

Template for Evaluating Expenditures

Name of Expenditure:	Annual cost:	Year of adoption:	Sunset date:
Tax Type (check all that apply): <input type="checkbox"/> Corporate <input type="checkbox"/> Personal Income <input type="checkbox"/> Sales <input type="checkbox"/> Other			
Goal of expenditure (check all that apply):			
<i>Business:</i> <input type="checkbox"/> Job creation & maintenance <input type="checkbox"/> Investment <input type="checkbox"/> Competitiveness/Strategic <input type="checkbox"/> Health/Environment/Social Justice <input type="checkbox"/> Other:		<i>Individual:</i> <input type="checkbox"/> Relief of poverty <input type="checkbox"/> Progressivity/assistance to low earners <input type="checkbox"/> Access to opportunity <input type="checkbox"/> Health/Environment/Social Justice <input type="checkbox"/> Other:	
Measurement and Effectiveness Ratings:			
<i>Which best reflects your opinion on each statement?</i>	<i>Strongly disagree</i>	<i>Somewhat disagree</i>	<i>Somewhat agree</i>
We can measure the overall benefit toward achieving the goal(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The TE's benefit justifies its fiscal cost	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The TE is claimed by its intended beneficiaries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The TE is claimed by a broad group of taxpayers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The TE amount claimed per taxpayer is meaningful as an incentive/benefit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The TE is relevant today	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The TE is easily administered	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Business only</i> -The TE is beneficial to smaller businesses			
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Individuals only</i> -The TE benefits lower income taxpayers			
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments 			