

# **VITA U** **CONFERENCE** **2026**



**May 18<sup>th</sup> - 20<sup>th</sup>, 2026**  
**Hyatt Place - Downtown Athens, GA**





# Welcome to **VITA U Conference 2026**

Welcome to the VITA U Annual Conference in Athens, Georgia. We are delighted to bring together faculty, students, practitioners, and community partners who share a commitment to advancing tax-based service learning through the Volunteer Income Tax Assistance (VITA), Tax Counseling for the Elderly (TCE), and Low Income Taxpayer Clinics (LITC) programs.

VITA U provides a forum for sharing research, scholarship, teaching practices, program models, and community impact assessments related to university- and college-affiliated tax service programs. While VITA has long been rooted in accounting and law, its reach continues to expand across disciplines such as financial planning, cooperative extension, social work, and other service-oriented fields together with TCE and LITC.

This conference is a welcoming space to exchange ideas, highlight student and faculty research, strengthen professional connections, and explore how VITA, TCE, and LITC programs support student learning, civic engagement, and community well-being.

Thank you for joining us. We look forward to a meaningful, inspiring, and impactful conference, and to keep GROWING TOGETHER!

**Warmest regards,**

**Dean Anisa M. Zvonkovic, Ph.D.**

Dean and Georgia Athletic Association Professor  
College of Family and Consumer Sciences  
University of Georgia

**Dr. Swarn Chatterjee, Ph.D.**

Department Head and  
Bluerock Professor of Financial Planning  
Department of Financial Planning,  
Housing and Consumer Economics  
University of Georgia

## VITA U 2026 Conference Committee Members

Dr. Thomas Madison, CPA – St. Mary's University

Prof. Li Luo, CPA – Hartwick College

Prof. Jennifer Kreiser – University of Wyoming

Mr. Kaushal Mahaseth, LL.M. – University of Georgia

Ms. Megan Bikus – Internal Revenue Service



# DAY 1 <sup>▪</sup> MONDAY, MAY 18, 2026

TIME	LOCATION	SESSION	DETAILS
3:00-4:00 PM	2 <sup>ND</sup> FLOOR	Registration	
4:00-4:30 PM	2 <sup>ND</sup> FLOOR	Welcome	Dean Zvonkovic & Dr. Chatterjee, UGA
4:30-5:00 PM	2 <sup>ND</sup> FLOOR	Funding for the VITA Program & Q&A	Suzanne Griffeth, University of Georgia
5:00-6:00 PM	2 <sup>ND</sup> FLOOR		Dinner on your own afterward

# DAY 2 <sup>▪</sup> TUESDAY, MAY 19, 2026

TIME	LOCATION / TRACK	PRESENTATION	SPEAKER(S)
7:00-8:00 AM	2 <sup>ND</sup> Floor	Breakfast	
8:00-8:45 AM	Ballroom	Opening Remarks	<b>Sharyn Fisk,</b> California State Polytechnic University, Pomona; former IRS Director, Office of Professional Responsibility
9:00-10:30 AM	Ballroom - Breakout I	Innovating University-Based VITA Programs: A Panel Session on Virtual Service Delivery Using Get Your Refund	<b>Dr. Jennifer D. Thayer,</b> <b>Landry Hampton,</b> <b>Massieullah Mahmood,</b> <b>William "JR" Martin,</b> Austin Peay State University
9:00-10:30 AM	Ballroom - Breakout I	Leveraging VITA-Athletic Department Partnerships to Support Student Athletes	<b>Jennifer Kreiser,</b> <b>Nicole Choi,</b> University of Wyoming; <b>Wil Golden/Bryce Carmen,</b> University of Georgia
9:00-10:30 AM	Room 3 - Breakout II	Framing Effects of Tax Legislation	<b>Dr. Lisa Nash,</b> University of North Georgia; <b>Dr. Amanda Thompson-Abbott,</b> Marshall University; <b>Connie Augustine,</b> Youngstown State University
9:00-10:30 AM	Room 3 - Breakout II	When the Economy Booms, Who Still Uses VITA?	<b>Qiongyao Zhang,</b> <b>Ira Abdullah,</b> Robert Morris University
9:00-10:30 AM	Room 3 - Breakout II	How Physical and Mental Health Shape EITC Filing During COVID-19	<b>Juan S. Sandoval,</b> University of Georgia
10:30-10:45 AM		Break	

