Earn It! Keep It! $ave It!

Site Coordinator Agreement

THIS AGREEMENT, signed and entered into this _____ day of __________ , 20____, by and between United Way of the Wine Country, as representative of the Earn It! Keep It! Save It! (EKS) Coalition, and ___________________, Site Coordinator, shall define the shared responsibilities of coordinating the Volunteer Income Tax Assistance program here in ________________ County. By signing below, the two parties agree to perform their respective duties as described below.

UNITED WAY OF THE WINE COUNTRY AS REPRESENTATIVE OF THE EKS COALITION AGREES:

A. To provide Site Coordinator with training and resources to define duties and responsibilities:

1. Face-to-Face training to be provided by IRS SPEC Relationship Manager, Kimberley Brown in December. **This training is mandatory for all site coordinators**. We highly recommended that ALL Site Coordinators attend this training each year for review and current updates to Site Coordinator duties.
2. Online tax training is available through Link and Learn for those who have attended face-to-face training in the past and are unable to attend the face-to-face training.
3. A *Site Coordinator Reference Binder* will be provided to each Site Coordinator at the Site Coordinator training. This binder contains all required forms and documents as well as important site coordinator procedures and responsibilities. ***Note: Those unable to attend the training can make other arrangements to acquire this binder from the United Way office in Santa Rosa.***
4. The Earn It! Keep It! Save It! Coalition Coordinator will be available by phone and email to advise Site Coordinators as needed and requested.
5. Provide important updates via IRS-issued Quality Site Requirement Alerts and Volunteer Alerts as well as coalition-issued updates and procedural reminders. These updates will be sent via email and discussed at Coalition Meetings.

THE SITE COORDINATOR WHOSE SIGNATURE IS BELOW AGREES:

A. To attend face-to-face training in December or to make other arrangements with the EKS Coordinator.

B. To check email regularly during tax season, being sure to read all EKS and IRS email updates in a timely manner.

C. To abide by standard site procedures, as defined in the IRS Quality Site Requirements (QSRs), the site coordinator training, and the *Site Coordinator Reference Binder.* Specifically:

1. Maintain client and volunteer confidentiality as described in the 10 QSRs, any QSRAs distributed throughout the season, and Publication 4299.
2. Set up TaxSlayer defaults and transmit returns within 24 hours of preparation. Address any rejected returns within 48 hours of original transmission. Contact the EKS Coordinator or your IRS SPEC Relationship Manager if you have questions about a rejected return or the return rejects a second time.
3. Make sure volunteers do not prepare returns that are out of scope for their certification level. Assure that clients are served whenever possible or directed to a site that can serve them when an appropriately certified volunteer is not available at your site.
4. Make sure clients are required to provide appropriate documentation before the return is filed.
5. Assist with Form W-7 and ITIN applications if appropriate at your site. Be sure client is directed to mail original identity documents along with the return and application.
6. Perform a Quality Review on every return prepared at the site. Use Section VIII of Form 13614-C.
7. Provide Volunteer Orientation to all volunteers serving at the site. Ensure that each volunteer is trained and comfortable in his or her responsibilities. Orientation Outlines are provided in the Site Coordinator Reference Binder.
8. Attend Coalition Meetings whenever possible. Check in with your Site Contact for important coalition updates if unable to attend the meeting yourself.

9. Provide Site Coordination at one or several off-site Ad Hoc Events sponsored by your site (as relevant and requested by site).
10. Keep contact with volunteers regarding shift scheduling; contact volunteers in advance if appointments are few and volunteers will not be needed during the shift.
11. Provide volunteers with a way to contact you directly when unable to make their scheduled shift. Making arrangements with the front desk at the agency to take such messages could be an alternative solution if unable to provide a personal phone number.
12. Contact subs if needed to fill in for an absent volunteer.
13. Contact clients 24-48 hours prior to their scheduled appointment to remind them of the appointment and the required documents to bring.

D. To keep site organized and ensure proper flow of client appointments by way of the following requirements:

1. Arrive 30 minutes early to set up site and prepare for volunteer and client arrival (e.g. turning on computers, setting up client intake area, setting out volunteer and client sign-in sheets, photocopying forms and documents as needed, etc.)
2. Keep any volunteer and client documents containing personal information (names, phone numbers, etc.) in a secure and locked location when not in use.
3. Distribute Quality Site Requirement Alerts (QSRAs) and Volunteer Tax Alerts to all site volunteers when received from IRS or EKS Coordinator. Keep printed copies in the Site Coordinator Reference Binder.
4. Keep copies of IRS Publications 4012, 17, and 4299 available at the site at all times.
5. Post Publication 4053, *Your Civil Rights are Protected* where it will be visible to all VITA clients.
6. Use Form 13614-C, *Intake/Interview and Quality Review Sheet* and Publication 730, *Important Tax Records* (envelope) for every return prepared.
7. Insure that clients are offered and financial education resource information at the site. Request additional materials from EKS Coordinator as needed.
8. Keep track of how many IRS forms are available at the site. Contact IRS SPEC Relationship Manager, Kimberley Brown in advance if additional IRS materials are needed (intake forms, envelopes, etc.). If the need is urgent, please contact Kelsey Cupples at kelsey.cupples@unitedwaywinecountry.org or (707) 528-4485 X122.

E. To complete the following site close-out requirements upon completion of tax season:

1. Compile and print all TaxSlayer acknowledgements and submit to IRS SPEC Relationship Manager as requested no later than the last day of April.
2. Gather the following materials and return to EKS Coordinator:
    a. Site Coordinator Reference Binder
    b. Final updates to Form 13206
    c. Completed Client Surveys
    d. Completed Volunteer Sign-In Sheets and Site Coordinator Time Sheets
    e. Completed Client Sign-In Sheets or client data-tracking sheets
    f. Completed Form W-9 (if relevant)
    g. Mileage Form (if relevant)
3. Attend EKS Site Close-Out Meeting at your site or UWWC.

BY SIGNING BELOW the two parties indicate their understanding and agreement to the terms defined in detail herein.

UNITED WAY OF THE WINE COUNTRY:

Signature | Date

Suzanne Yeomans

Print Name

Financial Stability Program Officer (EKS Coordinator)

Title

SITE COORDINATOR:

Signature | Date

Print Name

Title

Please know that we could never do the work we do together as a coalition if it wasn't for the skill, heart, and effort you give to our EKS Program. We're here for you in the same way you are there for us!