

# 2015-2016 Assessment Final Report

Department: Legal Services for Students

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## Tax Workshop Intern Assessment

### Introduction

#### Assessment Project Description

LSS provides tax preparation workshops at the Budig computer lab each spring. This year LSS hosted 42 tax workshops attended by over the course of two months. These workshops are staffed by at least one LSS tax attorney and up to 5 law student tax interns.

The workshops provide tax preparation assistance for all KU students, with an emphasis on tax preparation for international students. The law student tax interns answer a wide range of tax questions in helping students prepare and file state and federal tax returns. They also serve an important role in determining which students will need to schedule an individual appointment with a tax attorney in order to be able to complete their filings.

The purpose of this assessment project was to assess the interpersonal communication skills, subject matter knowledge, and issue-spotting skills of the law student tax interns in order to provide better training for the interns in the future.

#### Departmental Student Learning Outcome

Student interns who work for Legal Services for Students will be able to...

1. Develop transferable work-related skills, such as effective interpersonal communication, subject matter knowledge, issue-spotting skills, time management, research, and legal writing skills that will enable them to be effective in future professional legal positions. (CAS Standard: Interpersonal Competence; Practical Competence)

#### Service/Program Student Learning Outcome

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KU Law Student interns who work for Legal Services for Students as tax interns will be able to...

1. Assist in the preparation of state and federal income tax returns by demonstrating proficiency in the following areas:
  - a. determining the correct residency and filing status,
  - b. understanding state and federal filing requirements,
  - c. recognizing the income documentation necessary to prepare the return,
  - d. understanding the Glacier Tax Prep and My Free Taxes software platforms,
  - e. understanding the eligibility factors related to the education tax credits,
  - f. recognizing tax treaty issues,
  - g. understanding the rules that determine dependent exemptions and
  - h. properly assessing when an individual may need additional assistance. (*CAS Standard: Knowledge Acquisition; Interpersonal Competence; Practical Competence; Civic Engagement*)

**Population/Sample:** 5 law student tax interns

**Assessment Method:**

We developed a rubric that covered the eight outcomes that we were assessing. We had the interns complete a self-assessment before the workshops began. We then used the rubric to assess the intern's performance during the tax workshops. After the workshops were complete the interns completed an additional self-assessment.

**Summary of Key Findings/Results**

Using a pre/post design, the interns completed a self-assessment rubric of their subject matter knowledge and issue-spotting skills following their initial training and after conducting their final workshop. The following table presents results for each area. As displayed, there were no significant differences. Though not significant, results revealed increases in students' assessment of their knowledge in residency and filing status, software understanding, and tax treaty issues. In contrast, there were decreases in their assessment of their knowledge in filing requirements, income documentation, education tax credits, and dependent exemptions—signaling areas to focus on in future pre-workshop intern trainings.

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	Pre-Workshops	Post-Workshops
Residency and Filing Status	3.60	4.00
Filing Requirements	4.40	4.00
Income Documentation	4.40	4.00
Software Understanding	3.60	4.20
Education Tax Credits	4.20	4.00
Tax Treaty Issues	3.20	4.00
Dependent Exemptions	4.20	4.00
Issue Spotting Skills	4.20	4.20

*Note.* Rubric scale: 1 = Huh?, 2 = I've Heard of That, 3 = General Knowledge, 4 = Pretty Good Understanding, and 5 = Complete Mastery. \* - significant at  $p < 0.05$

### Conclusions

#### Impact of Assessment

The formal assessment helped us to recognize some gaps in our intern training and identify areas to focus on in the future. We will look at scheduling some additional training once the workshops have started and the interns have a better idea of how the workshops function. We will also look at debriefing with the interns after each individual workshop in order to make sure that any unique situations do not get lost in the shuffle.

It was difficult to know which workshops would allow for intern assessment. If the workshop became too busy, then it was not possible for the attorneys to focus on assessment.

While continued formal assessment may not be necessary, we will likely continue with a pre and post workshop evaluation for the interns.