

NATIONAL DEBATE TOPIC FOR HIGH  
SCHOOLS, 2023-2024

**Resolved:** The United States Federal  
Government Should Substantially Increase  
Fiscal Redistribution in the United States  
by Adopting a Federal Jobs Guarantee,  
Expanding Social Security, and/or  
Providing a Basic Income

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NATIONAL DEBATE TOPIC FOR HIGH SCHOOLS, 2023-2024  
Pursuant to 44 U.S.C. Section 1333

Compiled by the Congressional Research Service  
Library of Congress



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44 U.S.C., SECTION 1333

CHAPTER 13—PARTICULAR REPORTS AND DOCUMENTS

Sec. 1333. National high school and college debate topics

(a) The Librarian of Congress shall prepare compilations of pertinent excerpts, bibliographical references, and other appropriate materials relating to:

- (1) the subject selected annually by the National University Extension Association as the national high school debate topic and
- (2) the subject selected annually by the American Speech Association as the national college debate topic.

In preparing the compilations the Librarian shall include materials which in his judgment are representative of, and give equal emphasis to, the opposing points of view on the respective topics.

(b) The compilations on the high school debate topics shall be printed as Senate documents and the compilations on the college debate topics shall be printed as House of Representative documents, the cost of which shall be charged to the congressional allotment for printing and binding. Additional copies may be printed in the quantities and distributed in the manner the Joint Committee on Printing directs.

(P.L. 90-620, Oct. 22, 1968, 82 Stat. 1270)

Historical and Revision Notes

Based on 44 U.S. Code, 1964 ed., Supp. III, Sec. 170 [Sec. 276a] (Dec. 30, 1963, Pub. L. 88-246, Secs. 1, 2, 77 Stat. 802)

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## Foreword

The 2023–2024 high school debate topic is: “Resolved: The United States Federal Government Should Substantially Increase Fiscal Redistribution in the United States by Adopting a Federal Jobs Guarantee, Expanding Social Security, and/or Providing a Basic Income.”

In compliance with 44 U.S.C., Section 1333, the Congressional Research Service (CRS) and the Law Library of the Library of Congress prepared this bibliography to assist high school debaters in researching the topic. This bibliography is intended to assist debaters in the identification of further references and resources on the subject. In selecting items for inclusion in this bibliography, the Library of Congress has sampled a wide spectrum of opinions reflected in the current literature on this topic. No preference for any policy is indicated by the selection or positioning of articles, books, or websites cited, nor is the Library’s disapproval of any policy, position, or article to be inferred from its omission.

The bibliography was prepared by Audrey Celeste Crane-Hirsch, Devon Galena, Jason J. Hawkins, and Maya V. Thomas of the Knowledge Services Group, CRS; by Sarah K. Braun of the Domestic Social Policy Division, CRS; and by Jason S. Zarin of the Law Library of Congress, under the direction of project team leader Gary Sidor, with assistance from Sarah A. Donovan and Barry F. Huston.

We wish the best to each debater as they research, prepare, and present arguments on this year’s topic.

Robert R. Newlen, Interim Director  
Congressional Research Service



NATIONAL DEBATE TOPIC FOR HIGH SCHOOLS, 2023–2024

RESOLVED: THE UNITED STATES FEDERAL GOVERNMENT  
SHOULD SUBSTANTIALLY INCREASE FISCAL  
REDISTRIBUTION IN THE UNITED STATES BY ADOPTING A  
FEDERAL JOBS GUARANTEE, EXPANDING SOCIAL  
SECURITY, AND/OR PROVIDING A BASIC INCOME

AN ANNOTATED BIBLIOGRAPHY ON THE 2023–2024 HIGH  
SCHOOL DEBATE TOPIC

Compiled by  
Audrey Celeste Crane-Hirsch, Devon Galena, Jason J. Hawkins, and  
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Knowledge Services Group,  
Congressional Research Service

August 2023



## **Introduction**

The 2023–2024 high school debate topic is: “Resolved: The United States federal government should substantially increase fiscal redistribution in the United States by adopting a federal jobs guarantee, expanding Social Security, and/or providing a basic income.” The topic is selected annually by ballot of the delegates from the National Catholic Forensic League, the National Debate Coaches Association, and the National Speech and Debate Association, all organized under the umbrella organization, the National Federation of State High School Associations.

This selective bibliography, with brief annotations, is intended to assist debaters in identifying resources and references on the national debate topic. It lists citations to journal articles, books, congressional publications, legal cases, and websites. The bibliography is divided into six broad sections: Economic Inequality, Fiscal Redistribution, the Federal Government Role, Federal Jobs Guarantee, Expanding Social Security, and Providing a Basic Income.

## **Summary**

The purpose of the bibliography is to provide students with a brief overview of information related to the 2023–2024 high school debate topic.

This compilation is not intended to provide complete coverage of the topic. Further research on the topic may be accomplished at high school, public, and research libraries.

In addition to the resources included in this bibliography, there are many more international organizations, U.S. government agencies, and non-governmental organizations that provide information on the debate topic and sub-topics on their websites. Debaters are encouraged to consult library resources as well as the internet for their research.

## Economic Inequality (Overview)

### Articles

Milanovic, Branko and Marco Ranaldi. "Capitalist Systems and Income Inequality." *Journal of Comparative Economics* 50, no. 1 (2022): 20–32.

Available at

<https://stonecenter.gc.cuny.edu/files/2021/11/Ranaldi-and-Milanovic-2021.pdf>.

Using methodology and data from 47 countries between 1995 and 2018, this paper examines the relationship between compositional inequality, which measures how capital and labor income are distributed across different income levels, and inter-personal income inequality, which is the unequal distribution of income between individuals in a society.

Abel, Jaison R. and Richard Deitz. "Why Are Some Places So Much More Unequal Than Others?" *Federal Reserve Bank of New York* 25, no. 1 (2019): 58–75.

Available at [https://www.newyorkfed.org/medialibrary/media/research/epr/2019/epr\\_2019\\_wage-inequality\\_abel-deitz.pdf](https://www.newyorkfed.org/medialibrary/media/research/epr/2019/epr_2019_wage-inequality_abel-deitz.pdf).

The authors look at regional salary disparities in the United States. While the primary focus of this study is the New York-Northern New Jersey area, this study examines how salary disparities impact large urban areas. They explore reasons why geographic patterns of inequality persist and why some places are more equitable than others. The report examines how the least unequal areas have struggled with weak economic conditions and slow demands for workers, which affect wage growth.

Shen, Chengfang and Xindong Zhao. "How Does Income Inequality Affects Economic Growth at Different Income Levels?" *Economic Research-Ekonomska Istraživanja* 36, no. 1 (2023): 864–884.

Available at <https://www.tandfonline.com/doi/full/10.1080/1331677X.2022.2080742>.

This study examines the impact of income inequality on economic growth, its channels of influence, and how these channels vary due to country differences and income levels.

Beyleveld, Alexander D. "The Distribution of Income and Wealth within States Since the Beginning of the Twentieth Century: Changes and Effects." In *Taking a Common Concern Approach to Economic Inequality: Implications for (Cooperative) Sovereignty over Corporate Taxation*, 12–107. Brill, 2022.

Available at <https://www.jstor.org/stable/10.1163/j.ctv2kqwz7v.7?socuid=5fce92e1-7118-4c09-99cc-061065e0ba79>.

The chapter examines changes in income and wealth distribution within the United States since the early 1900s, and the effects of these changes on economic inequality. It looks at the decline and growth of different industries and sectors and their impact on income and wealth distribution. The chapter also discusses the role of tax policy in shaping income and wealth distribution and the impact of changes in tax policy on economic inequality.

## Books

Milanovic, Branko. *Global Inequality: A New Approach for the Age of Globalization*. Harvard University Press, 2016.

This economist presents an analysis of the evolution of global inequality over the past few decades, offering a framework for understanding its causes and consequences. He identifies three major factors that have contributed to the rise of global inequality: the increasing importance of skills and education in the global economy, the emergence of a new global middle class, and the concentration of wealth at the top.

Belle, Deborah and Heather E. Bullock. *The Psychology of Poverty, Wealth, and Economic Inequality*. University of California, Santa Cruz, 2022.

Belle and Bullock's article focuses on the importance of understanding the psychological impact of poverty, wealth, and economic inequality on individuals and society. They explore how the significance of these findings can impact policymaking decisions and lead to more effective strategies for reducing poverty and promoting greater economic equality. Exercises and reflection questions are included in each chapter to encourage readers to consider the relevance of study findings to their own life.

Casson, Catherine. *9: Capitalism and Income Inequality. In Evolutions of Capitalism*, Bristol, UK: Bristol University Press, 2022.

