



VITA U
Conference 2025

**Universidad de Puerto Rico,
Recinto de Río Piedras**

Welcome to

VITA U 2025

Conference

This conference aims to provide a space and forum to share scholarship stemming from university-affiliated Volunteer Income Tax Assistance (VITA) activities. VITA activities have been found on college and university campuses for decades. The primary disciplines associated with university-affiliated VITA sites have been accounting and law. Yet, in the past two decades, other fields, such as financial planning, cooperative extension, social work, and other professional and service-oriented campus units, have begun offering VITA services.

This conference is a welcoming space that brings together faculty from across disciplines who share a passion for VITA. We want to engage with others who have similar interests, whether that be on student-related learning outcomes, professional development, and civic engagement or the impact of VITA-based service learning on clients and the community. Regardless of the perspective from which VITA-focused scholarship is conducted, we want to hear your findings. VITA U is also an excellent forum for student research to be presented.

VITA U Conference 2026 is currently planned to be held in:

May 2026 - University of Georgia, Athens, GA

Thanks for coming!

With gratitude,
VITA U Conference Committee

Dr. Marisela Santiago-Castro - University of Puerto Rico - Rio Piedras

Dr. Lance Palmer, CPA - University of Georgia

Dr. Thomas Madison - St. Mary's University

Li Luo, CPA - Hartwick University

Maria Keyser, SPEC Growth Territory Manager



Welcome to

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**Bienvenidos (Welcome)
to the VITA U 2025 Annual Conference!**

We are thrilled to welcome you to this year's VITA U Annual Conference in San Juan, Puerto Rico. Over the next few days, we'll explore groundbreaking ideas, share transformative experiences, and build lasting connections that will shape the future of our VITA community and beyond.

Whether you are here to learn, lead, or be inspired, we are honored to have you with us. Let's make VITA U 2025 a celebration of knowledge, collaboration, and progress.

Here's to a memorable and impactful conference!

*Warm regards,
VITA U 2025 Conference Local Team*

*Dr. Marisela Santiago-Castro
Prof. Carolina Cubero-Rivera, CPA, CISA
Dr. Alejandro Méndez-Ramos, CPA
Dr. Rosa Reyes-Borges, CPA*

Schedule at a Glance

<i>DAY 1</i>		Wednesday, May 21	Museum of History, Anthropology and Art of Río Piedras		
1:00 PM - 2:00 PM		Registration opens			
2:00 PM - 3:00 PM		Walking tour of campus Drs. Robin Planas & Jorge Lizardi, School of Architecture UPR-RP			
3:00 PM - 4:15 PM		Welcome Remarks & Reception Dr. Angélica Varela-Llavona, Provost UPR - RP Dr. Rafael Marrero-Díaz, Dean Business School Dr. Marisela Santiago-Castro, UPR - RP Dr. Lance Palmer, University of Georgia			
4:15 PM - 4:30 PM		Walk to Business School Building - Ana María O'Neill (AMO) Room 403			
4:30 PM - 5:30 PM		Opening session: Puerto Rico VITA Milestones and the Impact on the Community Gloria Gelabert EA, CPA Marisa Diaz, Prof. Imer Y. Martin & Prof. Yanira E. Morales Universities with VITA in Puerto Rico & EduVITA			
<i>DAY 2</i>	Thursday, May 22	Centro para Puerto Rico	<i>DAY 3</i>	Friday, May 23	Centro para Puerto Rico
8:00 AM - 9:15 AM		Registration & Breakfast - Lobby		8:00 AM - 9:00 AM - Registration & Breakfast - Lobby	
9:30 AM - 10:30 AM		Keynote Address - Auditorium Thomas Godwin, CPA		9:00 AM - 10:00 AM - Concurrent Sessions A Panel - Auditorium Educational Impact - Room	
10:30 AM - 10:50 AM		Break - Lobby		10:00 AM - 10:30 AM - SPEC Presentation - Auditorium Director Gwen Garren	
10:50 AM - 12:20 PM		Concurrent Sessions 1 VITA & Community Engagement - Auditorium Educational and Motivational Insights - Room		10:30 AM - 10:50 AM - Break - Lobby	
12:20 PM - 1:30 PM		Lunch - Lobby		10:50 AM - 11:50 AM - Concurrent Sessions B Panel - Auditorium Specialized Topics - Room	
1:30 PM - 3:00 PM		Concurrent Sessions 2 VITA & Collaboration - Auditorium VITA & Behavioral Insights - Room		11:50 AM - 1:00 PM - Lunch - Lobby	
3:00 PM - 3:20 PM		Break - Lobby			
3:20 PM - 4:20 PM		Concurrent Sessions 3 VITA & Financial Capability - Auditorium VITA & Impact Studies - Room			



DAY 2 - Detailed Program

THURSDAY

Concurrent Sessions 1

10:50 AM - 12:20 PM

Session 1.1 - VITA Program & Community Engagement

Auditorium

Reaching Rural Communities Through Cooperative Extension.

Jared Hawkins - Utah State University
Jovana Sisovic - Westminster University

A New Era for VITA: How Franklin University's Hybrid Model Strengthened Community Engagement and Student Learning.

