

Berrien County Earned Income Tax Credit Coalition

MEMORANDUM OF UNDERSTANDING for Tax Year 2005

This Memorandum of Understanding is between the Berrien County EITC Coalition and _____(Fill in name of Coalition member).

By marking the box(es) listed below, I/my agency agrees to fulfill these commitments from the date of signing until May 31, 2006, with the potential for renewal after a review period upon expiration of this agreement.

Duties to be performed as a member of the Berrien County EITC Coalition (check each item to be undertaken)

OUTREACH:

- Make a presentation to area organizations regarding the benefits of the EITC initiative.
- Distribute posters or flyers on the Earned Income Tax Credit (EITC) ____ (#).
- Distribute paycheck stuffers to employers to distribute with W2s ____ (#).
- Display posters advertising the TY 2005 VITA sites in your workplace.
- Contact area social service agencies about the EITC program and ask them to provide information to their clients via flyers, newsletters, etc ____ (#).
- Sponsor a mailing to prior BCEC clients (approx. cost \$250) to promote service.
- Mail information regarding site dates and hours to ____ (#) clients of my agency.
- Adopt at least one neighborhood to focus on (including door-to-door outreach) ensuring the messages from the task force are received.
List the selected street(s): _____
- Obtain/fund outdoor signage to advertise site location and dates (approx. \$500 per sign for three months – 2 signs needed) ____ #

VITA SITES

- Agree to host a VITA site for the 2005 tax year. (site approval will be finalized by Coalition)
- Recruit _____ (#) volunteers for VITA.
- Provide training space for _____ (#) VITA/IRS volunteer trainings with computers / without computers (circle one).
- Assist with tax law and/or computer training for volunteers ____ (# sessions/hours).
- Work as a site supervisor for ____ (#) VITA filing dates (includes volunteer confirmation, set-up and take-down, record keeping and onsite supervision during filing).
- Train and work as an efiler (includes working rejected returns) for ____ (#) filing dates.
- Arrange to provide (order and deliver) volunteer meals for the following VITA filing dates:
 - Up to 7 Saturdays/BH (breakfast and lunch) (____# willing to handle)
 - Up to 4 Sundays/Niles (hearty snacks) (____# willing to handle)
 - Up to 11 Mondays/BH (dinner) (____# willing to handle)

ASSET BUILDING/FINANCIAL EDUCATION

- Conduct _____ (#) financial education trainings. For participants needing:
 - Access to financial institutions (the “unbanked”)
 - Credit repair
 - Homeownership training
 - Other (list): _____
- Make referrals to local social service organizations and financial education trainings based on client intake answers.

ADMINISTRATION

- I will/my agency will serve as:
 - EITC Campaign Coordinator
 - Tax Site Coordinator
 - Volunteer Recruiter/Manager
 - Fundraising and Resources Coordinator
 - Community Outreach and Marketing Coordinator
 - Asset Building Program Coordinator
 - Technology Coordinator

- I will/my agency will assist the coordinator for:
 - EITC Campaign
 - Tax Site
 - Volunteer Recruitment
 - Fundraising and Resources
 - Community Outreach and Marketing
 - Asset Building Program
 - Technology

Bring at least one additional organization to our monthly coalition meeting for information, awareness and possible participation.

Commit the following resources toward this EITC effort:

- Volunteers _____ (#)
- Office supplies _____
(list type and quantity) _____
- Paper/toner _____
- Make copies _____ (#)
- Computers _____ (#)
- Printers _____ (#)
- Office Space _____
- Onsite IT Assistance _____
- Internet Access _____
- Funds _____ (list \$ amount)

OTHER:

- _____
- _____

Coalition Member Name & Organization:

(Printed)

Signature _____ **Date**

Signature of Coalition Chair _____ **Date**