

University of Georgia, Athens
College of Family and Consumer Sciences

ITAU
Conference 2024



VITA U 2024

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 conferences are currently planned for the following years and locations:

May 2025- **University of Puerto Rico- Rio Piedras, San Juan, PR**

May 2026- **University of Georgia, Athens, GA (open)**

As we embark on this journey to create an interdisciplinary space for university-affiliated **VITA** scholarship, we deeply value your contributions. Your research submissions and presentations are the backbone of this conference. We are also immensely grateful to IRS SPEC personnel, university faculty, and staff who have dedicated their time to making the conference a reality. We hope you will consider volunteering your time and efforts and even hosting the conference to make this endeavor successful. 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, Athens, and Georgia 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

Schedule at a Glance

DAY 1 Wednesday, May 29

4:00PM-5:00PM

Registration is open

Opening Session- Georgia Center Hotel and Conference Center, Room K

Speaker Welcoming Remarks: Lance Palmer

Speaker Anisa Zvonkovic, Dean, College of Family and Consumer Science

Speaker William Bell, Sr. Divisional Managing Director, Charles Schwab

5:00PM-7:00PM

Reception and Tours- Schwab Financial Planning Center

DAY 2 Thursday, May 30

8:00AM-9:00AM

Registration Open

Breakfast- Magnolia Ballroom

9:00AM-10:30AM

Concurrent A1 Sessions-Room T/U

Concurrent A2 Sessions-Room V/W

10:30AM-10:50AM

Break

10:50AM-11:40AM

Concurrent B1 Sessions-Room T/U

Concurrent B2 Sessions-Room V/W

11:40AM-12:00PM

Break

12:00PM-1:30PM

Lunch- Magnolia Ballroom

Key Note Address

1:30PM-1:40PM

Break

1:40PM-3:10PM

Session C Presentations- Room T/U

3:10PM-3:20PM

Break

3:20PM-4:50PM

Concurrent D1 Sessions-Room T/U

Concurrent D2 Sessions-Room V/W

4:50PM-5:00PM

Break

5:00PM-6:30PM

Tour of UGA Athletic Facilities

Meet in the Hotel Lobby of The

Georgia Center

DAY 3 Friday, May 31

8:00AM-9:00AM

Breakfast- Magnolia Ballroom

9:00AM-9:45AM

E1 Session-Room K/L

E2 Session-

Schwab Financial Planning Center

9:45AM-10:00AM

Break

10:00AM-11:30AM

Session F Presentations- Room K/L

11:30AM-11:45AM

Break

11:45AM-1:15PM

Lunch- Magnolia Ballroom

Keynote Address

1:30PM

Conference Adjourns



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DAY 2 THURSDAY

Concurrent Sessions A1 & A2

9:00AM-10:30AM

Session A1

Room T/U

Title & Presenters:

Is VITA aligned with the BSBA Accounting program Goals: The case at the University of Puerto Rico, Mayaguez Campus

Luz I Gracia Morales and David Gonzalez

University of Puerto Rico – Mayagüez

Inclusive Service Learning at Hartwick VITA Program: A Dual-Pathway Integration Model to Promote Students' Career Self-Efficacy

Li Luo and Weian Wang

Hartwick College

Session A2

Room U/W

Title & Presenters:

2024 VITA Research Efforts, Compare and Build on 2021 Efforts

Scott Lail

Wingate University

Factors Associated with Client's Year-Over-Year Persistence when VITA Sites Relocate to a University Campus

Ruchika Bansal, Yun Lin, Jessica Weaver, and Lance Palmer

University of Georgia

Concurrent Sessions B1 & B2

10:50AM-11:40AM

Session B1

Room T/U

Title & Presenters:

Are VITA sites located in the highest need locations?

Danah Jeong, University of Georgia

Aman Sunder, College for Financial Planning

Lance Palmer, University of Georgia

DAY 2 THURSDAY

Session B2 VITA and Cooperative Extension Initiatives

Room U/W

Title & Presenters:

Forming sustainable local VITA sites through Cooperative Extension

Carrie Vanderver and Susie Burton Medina, University of Georgia

Tax literacy and facilitated self-assist

Lisa Leslie, University of Florida

VITA and Cooperative Extension nationwide

Suzanne Bartholomae, Iowa State University

Keynote Address

Magnolia Ballroom

12:00PM-1:30PM

Title & Presenters:

Current and future initiatives for Stakeholder Partnerships, Education, and Communication and other IRS initiatives

Gwen Garren, Director of Stakeholder Partnerships, Education and Communication, Internal Revenue Service

Session C

Room T/U

1:40PM-3:10PM

Title & Presenters:

The role of VITA in retention of knowledge – An AI projec

Sabrina Landa, Sudha Krishnan, Ping Lin
California State University, Long Beach

Development of an AI coaching tool to promote tax-time saving

Aman Sunder, College for Financial Planning
Lance Palmer, University of Georgia

DAY 2 THURSDAY

Concurrent Sessions D1 & D2

3:20PM-4:50PM

Session D1

Room T/U

Title & Presenters:

Rural Georgia Participation in the U.S. Tax System'

Erin Towery, Aaron Redman, and Terri Black

University of Georgia

Challenges and Opportunities in Offering VITA Service-Learning Sites In Higher Education Settings

Lisa Nash, University of North Georgia

Jamie Connors, Dalton State College

Rebecca Shortridge, University of Tennessee at Chattanooga

Session D2

Room U/W

Title & Presenters:

Encouraging high school students' participation in VITA services: The Puerto Rico experience

Yanira E. Morales, Internal Revenue Service

David Gonzalez, University of Puerto Rico – Mayagüez

Aixa Gonzalez, Puerto Rico Society of CPAs

Imer Martin Sustache, High School Urbana in Aguas Buenas

Victor McDougall, Aurea Quiles High School

Empowering high school students through tax-based service-learning programs: An integrative proposal with insights from the Volunteer Income Tax Assistance (VITA) program

Diahann Holder, Sheridan College

DAY 3 FRIDAY

Concurrent Sessions E1 & E2

9:00AM-9:45AM

Session E1

Room K/L

Title & Presenters:

Starting a VITA partnership at your institutio

IRS SPEC Relationship Managers and Consultant

Session E2

Room Schwab Financial Planning Center

Title & Presenters:

Fueling research ideas, speed dating networking

All faculty seeking additional research collaborations

Session F

Room: K/L

10:00AM-11:30AM

Title & Presenters:

Funding your VITA program (if it needs funding)

Lance Palmer, University of Georgia

Suzanne Griffeth, University of Georgia

Tom Cochran, Georgia United Credit Union

VITA Grant Application Process

IRS SPEC Director Dan Maier - Chief Grant Program Officer

Keynote Address

Magnolia Ballroom

11:45AM-1:15PM

Title & Presenters:

Overview of the VITA Grant Program

Dan Maier, Chief VITA/TCE Grant Program Office, Internal Revenue Service

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