Ian Chang - Columbus Academy
Annette Hoelzer - Franklin University
Martina Peng - Franklin University
Alyncia Brown - Franklin University

Improving Tax Literacy and Compliance: Establishing a University-Based Financial Literacy Center for Specialized Nonresident Tax Assistance.

Davaajargal Dorjsuren - Campbellsville University

Session 1.2 - Educational & Motivational Insights

Conference Room

Reconciling Academic Learning and Community Service Ethical Challenges in a College VITA Program.

Li Luo - Hartwick College

Exploring How Service-Learning as Experiential Education fosters Essential Life Skills, Academic Achievement, and Civic Responsibility among High School Students.

Diahann Holder - Sheridan College

Students' Motivation, Perceptions and Reflections on VITA Program: An Interdisciplinary Focus.

Elizabeth Acquah - North Carolina A&T State University

Concurrent Sessions 2

1:30 PM - 3:20 PM

Session 2.1 - VITA Program & Collaboration

Auditorium

Establishing an Interdisciplinary Volunteer Income Tax Assistance (VITA) Program at North Carolina A&T State University: Process, Challenges, and Rewards

Devona Dixon - North Carolina A&T State University
Valerie Giddings - North Carolina A&T State University
Sean Johnson - North Carolina A&T State University

Benefits of Implementing VITA for Accounting Departments and Students

Stephan Davenport - University of Tennessee at Chattanooga
Jamie Connors - Dalton State College

Collaborative Success: Dallas College and Sharing Life's Impact on the VITA Program

Stephanie Harris - Dallas College
Wendy Garner - Dallas College
Carlos Cruz - Dallas College



DAY 2 - Detailed Program

THURSDAY

Concurrent Sessions 2

1:30 PM - 3:20 PM

Session 2.2 - VITA Program & Behavioral Insights

Conference Room

Behavioral Insights into VITA Utilization: Examining Client Acquisition and Retention.

Kiana Drummond - University of Georgia

VITA Service-Learning Experience, Social Norms, Public Service Motivation, and Prosocial Behaviors.

Juan Sandoval - University of Georgia

Cultural Dimensions and its Influence on Student Volunteers' Experiences in the VITA Program.

Robin L. Guerrero - University of the Incarnate Word

J.T. Norris - University of the Incarnate Word

Concurrent Sessions 3

3:20 PM - 4:20 PM

Session 3.1 - VITA Program & Financial Capability

Auditorium

The Volunteer Income Tax Assistance (VITA) Program: a Vehicle for Promoting Financial Capability-Building among VITA Clients

Tom Madison - St. Mary's University

Improving Financial Literacy Among High School Students

David Mannaioni - College for Financial Planning

Session 2.1 - VITA Program & Impact Studies

Conference Room

Does the Vita program increase student success and belonging at the college as well as affect the surrounding communities positively?

Jamie Connors - Dalton State College

Examining barriers qualifying taxpayers face in filing returns to Internal Revenue Services (IRS) and claiming the Earned Income Tax Credit (EITC).

Catherine Asiimwe - University of Georgia



FRIDAY

Concurrent Sessions A

9:00 AM - 10:00 AM

Session A1 - Panel

Auditorium

Collaboration between VITA and LITC

Nichole Choi - University of Wyoming
Jennifer Kreiser - University of Wyoming
Jovana Sisovic - Westminster University

Session A2 - Educational Impact

Conference Room

Perspectives and Experiences of High School Teachers on the VITA Program Implementation in Puerto Rico: An Exploratory Study

Barbara Romero - University of Puerto Rico, Cayey
Montserrat Cardoza - University of Puerto Rico, Mayagüez
David González - University of Puerto Rico, Mayagüez
Yanira Morales - Universities with VITA in Puerto Rico & EduVITA

Utilizing University VITA Tax Filing Services to Increase Retention and Close Equity Gaps for Student Taxpayers

Beth Hunsaker - University of Utah

Concurrent Sessions B

10:50 AM - 11:50 AM

Session B1 - Panel

Auditorium

Incorporating VITA into Business Schools to Comply with AACSB Standards: The Case of University of Puerto Rico, Río Piedras

Aníbal Báez-Díaz - University of Puerto Rico, Río Piedras
Arleen Hernández-Díaz - University of Puerto Rico, Río Piedras
Marisela Santiago-Castro - University of Puerto Rico, Río Piedras

Session B2 - Specialized Topics

Conference Room

Imagine a World Where All Your Financial Worries are Gone” - A Test of AI-backed Solution-Focused Brief Therapy (SFBT) at VITA Sites

Xiaoyuan Sun - University of Georgia
Aman Sunder - College for Financial Planning
Lance Palmer - University of Georgia

NIL Income for Student-Athletes

Lindsey Korson - Boise State University

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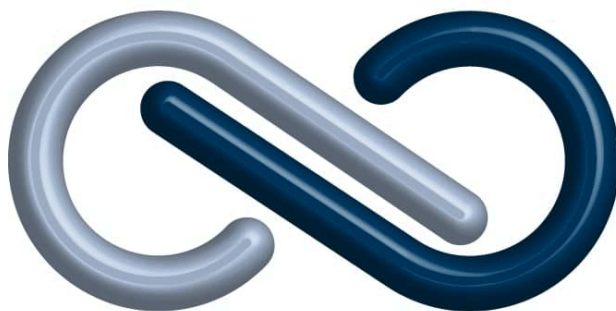
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