



AVON GROVE  
SCHOOL DISTRICT

SENIOR CITIZEN  
VOLUNTEER  
**TAX**  
**RELIEF**  
PROGRAM



*Volunteer in Avon Grove School District and reduce your taxes*



## SENIOR CITIZEN VOLUNTEER TAX RELIEF PROGRAM

Thank you for your interest in the Senior Citizen Volunteer Tax Relief Program. This program not only provides a monetary benefit to its volunteers, but also makes a positive impact on the Avon Grove students, staff members and the community at large. We encourage you to join this rewarding program and enjoy the satisfaction of a job well done!

### **BENEFITS**

- Earn up to \$500 in school tax relief (adjusted for estimated taxes)
- Support your community and public schools

### **ELIGIBILITY**

- Any Avon Grove resident who will be 60+ years old by December 31 of the serving year and who pays school taxes

### **OPPORTUNITIES**

- Office/Clerical
- Tutoring/Aide
- Cafeteria/Hall Monitor
- Light Gardening

## Registration Process

- Complete an application packet
  - Application (pages 1 - 2)
  - Emergency Health Information (page 3)
  - Form W9
  - Clearances (see below)
- Complete the volunteer clearances at [www.avongrove.org/community/volunteer](http://www.avongrove.org/community/volunteer)
  - Act 151 PA Child Abuse Clearance
  - Act 34 State Police Criminal History Report
  - FBI Federal Criminal History Report (or Waiver, if you have lived in Pennsylvania continuously for the past 10 years)
  - Employee/Volunteer Self-Reporting Commitment Form
  - Volunteer Acknowledgement of Policy No. 916/Volunteers & Policy No. 806/Child Abuse Form
- Return completed packet with clearances to the District office
- Cathy Santiago from the District office will contact you regarding next steps

## Frequently Asked Questions

### *How does the program work?*

This is a tax relief program that allows a maximum of 50 hours of volunteer participation at \$10.00 per hour credit.

### *When will I receive my check?*

The tax year runs from July 1 through June 30 of each year. You will receive a check in July or August for services rendered in the prior year. You must turn in a tax receipt to be eligible for the reimbursement.

### *Can two people living in the same household participate?*

Married couples who are both listed as owners of an eligible property can each earn 50 hours or \$500.00 in tax relief. If your spouse has a medically certified disability, you may earn his/her 50 hours in addition to your own 50 hours.

### *What does the volunteer clearance process involve?*

In order to work in our schools, all volunteers must complete the clearance process.

The process involves requesting and completing five clearances:

- Act 151 PA Child Abuse Clearance
- Act 34 State Police Criminal History Report
- FBI Federal Criminal History Report or Waiver (if you have lived in Pennsylvania continuously for the past 10 years)
- Employee/Volunteer Self-Reporting Commitment Form
- Volunteer Acknowledgement of Policy No.916 Volunteers and Policy No. 806 Child Abuse Form

### *Does it cost anything to become a volunteer?*

All of the clearances are free to volunteers except the FBI Federal Criminal History Report. This report costs \$22.60 unless you have lived in Pennsylvania continuously for the past 10 years. If so, you need only complete the Volunteer Request for Waiver of FBI - Federal Criminal History Record Check, which is free.

### *Where can I find my PSD code or EIT rate for my Residency Certification Form?*

Please visit the PA Department of Community & Economic Development at <https://bit.ly/2tvcuFs>

## Other Important Information

- The funds earned through this program are considered earned income by the Federal and Pennsylvania governments and are subject to income taxes.
- The maximum relief cannot exceed the actual amount of your school real estate taxes.
- Participants must complete and submit a verified log of volunteer hours, provided by the District office.
- If you are accepted to the program but do not participate for two consecutive years, you must complete an updated application packet.
- Clearances must be re-certified every five years.

## Questions?



**Avon Grove School District**  
375 South Jennersville Road, West Grove, PA 19390

## SENIOR CITIZEN VOLUNTEER TAX RELIEF PROGRAM APPLICATION

Thank you for your interest in the Senior Citizen Volunteer Tax Relief Program. While this program provides a monetary benefit to its volunteers, there is also a significant positive impact on the students, staff, school district and the community at large. Thank you for your service.

### Personal Information

First Name \_\_\_\_\_ Last Name \_\_\_\_\_  
 Street Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_  
 Social Security Number \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

### Tax Rebate Program

In order to participate in the Senior Citizen Volunteer Tax Relief Program, you must be at least 60 years of age by December 31 of the calendar year in which you apply.

Do you meet this requirement? Yes  No

The tax relief applies to the following parcel of land:

Street Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

I choose to donate my tax relief earnings to the Avon Grove School District: Yes  No

### For official use only

Employee Name _____	FBI Clearance or Waiver (Act 114) _____
Date Received _____	Self-Reporting Commitment Form _____
Application _____	Policy No. 916 & 908 Receipt _____
Emergency Contact Form _____	Form W9 _____
PA Child Abuse Clearance (Act 151) _____	
State Police Check (Act 34) _____	

## Volunteer Availability

### Availability:

Morning

Afternoon

Evening

## Volunteer Opportunities

Please designate your preferred location and volunteer opportunities

### School-Based Support

#### Location:

Penn London  
Elementary

Avon Grove  
Intermediate

Fred S. Engle  
Middle

Avon Grove  
High School

#### Opportunities:

Tutoring

Library Aide

Classroom Aide

Cafeteria/Hall Monitor

### Office / Clerical Support

#### Location:

Penn London  
Elementary

Avon Grove  
Intermediate

Fred S. Engle  
Middle

Avon Grove  
High School

#### Opportunities:

Answering Phones

Preparing Items for Distribution

Typing

Photocopying

Ticket Sales / Collecting

### Other

Please list any other ideas or opportunities for which you may be interested:

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## Emergency Health Information

First Name  Last Name   
Street Address   
City  State  Zip   
Home Phone  Cell Phone

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Emergency Contact 1 Name   
Emergency Contact 1 Phone  Relationship   
Emergency Contact 2 Name   
Emergency Contact 2 Phone  Relationship

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Primary Care Physician  Phone   
Specialist  Phone   
Specialist  Phone

Please list any health conditions that you believe would be important for the building school nurse to be aware of if you had a medical emergency or injury while volunteering: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please list any medications you are currently taking and their dosages: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please list any physical condition that may require special accommodations while volunteering:  
\_\_\_\_\_  
\_\_\_\_\_

Date of last tetanus shot  Have you ever had chicken pox?

### *Insurance Information for Emergency Use Only*

Insurance Company   
Policy Number  Group Number



## Request for Taxpayer Identification Number and Certification

**Give Form to the  
 requester. Do not  
 send to the IRS.**

Print or type  
 See Specific Instructions on page 2.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
2 Business name/disregarded entity name, if different from above	
3 Check appropriate box for federal tax classification; check only <b>one</b> of the following seven boxes: <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ <input type="checkbox"/> Other (see instructions) ▶ _____ <small>Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner.</small>	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>
5 Address (number, street, and apt. or suite no.)	Requester's name and address (optional)
6 City, state, and ZIP code	
7 List account number(s) here (optional)	

### Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

**Note.** If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

<b>Social security number</b>												
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### Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

**Sign Here**      Signature of U.S. person ▶

Date ▶

### General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at [www.irs.gov/fw9](http://www.irs.gov/fw9).

#### Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)

- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding? on page 2.*

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.