Available at <https://www.degruyter.com/document/doi/10.56687/9781529214826/pdf>. Casson takes a look at the relationship between capitalism and income inequality. She provides an overview of the history of capitalism, tracing its origins to the 18th century and its evolution through various stages of development. She then discusses the different theories of capitalism and their relationship to income inequality, as well as several key factors that influence income distribution, including technological change, globalization, and labor market institutions.

## Reports

U.S. Library of Congress. Congressional Research Service. *The U.S. Income Distribution: Trends and Issues*, by Sarah A. Donovan, Joseph Dalaker, Marc Labonte, Paul D. Romero. R44705.

Available at <https://crsreports.congress.gov/product/details?prodcode=R44705>.

This resource summarizes the fundamental elements that influence current distributional patterns, examines long-term and recent trends in income distribution, and suggests possible connections between inequality and economic growth.

Chancel, Lucas, Thomas Piketty, Emmanuel Saez, and Gabriel Zucman. *World Inequality Report 2022*. World Inequality Lab, 2022.

Available at [https://wir2022.wid.world/www-site/uploads/2023/03/D\\_FINAL\\_WIL\\_RIM\\_RAPPORT\\_2303.pdf](https://wir2022.wid.world/www-site/uploads/2023/03/D_FINAL_WIL_RIM_RAPPORT_2303.pdf).

The World Inequality Report 2022 is an analysis of global income and wealth inequality, produced by a team of economists and researchers from around the world. The report provides an examination of trends in inequality over the past several decades, as well as projections for future trends and potential policy solutions.

U.S. Congress, Joint Economic Committee. *Measuring Economic Inequality in the United States: hearing before the Joint Economic Committee Congress of the United States, One Hundred Sixteenth Congress, first session*, October 16, 2019.

Available at <https://www.jec.senate.gov/public/cache/files/466cdb23-96b5-4a38-b646-1d0a9fec2ee4/measuring-economic-inequality-in-the-united-states-october-16-2019.pdf>.

This is a transcript of the hearing to address concerns about the growing gap between high and low-income earners in the United States and to explore potential policy solutions. During the hearing, expert witnesses provided testimony and analysis on topics related to economic inequality, including the causes and consequences, methods for measuring and tracking, and potential policy solutions.

Rose, Stephen J. *How Different Studies Measure Income Inequality in the U.S: Piketty and Company Are Not the Only Game in Town*. Urban Institute, December 2018.

Available at <https://www.urban.org/sites/default/files/publication/99455/how-different-studies-measure-income-inequality.pdf>.

The author examines how different studies measure income inequality in the United States. He provides an overview of different ways to measure income inequality, highlighting the strengths and limitations of each approach. He notes that while many recent studies of income inequality have relied on data from tax returns or household surveys, there are also alternative sources that can be used to shed light on inequality patterns.

Schaeffer, Katherine. *6 Facts About Economic Inequality in the U.S*. Pew Research Center, February 7, 2020.

Available at <https://www.pewresearch.org/fact-tank/2020/02/07/6-facts-about-economic-inequality-in-the-u-s>.

Using data from the U.S. Census Bureau and other sources, the author focuses on six economic inequalities that exist in the United States, and the ongoing debates about how to address them.

Horowitz, Juliana Menasce, Ruth Igielnik, and Rakesh Kochhar. *Trends in income and wealth inequality*. Pew Research Center, January 9, 2020.

Available at <https://www.pewresearch.org/social-trends/2020/01/09/trends-in-income-and-wealth-inequality>.

The authors draw on data from the Federal Reserve's Survey of Consumer Finances and other sources to highlight the growing gap between the richest Americans and everyone else in the United States. The report also highlights differences in inequality across demographic groups, including race, age, and education level. In addition, the article discusses the various factors that contribute to income and wealth inequality, including changes in the labor market, tax policy, and other economic policies.

Siripurapu, Anshu. *The U.S. Inequality Debate*. Council on Foreign Relations, April 20, 2022.

Available at <https://www.cfr.org/backgrounders/us-inequality-debate>.

The report provides an overview of the factors contributing to rising inequality, including technological advances, globalization, and shifts in the labor market. It also discusses the impact of inequality on economic growth, social mobility, and political polarization.

Horowitz, Juliana Manasce, Ruth Igielnik, and Rakesh Kochhar. *Most Americans Say There Is Too Much Economic Inequality in the U.S., but Fewer Than Half Call It a Top Priority*. Pew Research Center, January 9, 2020.

Available at <https://www.pewresearch.org/social-trends/2020/01/09/most-americans-say-there-is-too-much-economic-inequality-in-the-u-s-but-fewer-than-half-call-it-a-top-priority>.

The report explores the factors that contribute to Americans' perceptions of economic inequality, such as their financial circumstances, political affiliation, and levels of trust in the government. It also discusses how these views vary across different demographic groups, including age, education, and income. It touches on the potential implications of Americans' varying priorities regarding economic inequality, particularly concerning political and policy preferences.

Schaeffer, Katherine. *'What's the Difference between Income and Wealth?' and other Common Questions about Economic Concepts*. Pew Research Center, July 23, 2021.

Available at <https://www.pewresearch.org/decoded/2021/07/23/whats-the-difference-between-income-and-wealth-and-other-common-questions-about-economic-concepts/#:~:text=Economic%20inequality%20is%20a%20broad,of%20income%20throughout%20a%20population>.

This report serves as a guide to common economic terms and concepts that are frequently discussed in public discourse. It covers a range of topics, including the difference between income and wealth, the meaning of terms like "poverty line" and "middle class," and the role of taxes and government spending in shaping economic outcomes. It also discusses how economic concepts can be measured and compared over time and across different countries.

## Websites

Inequality.org. "Income Inequality."

Available at <https://inequality.org/facts/income-inequality>.

This webpage discusses several forms of inequality, including wage inequality, racial income inequality, and CEO-worker pay gaps. It argues that income inequality is a significant problem in the United States that has wide-ranging negative consequences, and addressing it will require a range of policy solutions.

Inequality.org. "Wealth Inequality."

Available at <https://inequality.org/facts/wealth-inequality>.

This webpage explores wealth inequality with a focus on household wealth, and the racial wealth divide. It presents data and statistics on the concentration of wealth among the top 1% and the racial and gender disparities in wealth. It also examines the causes and consequences of wealth inequality and concludes with policy recommendations for reducing it.

United Nations. "Inequality – Bridging the Divide."

Available at <https://www.un.org/en/un75/inequality-bridging-divide>.

This website highlights the disparities in income and wealth among countries, regions, and social groups, and identifies the various factors that contribute to inequality, including globalization, technological change, and government policies. It also examines the social and economic consequences of inequality, such as reduced social mobility, higher levels of poverty, and greater political instability.

The Economist. “Global Inequality is Rising Again: But the causes of the resurgence are not all bleak,” August 2, 2022.

Available at <https://www.economist.com/finance-and-economics/2022/08/02/global-inequality-is-rising-again>.

The article examines the recent resurgence of global inequality and the factors driving this trend. It draws on a range of data sources and includes detailed charts and graphs to help illustrate key trends and patterns in global inequality. The article also examines some of the policy responses that are being proposed to address this issue, such as increased taxation and greater investments in education and training.

Gordon, Colin. Inequality.org “Growing Apart: A Political History of American Inequality,” 2018.

Available at

<https://inequality.org/research/growing-apart-political-history-american-inequality>.

The goal of this report is to provide a political, historical, and expansive explanation for the growth of inequality in the United States.

## Fiscal Redistribution

### Overview

#### Articles

Saez, Emmanuel, and Gabriel Zucman. “The Rise of Income and Wealth Inequality in America: Evidence from Distributional Macroeconomic Accounts.” *The Journal of Economic Perspectives* 34, no. 4 (2020): 3–26.

Available at <https://www.jstor.org/stable/26940888>.

The authors discuss shortcomings in data for measuring income and wealth inequality and propose to examine inequality using a model based on “distributional national accounts,” which comprehensively capture national income and household wealth recorded in official national accounts. Authors argue that this model reduces arbitrariness in inequality data and better facilitates longitudinal measurements and comparing inequality between countries.

Schapiro, Robert A. “States of Inequality: Fiscal Federalism, Unequal States, and Unequal People.” *California Law Review* 108, no. 5 (2020): 1531–1596.

Available at <https://www.californialawreview.org/print/states-of-inequality-fiscal-federalism-unequal-states-and-unequal-people>.

The author documents examples of inequality among states and argues that these inequalities undermine the current system of federalism. The author criticizes some recent proposals for addressing inequality and offers some recommendations.

## Reports

Berube, Alan. *City and Metropolitan Income Inequality Data Reveal Ups and Downs Through 2016*. Washington, D.C.: Brookings Institution, 2018.

Available at <https://www.brookings.edu/research/city-and-metropolitan-income-inequality-data-reveal-ups-and-downs-through-2016>.