TIME	LOCATION / TRACK	PRESENTATION	SPEAKER(S)
10:45 AM–12:15 PM	Ballroom - Breakout I	Improving Efficiency and Accountability in University-Affiliated VITA Programs Through Real-Time Return Tracking Systems	<b>Dr. Stephanie Yates,</b> The University of Alabama at Birmingham
10:45 AM–12:15 PM	Ballroom - Breakout I	Assisting Immigrant Taxpayers in a Shifting Policy Landscape: Evidence-Informed Best Practices from the VITA Field	<b>E. Darren Liddell,</b> Vesta Prosperity
10:45 AM–12:15 PM	Room 3 - Breakout II	Academic and Professional Impact of Student Participation in the VITA Program: A Qualitative Study with Former Student Volunteers	<b>Monserrate Cardoza,</b> University of Puerto Rico–Mayagüez; <b>Barbara Romero,</b> University of Puerto Rico–Cayey; <b>Yanira Morales,</b> IRS SPEC Senior Relationship Management
10:45 AM–12:15 PM	Room 3 - Breakout II	The VITA Grant Program	<b>Sharon Alley,</b> Chief, Grants Management Office
12:30–2:00 PM		Lunch Speech	<b>Richard Rodriguez,</b> SPEC Director
2:15–3:45 PM	Ballroom - Breakout I	From Local to Networked: Designing Virtual VITA Collaboration Across Institutions	<b>Li Luo,</b> Hartwick College <b>Thomas Godwin,</b> Cornell University <b>Ginger DeLatte, CPA,</b> Texas A&M University – Corpus Christi
2:15–3:45 PM	Ballroom - Breakout I	The LITC Grant Program	<b>William Bard,</b> IRS LITC Program Analyst
2:15–3:45 PM	Room 3 - Concurrent Session	Q&A with SPEC	SPEC Team
2:15–3:45 PM	Butterfly Room - Concurrent Session	Q&A on VITA Grants	<b>Sharon Alley,</b> Chief, Grants Management Office

## DAY 3<sup>1</sup> WEDNESDAY, MAY 20, 2026

TIME	LOCATION / TRACK	PRESENTATION	SPEAKER(S)
7:00–8:00 AM		Breakfast	
8:15–9:45 AM	Ballroom - Breakout I	VITA: Building Bridges, Developing Leaders	<b>Lena Yang,</b> <b>Sara Flynn,</b> <b>Anh Hua,</b> San Francisco State University; <b>Lindsay Rojas,</b> United Way Bay Area

TIME	LOCATION / TRACK	PRESENTATION	SPEAKER(S)
8:15–9:45 AM	Ballroom - Breakout II	Partnering VITA with Our Local College and University	<b>Cary Gray,</b> Allan Hancock College United Way of NSBC
8:15–9:45 AM	Room 3 - Breakout II	Managing a Multi-disciplinary, Multi-departmental VITA Program	<b>Dave Jordan,</b> <b>Michael Bedell,</b> Northeastern Illinois University
8:15–9:45 AM	Room 3 - Breakout II	High School VITA	<b>Hurley Cavacas, BROC</b> Mt. St. Joseph Academy
9:45–10:00 AM		Break	
10:00–11:30 AM	Ballroom - Breakout I	VITA Mentorship Program 2026 Research Plan: Encouraging Confident Leaders	<b>Roland Armstrong,</b> <b>Kaylan Ma,</b> University of Oregon
10:00–11:30 AM	Ballroom - Breakout I	Concurrent Session Q&A – LITC Grants	<b>William Bard,</b> IRS LITC Program Analyst
10:00–11:30 AM	Room 3 - Breakout II	Ethics, Professional Responsibility, and Participation in the Volunteer Income Tax Assistance (VITA) Program	<b>Robin L. Guerrero,</b> <b>Michael Forrest,</b> <b>JT Norris,</b> <b>Baio Ma,</b> University of the Incarnate Word
10:00–11:30 AM	Room 3 - Breakout II	Examining the Volunteer Income Tax Assistance (VITA) Program: Navigating Challenges and Embracing	<b>Ran Li,</b> Texas A&M Central Texas; <b>Elizabeth S. Quaye,</b> City University of New York; <b>Daniel J. Gaydon,</b> <b>Daniel P. Mahoney,</b> University of Scranton
11:30 AM–12:00 PM	Butterfly Room	Research Networking	
11:30 AM–12:00 PM	Butterfly Room	Future VITA U Planning & Hosting	
12:00–1:30 PM	Butterfly Room	Concluding Remarks & Lunch	<b>William Bard,</b> IRS LITC Program Analyst



# Thank you to our Sponsors

---



## Financial Planning, Housing and Consumer Economics

*College of Family and Consumer Sciences*

**UNIVERSITY OF GEORGIA**



# Thank you to our Committee Members

---

ST. MARY'S  
UNIVERSITY



HARTWICK  
COLLEGE

est. 1797



UNIVERSITY  
OF WYOMING

College of  
Business

---

If you or your institution wish to become part of the  
VITA U Conference, please reach out to any of us below:

Dr. Tom Madison - [tmadison@stmarytx.edu](mailto:tmadison@stmarytx.edu)  
Prof. Li Luo - [luol2@hartwick.edu](mailto:luol2@hartwick.edu)  
Prof. Jennifer Kreiser - [jkreiser@uwyo.edu](mailto:jkreiser@uwyo.edu)  
Megan Bikus - [megan.bikus@irs.gov](mailto:megan.bikus@irs.gov)  
Kaushal Mahaseth - [mahaseth@uga.edu](mailto:mahaseth@uga.edu)

