

# 2015-2016 Student Affairs Assessment Plan

## Department: Legal Services for Students

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### **Tax Workshop Intern Assessment**

#### **Divisional Mission**

To engage the KU community in services and programs that complement academic goals and enhance quality of life.

#### **Departmental Mission**

To prevent and resolve legal problems that confront students by providing professional and confidential legal counseling, representation, advice and education.

#### **Departmental Student Learning Outcomes**

Legal Services for Students (LSS) clients will be able to...

1. Demonstrate an understanding of the legal options related to their cases. (*CAS Standard: Knowledge Acquisition*)
2. Acquire skills and knowledge that better equip them to handle future legal situations. (*CAS Standard: Knowledge Acquisition; Cognitive Complexity; Practical Competence*)
3. Demonstrate self-advocacy skills regarding their particular legal issue. (*CAS Standard: Practical Competence*)

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*)

#### **Description of Service/Program**

LSS provides tax preparation workshops at the Budig computer lab each spring. 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

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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.

### **Service/Program Student Learning Outcome**

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)

### **Divisional Student Learning Outcomes:** *Check all that apply*

- Knowledge Acquisition
- Cognitive Complexity
- Intrapersonal Development
- Interpersonal Competence
- Humanitarianism & Civic Engagement
- Practical Competence

### **Project Specifics**

**Project Title:** Tax Workshop Intern Assessment

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**Purpose of the project:** To assess the interpersonal communication skills, subject matter knowledge, and issue-spotting skills of the law student tax interns.

**Assessment method(s):** Self-assessment via a rubric and supervisor assessment via the same rubric. The skills assessed will be:

- 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

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**Timeline/frequency:** The tax workshops start in late February and continue through April. We will perform the self-assessment before the workshops begin and after the workshops end. Supervisor assessment will occur during the workshops.

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

**Special challenges to this assessment:** The best time to assess the tax interns may also be the most difficult to do so. The workshops get very busy at times. It will be a challenge to perform the assessment at these times. We may need to have an extra person on hand to do the assessment at these times.



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**Use to inform current practice:** We will use the assessment to evaluate where we will need to focus our training of the tax interns.

**Plans for reporting results:** The results will be shared internally. Anonymized results will be shared with the department.

**CampusLabs Used:**  Yes  No