The author uses data from the U.S. Census Bureau's American Community Survey to examine income inequality in American cities. The author finds mixed results: wages for low-income earners rose faster in some cities than for high-income households, while the relative gap between them widened in other cities.

## Websites

Center on Budget and Policy Priorities. "Income Inequality in the States: A Snapshot."

Available at <https://www.cbpp.org/blog/a-state-by-state-look-at-income-inequality>.

This website provides fact sheets on income inequality in each state. The fact sheets provide information on the percentage of income earned by the top 5% of households, the rate of growth of income inequality since 1979, and comparisons of average incomes for low-, middle-, and high-income households.

Opportunity Insights.

Available at <https://opportunityinsights.org>.

Opportunity Insights provides reports, datasets, data visualizations, and other materials on income inequality, social mobility, and other life outcomes.

## Factors Contributing to Economic Inequality

### Articles

Carter, Valerie J. Carter, and Michael W. Howard, "Income inequality." In *Britannica Academic*, accessed April 18, 2023.

Available at <https://academic.eb.com/levels/collegiate/article/income-inequality/627100>.

The authors identify different causes of income inequality, such as segmented labor markets, discrimination, racism and sexism, gender roles, and family responsibilities. They note other factors such as corporate power, collective-bargaining frameworks, and minimum wage laws. They also consider some policies that can directly or indirectly reduce income inequality.

Patten, Eileen. "Racial, Gender Wage Gaps Persist in U.S. Despite Some Progress." *Pew Research Center*, July 1, 2016.

Available at <https://www.pewresearch.org/short-reads/2016/07/01/racial-gender-wage-gaps-persist-in-u-s-despite-some-progress>.

The author discusses racial and gender wage gaps in the U.S. economy. The author notes that racial and gender wage gaps may be attributed to differences in education, labor force experience, occupation or industry, and racial or gender discrimination.

Schmitz, James A., Jr., “Because of Monopolies, Income Inequality Significantly Understates Economic Inequality.” Working Paper, No. 77. Minneapolis, MN: Federal Reserve Bank of Minneapolis, Research Division, 2021.

Available at <https://www.minneapolisfed.org/research/working-papers/because-of-monopolies-income-inequality-significantly-understates-economic-inequality>.

The author analyzes income and economic inequality by looking at the correlation between monopoly power, higher prices, and purchasing power of lower-income households. The author argues that monopolies also destroy markets for low-cost substitutes, leaving low-income households with poor or no alternatives.

Stiglitz, Joseph E. “The Origins of Inequality.” *National Tax Journal* 68, no. 2 (2015): 425–448.

Available at <https://academiccommons.columbia.edu/doi/10.7916/d8-t92w-f529>.

The author criticizes the argument that inequality is a consequence of capitalism. The author argues that factors such as the exploitation arising from monopoly power and political influence drive inequality.

## Websites

U.S. Census Bureau. “Income Inequality.”

Available at <https://www.census.gov/topics/income-poverty/income-inequality.html>.

This website provides access to income inequality visualizations, data tools, and data tables from the U.S. Census Bureau. It also provides access to income, poverty, and inequality census reports.

Institute for Policy Studies. “Inequality.org.”

Available at <https://inequality.org>.

This website serves as a portal for data, research, and analysis on income and wealth inequality. Other topics covered include racial economic inequality, global inequality, gender economic inequality, and inequality and taxes.

## Initiatives To Lessen Economic Inequality

### Articles

Mollenkamp, Daniel Thomas. “Legal Milestones That Fight Income Inequality.”

Investopedia, reviewed by Dorethea Clemon, February 21, 2022.

Available at <https://www.investopedia.com/legal-milestones-that-fight-inequality-5116659>.

The author summarizes America’s attempts to address inequality through various policies, laws, and court decisions from the 17th century through today. The author considers efforts to address monopolies, promote equal pay, and prevent discrimination.

## Reports

Bhatt, Anjali, Melina Kolb, and Oliver Ward. *How to Fix Economic Inequality? An Overview of Policies for the United States*. Washington, D.C.: Peterson Institute for International Economics, 2020.

Available at <https://www.piie.com/sites/default/files/documents/how-to-fix-economic-inequality.pdf>.

This report considers factors that drive research on inequality trends and causes, focusing on the United States. One section offers several policy options for addressing inequality, including guaranteeing a minimum income level for everyone, a federal jobs guarantee, relaxing eligibility conditions for federal safety net programs, and expanding access to federal programs to assist people experiencing poverty.

Hall, Daniel. *Fixing Economic Inequality*. Stanford, CA.: Hoover Institution, 2021.

Available at <https://www.hoover.org/research/fixing-economic-inequality>.

This report mixes written analysis and video presentations from various presenters on income inequality. Authors and presenters argue that existing measures of income inequality are insufficient as they do not adequately capture consumption statistics which are better indicators of resources available to households. Authors and presenters argue income inequality can be more effectively addressed by ensuring that businesses and consumers are not burdened by regulations and by reducing occupational licensing rules.

## Dissenting View: Objections to This Approach and Hurdles to Adoption

### Articles

Mishel, Lawrence, and Josh Bivens. *Identifying the Policy Levers Generating Wage Suppression and Wage Inequality*. Washington, D.C.: Economic Policy Institute, 2021.

Available at

<https://www.epi.org/unequalpower/publications/wage-suppression-inequality>.

The authors argue that wage inequality is driven by intentional government policy decisions and corporate practices that suppress wage growth. As examples, the authors point to macroeconomic policies to fight inflation that leads to higher unemployment rates than are needed, policies and laws that have eroded collective bargaining power, weaker labor standards, and employer-imposed contracts such as non-compete agreements and forced arbitration.

Tanner, Michael. "Five Myths about Economic Inequality in America." Policy Analysis, no. 797. Washington, D.C., Cato Institute: Sept. 2016.

Available at [https://www.cato.org/sites/cato.org/files/pubs/pdf/pa797\\_2.pdf](https://www.cato.org/sites/cato.org/files/pubs/pdf/pa797_2.pdf).

The author argues that policies aimed at reducing inequality that include raising taxes or creating additional social welfare programs may have unintended consequences that will harm low income earners as they may impose new burdens on the wealthy, resulting in slower economic growth and reduced job opportunities.

## Reports

American Enterprise Institute. *Opportunity for All: How to Think about Income Inequality*. Washington, D.C.: American Enterprise Institute, 2014.

Available at [https://www.aei.org/wp-content/uploads/2014/03/-opportunity-for-all\\_152949441244.pdf](https://www.aei.org/wp-content/uploads/2014/03/-opportunity-for-all_152949441244.pdf).

This report is a collection of essays on income inequality by various authors. In different essays, the authors consider problems with existing methods for measuring inequality, discuss the drawbacks of raising tax rates or minimum wages, and offer other policy proposals such as investing more in education, training, and apprenticeships.

## The Federal Government Role

### Federal Responsibility

#### Articles

Bartscher, Alina K., Moritz Schularick, Moritz Kuhn, and Paul Wachtel. "Monetary Policy and Racial Inequality." *Brookings Papers on Economic Activity*, 2022, no. 1 (2022): 1–63.

Available at <https://muse.jhu.edu/article/872593>.

The authors discuss the history of central bank monetary policy concerning economic inequality. They discuss how previously central banks, like the United States Federal Reserve, believed they did not have a role in inequality and how views on the role of the central bank have changed over time. The authors examine and quantify the impact of federal monetary policy on the wealth and income of Black and White households.

#### Books

Petrou, Karen. *Engine of Inequality: The Fed and the Future of Wealth in America*. Wiley Press, 2021.

Petrou, a financial policy analyst, provides a picture of economic policy impacts since the 2008 financial recession. She also discusses policy solutions to economic inequality.

## Reports

Bivens, Josh. *Thinking Seriously about What ‘Fiscal Responsibility’ Should Mean*. Economic Policy Institute, September 26, 2019.

Available at <https://files.epi.org/pdf/173153.pdf>.

The report is one in a series that discusses what the goals of “fiscal responsibility” should be, in relation to the think tank’s “Solutions Initiative” project. The two main goals the author describes are full employment and reducing inequality. According to the author, only after these two goals are met should fiscal policy focus on minimizing the risks of high debt levels.

Boddupalli, Aravind, Tracy Gordan, and Lourdes German. *More than Fines and Fees: Incorporating Equity into City Revenue Strategies*. Tax Policy Center, December 1, 2021.

Available at <https://www.taxpolicycenter.org/publications/more-than-fines-and-fees-incorporating-equity-city-revenue-strategies>.

