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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:**  
3/28/13

**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, 2013 through July 2, 2013;
2. Authorize the Executive Director of CAP Riverside to sign assurances, exhibits, and reports made under the Agreement; and
3. Authorize the Executive Director of CAP Riverside to administer the program.

  
\_\_\_\_\_  
Maria Y. Juarez, CCAP, Executive Director

**Continued (2 pages total)**

|                       |                               |           |                         |       |
|-----------------------|-------------------------------|-----------|-------------------------|-------|
| <b>FINANCIAL DATA</b> | Current F.Y. Total Cost:      | \$ 10,000 | In Current Year Budget: | Yes   |
|                       | Current F.Y. Net County Cost: | \$ 0      | Budget Adjustment:      | No    |
|                       | Annual Net County Cost:       | \$ 0      | For Fiscal Year:        | 12/13 |

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

**C.E.O. RECOMMENDATION:** APPROVE  
 BY:   
 Donna Shaw

**County Executive Office Signature**

ATTACHMENTS FILED WITH THE CLERK OF THE BOARD  
 FORM APPROVED COUNTY COUNSEL  
 BY:   
 NEAL R. KIPNIS  
 DATE: 3/28/13  
 Departmental Concurrence

Dept't Recomm:  Consent  Policy  
 Per Exec. Ofc:  Consent  Policy

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of Riverside County

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**PAGE:** 2 of 2

**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 14,158 income tax returns have been completed, generating over \$19.5 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 advertising and marketing materials.

**FINANCIAL IMPACT:** No County General Funds will be required.

**CONCURE/EXECUTE:**

MYJ/KS:jb

**2013**  
**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 who used VITA services
    - Total amount of EITC returned to clients of VITA services including all tax credits
  - 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 June 28, 2013.
  - 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; estimated total circulation is 373,236 households. The advertising will be in key local newspaper ads throughout Riverside County in English and in Spanish. 22,000 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 27 2012 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 will open 12 VITA sites throughout Riverside County, including the following: Arlanza Public Library, Blythe Community Center, Casa Blanca Library, Center for Employment Training (CET) Desert Hot Springs Family Resource Center, Glen Avon Library, Mount San Jacinto College, Riverside Community College, Southwest Veteran's Business Center, Moreno Valley Youth Opportunity Center, and the Lake Elsinore Senior Center.

**BUDGET:**  
**Grant Budget**

| Line Item  | Amount          |
|--|-----------------|
| 15 signs to advertise sites  | \$3,000         |
| Publicity-Media Ads:   | \$7,000         |
| Pennysaver(West County Zones/2 weeks=378,296 circulation             |                 |
| Time Warner/Charter Cable (West County/4 weeks) = 235,783 households |                 |
| Green Sheet (West County/2 weeks) = 140,000 circulations             |                 |
| <b>TOTAL</b>   | <b>\$10,000</b> |

**Term of Contract:**

Agreement commences on January 1, 2013 through July 2, 2013.

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: Neal R. Kipnis DATE: 3/20/13