



VitaU

Conference 2023

University of Puerto Rico - Mayagüez
College of Business Administration

VITA U 2023

Welcome to the VITA U 2023 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 brings together faculty from across disciplines who share a passion for VITA and want to engage with others with 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 offered by VITA. 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 conferences are currently planned for the following years and locations:

May 2024 – University of Georgia, Athens, GA

May 2025 – University of Puerto Rico – Mayagüez, Mayagüez, PR

May 2026 – University of Georgia, Athens, GA (open)

Beginning in 2026, conference locations in even-numbered years may rotate to other campuses. As we embark on this journey to create an interdisciplinary space for university-affiliated VITA scholarship, we hope you will volunteer your time and efforts to make this conference successful. We are grateful for your research submissions and presentations. We are also deeply grateful for the UPRM faculty who have given of their time to make the conference a reality!

We look forward to engaging with you over the next few days as we gain new perspectives on VITA-based service learning. Enjoy the conference, Mayagüez, and Puerto Rico during your stay!

With gratitude,

VITA U Conference Committee

Dr. Lance Palmer, CPA - University of Georgia

Dr. Luz I. Gracia-Morales, CPA- UPR - Mayagüez Campus

Dr. David González-López, CPA- UPR - Mayagüez Campus

Prof. Jaime Sepúlveda, CPA- UPR - Mayagüez Campus

Prof. Yanira Morales -Senior Relationship Management



SCHEDULE AT A GLANCE

Day 1 Tuesday, May 23

Conference Registration 8:00 am - 9:00 am*

*Continental breakfast

City Tour 9:00 am - 12:15 am

Lunch 12:15 - 1:15 pm

Plenary Session 1:30 pm - 2:50 pm **Room: AE 242**

Empowering Tomorrow's Leaders: High School Students Making a Difference Through the VITA Program

Diahann M. Holder

Sheridan Technical College and High School Business Students

Incorporating VITA into the Accounting Program at Aurea Quiles High School - Guánica, Puerto Rico

Víctor McDougall-Rivera

Day 2 Wednesday, May 24

Registration 8:30 am - 9:30 am*

*Continental breakfast

Plenary Session: 9:30 am - 10:45 am

Panel Sessions A1- A2: 10:50 am - 12:10 m

Lunch 12:15 - 1:15 pm

Panel Sessions B1- B2 : 1:30 pm - 2:50 pm

Panel Sessions C1- C2: 3:00 pm - 4:20 pm

Day 3 Thursday, May 25

Continental breakfast 8:30 am - 9:30 am

Panel Sessions D1: 9:30 am - 10:50 am

Closing Plenary Session: 10:50 am - 12:30 pm

Lunch 12:30 - 1:15 pm

Day 2 - Wednesday

Plenary Session

Room: AE 242

9:30 am - 10:45 am

Panel Session A1

Room: AE 242

10:50 a.m - 12:10 pm

Title & Presenters:

Transitioning from face-to-face to online training during COVID-19 limitations

Yanira Morales, Gloria Gelabert, Marisa Díaz-Méndez, and Ileana López
Universities with VITA in Puerto Rico

Integrating Service Learning and Income Tax Preparation: An African American Perspective

Marlissa Phillips, Crystal Hudson, John Young, and Tonya Smalls
Clark Atlanta University

FSA Implementation Study

Lisa Nash

University of North Georgia

Panel Session A2

Room: AE 203

10:50 a.m - 12:10 pm

Title & Presenters:

The Current State of VITA at Colleges and Universities

Danah Jeong, Aman Sunder, Heejae Lee, Joan Koonce, Ruchika Bansal, and Lance Palmer
University of Georgia

Does the Utility Value of Experimental Learning Persist? Evidence from VITA Program Experience

R. Thomas Godwin, Purdue University, Indiana
Jason W. Stanfield, Ball State University, Indiana

Why University-Affiliated VITA Programs Discontinue

Danah Jeong, Aman Sunder, Heejae Lee, Ruchika Bansal, and Lance Palmer

Day 2 - Wednesday

Panel Session B1

Room: AE 242

1:30 pm - 2:50 pm

Title & Presenters:

Current and former student volunteers' reasons for volunteering and effect VITA has had on their careers

Mary B. Scott

Christopher Newport University, Virginia

VITA & Community Engagement

Luz I. Gracia-Morales and David González-López

University of Puerto Rico at Mayagüez

VITA Improvements on TAP

Rita W. Green

Tennessee TAP Representative

University of Memphis

Panel Session B2

Room: AE 203

1:30 pm - 2:50 pm

Title & Presenters:

Are VITA/TCE Sites Located in the Highest Need Areas?