The authors analyze how an influx of federal money from the Infrastructure Investment and Jobs Act and American Rescue Plan Act of 2021 allows city governments to rethink equity in their budgets. They perform a qualitative scan of all 28 cities participating in the City Budgeting for Equity and Recovery program and discuss the challenges cities face with limited data about how tax and revenue policies affect different populations. The report concludes with best practice recommendations for city leaders.

U.S. Library of Congress. Congressional Research Service. *Wage Inequality and the Stagnation of Earnings of Low-Wage Workers: Contributing Factors and Policy Options*. by Jane G. Gravelle. R46212. February 5, 2020.

Available at <https://crsreports.congress.gov/product/pdf/R/R46212>.

This report reviews wage growth over several decades to show how income inequality has increased. Factors like immigration, globalization, and the decline of unions are discussed. The report concludes with policy options that the federal government could use to reduce inequality.

## Websites

Peterson Institute for International Economics. “How to Fix Economic Inequality? An Overview of Policies for the United States and Other High-Income Economies.”

Available at <https://www.piie.com/microsites/how-fix-economic-inequality>.

The research on this interactive webpage describes the trends and drivers of economic inequality in high-income countries. Later sections of the webpage focus specifically on how U.S. efforts to reduce inequality have lagged behind other high-income countries. The institute then recommends policy options, including those related to taxes, labor, education, corporate regulations, and the social safety net.

## Execution

### Articles

Saez, Emanuel and Gabriel Zucman. “Progressive Wealth Taxation”. *Brookings Papers on Economic Activity* (Fall 2019).

Available at <https://www.brookings.edu/bpea-articles/progressive-wealth-taxation>.

The authors discuss recent federal wealth tax proposals and the feasibility of such a tax. They discuss administrative and constitutional questions a wealth tax could pose and suggest alternative solutions to ease inequality, such as reforming the estate or gift tax.

## Reports

Ferriere, Axelle, Phillipp Grubener, Gaston Navarro, and Oliko Vardishvili. *On the Optimal Design of Transfers and Income-Tax Progressivity*. Federal Reserve Board, June 24, 2022.

Available at <https://www.federalreserve.gov/econres/ifdp/files/ifdp1350.pdf>.

The authors discuss how two different policies, progressive income taxes, and means-tested transfer programs can affect inequality. By developing analytical and dynamic models for the policies, the authors determine the optimal design for redistributive policies and present their findings.

Kearney, Melissa S. and Magne Mogstad. *Universal Basic Income (UBI) as a Policy Response to Current Challenges*. Aspen Institute, August 23, 2019.

Available at

<https://www.brookings.edu/wp-content/uploads/2019/08/UBI-ESG-Memo-082319.pdf>.

This report discusses the challenges and opportunities of a universal basic income scheme. The authors define universal basic income, discuss why it might not be ideal for income redistribution, and conclude by suggesting alternative federal programs to universal basic income.

U.S. Library of Congress. Congressional Research Service. *An Economic Perspective on Wealth Taxes*. by Mark P. Keightley and Donald J. Marples. IF11823, April 1, 2022.

Available at <https://crsreports.congress.gov/product/pdf/IF/IF11823>.

According to the report, the goals of a wealth tax are: mitigating wealth inequality, raising revenue, and capturing sources of income that are not currently taxed. The authors present an economic perspective on a general wealth tax and consider the policy implications of the enactment of a wealth tax. They also discuss alternatives to a wealth tax that could achieve the same objectives.

U.S. Library of Congress. Congressional Research Service. *Universal Basic Income Proposals for the United States*. by Sarah A. Donovan. IF10865, April 3, 2018.

Available at <https://crsreports.congress.gov/product/pdf/IF/IF10865>.

This report provides a general overview of universal basic income proposals in the United States. The author defines universal basic income and discusses the benefits and concerns around proposals for universal basic income. The report concludes with a discussion of two proposals from Charles Murray and Andy Stern in 2016.

## Websites

Economic Policy Institute. “U.S. Tax & Spending Explorer.”

Available at <https://www.epi.org/explorer>.

This is an interactive hands-on resource that provides insight into how the government affects economic inequality with its policies.

Georgetown Law Center on Poverty and Inequality. “Taxes & Income Supports.”

Available at <https://www.georgetownpoverty.org/issues/tax-and-income-supports>.

This resource provides an abundance of white papers and reports. The publications focus on evidence-based ideas for improving the U.S. tax and benefits system.

## Targeted Policy

### Articles

Zewde, Naomi. “Universal Baby Bonds Reduce Black-White Wealth Inequality, Progressively Raise Net Worth of All Young Adults.” *The Review of Black Political Economy* 47, no. 1 (2020): 3–19.

Available at <https://doi.org/10.1177/0034644619885321>.

The author shows how the implementation of a baby bond program could reduce racial wealth inequality. Zewde provides background information on historic wealth disparities and designs a study to examine the economic effects of a hypothetical baby bond program. She concludes that in the short term, baby bonds would reduce generational wealth inequities, but acknowledges that several factors make it difficult to determine the long-term effects of a baby bond program.

### Books

Darity, William A., and A. Kirsten Mullen. *From Here to Equality: Reparations for Black Americans in the Twenty-First Century*. The University of North Carolina Press, 2022.

In this book, Darity and Mullen consider arguments for and against comprehensive reparations. They examine methods for financing and propose a plan for reparations paid for by Congress to descendants of slavery.

### Reports

Brown, Madeline, Ofonama Biu, Catherine Harvey, and Trina R. Shanks. *The State of Baby Bonds*. Urban Institute, February 2, 2023.

Available at <https://www.urban.org/research/publication/state-baby-bonds>.

This report provides a clear definition of baby bonds, that they are “universal, publicly funded child trust accounts,” and pays specific attention to racial wealth inequalities. The authors then discuss different policy proposals and describe the key components of baby bonds. They conclude that while baby bonds are not the only solution to racial wealth inequalities, they could be part of a solution.

Ford, LesLeigh D., and Jon Sankofa. *The Next Reconstruction: Examining the Call for a National Reparations Program*. The Urban Institute, March 30, 2023.

Available at <https://www.urban.org/research/publication/next-reconstruction>.

Ford and Sankofa discuss and examine historic and current proposals for reparations in the United States. They examine how reparations proposals have evolved since the 18<sup>th</sup> century and recommend that the federal government invest in research to ensure an evidence-based reparations policy.

Maag, Elaine. *Who Benefits from Expanding the EITC or CTC?* Tax Policy Center, July 30, 2018.

Available at

<https://www.taxpolicycenter.org/publications/who-benefits-expanding-eitc-or-ctc>.

The author discusses how the Child Tax Credit and Earned Income Tax Credit could be redesigned to better target very low-income people and families. She proposes and compares different options and discusses the effect she believes those proposals would have on poverty at the household level.

Solomon, Danyelle, Connor Maxwell, and Abril Castro. *Systematic Inequality and Economic Opportunity*. Center for American Progress, August 7, 2019.

Available at

<https://www.americanprogress.org/article/systematic-inequality-economic-opportunity>.

The authors of this report provide background information on historic racial wealth inequality. They propose that repealing or amending specific labor laws they view as discriminatory and creating a federal program to encourage minority participation in certain labor fields would decrease economic inequality.

## **Is Federal Government Action the Most Effective or Promising Way To Address Income Inequality?**

### **Books**

Conard, Edward. *The Upside of Inequality: How Good Intentions Undermine the Middle Class*. Portfolio, 2016.

Conard acknowledges that inequality is an issue, but challenges the predominant theories about its causes. He defends capitalism and suggests that government intervention to reduce inequality hurts the middle and working class.

Hecht, Ben. *Reclaiming the American Dream: Proven Solutions for Creating Economic Opportunity for All*. Brookings Institution Press, 2018.

Hecht, President and CEO of Living Cities, explores how community leaders work to reduce economic and social disparity. He suggests, and proposes a blueprint for, communities to combat inequality without relying on what he sees as slow-moving government policies.

### **Reports**

Edwards, Chris, and Boure, Ryan. *Exploring Wealth Inequality*. Cato Institute, November 5, 2019.

Available at <https://www.cato.org/policy-analysis/exploring-wealth-inequality>.

The authors of this report generally argue that there is no crisis of inequality. Throughout the six sections of the report, they discuss how, in their opinion, poverty not inequality, is the real economic challenge; that government undermines wealth building; and other factors that affect economic well-being.

Rowe, Ian. *Incentivize Individual Agency to Achieve Upward Mobility*. American Enterprise Institute, September 2020.

Available at <https://www.aei.org/wp-content/uploads/2020/08/Incentivize-Individual-Agency-to-Achieve-Upward-Mobility.pdf?x91208>.

This report challenges what the author views as the prevailing theory that a “black person can do nothing individually to close the racial wealth gap.” Instead, the author suggests that encouraging young people to follow the “success sequence”—earning at least a high school degree, working full time, and getting married before having children—would drive the intergenerational transfer of wealth upward. He recommends educators and philanthropists create evidence-based curricula to teach the success sequence and other skills to improve the individual agency of young people.

