first acts will be signing an executive order reversing this ban.”

<http://my.barackobama.com/page/-/Press/Fact%20Sheet%20VFW%20Speech%20Final.pdf.pdf>

Cost: \$1.87 billion (\$8.8 billion over five years).

Source: Enrollment for ‘Priority 8’ veterans was included in the CBO cost estimate for S. 1233 (110<sup>th</sup> Congress).

<http://www.cbo.gov/ftpdoc.cfm?index=8573&type=1>

#### F. Reintegration to Civilian Life:

“As President, Obama will demand that the military and the VA coordinate to provide a truly seamless transition for service members from active duty to civilian life. Obama’s plan will be modeled in part on legislation he introduced to require that each service member receive his or her medical and service records electronically upon discharge and that the military and VA enhance their outreach to separating members of the National Guard and Reserves, who often receive fewer benefits than their active-duty counterparts. Given the amount of time required for a service member to adjust to civilian life, Obama would also extend the window for new veterans to enroll in the VA from two to five years. Finally, Obama Administration appointees to the DOD and VA would place the veteran – rather than bureaucratic turf concerns – at the center of all care and recovery plans.”

<http://my.barackobama.com/page/-/Press/Fact%20Sheet%20VFW%20Speech%20Final.pdf.pdf>

Cost: Unknown.

Source: Senator Obama is a sponsor of S. 117 (110<sup>th</sup> Congress): A bill to amend Titles 10 and 38, United States Code, to improve benefits and services for members of the Armed Forces, veterans of the Global War on Terrorism, and other veterans, to require reports on the effects of the Global War on Terrorism, and for other purposes. A cost estimate is unavailable.

Note: On May 9, 2007, the Under Secretary of Defense made this statement in testimony before the Senate Committee on Veterans’ Affairs regarding the bill’s requirement that electronic records be supplied to discharging veterans: “If scanning of medical records were done at a Military Treatment Facility (MTF), each MTF would need a high[-]speed scanner that we estimate would cost approximately \$4,200 each. In addition, the cost to

provide medical record data on a thumb drive for each separating Service member would be roughly \$20 per drive for each of the Service members who separate each year.”  
<http://www.dod.mil/dodgc/olc/docs/testChu070509.pdf>

#### G. Vet Centers:

“Vet Centers are often the first line of defense for veterans to get help in their communities by offering counseling for vets and their families. They provide counseling for mental health care, sexual trauma and substance abuse. They also provide vocational and employment assistance, VA claims and benefits information, help for homeless veterans, social service and health care referrals. Barack Obama will expand and strengthen Vet Centers.”  
<http://my.barackobama.com/page/-/Press/Fact%20Sheet%20VFW%20Speech%20Final.pdf.pdf>

Cost: Unknown.

#### H. Veterans Administration Actuary and Planning Division:

“Barack Obama will establish a world-class VA Actuary and Planning Division that would break down bureaucratic barriers between the VA’s health and benefits administration and war planners in the Pentagon to anticipate the needs of our veterans. Obama believes that, in addition to concrete, regularly updated short-term plans and budgets for our veterans, the country should always anticipate the long-term needs of these heroes over their lifetimes.”  
<http://my.barackobama.com/page/-/Press/Fact%20Sheet%20VFW%20Speech%20Final.pdf.pdf>

Cost: Unknown.

#### I. Veterans Administration Backlog:

“As President, Barack Obama will fully fund the VA, fix the Veterans Benefits Administration, and reduce the claims backlog.”  
<http://www.barackobama.com/issues/seniors/>

Cost: Unknown.

Note: According to the findings section in H.R. 1435 (110<sup>th</sup> Congress), “There are more than 500,000 veterans who have claims pending with the Department of Veterans Affairs for benefits, and approximately 100,000 of such claims are over one year old without resolution.”

#### J. Veterans Administration Specialty Care:

“Advances in technology have meant that the survival rate for U.S. service members is higher now than in any previous conflict. There will be a long-term need for strengthened specialty care within the VA, including additional polytrauma centers as well as centers of excellence for ... PTSD [Post-Traumatic Stress Disorder], vision impairment, prosthetics, spinal cord injury, aging, women’s health and other specialized rehabilitative care. ... As President, he will expand the number of these centers of excellence and invest in specialty care.”

