

VITA 2013 tracking and evaluation

Brief description of program / project:

VITA (Volunteer Income Tax Assistance) is a national program, headed by the Internal Revenue Service (IRS) to assist low-income individuals and families with free tax preparation and assistance with claiming their tax credits. With student volunteers from Beta Alpha Psi, a student organization in the David Eccles School of Business, the PMMC assists University students in completing and submitting their tax returns. We do this for non-resident and resident students, saving them on average \$189 per student in tax preparation fees. We had one evaluative questionnaire given to each student and a tracking device for the program this year.

Who was asked to complete survey:

Students who visited our VITA site were asked to complete a questionnaire and the tracking was done by Jordan Waite, PMMC assistant.

How many people were asked? The questionnaire was given to approximately 570 students.

Respondents: 379 (66.5%)

Administration Type: Paper

Summary of Key Findings:

Through the questionnaire we learned of students' financial habits, such as how they spent last year's tax return and what method they used to cash or deposit their money. We learned about respondents' financial needs and concerns and what purchases they plan on making in the next 12 months. We learned how students did their taxes last year and if they would like a reminder for VITA preparation next year. Additionally, we gathered some demographic information.

Through the tracking project, we collected data on each of our four sites around campus. We now know which sites and which times had the most traffic.

Actions Taken:

The VITA questionnaire was given to approximately 14,000 individuals around the state. Our questionnaire will add to the state data which the IRS uses to measure the success of the VITA program. Some of the data will go into our Annual Report. We are currently emailing each respondent who requested educational information or one-on-one assistance (a total of 114 students) inviting them to come into the PMMC or explaining how to go to our website and make an appointment.

Additionally, we will use this questionnaire and the tracking data as we design and plan for our 2014 VITA season.

Which department and/or program goals does this program / project align with?

PMMC goals:

- Promote practical life skills to assist students in becoming financially sound.
- Provide a variety of resources that will effectively meet students' needs.
- Increase awareness of the PMMC.

Which Student Affairs goals does this program / project align with?

- All Student Affairs departments will develop a department specific strategic plan in collaboration with Assessment, Evaluation and Research (AER) to measure progress toward departmental and Student Affairs strategic objectives and learning outcomes.
- Annual reports will be based on departmental and Student Affairs strategic plans to formally document progress toward strategic objectives.