## Federal Jobs Guarantee

### Articles

Gulker, Max. “Opinion | The Dangerous Fantasy of a ‘Jobs Guarantee.’” *Wall Street Journal*, November 14, 2018, sec. Opinion.

Available at

<https://www.wsj.com/articles/the-dangerous-fantasy-of-a-jobs-guarantee-1542239737>.

The author argues that a proposed federal jobs guarantee of \$12/hour would have an exorbitant cost, destabilize the labor market, and be impossible to administer.

King, Adam D. K. “Critical Reflections on the Job Guarantee Proposal.” *Studies in Political Economy* 101, no. 3 (September 1, 2020): 230–44.

Available at <https://doi.org/10.1080/07078552.2020.1848497>.

This article assesses the job guarantee from two angles. First, by tracing some of the job guarantee’s intellectual origins in the inflationary crises of the 1970s, it questions claims about the potential to increase workers’ bargaining power. Second, it critiques job guarantee advocates thinking by examining how their claims about the dignity of employment obscure the centrality of unpaid social reproductive labor to capitalism and could potentially reinforce social welfare cuts and workfare.

Lu, Lynn D. “From Stigma to Dignity? Transforming Workfare with Universal Basic Income and a Federal Job Guarantee.” *South Carolina Law Review* 72, no. 3 (2021 2020): 703–34.

Available at

<https://scholarcommons.sc.edu/cgi/viewcontent.cgi?article=4373&context=sclr>.

The author, a law professor and director of a university economic social justice project, examines proposals for universal basic income and a federal job guarantee, which seek to reduce poverty, income inequality, and the widening racial wealth gap. The author focuses on the potential benefits for Blacks and other people of color with less access to wealth, higher education, and protection against employment discrimination. The author examines historical policies leading to proposals; persistent ideological beliefs and societal assumptions about race, work, and personal responsibility that have limited the potential of job guarantee proposals in the past; and analyzes contemporary examples of local universal basic income and job guarantee reforms.

Porter, Eduardo. “Should the Feds Guarantee You a Job?” *The New York Times*, February 18, 2021, sec. Business.

Available at

<https://www.nytimes.com/2021/02/18/business/economy/job-guarantee.html>.

The author examines job guarantee proposals made as part of the Green New Deal.

## Books

Attewell, Steven. 2018. *People Must Live by Work: Direct Job Creation in America, from FDR to Reagan*. Politics and Culture in Modern America. Philadelphia: University of Pennsylvania Press.

This book discusses the history of the policy that the federal government should fight unemployment by hiring the unemployed directly, and of the idea that the government has both a moral mandate and a practical capacity to end unemployment altogether.

Dennis, Michael. *The Full Employment Horizon in 20th-Century America: The Movement for Economic Democracy*. New York, NY: Bloomsbury Academic, 2021.

This book follows the campaign for economic democracy and the fight for full employment in the United States. The author explores its intellectual and philosophical underpinnings starting in the 1930s, and the class struggle that determined the fate of legislation and the role of left-wing civil rights activists in its revival.

Tcherneva, Pavlina R. *The Case for a Job Guarantee*. John Wiley & Sons, 2020.

The author challenges the prevailing economic theory that unemployment is both unavoidable and necessary for the smooth functioning of the economy.

## Reports

U.S. Library of Congress. Congressional Research Service. *Wage Inequality and the Stagnation of Earnings of Low-Wage Workers: Contributing Factors and Policy Options*, by Jane G. Gravelle. R46212. Feb. 5, 2020.

Available at <https://crsreports.congress.gov/product/pdf/R/R46212>.

The author examines why earnings have continued to stay low for some workers, and suggests how Congress could address the issue.

The Brookings Institution. The Hamilton Project. *Labor Market Considerations for a National Jobs Guarantee*, by Ryan Nunn, Jimmy O’Donnell, and Jay Shambaugh. Dec. 2018.

Available at

[https://www.hamiltonproject.org/assets/files/JobGuarantee\\_FP\\_web\\_20190206.pdf](https://www.hamiltonproject.org/assets/files/JobGuarantee_FP_web_20190206.pdf).

The authors offer conditions that would support a federal jobs guarantee, and how such a policy would affect economic factors.

## Websites

Dorfman, Jeffrey. “Job Guarantee: A Liberal Idea That Conservatives May Embrace.” *Forbes*. May 1, 2018.

Available at <https://www.forbes.com/sites/jeffreydorfman/2018/05/01/job-guarantee-a-liberal-idea-that-conservatives-may-embrace>.

The author argues that if a job guarantee program replaces virtually all of the current safety net it might reduce both federal spending and the budget deficit, not increase them.

Hamilton, Darrick, et al. “The Full Employment Solution.” *The American Prospect*, Feb. 12, 2018.

Available at <https://prospect.org/health/full-employment-solution>.

The authors, professors at several universities, explore the origins of a government jobs guarantee in the Franklin Roosevelt Administration, and propose a method for implementing such a guarantee in today’s economy.

Matthews, Dylan. “Job Guarantees, Explained.” *Vox*, September 6, 2017.

Available at <https://www.vox.com/policy-and-politics/2017/9/6/16036942/job-guarantee-explained>.

The author examines current federal job guarantee proposals in light of previous federal jobs programs, such as the Comprehensive Employment and Training Act (CETA) in the 1970s. The author also compares the proposal to an experimental employment program in the Indian state of Andhra Pradesh.

Spross, Jeff. “What If You Could Sue the Federal Government for a Job?.” *The Week*, June 12, 2019.

Available at <https://theweek.com/articles/786745/what-could-sue-government-job>.

The author argues that a federal jobs guarantee program would not have a useful effect unless the public has a legal right to sue for enforcement.

## Expanding Social Security

### Articles

Andrew G. Biggs, “We Do Not Need to Expand Social Security,” *National Review*, (December 5, 2019).

Available at

<https://www.nationalreview.com/2019/12/social-security-no-need-to-expand>.

This article argues that Social Security does not need to be expanded. The author uses data from the Congressional Budget Office, the Federal Reserve, and the Social Security Administration to state that American incomes are increasing and there is no need for expanded Social Security.

Jan E. Mutchler, Yang Li, and Ping Xu, “How strong is the Social Security safety net? Using the Elder Index to assess gaps in economic security,” *Journal of Aging & Social Policy*, vol. 31, no. 2 (May 2019), pp. 123–137.

Available at <https://www.tandfonline.com/doi/full/10.1080/08959420.2018.1465798>.

This study analyzes the adequacy level of Social Security benefits in meeting the needs of senior citizens. It uses the Elder Economic Security Standard Index as a benchmark. It discusses policies to strengthen Social Security.

Larry DeWitt, “The development of Social Security in America,” *Social Security Bulletin*, vol. 70, no. 3 (2010).

Available at <https://www.ssa.gov/policy/docs/ssb/v70n3/v70n3p1.pdf>.

This article, authored by a historian in the Social Security Administration, covers the historical and legislative origins of the United States Social Security program. The introduction of the Social Security Act of 1935 and its amendments are detailed. It also examines how Social Security fits into the country’s overall welfare system and discusses the future of the program.

Monique Morrissey, “Social Security expansion would likely bolster, not hurt, economic growth,” *Economic Policy Institute: Working Economics Blog*, (July 25, 2019).

Available at <https://www.epi.org/blog/>

[social-security-expansion-would-likely-bolster-not-hurt-economic-growth](https://www.epi.org/blog/social-security-expansion-would-likely-bolster-not-hurt-economic-growth).

This article from the Economic Policy Institute responds to a March 2019 analysis of the proposed Social Security 2100 Act done by the University of Pennsylvania Penn Wharton Budget Model. While the Penn Wharton analysis predicted that expansion of Social Security would result in a drop in GDP, this article argues that expansion would boost the economy.

## Reports

Center on Budget and Policy Priorities, *Social Security Benefits Are Modest; Benefit Cuts Would Cause Hardship for Many*, January 8, 2020.

Available at

<https://www.cbpp.org/research/social-security/social-security-benefits-are-modest>.

This report presents a case for not cutting Social Security benefits because many seniors rely on them as a source of income, and those benefits are under 40 percent above the poverty level. It provides data on the percentage of recipients who have other pension benefits and compares Social Security in the United States with that of other countries.

Century Foundation, *Social Security Is Essential. So Why Do Some Want to Cut It?*, March 16, 2023.

Available at <https://tcf.org/content/report/>

[social-security-is-essential-so-why-do-some-want-to-cut-it](https://tcf.org/content/report/social-security-is-essential-so-why-do-some-want-to-cut-it).

This report provides an overview of Social Security, examines the need for it, and explores what Social Security beneficiaries would do without the program.

