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SUBMITTAL TO THE BOARD OF SUPERVISORS COUNTY OF RIVERSIDE, STATE OF CALIFORNIA


FROM: Community Action Partnership of Riverside County

SUBMITTAL DATE:
3/10/11

SUBJECT: Memorandum of Understanding with United Way of the Inland Valleys

RECOMMENDED MOTION: That the Board of Supervisors:

1. Ratify and authorize the Chairman of the Board to sign the attached Memorandum of Understanding (MOU) between United Way of the Inland Valleys (United Way) and Community Action Partnership of Riverside County (CAP Riverside) for the Earned Income Tax Credit (EITC) Program not to exceed \$10,000 covering the term January 1, 2011 through April 15, 2011;
2. Approve and direct the Auditor Controller to adjust the budget as detailed in the attached Schedule A;
3. Authorize the Executive Director of CAP Riverside to sign assurances, exhibits, and reports made under the Agreement; and



 Maria Y. Juarez, CAP, Executive Director

Continued (3 pages total)

FINANCIAL DATA	Current F.Y. Total Cost:	\$ 10,000	In Current Year Budget:	No
	Current F.Y. Net County Cost:	\$ 0	Budget Adjustment:	Yes
	Annual Net County Cost:	\$ 0	For Fiscal Year:	10/11

SOURCE OF FUNDS: 100% United Way of the Inland Valleys	Positions To Be Deleted Per A-30	<input type="checkbox"/>
	Requires 4/5 Vote	<input checked="" type="checkbox"/>

C.E.O. RECOMMENDATION:

APPROVE

BY: 
 Debra Cournoyer

County Executive Office Signature

FISCAL PROCEDURES APPROVED
 PAUL ANGULO, CPA, AUDITOR-CONTROLLER
 BY:  3/15/11
 Samuel Wong, Auditor-Controller
 NEAL R. KIPNIS, County Counsel
 BY:  3/15/11
 Neal R. Kipnis, County Counsel
 POLICE DEPARTMENT
 BY:  3/15/11
 Debra Cournoyer, County Executive
 ATTACHMENTS FILED WITH THE CLERK OF THE BOARD
 Per Exec. Ofc.:

Prev. Agn. Ref.: 4/1/08 (#3.27),
12/9/08 (#3.17), 4/6/10 (#3.27)

District: All

Agenda Number:

3.5

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RECOMMENDED MOTION (Continued):

4. Authorize the Executive Director of CAP Riverside to administer the program.

BACKGROUND:

The Internal Revenue Service estimates that 25% of California's eligible EITC funds go unclaimed each year. EITC is recognized nationally as one of the most effective means to move low-income people out of poverty. Since 2004, CAP Riverside has coordinated Volunteer Income Tax Assistance (VITA) sites. Over 8,983 income tax returns have been completed, generating over \$11 million in tax refunds for low-income residents of Riverside County.

Again, this coming tax season, United Way and Bank of America are partnering with CAP Riverside by providing \$10,000 to expand the EITC outreach efforts within Riverside County. The funding will be utilized to cover the cost of 30,000 printed materials and advertising in key local newspapers throughout Riverside County.

FINANCIAL IMPACT: No County General Funds will be required.

CONCURE/EXECUTE: Auditor Controller

MYJ/KS:jb

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SCHEDULE A
Community Action Partnership of Riverside County
Budget Adjustment
Fiscal Year 2010/2011

INCREASE IN APPROPRIATIONS:

CAARC-21050-5200300000-527780	Special Program Expense	\$10,000
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INCREASE IN ESTIMATED REVENUE:

CAARC-21050-5200300000-781360	Other Misc Revenue	\$10,000
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**2011
MEMORANDUM OF UNDERSTANDING
BETWEEN
UNITED WAY OF THE INLAND VALLEYS AND COMMUNITY ACTION
PARTNERSHIP OF RIVERSIDE COUNTY**

