

**COLGATE UNIVERSITY**  
13 Oak Drive  
Hamilton, NY 13346-1385

**Institutional Review Board Proposal Cover Sheet**

Title of Project: Volunteer Income Tax Assistance Survey in Madison and Chenango Counties

Anticipated number of participants: females: 700 males: 500

Approximate ages: 18-65

Submission date: XX/XX/XXX

Anticipated start date: XX/XX/XXXX

**Expedited Review:** for research that does **not** manipulate participants' behavior, use deception, threaten privacy, or cause stress to participants (e.g. observational studies, studies of archival data, some questionnaire and interview studies). Review takes approximately 5 days.

**Full Review:** for all research that is not eligible for expedited review. Reviews occur once each semester.

Investigator(s): Investigator Name Here \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Faculty Supervisor: Supervisor Name Here (if applicable) \_\_\_\_\_

Contact information for Principal Investigator:

Name: Investigator Name Here \_\_\_\_\_

Phone: (xxx) xxx-xxxx \_\_\_\_\_

Email: Investigator @colgate.edu \_\_\_\_\_

X I have read and agree to uphold the ethical principles and guidelines for the protection of human research participants as they are described in the Belmont Report issued by the Federal Office of Health, Education & Welfare. This proposal and the attached materials meet the guidelines described by the APA Code of Ethics.

A copy of the Belmont Report is available at <http://www.hhs.gov/ohrp/humansubjects/guidance/belmont.htm>

IRB #:	_____
Reviewer:	_____
Decision:	_____
Date:	____/____/____
<i>For Office Use Only</i>	

**Purpose of Investigation and Procedures:**

We plan to administer a survey to approximately 1,200 low-income households in Madison and Chenango Counties who qualify for free tax preparation service using the Volunteer Income Tax Assistance (VITA) program. Approximately 40 Colgate students will administer the survey during the clients' tax preparation sessions, which will take place at various sites in Madison and Chenango County between January and April 15

When sharing the data with students and various non-profit organizations involved in the program, the dataset will not include the names of taxpayers so that no person or household can be identified from the sample.

**Manner of Obtaining Participants:**

The participants are low-income households in Madison and Chenango counties who qualify for free income tax preparation using the VITA program. The VITA program is a collaboration between Colgate University and several non-profit organizations in Madison and Chenango counties. The non-profit organizations are responsible for recruiting VITA participants based on income eligibility. We offer no compensation for participation in the survey.

# ***VITA Survey 2010***

## **Certificate of Informed Consent**

Overview and Procedure. As part of the Volunteer Income Tax Assistance (VITA) program, we would like to learn more about our clients. Specifically, we would like to analyze the effects of the Earned Income

Survey Questions (excluded from the example)