Development Pathways, *The social contract and the role of universal social security in building trust in government*, November 2020.

Available at <https://www.developmentpathways.co.uk/wp-content/uploads/2020/11/Social-Contract-paper-Nov242020.pdf>.

This working paper discusses the role of Social Security in building trust in the government. It begins with a historical view of social programs in post-Second World War Europe. It then relates those findings to the current development and implementation of social security programs in the Global South.

EU-Mediterranean and African Network for Economic Studies, *Social Security in Arab Countries* EMNES Working Paper no. 30, April 2020.

Available at [https://emnes.org/wp-content/uploads/2020/04/emnes\\_wp\\_030\\_social\\_security\\_in\\_arab\\_countries\\_v2.pdf](https://emnes.org/wp-content/uploads/2020/04/emnes_wp_030_social_security_in_arab_countries_v2.pdf).

This working paper examines social security systems in Middle Eastern and North African countries. It covers how those programs factor into the well-being of senior citizens and other vulnerable groups within the context of the COVID-19 pandemic.

International Social Security Association, *Priorities for social security—Asia and the Pacific 2022: Trends, challenges and solutions*, February 2022.

Available at <https://ww1.issa.int/sites/default/files/documents/2022-02/2-Priorities-report-asia.pdf>.

This report covers priorities for social security in Asia and the Pacific region. Sections of the report include extending and maintaining social security coverage, as well as social cohesion, the needs of elderly populations, and responses to the COVID-19 pandemic.

International Social Security Association, *Extending and maintaining social security coverage—Africa*, September 29, 2021.

Available at <https://ww1.issa.int/analysis/extending-and-maintaining-social-security-coverage-africa>.

This analysis reviews Africa's social protection legislation and how those programs are delivered to beneficiaries. It describes the different ways programs are financed and the coordination of public and private entities, while also addressing the deficit in coverage. The final section highlights programs in Kenya and Djibouti.

International Social Security Association, *Extending and maintaining social security coverage—Americas*, November 12, 2021.

Available at <https://ww1.issa.int/analysis/extending-and-maintaining-social-security-coverage-americas>.

This analysis covers social security trends in North and South America and reviews administrative and funding challenges to extending programs in those regions. It details the evolution of programs in different countries and discusses these programs with the unique populations they benefit. The final section highlights initiatives in Guatemala, Colombia, and Canada.

National Academy of Social Insurance, *Americans Make Hard Choices on Social Security: A Survey with Trade-Off Analysis*, October 2014.

Available at [https://www.nasi.org/wp-content/uploads/2014/11/Americans\\_Make\\_Hard\\_Choices\\_on\\_Social\\_Security.pdf](https://www.nasi.org/wp-content/uploads/2014/11/Americans_Make_Hard_Choices_on_Social_Security.pdf).

This survey gathers feedback from Americans about how they would address potential changes to Social Security. A general willingness to pay into Social Security, and to pay more to stabilize the program, was found in this survey.

Netherlands Institute of Social Research, *Public sector achievement in 36 countries: Key findings—chapter 5: Social Security*, 2016.

Available at [http://digitaal.scp.nl/psa/5\\_social\\_security](http://digitaal.scp.nl/psa/5_social_security).

This report analyzes 28 EU member states, in addition to Norway and Switzerland. It considers four indicators to assess the status of each country's social security performance: contextual poverty, pension replacement rates, non-employment in youth, and long-term unemployment.

Pew Research Center, *Looking to the Future, Public Sees an America in Decline on Many Fronts—4. Retirement, Social Security and long-term care*, March 21, 2019.

Available at <https://www.pewresearch.org/social-trends/2019/03/21/retirement-social-security-and-long-term-care/>.

This report presents findings from a Pew Research Center survey of Americans about what they think the future will be like in 2050. The survey found that Americans do not believe that Social Security will be available to older people at current levels. The results are broken down by various demographic aspects, such as age range and political party.

University of Maryland, School of Public Policy. Program for Public Consultation. *Americans on Social Security*, July 2022.

Available at [https://publicconsultation.org/wp-content/uploads/2022/09/Social\\_Security\\_2022\\_Report.pdf](https://publicconsultation.org/wp-content/uploads/2022/09/Social_Security_2022_Report.pdf).

This study had respondents participate in a “policymaking simulation” by briefing them about the Social Security program and then having them evaluate arguments for and against proposals to address the shortfall and potential increase of Social Security benefits. The study included 2,500 voters and the proposed solutions are options that have been proposed by the Social Security Administration and some have been included in proposed congressional legislation.

U.S. Library of Congress. Congressional Research Service. *Social Security Overview*, by Barry F. Huston. IF10426.

Available at <https://crsreports.congress.gov/product/pdf/IF/IF10426>.

This report provides an overview of Social Security. It covers how Social Security is financed, who qualifies for benefits, how benefit amounts are calculated, and the status of Social Security.

U.S. Library of Congress. Congressional Research Service. *Social Security Primer*, by Barry F. Huston. R42035.

Available at <https://crsreports.congress.gov/product/pdf/R/R42035>.

This is a detailed report about Social Security. It explains Social Security financing in relation to taxation and trust funds. It also outlines the rules for receiving benefits and includes several tables of Social Security statistics, requirements, and qualification ages.

## Websites

Employee Benefit Research Institute. “2023 Retirement Confidence Survey.”

Available at <https://www.ebri.org/retirement/retirement-confidence-survey>.

The Retirement Confidence Survey is an annual survey of Americans aged 25 or older who are either working or retired. It assesses participants’ views of retirement preparation, retirement, and related issues. One of the major topics of the survey is the perception of, and confidence in, Social Security.

Peter G. Peterson Foundation. “Should we Eliminate the Social Security Tax Cap? Here are the Pros and Cons,” (February 6, 2023).

Available at <https://www.pgpf.org/blog/2023/02/>

[should-we-eliminate-the-social-security-tax-cap-here-are-the-pros-and-cons](https://www.pgpf.org/blog/2023/02/should-we-eliminate-the-social-security-tax-cap-here-are-the-pros-and-cons).

This article discusses the possible effects of eliminating the Social Security tax cap. It details proposals such as setting the cap as a portion of earnings instead of a dollar amount. The author also speculates on responses to lifting the tax cap, like employers and employees switching to compensation types to one that is taxed at a lower rate.

Social Security Administration. “A Summary of the 2023 Annual Reports.”

Available at <https://www.ssa.gov/OACT/TRSUM/index.html>.

This is a summary of the 2022 Annual Report of the Board of Trustees of the Federal Old-Age and Survivors Insurance and Federal Disability Insurance Trust Funds. It covers Social Security and gives an overview of its current and projected financial status. It includes a link to the full report.

Social Security Administration. “Historical Background and Development of Social Security.”

Available at <https://www.ssa.gov/history/briefhistory3.html>.

This webpage gives the history of Social Security, starting with early systems of economic security in ancient Greece, medieval Europe, and colonial America. It traces the passage of the Social Security Act in 1935, its subsequent amendments, and the creation of the Social Security Administration.

Social Security Administration. “Office of the Chief Actuary's Estimates of Proposals to Change the Social Security Program or the SSI Program.”

Available at <https://www.ssa.gov/OACT/solvency>.

This report from the Social Security Administration Office of the Chief Actuary analyzes current proposals from policymakers for adjustments to the Social Security program. This report comes after the last Trustee Report that predicts that Social Security's Old-Age, Survivors, and Disability Insurance Trust Fund reserves will run out between 2033 and 2035 at current levels.

Social Security Administration. “Social Security in Other Countries.”

Available at <https://www.ssa.gov/international/links.html>.

This list from the Social Security Administration provides links to international social security organizations and social security agencies in other countries.

University of Pennsylvania Penn Wharton Budget Model. “The Social Security 2100 Act: Effects on Social Security Finances and the Economy,” September 24, 2019.

Available at <https://budgetmodel.wharton.upenn.edu/issues/2019/9/24/the-social-security-2100-act-updated-analysis-of-effects-on-social-security-finances-and-the-economy>.

This analysis predicts that expansion of Social Security under the proposed Social Security 2100 Act would reduce the imbalance of the program, while at the same time reducing GDP over ten years. It details the main features of the act and estimates its financial effects.

## Providing a Basic Income

### Overview

#### Articles

Francesca, Maura and Delphine Prady. “What is Universal Basic Income?” *F&D Magazine* (Dec. 2018).

Available at <https://www.imf.org/en/Publications/fandd/issues/2018/12/what-is-universal-basic-income-basics>.

This International Monetary Fund article explains that a universal basic income program must be, by definition, unconditioned and a cash transfer. Such programs can either supplement or replace existing social safety net programs; and can be distributed on a per-individual or per-household basis. It states that funding for such programs must come from some combination of redirecting current governmental expenditures and increasing total tax revenues.

