

Democracy N.C. and the "Mystery Box"

Marty Folsom

AAUW NC Tar Heel News Editor

IT WAS AN ordinary Friday morning. Made a cup of tea, started the computer, checked my e-mail. Beth Messersmith's name popped into the mailbox and I opened it her message right away. She said, "It's short notice, but can you meet a couple of Democracy N.C. guys who are headed to Statesville?" I said sure and headed to the rendezvous to meet Bob Hall and Antony Khamala.

The problem was people were not checking the box on their tax returns to allocate \$3 to judicial election reform because they didn't notice it ("Mystery Box") or, if their taxes were being prepared, they were not being asked if they wanted to do this. Hall and Khamala were two of several folks who hit nearly 40 cities to educate the public through press conferences and personal contacts from April 6-15. In Statesville, they met reporters at three newspapers and several CPAs, before moving on.

Messersmith said she met with Laura Rumbley and JoAnn Hall in Jacksonville. Raleigh, Wilmington, Brevard, and Statesville Branches, and members who attended convention passed out fliers. "AAUW was one of the groups most involved in spreading the word. I was really pleased with the participation."

Followup—Questions from THN answered by Bob Hall:

Q. To date, how many people have checked the box for the \$3 allocation?

A. Based on numbers from N.C. Dept of Revenue, we are on track to receive about \$900,000 or even \$1 million from the \$3 check-off. This is an impressive showing because Democracy N.C. estimates that more than half of the state's taxpayers received incorrect or misleading information—or were never even asked—about the check-off.

Q. When Bob and Khamala visited CPAs in Statesville, they received interesting responses—one said they didn't know they had to ask their clients; another said they had received notification from the N.C. Association of CPAs that morning.

A. You're right about the response. Even CPAs didn't realize the law requires tax consultants to ask the question and provide adequate information for the taxpayer to make an informed decision. After prodding from Democracy N.C., the N.C. Association of CPAs sent a fax alert to CPAs about the requirements; they had earlier sent a simple notice about what the check-off was and what it funded, but it didn't emphasize that tax consultants have a legal responsibility to ask each taxpayer about the check-off.

Q. How many newspaper offices and CPAs did your teams contact?

A. Between January 15-April 15, Democracy N.C. coordinated telephone calls to more than 1,000 tax offices (H&R Block, Jackson Hewitts, accounting offices, etc.) and 2,500 received a letter from the State Board of Elections. In the 10 days of the "Mystery Box" tour, teams visited more than 50 tax accountants and tax service offices, and more than three dozen newspaper offices. Letters to editors from former Governors Jim Holshouser and Jim Hunt were sent to more than 80 papers and about half printed them. Also: N.C. Voters for Clean Elections sponsored short ads about the check-off on 75 radio stations in the N.C. News Network. Dozens of other papers, radios and TV stations carried stories, public service announcements, and editorials.

Q. What is the strategy for months to come, to help avoid misunderstandings next year?

A. The N.C. Department of Revenue has promised the legislative sponsors of the Judicial Campaign Reform Act that they will be much more diligent in informing software vendors and tax consultants about the legal requirement that the check-off be fully presented, with specific language approved by the State Board of Elections and Revenue Department. This didn't happen during trainings or in memos sent last year. The N.C. Association of CPAs also wants to provide clearer instructions about the legal requirements to their members. And H&R Block managers are ready to have us participate in trainings of their tax consultants; other companies will be approached to cooperate, too. We are seeking legislative approval to change the name of the fund from the Public Campaign Financing Fund to something like the Judicial Elections Fund that conveys more clearly what it is for. Grassroots organizing will begin earlier and involve more people in local areas, with travelers, regional meetings, and state teleconferencing helping orient and coordinate the whole outreach effort.

Editors Note: For persons unfamiliar with judicial election reform, checking the box simply allocates \$3 of taxes in the N.C. budget to fund elections, so candidates do not have to accept money from political actions committees (PACs) and enables persons who do not have huge personal fortunes to become candidates. It does not reduce or raise individual tax refunds/payments.

A Matter of Justice: Judicial Selection and Election

THE UNC-CHAPEL HILL School of Law, AAUW NC, and Democracy N.C. sponsored an issue forum on February 19. Panelists discussed the federal judicial appointment process and the new N.C. law that supports campaign finance reform for the 2004 state appellate court judicial election. N.C. Women United and the League of Women Voters of N.C. were co-sponsors. Panelists were:

- Louis D. Bilionis, a Samuel Ashe Distinguished Professor of Constitutional Law at UNC Chapel Hill, speaking on the Role of the Federal Court;
- Michael Gerhardt, the Arthur B. Hanson Professor of Law at William and Mary School of Law, speaking on the Federal Appointment Process;

- Bob Hall, co-executive director and research director of Democracy N.C.; speaking on the N.C. Judicial Reform Act
- Judge Wanda Bryant, a member of the NC Court of Appeals, speaking on a State Judge's Viewpoint.

Following the discussion, Mary A. Peterson, AAUW NC program vice-president and panel moderator, opened the forum to a question and answer period.

