Family and Consumer Studies 5964-1  
Spring 2015 – 3 Credits  
Tax Preparation Certification and Community Engagement

Recommended Pre-Requisites – FCS 5530 or Accounting 5310  
Time – Mondays 6pm-9pm  
Location – OSH 236

Instructor – Ann House, MS, CPFC, CEPF  
Email – ahouse@sa.utah.edu  
Phone – (801) 585-7379  
Office Location & Hours – Personal Money Management Center, Olpin University Union, #317, 8am-5pm

Course Overview

This class gives students the opportunity to participate in a national program to help people prepare their income taxes, called the Volunteer Income Tax Assistance (VITA). Students will devote seven classes to gain knowledge and skills necessary for IRS certification. The remainder of the semester will be devoted to putting that certification to work by engaging in tax preparation and directing clients to other sources of help.

Course Objectives

In this course, students will be prepared to:
1. Become an IRS Certified Tax Preparer  
2. Complete fifty-five hours as a tax preparation and social advocacy volunteer  
3. Learn to become an advocate to influence decisions within political, economic and social systems

Teaching and Learning Methods

This is a hybrid course composed of six in-person classes, followed by eight weeks to complete volunteer hours, with a final in-person class on April 27th 2015.

The first six classes (eight weeks into the semester), we will have a variety of guest speakers, lectures, and discussions. There will be reading assignments to complete before class so you are prepared for the lecture and can participate in the discussion. Additionally, during these eight weeks, you will be required to study and finish the IRS tax preparer certification.

The remainder of the semester, you will be in the community at various VITA sites filing taxes for low-income Utahns. We will be partnering with the Earn it. Keep it. Save it. (EIKISI) initiative to complete this community service. Last year, EIKISI helped over 19,000 Utah residents and brought in $9.9 million in Earned Income Tax Credits (EITC) and saved these low-income Utahns $4 million in tax preparation fees. You will also act as an advocate at these centers to direct filers to use local resources.

We will convene as a class once again on the final day of the semester to present your writing assignment, orally and in writing, and to have a discussion and reflection on your experiences.

Required Reading (Tentative)


Assignments

- Speaker and/or reading papers
  - Six 2-page reflection papers on your assigned reading and impressions of our guest presenter. Quality of your contemplation and musings will be important as is your grammar and organization.

- You will be required to complete the IRS tax preparer training and pass the IRS tax preparer certification test. The location for the training and testing will be at the Sorenson Center, 855 West California Avenue (1300 South) with several times available for your convenience.

- Community service involves at least fifty-five volunteer hours working with self-selected community VITA sites. Forty of these hours will be assisting clients with tax filing and fifteen hours as a financial advocate. To stay on track, organize your volunteer hours as suggested below:
  - Jan 26-Feb 28 complete 20 hours as a tax filer and 5 hours as a financial advocate
  - Mar 1-Mar 14 complete 10 hours as a tax filer and 5 hours as a financial advocate
  - Mar 21-Apr 15 complete 10 hours as a tax filer and 5 hours as a financial advocate

Locations and times for sites. The website (utahtaxhelp.org) will keep us current on VITA sites.
  - Copperview 6-9 pm
  - Redwood 1-4 pm

- Significant Impressions paper will be due on your last day of class. You are to write a 4-6 page paper of the most impressionable aspects of your volunteer experience and the take-a-ways of the guest lectures. Meaningful thought and effort should be put into your paper. The evaluation you receive on this paper will be based on the following:
  - Thoroughness of your points. They need to tie to cited research, your readings, our guest speaker’s comments and your volunteer work.
  - Quality of grammatical expression and organization (for example, you will need a beginning middle and an ending!). You may organize your paper with headings for each of your ideas and subheadings if logical.
  - Your attendance in class that day and your participation in class presentations as each student will present orally from their paper.
  - 4-6 pages double spaced, 1” margins, Times Roman 12 font.