LaPonsie, Maryalene. “What is Universal Basic Income?” *U.S. News & World Report* (Mar. 1, 2022).

Available at <https://money.usnews.com/money/personal-finance/articles/what-is-universal-basic-income>.

The article surveys the principal arguments for and against a universal basic income. It reports that Mayors for a Guaranteed Income found recipients overwhelmingly used their guaranteed income payments to pay for basic necessities.

#### Reports

U.S. Library of Congress. Congressional Research Service. *Universal Basic Income Proposals for the United States*, by Sarah A. Donovan. IF10865.

Available at <https://crsreports.congress.gov/product/pdf/IF/IF10865>.

This overview of the main features of Universal Basic Income (UBI) identifies two broad rationales. One of them conceives of UBI as a replacement for existing social insurance and welfare programs, with efficiency gains compared to the status quo. The other major rationale is to improve employment wages and job quality.

#### Websites

Stanford Basic Income Lab. “What is Basic Income.”

Available at <https://basicincome.stanford.edu/about/what-is-ubi>.

This Stanford University research initiative explains that the definition of basic income varies based on geographic and historical context. It discusses the historic ancestors of UBI, including a 1797 proposal from Thomas Paine to provide a lump sum to all citizens at adulthood.

## Historical or Current Assessments

### Articles

Guo, Eileen. “Universal Basic Income is Here—it Just Looks Different from What You Expected.” *MIT Technology Review* (May 7, 2021).

Available at <https://www.technologyreview.com/2021/05/07/1024674/ubi-guaranteed-income-pandemic>.

The author distinguishes guaranteed income programs from universal basic income programs and argues that field research and pilot studies conducted to date provide valuable insights, but have lacked a broad applicability. The article contends that social safety-net programs adopted early during the COVID-19 pandemic approximated a guaranteed income, such as stimulus payments, increased Child and Dependent Tax Credits, and increased unemployment benefits, and effectively constitute a nationwide test of something close to a guaranteed income.

Samuel, Sigal. “Everywhere Basic Income Has Been Tried, in One Map: Which Countries Have Experimented With Basic Income—and What Were the Results?” *Vox* (Updated Oct. 20, 2020).

Available at <https://www.vox.com/future-perfect/2020/2/19/21112570/universal-basic-income-ubi-map>.

The article compiles research from jurisdictions that have tried some form of basic income to evaluate unconditional cash grants. The author writes that the evidence suggests a basic income tends to increase health, happiness, school attendance, and trust in social institutions, and to reduce crime. According to the author, the evidence does not show that a universal basic income would disincentivize work, reduce productivity, or deprive individuals of self-fulfillment through work.

### Books

United Nations Educational, Scientific and Cultural Organization (UNESCO) *Basic Income on Data and Policy*. Paris, France: UNESCO, 2021.

Available at <https://unesdoc.unesco.org/ark:/48223/pf0000380169>.

This book combines short essays with hyperlinks to extended podcast discussions. It surveys what is known and not known about universal basic income programs. The volume observes that a universal basic income program does not exist in a vacuum, and must be planned, financed, implemented, and evaluated in the context of minimum-wage policies, unemployment benefits, severance pay, pensions, and other social protections.

### Reports

Lehto, Otto. *Basic Income Around the World: The Unexpected Benefits of Unconditional Cash Transfers*. London, UK: Adam Smith Institute, 2018.

Available at <https://www.adamsmith.org/research/basic-income-experiments>.

The author summarizes studies in India, Kenya, Namibia, and Uganda finding that unconditional cash transfers successfully alleviate poverty in the developing world. He argues that a universal basic income in rich countries will likewise help poor people regain their freedom and dignity.

Silver, David and Jonathan Zhang. Impacts of Basic Income on Health and Economic Well-Being: Evidence from the VA's Disability Compensation Program. Cambridge, MA: National Bureau of Economic Research, March 2022.

Available at <https://www.nber.org/papers/w29877>.

Like universal basic income proposals, Veterans Affairs disability compensation is not means-tested and does not restrict recipients' ability to work. The authors report that, all else equal, veterans who are awarded benefits have better food and housing security and make better use of healthcare services, including preventative care.

Verlaat, Timo, Federico Todeschini and Xavier Ramos. *The Employment Effects of Generous and Unconditional Cash Support*. Bonn, Germany: IZA Institute of Labor Economics, Feb. 2023.

Available at [https://papers.ssrn.com/sol3/papers.cfm?abstract\\_id=4375359](https://papers.ssrn.com/sol3/papers.cfm?abstract_id=4375359).

A two-year, randomized controlled trial of unconditional cash benefits in Barcelona, Spain, evaluated labor-force participation. Households randomly selected to receive the benefits were 14% less likely to have at least one member working than control households that did not receive the benefits. The authors report that it appears these results were driven by households with children, suggesting that the cash benefits enabled households to spend more time on care tasks.

## Websites

Forbes Advisor. "An Unexpected Outcome of the Covid-19 Pandemic: A Slew of Universal Income Programs."

Available at

<https://www.forbes.com/advisor/personal-finance/universal-basic-income-programs>.

This website summarizes arguments for and against universal basic income programs and then describes key features of nine pilot programs across the United States that began during the COVID-19 pandemic.

Stanford Basic Income Lab. "The Guaranteed Income Pilots Dashboard."

Available at <https://basicincome.stanford.edu/research/guaranteed-income-dashboard>.

This dashboard is a partnership between the Center for Guaranteed Income Research, Mayors for Guaranteed Income, and the Stanford Basic Income Lab. It incorporates information on over 30 pilot studies on Universal Basic Income, tracking a total of over 7,300 participants.

University of North Carolina College of Arts and Sciences. "The Pros and Cons of Universal Basic Income."

Available at <https://college.unc.edu/2021/03/universal-basic-income>.

Fabian Wendt and Doug MacKay of the University of North Carolina discuss universal basic income in light of a proposed pilot program in Durham, North Carolina, paid for by an outside donor, that would give \$500 per month to 55 formerly incarcerated residents. Wendt and MacKay summarize empirical research and arguments made for

## Potential Impact To Achieve the Goal of Redistribution of Income and/or Wealth, or Economic Inequality

### A. A Universal or Targeted Benefit?

#### Articles

Fleischer, Miranda Perry and Hemel, Daniel. "The Architecture of a Basic Income." *University of Chicago Law Review* 87, no. 3: 625 (2020). Available at <https://chicagounbound.uchicago.edu/uclrev/vol87/iss3/1>. The authors propose a universal basic income of \$500 per month (\$6,000 annually) that includes children. They address numerous logistic issues and recommend having the universal basic income paid by the Social Security Administration as a direct deposit every two weeks. They argue that, subject to limits, recipients should have some ability to borrow against future payments.

Hanna, Rema and Benjamin A. Olken. "Universal Basic Incomes versus Targeted Transfers: Anti-Poverty Programs in Developing Countries." *Journal of Economic Perspectives* 32, no. 4 (Fall 2018). Available at <https://www.aeaweb.org/articles?id=10.1257/jep.32.4.201>. Drawing upon multi-year field experiments in Peru and Indonesia, the authors conclude that targeting aid programs to low income earners delivers considerably more welfare in developing countries than a universal basic income, because doing so allows transferring more money to fewer households. The authors discuss several mechanisms to improve the accuracy of identifying the poorest households and thus reduce the inevitable—and arguable unjust—overinclusion and under inclusion in any targeted program.

Slavov, Sita Nataraj. "A Framework for Understanding Universal Basic Income." *Tax Notes Federal* 170 (Feb. 22, 2021). Available at <https://www.aei.org/wp-content/uploads/2021/03/Slavov-On-the-Margin-Feb-22-2021.pdf?x91208>. The article explains that a universal basic income follows from an "optimal tax" framework, which seeks to promote both economic efficiency (increasing the size of the pie) and equality (slicing the pie more equally).

Tanner, Michael D. "Is an Allowance for all Americans as Crazy as it Sounds?" *The Hill* (June 2, 2017). Available at <https://thehill.com/blogs/pundits-blog/economy-budget/336084-opinion-is-an-allowance-for-all-americans-as-crazy-as-it>. The article suggests that advocates and detractors of Universal Basic Income (UBI) need to be pressed on whether they are assuming that UBI will replace or supplement existing social safety-net programs, such as poverty programs, unemployment insurance, Social Security, and Medicare. The author argues that if UBI is a replacement, then the poor would be "big winners" at the expense of "politically

## Books

Gentilini, Ugo, Margaret Grosh, Jamele Rigolini, and Ruslan Yemtsov, eds. *Exploring Universal Basic Income: A Guide to Navigating Concepts, Evidence, and Practices*. Washington, DC: World Bank, February 4, 2020.