<http://my.barackobama.com/page/-/Press/Fact%20Sheet%20VFW%20Speech%20Final.pdf.pdf>

Cost: \$7 million (\$36 million over five years).

Source: Senator Obama is a sponsor of two related bills in the 110<sup>th</sup> Congress – S. 1999:

A bill to provide for the establishment of a Center of Excellence in Prevention, Diagnosis, Mitigation, Treatment, and Rehabilitation of Military Eye Injuries, and for other purposes (text authorizes \$5 million); and, S. 2004: A bill to amend Title 38, United States Code, to establish epilepsy centers of excellence in the Veterans Health Administration of the Department of Veterans Affairs, and for other purposes, for which a CBO cost estimate is available (\$31 million over five years).

<http://www.cbo.gov/ftpdocs/88xx/doc8864/s2004.pdf>

### **Miscellaneous: \$10.817 billion**

#### A. Automatic Workplace Pension Plan:

“Under this plan, employers who do not currently offer a retirement plan will be required to automatically enroll their employees in a direct deposit IRA account. Employees may opt-out by signing a written waiver. Even after enrollment, employees will retain the right to change their savings levels, reallocate investment portfolios or end contributions to the account. Obama’s plan will give options to the self-employed to access new easy-to-enroll savings plans and direct the IRS to deposit tax refunds into those savings plans for people who choose to save some of their refunds. Under the Obama plan when employees change jobs, their savings will be automatically rolled over into the new employer’s system to ensure continued savings. ... In addition, Obama will make temporary tax credits available to firms to defer the cost of establishing these plans. Firms with fewer than 10 employees or who have been in business for less than two years will be exempt from this requirement, but may take advantage of this low-cost opportunity to offer a saving plan for their employees if they so choose.”

<http://www.barackobama.com/pdf/retirementFactSheet.pdf>

Cost: Unknown.

#### B. Federal Government – Chief Financial Officer:

“As President, Obama will appoint a Chief Financial Officer to oversee the rebuilding following national disasters to minimize waste and abuse.”

<http://my.barackobama.com/page/-/HQpress/020708%20Katrina%20Fact%20Sheet.pdf>

Cost: \$4 million (\$20 million over five years).

Source: CBO estimate for H.R. 2886 (108<sup>th</sup> Congress): A bill to amend Title 31, United States Code, to improve the financial accountability requirements applicable to the Department of Homeland Security, and for other purposes.

<http://www.cbo.gov/ftpdoc.cfm?index=4811&type=1>

C. Federal Government – Chief Technology Officer:

“Obama will appoint the nation’s first Chief Technology Officer (CTO) to ensure that our government and all its agencies have the right infrastructure, policies and services for the 21st century. The CTO will ensure the safety of our networks and will lead an interagency effort, working with chief technology and chief information officers of each of the federal agencies, to ensure that they use best-in-class technologies and share best practices.”

<http://www.barackobama.com/issues/technology/>

Cost: Unknown.

D. Federal Government – E-Government:

“Obama will integrate citizens into the actual business of government by:

- Making government data available online in universally accessible formats to allow citizens to make use of that data to comment, derive value, and take action in their own communities. Greater access to environmental data, for example, will help citizens learn about pollution in their communities, provide information about local conditions back to government and empower people to protect themselves.
- Establishing pilot programs to open up government decision-making and involve the public in the work of agencies, not simply by soliciting opinions, but by tapping into the vast and distributed expertise of the American citizenry to help government make more informed decisions.
- Requiring his appointees who lead Executive Branch departments and rulemaking agencies to conduct the significant business of the agency in public, so that any citizen can watch a live feed on the Internet as the agencies debate and deliberate the issues that affect American society. He will ensure that these proceedings are archived for all Americans to review, discuss and respond. He will require his appointees to employ all the technological tools available to allow citizens not just to observe, but also to participate and be heard in these meetings. ...
- Lifting the veil from secret deals in Washington with a [W]eb site, a search engine, and other [W]eb tools that enable citizens easily to track online federal grants, contracts, earmarks, and lobbyist contacts with government officials.
- Giving the American public an opportunity to review and comment on the White House [Web site] for five days before signing any non-emergency legislation.
- Bringing democracy and policy deliberations directly to the people by requiring his Cabinet officials to have periodic national online town hall meetings to answer questions and discuss issues before their agencies.
- Employing technologies, including blogs, wikis and social networking tools, to modernize internal, cross-agency, and public communication and information sharing to improve government decision-making.