The forum was funded by an impact grant from AAUW. The grants help inform the public about public policy issues. The goal of this forum was to make the public aware of court and judicial decisions that affect their daily lives.

The Chapel Hill branch hosted a reception before the panel presentation.

AAUW NC Convention 2004 • Asheville • April 15-17

Asheville invites you to the 2005 state convention to be held April 15-17, at the Renaissance Hotel in downtown Asheville. The dogwoods should be in bloom and the Festival of Flowers will be going on at the famous Biltmore Estate. The Renaissance is in downtown Asheville, next door to the newly restored Thomas Wolfe Memorial (the Old Kentucky Home Boarding House damaged by a fire in 1998) and on the 1.7 mile Urban Walking Trail that runs through Asheville's historic past.

Come early and stay late! Nearby attractions include the Cherokee Indian Reservation with a wonderful Museum, Chimney Rock Park, Folk Art Center, Grandfather Mountain, Lake Lure Tours, Carl Sandburg Home National Historic Site, Great Smoky Mountains Railroad, and much more. Room rates are \$114 plus tax, single or double, good until March 16, 2005, then rooms will be released. Rate is good for two days before and two days after the convention.

The POWER of AAUW

Ann S. Terry

South Atlantic Regional Director

SPRINGTIME IN AAUW brought state conventions throughout the South Atlantic Region. I was privileged to be a part of the excitement of the Georgia, North Carolina and South Carolina conventions, and joined many friends in Florida for that state's celebration of its 75th anniversary.

As I traveled, I saw first-hand the power of AAUW at work.

AAUW's power is reflected in its mission. As members of this organization, we pledge to do everything in our power to create an atmosphere for change to provide opportunities for the women and girls who come after us. We pledge to never stop learning and to keep our minds and hearts open to new ideas—new ways to do things and to ensure that education is a part of everyone's life—female or male.

AAUW's power is reflected in its advocacy. The rights of women and families have been of concern to AAUW members for more than 100 years. Much of AAUW's advocacy is done by members like you at the grassroots level—writing or talking to your legislators, speaking up at school board meetings, providing information on voting records, writing letters to the editor, or even marching on Washington as many of you did on April 25. With these efforts and others, you are fighting for women and their families and for a political system that recognizes the power and the interests of women.

AAUW's power is reflected in its leadership. I continue to be awed by the commitment and dedication of the leaders in our organization at all levels—so many, working so hard and so long—accomplishing great things. Peoples' lives are packed full of obligations to family, work, and community. Finding time is hard. Finding people willing to serve as leaders is even harder. I admire all of you who continue to work for AAUW despite the pressures that could pull you away from our work. I know your caring spirit and desire to make a difference are often the only things that keep you going. Show your support to those who have stepped up to be your leaders. Let them know that their work and efforts are valued and appreciated. And when you are asked to serve, be willing to join the team, too.

AAUW's power is reflected in its branches and states. Whether working in coalition with other groups and organizations or simply as a branch or state, you are impacting the mission of AAUW, as well. Statewide legislative days, student leadership conferences, women-to-women summits, or technology or science camps for

girls are just a few of the projects and programs states are using to carry AAUW's purpose and mission forward.

AAUW's power is reflected in its resources. The amount and caliber of resources available to us as AAUW members is amazing. Time and talent have gone into the preparation of materials to help us as leaders or members. Training packets and toolkits for membership, sister-to-sister summits, fund-raising, programming, and a wealth of other topics are readily available and nearly always free.

AAUW's power is reflected in its giving. One of the most awesome aspects about AAUW for me is the fact that our members give inordinate amounts of time, talent, and energy to the work of AAUW, as well as giving financially. SAR states have a long tradition of strong support of the Educational Foundation and Legal Advocacy Fund, and are often found in the top ten in per capita giving among all the states of AAUW.

SAR places in 2003 EF Rankings

- Total Giving: Top States, Florida #3, Virginia #9. Top Branches: McLean Area (VA) Branch #4 and Naples (FL) ranked #5.
- Per Capita Giving: Top States, Georgia #2, South Carolina #7, and Virginia #10. Top Branches, Niceville-Valparaiso (FL) #6, Roswell-Alpharetta (GA) #7, and Falls Church (VA) #8.

The efforts we make for EF or LAF far exceed the monetary. The projects and work funded by our dollars are changing lives every day.

AAUW's power is reflected in its networking opportunities. I hope you have never left an AAUW meeting—either in your branch, at a state meeting, regional conference or Association convention, without making a new friend or learning more about the friends you have. The women I have met in my AAUW life have meant, and will continue to mean, a great deal to me. Never miss a chance to tap into the energy, talent, and dedication of the many AAUW members you know or will meet—as well as the other women whose lives cross yours along the way.

And lastly, *AAUW's power is reflected in its members.* All of this work could have never been accomplished without the talents, time, energy, expertise, and commitment of AAUW members everywhere. Working wherever we are able—as leaders or members—together we affect change in our communities, in our states, in our nation and in our world.

Ours is a powerful organization with a powerful purpose filled with powerful people!