Available at <https://www.worldbank.org/en/topic/socialprotection/publication/exploring-universal-basic-income-a-guide-to-navigating-concepts-evidence-and-practices>.

This book offers a framework to evaluate universal basic income proposals. Key themes include the importance of considering both the performance of existing tax and transfer systems, as well as implications under a UBI program; identifying the program's specific objective; and being alert to necessary trade-offs. The volume offers empirical analysis and policy considerations.

Hiilamo, Heikki. *Participation Income: An Alternative to Basic Income for Poverty Reduction in the Digital Age*. Northampton, MA: Edward Elgar Publishing, 2022.

Available at <https://socialprotection.org/discover/publications/participation-income-alternative-basic-income-poverty-reduction-digital-age>.

The author reviews the idea of basic income and basic income experiments. He then argues that participation income, in which payments are conditioned on an individual's economic or social participation, is a better model to fight poverty than basic income.

## Reports

Daruich, Diego and Raquel Fernández. *Universal Basic Income: A Dynamic Assessment*. Cambridge, MA: National Bureau of Economic Research, June 2020.

Available at [https://www.nber.org/system/files/working\\_papers/w27351/w27351.pdf](https://www.nber.org/system/files/working_papers/w27351/w27351.pdf).

The authors model a universal basic income within a general equilibrium life-cycle framework. They report that welfare increases for people who are adults when a universal basic income is initiated but decreases for future generations, due to the taxes required to support payments and a long-run reduction in GDP.

## B. Alaska Permanent Fund Dividend and Its Impacts

### Articles and Master's Thesis

Cafasso, Michele. "Universal Basic Income and the Alaska Permanent Fund: Impact on Labor Outcomes and Skill Composition." Master's thesis, The City University of New York, Hunter College, 2022.

Available at [https://academicworks.cuny.edu/cgi/viewcontent.cgi?article=2015&context=hc\\_sas\\_etds](https://academicworks.cuny.edu/cgi/viewcontent.cgi?article=2015&context=hc_sas_etds).

The author finds some evidence that the Alaska Permanent Fund unconditional cash payments increased part-time employment, decreased work hours, and shifted human capital away from mechanical skills toward social, fundamental, and analytic skills. However, the author cautions against drawing any conclusions as there are no comparable states.

Jones, Damon and Ioana Marinescu. “The Labor Market Impacts of Universal and Permanent Cash Transfers: Evidence from the Alaska Permanent Fund.” *American Economic Journal: Economic Policy* 14, no. 2: 315 (May 2022).

Available at <https://www.aeaweb.org/articles?id=10.1257/pol.20190299>.

This article finds that unconditional cash transfers made from the Alaska Permanent Fund had no effect on employment and increased part-time work by 1.8 percentage points. The article states that results were consistent with cash stimuli to the local economy. The authors conclude that the data suggest a universal basic income will not significantly decrease overall employment.

LaPonsie, Maryalene. “Alaskans Receive Record Dividends of \$3,284.” *Forbes Advisor* (Nov. 10, 2022).

Available at <https://www.forbes.com/advisor/personal-finance/alaska-dividend-2022>.

The article provides an overview of the Alaska Permanent Fund Dividend. It explains that the size of Alaska's Permanent Fund Dividend payment is determined by a vote of the state legislature each year, prompting concerns of arbitrary political interference.

## Reports

Guettabi, Mouhcine. *What do we know about the effects of the Alaska Permanent Fund Dividend?* Anchorage: Alaska: Institute of Social and Economic Research, University of Alaska Anchorage, May 20, 2019.

Available at <https://scholarworks.alaska.edu/handle/11122/10581>.

This report summarizes research on the effects of unconditional cash transfers paid to all Alaskans from the Alaska Permanent Fund over a 37-year period. The findings are presented by the program's effect on employment, consumption, poverty, health, and crime.

Yonzan, Nishant, Laxman Timilsina and Inas Rashad Kelly. *Economic Incentives Surrounding Fertility: Evidence from Alaska's Permanent Fund Dividend*. Cambridge, MA: National Bureau of Economic Research, Jan. 2020.

Available at <https://www.nber.org/papers/w26712>.

Using a synthetic control model, the authors concluded that the Alaska Permanent Fund payments are associated with increased fertility. Based upon comparing birth and abortion data in all 50 states for the six years before and six years after the payments began in 1982, they found increases in birth rates for all women ages 20 to 45; no significant effect on birth rates for 15- to 19-year-olds; and no significant effect on abortion rates for any age group.

## Objections and Hurdles to Adoption

### Articles

Annunziata, Marco. “Universally Basic Income: A Universally Bad Idea.” *Forbes* (July 27, 2018).

Available at <https://www.forbes.com/sites/marcoannunziata/2018/07/27/universal-basic-income-a-universally-bad-idea/?sh=573f49943269>.

The author argues that Universal Basic Income is not necessary to protect against technology-produced job loss, and that because social improvement requires human work, all members of society should be obliged to contribute to their full capacity.

Grossberg, Jonathan D. "Something for Nothing: Universal Basic Income and the Value of Work Beyond Incentives," *Washington and Lee Journal of Civil Rights and Social Justice* 26, no.1: 3 (2019).

Available at <https://scholarlycommons.law.wlu.edu/cgi/viewcontent.cgi?article=1483&context=crsj>.

The author identifies four dimensions of the "value of work": reciprocity (paying one's dues), the dignity of a vocation or calling, self-sufficiency, and economic incentives for a labor force. He argues against a universal basic income because he says it can at most address only the last of these dimensions.

Schwarz, Gonzalo. "The Real Cost of Universal Basic Income." Foundation for Economic Education (FEE) (Feb. 22, 2019).

Available at <https://fee.org/articles/the-real-cost-of-universal-basic-income>.

The Foundation for Economic Education advocates free market economics and limited government.

The author argues that universal basic income programs do not work, based on Ontario and Finland's ending such programs and Switzerland's voting not to adopt one. The author argues that such programs cannot reduce inequality, because they give everyone the same amount of money. In addition, he contends, they deprive recipients of the structure and social relationships that work provides, by reducing their economic needs.

## Reports

Cogan, John F. and Daniel L. Heil. *The Economic Impact of a Universal Basic Income*. Stanford, CA: Hoover Institution, Jan. 14, 2021.

Available at

<https://www.hoover.org/research/economic-impact-universal-basic-income>.

This paper critiques a universal basic income on grounds that it would be more of a work disincentive than current income transfer programs, and would thus diminish national labor force availability and resources. It further argues that a universal basic income would also deprive recipients of the fulfillment and sense of self-worth that come from satisfying material needs through one's own individual efforts and sacrifices.

Kearney, Melissa S. and Magne Mogstad. *Universal Basic Income as a Policy Response to Current Challenges*. Washington, DC: Brookings Institution, Aug. 30, 2019.

Available at [https://www.brookings.edu/research/](https://www.brookings.edu/research/universal-basic-income-as-a-policy-response-to-current-challenges)

[universal-basic-income-as-a-policy-response-to-current-challenges](https://www.brookings.edu/research/universal-basic-income-as-a-policy-response-to-current-challenges).

The authors argue that a universal basic income would be an expensive and sub-optimal mechanism to address inequality, lack of opportunity, and limited social mobility. They recommend instead targeting governmental benefits to the poorest and most vulnerable, accompanied by government programs that would develop human capital, advance opportunity, and promote economic mobility.

Rector, Robert and Mimi Teixeira. *Universal Basic Income Harms Recipients and Increases Dependence on Government*. Washington, DC: The Heritage Foundation, Feb. 14, 2018.

Available at <https://www.heritage.org/sites/default/files/2018-02/IB4817.pdf>.

The authors contend that four controlled studies evaluating negative income tax conducted during the 1970s found a significant drop in the number of hours worked and that, on average, family earnings dropped \$660 for each \$1,000 in benefits, meaning that it cost \$3,000 in benefits to raise a family's income \$1,000. According to the authors, this demonstrates that a universal basic income would hurt recipients and increase dependence on government handouts.

## SUBJECT BIBLIOGRAPHY

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**How does household production affect earnings inequality?**Available online: <https://www.bls.gov/osmr/research-papers/2006/pdf/ec060050.pdf>

Publisher: U.S. Bureau of Labor Statistics, Office of Employment and Unemployment Statistics

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Publisher: Congressional Research Service

Year: 2023

**Reducing income inequality through progressive tax policy**Available online: <https://purl.fdlp.gov/GPO/gpo88022>

Publisher: U.S. Department of the Treasury

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Publisher: Social Security Administration (SSA)

Year / Pages: 2012, 318 p.

Print price: \$6.38

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Year / Pages: 2016; iii, 102 p.

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Available online: <https://purl.fdlp.gov/GPO/gpo62998>

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