<http://www.barackobama.com/issues/technology/>

“Barack Obama will require his appointees who lead the Executive Branch departments and rulemaking agencies to conduct the significant business of the agency in public, so that any citizen can see in person or watch on the Internet as the agencies debate and

deliberate the issues that affect American society. Videos of meetings will be archived on the [W]eb, and the transcript will be available to the public. Obama will also require his nominees to commit to employ all the technological tools available to allow average citizens not just to observe, but to participate and be heard on the issues that affect their daily lives.”

<http://www.barackobama.com/pdf/TakingBackOurGovernmentBackFinalFactSheet.pdf>

Cost: Unknown.

E. Federal Government – Equal Employment Opportunity Commission:

“Barack Obama would increase funding for the Equal Employment Opportunity Commission, and would fight to eliminate racial and sexual discrimination. He also would strengthen whistleblower protections.”

[http://www.barackobama.com/issues/economy/Obama\\_Keeping\\_Americas\\_Promise.pdf](http://www.barackobama.com/issues/economy/Obama_Keeping_Americas_Promise.pdf)

Cost: Unknown.

F. Federal Government – Ethics Enforcement:

“Earlier this year, Congress defeated legislation that Barack Obama championed to create an independent and professional enforcement agency to investigate congressional ethics violations. As President, Obama will use the power of the presidency to fight for passage of this law, ensuring an independent watchdog oversees the investigation of ethics violations so that the public can be assured that ethics complaints will be investigated. Final enforcement for violations would remain with the Ethics Committees.”

Cost: Unknown.

Source: Senator Obama is referring to Senate Amendment 30, offered to S. 1, the Honest Leadership and Open Government Act of 2007 (110<sup>th</sup> Congress). The Amendment would have established a Senate Office of Public Integrity. A cost estimate is unavailable.

G. Federal Government – Federal Rebuilding Coordinator:

“He will elevate the federal rebuilding coordinator so that he or she reports directly to the President and so that rebuilding remains a national priority.”

<http://my.barackobama.com/page/-/HQpress/020708%20Katrina%20Fact%20Sheet.pdf>

Cost: Unknown.

H. Federal Government – Lobbying Database:

“As President, Obama will create a centralized database of lobbying reports, congressional ethics records, and campaign finance filings that is made available on the Internet in a searchable, sortable and downloadable format, and compiled and maintained by one agency and under one roof. This database will allow Americans to see easily and in one place who their legislators are



meeting with; who they are collecting money from and how much money they are collecting; and to review their ethics records.”

<http://www.barackobama.com/pdf/TakingBackOurGovernmentBackFinalFactSheet.pdf>

Cost: \$3 million (\$15 million over five years).

Source: This proposal is very similar to S. 2590, the Federal Funding Accountability and Transparency Act of 2006 (became law in the 109<sup>th</sup> Congress) which directed the Office of Management and Budget to create a comprehensive database of federal grants, loans, and other funding. A CBO estimate for that law is available.

<http://www.cbo.gov/ftpdocs.cfm?index=7483&type=1>

#### I. Federal Government – Occupational Safety and Health Administration:

“Barack Obama will increase funding for the Occupational Safety and Health Administration, including more job site inspections and grants for safety and health training programs for small business employers, and employees and workers in high-risk jobs such as construction.”

[http://www.barackobama.com/issues/economy/Obama\\_Keeping\\_Americas\\_Promise.pdf](http://www.barackobama.com/issues/economy/Obama_Keeping_Americas_Promise.pdf)

Cost: Unknown.

#### J. Federal Government – ReadyReturn Tax Forms:

“Currently, the IRS receives Americans’ financial information directly from employers and banks. Obama will ensure that the IRS uses this information to give taxpayers the option of a pre-filled tax forms to verify, sign and return to the IRS or online. This will eliminate the need for Americans to hire expensive tax preparers and to gather information that the federal government already has on file.”

<http://www.barackobama.com/issues/economy/>

Cost: Unknown.

Note: California enacted a similar program called ReadyReturn. In its first two years of operation, it cost \$383,000 and served 22,201 filers, an average cost per return of \$17.25. The state forecasts that average costs will drop in future years.