- I. **Preamble:** Community Action Partnership of Riverside County (CAP Riverside) recognizes that it has entered into a partnership with United Way of the Inland Valleys per its acceptance of a grant from Bank of America in the amount of \$10,000 for the purpose of building the capacity of Earned Income Tax Credit (EITC) outreach and free tax preparation efforts in Riverside County.
- II. **Community Action Partnership of Riverside County Commits to:**
- A. Utilize the funding provided to broaden EITC outreach and free tax preparation efforts within Riverside County.
 - B. Outline the specific use(s) of the grant funds in Section III (Scope of Work) of this Memorandum of Understanding.
 - C. Track the following data:
 - Number of volunteers
 - Number of Bank of America volunteers
 - Number of volunteer hours
 - Total number of returns filed
 - Total amount of refunds to clients
 - Total amount of EITC returned to clients
 - D. Collect and submit demographic data, including:
 - Gender
 - Race/ethnicity
 - Education level
 - Housing status
 - Banking relationship
 - Planned use of refund
 - How taxes were filed last year
 - E. Submit a final report to United Way of Inland Valleys summarizing the activities during the tax season, the activities supported by the grant, and the results of the EITC outreach program (represented by the indicators listed above). The report must be submitted no later than July 1, 2011.
 - F. List United Way of the Inland Valleys and Bank of America as sponsors, where possible, on the campaign's website and on its marketing and other campaign materials.
- III. **Scope of Work:** CAP Riverside will use the funds provided by Bank of America

to broaden EITC outreach and free tax preparation. The \$10,000.00 in funding will be used in outreach. The advertising will be in key local newspaper ads throughout Riverside County in English and in Spanish. 30,000 printed materials will be distributed at key locations in various communities such as parks and recreation sites, libraries, schools, social service agencies and church sites.

Part of the outreach/marketing plan will focus on making information available to local employers so they may provide this information to their employees who would be eligible to access the tax sites or who may be interested in volunteering.

CAP Riverside volunteer recruitment efforts will also target Bank of America employees in United Way of the Inland Valleys service region. In addition, CAP Riverside will host a media event on Friday, January 28 2011 for National EITC Awareness Day with elected officials, media, United Way staff and CAP staff. The event will be held at the Southwest Veterans' Business Resource Center located in Perris, California, and will showcase the CAP Riverside Mobile Unit for free on-site tax preparation.

PROPOSED SITES:

CAP Riverside has also received an IRS VITA grant and plans to open approximately 11 VITA sites throughout Riverside County. The proposed VITA sites include: Blythe Community Center, Casa Blanca Family Learning Center, Center for Employment Training (CET), Lake Elsinore Senior Center, Moreno Valley Wesleyan Christian Fellowship, Mount San Jacinto Community College – Main Campus, Southwest Veterans' Business Resource Center in Perris, and Riverside Community College – Main Campus. CAP Riverside will also operate special event mobile sites allowing the VITA program to reach remote rural areas within Riverside County.

BUDGET:

Type	Quantity	Unit Cost	Total
Printing – Flyers: double-sided, English/Spanish (includes coming soon, sites open, special events and surveys)	25,000	\$0.0688	\$ 1,720
Sub-total			\$1,720
Printing – Brochures tri-fold glossy	5,000	\$0.3257	\$ 1,629
Category sub-total			\$ 3,349
Newspaper – Print Advertisements			
Press Enterprise Banning Record Gazette Temecula Valley News Inland Empire Hispanic News Precinct Reporter Black Voice Perris Progress The Californian – Temecula Jurupa Valley News			
Category sub-total			\$ 6,651
Total			\$10,000

Term of Contract:

Agreement commences on January 1, 2011 through April 15, 2011.

This Memorandum of Understanding is agreed to by:

**Community Action Partnership of
Riverside County**

UNITED WAY OF THE INLAND VALLEYS

BY: _____
Signature

BY: _____
Signature

Kevin J. McCarthy

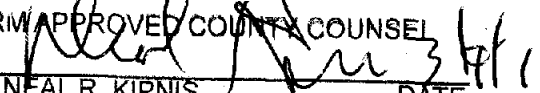
TITLE: _____

TITLE: **President/Chief Executive Officer**

DATE: _____

DATE: _____

Federal Tax ID #95-1742174

FORM APPROVED COUNTY COUNSEL
BY:  3/1/11
NEAL R. KIPNIS DATE