Danah Jeong, Aman Sunder, and Lance Palmer

University of Georgia

VITA Program Models: What Did We Learn During the Pandemic?

R. Thomas Godwin, Purdue University, Indiana

Jason W. Stanfield, Ball State University, Indiana

Maximizing Education Benefits at VITA Sites

Robin Boneck, Jonathan Lee, and Zhuoli Axelton

Southern Utah University

University of Wisconsin- Green Bay

Day 2 - Wednesday

Panel Session C1

Room: AE 242

3:00 pm - 4:20 pm

Title & Presenters:

Engaging Graduate Students in Social Work and Nonprofit Leadership in Delivering VITA Services for Low-Resourced Communities

Anthony J. Mallon, Taylor Nicholson, Michaela Mcelroy, Alexandria Maddox, Addie Bone, Drew Lock, and Natasha Hernández

University of Georgia

United Way Puerto Rico

Improving Low-income Families' SNAP Access through VITA

Baorong Guo and Annah Bender

University of Missouri-St. Louis

Panel Session C2

Room: AE 203

3:00 pm - 4:20 pm

Title & Presenters:

What Happens When a VITA Site is Moved from the Community to a College Campus?

Yun Lin, Lance Palmer, Wil Golden, and Jessica Weaver

University of Georgia

Fostering Financial Capability within and through a VITA Program: A Proposed South-Central Texas Hispanic Community Study and Analysis to Inform and Build Financial Capability

Tom Madison, Valerie Ballesteros, and Prasad Padmanabha

St. Mary's University of San Antonio, Texas

Day 3 - Thursday

Panel Session D1

Room: AE 242

9:30 am - 10:50 am

Title & Presenters:

Factors Associated with the Probability of VITA Discontinuation at University Programs in One to Three Years

Danah Jeong, Aman Sunder, Heejae Lee, and Lance Palmer
University of Georgia

VITA, Integrating and entire community

Carlos Traverso and Lloyd Camacho
Inter-American University at Aguadilla

Best Practice-IRS, CPAs and VITA

Luz I. Gracia-Morales and David González-López
University of Puerto Rico at Mayagüez

Closing Plenary Session: 10:50 am - 12:30 pm

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Centro VITA RUM
Alianza del Oeste





Keynote Speakers



David Alito is the SPEC area Director in Atlanta. In this role, he is responsible for maintaining and establishing partnerships with key stakeholders in 16 states along the East Coast, plus Puerto Rico and the District of Columbia. The focus is on assisting taxpayers in satisfying their tax responsibilities through the Volunteer Income Tax Assistance and Tax Counseling for the Elderly programs.

Prior to this position, David was the Wage and Investment Division (W&I) Deputy Commissioner. In this role, he assisted the W&I Commissioner in overseeing all W&I organizations. W&I has approximately 37,000 employees and is responsible for the provision of customer service (including on-site and telephone assistance) and the processing of tax returns for all United States taxpayers, as well as compliance activities pre-refund for W&I taxpayers.

David began his IRS Career in 1987 as a tax examiner in the Atlanta Service Center. Throughout his career, he has held positions in a variety of Compliance functions, including Director, Filing and Payment Compliance and Director, Collection. And, in the W&I Division, he has served as the Director, Reporting Compliance and the Director, Compliance.

A native of Binghamton, NY, David studied at the University of Florida in Gainesville, where he earned a bachelor's degree in political science. David is a graduate of the May 2003 IRS Executive Development Program.

Maryann Enciso is the Director for Stakeholder Partnerships, Education and Communication "SPEC" in the Wage and Investment Division. In this role, she is responsible for the delivery of tax education, free return preparation services and financial education to our nation's low-income, elderly, disabled, Native American, non-English speaking and rural taxpayers. Prior to this position, Maryann served as the Field Assistance Area 4 director.

Maryann received her master's degree in Business Administration and her Bachelor of Science degree in Workforce Education and training from Southern Illinois University. She received her Associates Degree from the Community College of the Air Force in Human Resource Management. She retired from the California Air National Guard as a Chief Master Sergeant (E-9) as a Senior Human Resource Advisor. Prior to that, she served 9 years as a First Sergeant responsible for numerous deployments and taking care of the enlisted personnel on the base. Maryann is a graduate of the 2018 Senior Executive Service Program.

Maryann's career began with the IRS in 1992 as a GS-4 Taxpayer Service Representative. She was promoted to Field Collection in 1994 and joined the management ranks in 2004. She was selected as an SB/SE Field Collection Territory Manager in 2009. Prior to joining IRS, Maryann served 10 years on active duty with the United States Marine Corps.

Maryann and her husband, Tony, have three children and two grandchildren. She enjoys spending time with her family, home improvement projects, running/hiking, and serving the veterans in her local community.



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