<http://www.ftb.ca.gov/readyReturn/readyreturn.971.pdf>

In 2006, former IRS Commissioner Charles Rossotti told the *Wall Street Journal*, that there are significant challenges to enacting this type of program at the federal level: “For one thing, he says, the IRS doesn’t currently have the manpower or computer power to quickly handle and tabulate the reams of financial information from employers, banks and brokers in a timely way. That means potential refunds could be delayed. For example, individual taxpayers usually get W-2 forms, on which employers report wages and withheld taxes, in January, but the IRS doesn’t get the forms until February. Similarly, taxpayers generally can get their 1099 information from financial institutions as early as January, but the IRS often gets 1099s as late as August. Even for the simplest of returns, documents from employers, banks and other financial institutions would have to arrive at the IRS well before the end of tax season around April 15.”

[http://online.wsj.com/public/article/SB114489444487224827-iWhfioruO1\\_e0H68j9TWj9vzc30\\_20060419.html?mod=mktw](http://online.wsj.com/public/article/SB114489444487224827-iWhfioruO1_e0H68j9TWj9vzc30_20060419.html?mod=mktw)

K. Federal Government – Small Business Administration:

“As President, Barack Obama will fix the SBA bureaucracy so that it can step in during a disaster and provide assistance.”

<http://my.barackobama.com/page/-/HQpress/020708%20Katrina%20Fact%20Sheet.pdf>

Cost: Unknown.

L. Federal Government – Tax Expenditure Database:

“Building on his ‘Google for Government’ bill, which allows every American to do a simple search and see exactly how federal money is being spent, Barack Obama will ensure that any tax breaks for corporate recipients – or tax earmarks – are also publicly available by directing the Office of Management and Budget to post them on its [Web site] in an easily searchable format.”

<http://www.barackobama.com/pdf/TakingBackOurGovernmentBackFinalFactSheet.pdf>

Cost: Unknown.

M. Offsets:

“He will maintain fiscal responsibility and prevent any increase in the deficit by offsetting cuts and revenue sources in other parts of the government. The early education plan will be paid for by delaying the NASA Constellation Program for five years, using purchase cards and the negotiating power of the government to reduce costs of standardized procurement, auctioning surplus federal property, and reducing the erroneous payments identified by the Government Accountability Office . . . .”

[http://obama.3cdn.net/a8dfc36246b3dcc3cb\\_lem6bxpgh.pdf](http://obama.3cdn.net/a8dfc36246b3dcc3cb_lem6bxpgh.pdf)

Cost: Unknown.

Notes:

- Constellation: Senator Obama has since backed off his call to delay the Constellation program. According to TheSpaceReview.com: “. . . Barack Obama, recently clarified his stance on space policy after calling for a five-year delay in the Constellation program (which includes Ares and Orion) in November to help pay for his education program. In a document published on SpaceRef.com late last week, Obama outlined a set of goals and priorities . . . including support for the continued development of Ares and Orion.” It is unclear whether he intends to reduce other NASA funding within the Constellation program.  
<http://www.thespacereview.com/article/1036/1>
- Purchase Cards and Procurement: Related legislation has been introduced, S. 457, the Purchase Card Waste Elimination Act of 2005 (109<sup>th</sup> Congress). According to CBO, “. . . [T]his bill would direct the Office of Management and Budget to issue guidance to all executive branch agencies on the use of purchase cards (a

purchase card is a credit card issued by a commercial bank for the federal government to purchase goods and services). ... Enacting S. 457 could result in budget savings, but CBO cannot estimate the likely amounts of such savings, if any. Achieving the goals of this legislation by reducing wasteful and fraudulent agency purchases and obtaining discounts from retailers would reduce federal spending, assuming amounts provided in appropriation acts would be correspondingly diminished.”