Grading Policy

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Speaker and/or reading write-ups</td>
<td>20 pts</td>
</tr>
<tr>
<td>Completing tax training &amp; testing on time</td>
<td>15 pts</td>
</tr>
<tr>
<td>Community service</td>
<td>45 pts</td>
</tr>
<tr>
<td>Significant Impressions paper</td>
<td>20 pts</td>
</tr>
<tr>
<td><strong>Total PTS</strong></td>
<td>100</td>
</tr>
</tbody>
</table>
## Tentative Schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Content</th>
<th>Guest Presenter(s)</th>
<th>Assignment Due (read for this date)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>January 12th</strong></td>
<td>Introduction to class</td>
<td>Community Action Partnership of Utah, Greg McDonald, Regional EIKISI Coordinator, Blake Perez, Financial Integration Coordinator</td>
<td></td>
</tr>
<tr>
<td></td>
<td>IRS certification</td>
<td></td>
<td>Volunteer Tax Preparation in the community Jan 26 through April 15</td>
</tr>
<tr>
<td></td>
<td>Training &amp; exam schedule</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sign up for service opportunities</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>January 19th</strong></td>
<td>NO CLASS- MLK Day</td>
<td></td>
<td>Complete the IRS tax preparer training and pass the IRS tax preparer certification test.</td>
</tr>
<tr>
<td><strong>January 26th</strong></td>
<td>Advocacy training</td>
<td>Community Action Partnership of Utah, Blake Perez, Financial Integration Coordinator</td>
<td></td>
</tr>
<tr>
<td><strong>February 2nd</strong></td>
<td>The Utah labor market</td>
<td>Internal Revenue Service Associate Area Counsel, Charles B. Burnett</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Video: “An Inconvenient Tax”</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>February 9th</strong></td>
<td>Power of your vote, view of our legislative session, getting politically involved</td>
<td>League of Women Voters, Voices for Utah Children</td>
<td>Democracy Day, Feb 12, Capitol</td>
</tr>
<tr>
<td></td>
<td>A view of poverty</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>February 16th</strong></td>
<td>NO CLASS- Presidents Day</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>February 23rd</strong></td>
<td>Access to credit, housing, healthcare, food &amp; nutrition</td>
<td>Communications Director, AARPUtah - Laura Polachek, Republic Home Loans - Al Bingham, Senior Loan Officer and Credit Score Expert, Community Services Block Grant,</td>
<td></td>
</tr>
<tr>
<td><strong>March 2nd</strong></td>
<td>How taxes affect the lives of Americans</td>
<td>Department of Workforce Services</td>
<td></td>
</tr>
<tr>
<td><strong>March 9th—April 20th</strong></td>
<td>NO CLASS</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>April 27th</strong></td>
<td>Significant Impressions presentation, discussion and reflection</td>
<td></td>
<td>Significant Impressions paper</td>
</tr>
</tbody>
</table>
INCOMPLETE POLICY: According to University policy, students must have completed 80% of the course requirements and be in good standing (i.e., have earned at least a C on all completed work) and receive permission from the instructor to be eligible for an “Incomplete” grade. The Family and Consumer Studies Department Policy is that students who do not complete the remaining course work within one year from the time the incomplete is given will automatically receive a failing grade for the course. No exceptions will be made to this policy.

UNIVERSITY DROP and WITHDRAWAL POLICY: You may drop this course without penalty or permission of the instructor until Wednesday, January 21. You may withdraw from this course without permission of the instructor until Friday, March 6 but a “W” will be recorded on your academic record, and applicable tuition and fees will be assessed. If you remain in this course after October 24th, you cannot withdraw for academic reasons at any other time during the term. If you have any questions regarding this policy, please contact the Office of Admissions and Registrar at (801) 581-5808. More information about these policies can be found at: http://registrar.utah.edu/handbook/withdrawal.php.

REQUESTS for SPECIAL ACCOMMODATIONS by STUDENTS with DISABILITIES: Persons with disabilities requiring special accommodations to meet the expectations and assignments of this course are encouraged to bring this to the attention of the instructor as soon in the term as possible. The University of Utah seeks to provide equal access to its programs, services and activities for people with disabilities. If you will need accommodations in the class, reasonable prior notice needs to be given to the Center for Disability Services, http://disability.utah.edu/, 162 Union Building, 581-5020 (V/TDD). CDS will work with you and the instructor to make arrangements for accommodations. All written information in the course can be made available in alternative format with prior notification to the CDS. More information is available at: http://www.oeo.utah.edu/ada/guide/faculty/.

Wellness Statement
Personal concerns such as stress, anxiety, relationship difficulties, depression, cross-cultural differences, etc., can interfere with a student’s ability to succeed and thrive at the University of Utah. For helpful resources contact the Center for Student Wellness –http://www.wellness.utah.edu; 801-581-7776.

Veterans Center
If you are a student veteran, I want you to know that the U of Utah has a Veterans Support Center on campus. They are located in Room 161 in the Olpin Union Building. Hours: M-F 8-5pm. Please visit their website for more information about what support they offer, a list of ongoing events and links to outside resources: http://veteranscenter.utah.edu/. Please also let me know if you need any additional support in this class for any reason.

LGBT Resource Center
If you are a member of the LGBTQ community, I want you to know that my classroom is a safe zone*. Additionally, please know that the U of Utah has an LGBT Resource Center on campus. They are located in Room 409 in the Oplin Union Building. Hours: M-F 8-5pm. You can visit their website to find more information about the support they can offer, a list of events through the center and links to additional resources: http://lgbt.utah.edu/. Please also let me know if there is any additional support you need in this class.
Learners of English as an Additional/Second Language
If you are an English language learner, please be aware of several resources on campus that will support you with your language development and writing. These resources include: the Department of Linguistics ESL Program (http://linguistics.utah.edu/esl-program/); the Writing Center (http://writingcenter.utah.edu/); the Writing Program (http://writing-program.utah.edu/); the English Language Institute (http://continue.utah.edu/eli/). Please let me know if there is any additional support you would like to discuss for this class.