<http://www.cbo.gov/ftpdoc.cfm?index=6617&type=1>

- Auctioning Surplus Property: The government already auctions surplus items; if Senator Obama intends to expand this program, he has provided no details regarding which surplus property he would provide for auction.  
<http://gsaauctions.gov>
- Reducing Erroneous Payments: Under H.R. 4878, the Improper Payments Information Act of 2002 (passed in the 107<sup>th</sup> Congress), federal agencies are already required to report erroneous payments and the steps they are taking to reduce the amount of such payments. In FY 2007, major federal agencies reported erroneous payments of \$55 billion, according to a January 23, 2008 GAO report. Senator Obama has not detailed any additional steps he would take to reduce erroneous payments.  
<http://www.gao.gov/new.items/d08377r.pdf>

#### N. Parental Filters:

“Obama will work to give parents the tools to prevent reception of programming that they find offensive on television and on digital media. Obama will encourage improvements to the existing voluntary rating system, exploiting new technologies like tagging and filtering, so that parents can better understand what content their children will see, and have the tools to respond. Private entities like Common Sense Media are pursuing a ‘sanity not censorship’ approach, which can serve as a model for how to use technology to empower parents without offending the First Amendment.”

<http://www.barackobama.com/issues/technology/>

Cost: Unknown.

#### O. Retirement Savings Incentives for Working Families:

“Obama will expand the existing Savers Credit to match 50 percent of the first \$1,000 of savings for families that earn under \$75,000, and he will make the tax credit refundable. To help ensure that this proposal actually strengthens retirement investments, the savings match will be automatically deposited into designated personal accounts by using the account information listed on IRS tax filings.”

<http://www.barackobama.com/pdf/retirementFactSheet.pdf>

Cost: \$3 billion (\$15 billion over five years).

Source: Center for Budget Priorities and Policies, “Refundability would add \$2 billion to \$3 billion per year to the cost of the credit and promote saving among millions of low- and moderate-income households.”

<http://www.cbpp.org/6-4-04tax.pdf>

P. Senior Corps:

“Barack Obama will engage more interested seniors into public service opportunities by expanding the Senior Corps program, which connects individuals over the age of 55 to local volunteer opportunities, and work to provide additional security, including assistance with retirement and family-related costs, to seniors who participate in public service.”

<http://www.barackobama.com/pdf/seniorsFactSheet.pdf>

Cost: Unknown.

Q. Welfare – Earned Income Tax Credit:

“As President, Obama will reward work by increasing the number of working parents eligible for EITC benefits, increasing the benefit available to parents who support their children through child support payments and reducing the EITC marriage penalty which hurts low-income families. Under the Obama plan, full-time workers making minimum wage would get an EITC benefit up to \$555, more than three times greater than the \$175 benefit they get today. If the workers are responsibly supporting their children on child support, the Obama plan would give those workers a benefit of \$1,110. Obama would also increase the EITC benefit for those families most likely to be in poverty – families with three or more children.”

<http://www.barackobama.com/issues/pdf/PovertyFactSheet.pdf>

Cost: \$2.64 billion (\$13.2 billion over five years).

Source: This is a refundable tax credit; as per the note listed earlier in this document, NTUF assumes 88 percent refundability. According to *The Washington Post*, “Mr. Obama has similar plans [to Senator John Edwards] for the EITC, but that \$3 billion proposal would come on top of his \$80 billion-plus in middle-class tax goodies.”

[http://www.washingtonpost.com/wp-](http://www.washingtonpost.com/wp-dyn/content/article/2007/09/24/AR2007092401444.html)

[dyn/content/article/2007/09/24/AR2007092401444.html](http://www.washingtonpost.com/wp-dyn/content/article/2007/09/24/AR2007092401444.html)

R. Windfall Elimination Provision (WEP) and the Government Pension Offset (GPO):

“Protect the Social Security Benefits of Public Employees and their Families: Barack Obama co-sponsored the Social Security Fairness Act, which would repeal the Windfall Elimination Provision and the Government Pension Offset. The first provision cuts the Social Security benefits of some public employees, while the second cuts the benefits of the spouse or widow of some public employees. These provisions hurt teachers, police officers, firefighters, and other public employees. Barack Obama believes that we have a responsibility to take care of workers who have devoted their lives to public service and that we shouldn’t be discouraging our young people from working in these essential jobs.”

<http://www.barackobama.com/issues/seniors/>

Cost: \$5.17 billion (\$51.7 billion over 10 years).

Source: Senator Obama is a cosponsor of S. 206 (110<sup>th</sup> Congress): A bill to amend Title II of the Social Security Act to repeal the Government pension offset and windfall elimination provisions.

- GPO – Congressional Research Service (CRS), “According to the CBO and the Office of the Actuary of the Social Security Administration, elimination of the GPO would cost \$32.7 [billion] over 10 years . . . .” <http://www.house.gov/brady/crsgpo.pdf>
- WEP – According to the Congressional Research Service, “The General Accounting Office testified that eliminating the WEP would cost \$19 billion over 10 years.” <http://www.house.gov/brady/crswep.pdf>

### **Fiscal Quotes:**

“Barack Obama will make sure Social Security is solvent and viable for the American people, now and in the future. . . . Obama will work in a bipartisan way to maintain Social Security’s solvency for future generations.”

<http://www.barackobama.com/issues/seniors/>

“Eliminate [i]ncome [t]axes for [s]eniors [m]aking [l]ess [t]han \$50,000. Since the New Deal we’ve had a basic understanding in America: If you work hard and pay into the system, you’ve earned the right to a secure retirement. But too many seniors aren’t getting that security, even though they’ve held up their end of the bargain. Lower[-] and middle[-]income seniors are struggling as their expenses on health and energy skyrocket while their incomes do not keep pace. This strain has been greater since 1993, when taxes on [S]ocial [S]ecurity benefits were raised. Millions of seniors saw their net benefits go down. Seniors also had to take on the added strain – and sometimes cost – of filing a complicated tax return. And after going through all of these complicated calculations, many seniors find that they owe little or no tax, meaning that all of the hassle was for naught.”

<http://www.barackobama.com/issues/seniors/>

“Barack Obama will eliminate all income taxation of seniors making less than \$50,000 per year. This will provide an immediate tax cut averaging \$1,400 to 7 million seniors and relieve millions from the burden of filing tax returns. For millions of seniors, this will eliminate the need to hire a tax preparer, resulting in even larger savings.”

<http://www.barackobama.com/pdf/seniorsFactSheet.pdf>

“Obama supports increasing the maximum amount of earnings covered by Social Security and he will work with Congress and the American people to choose a payroll tax reform package that will keep Social Security completely solvent for at least the next half century.”

<http://www.barackobama.com/pdf/seniorsFactSheet.pdf>

“As president, Obama would further raise the minimum wage, index it to inflation and increase the EITC to make sure that full-time workers can earn a living wage that allows them to raise

their families out of poverty and pay for basic needs such as food, transportation, and housing – things so many people take for granted.”

<http://www.barackobama.com/pdf/seniorsFactSheet.pdf>

“Obama will also eliminate the capital gains taxation of start-up businesses to encourage innovation and job creation.”

<http://www.barackobama.com/issues/economy/>

Federal Government – Open Government:

“As president, Barack Obama will not sign any non-emergency bill without giving the American public an opportunity to review and comment on the White House [Web site] for five days. In addition to ensuring that the public has the ability to review legislation, the sunlight will help ensure that earmarks tucked into appropriations bills are exposed.

Senator Obama also introduced the Curtailing Lobbyist Effectiveness through Advance Notification, Updates, and Posting Act (The CLEAN UP Act). The bill aims to improve public access to information about all legislation, including conference reports and appropriations legislation, in particular after hurried, end-of-session negotiations. Conference committee meetings and deliberations would have to be open to the public or televised, and conference reports would have to identify changes made to the bill from the House and Senate versions. Finally, no bill could be considered by the full Senate unless the measure has been made available to all Senators and the general public on the Internet for at least 72 hours.”

<http://www.barackobama.com/pdf/TakingBackOurGovernmentBackFinalFactSheet.pdf>

“Barack Obama’s plan will provide \$80 [billion to] 85 billion in tax relief to America’s workers, seniors, and homeowners. Unlike President Bush, whose fiscally irresponsible tax cuts that traded the budget surpluses of the 1990s to record deficits today, Obama has a plan to pay for his tax reform plan. In addition to closing the corporate loopholes and cracking down on international tax havens, he will pay for middle class tax relief by and increasing the highest bracket for capital gains and dividends and closing the carried interest loophole.”

<http://my.barackobama.com/page/->

[/HQpress/Fact%20Sheet%20Tax%20Fairness%20Speech%20091707%20FINAL%20IH.pdf](http://my.barackobama.com/page/-/HQpress/Fact%20Sheet%20Tax%20Fairness%20Speech%20091707%20FINAL%20IH.pdf)