

Town of Harvard
Elderly and Disabled Taxation Aid (E&DTA) Committee Meeting
Minutes

Meeting Date: July 26, 2011

Called to Order: 3:30 pm

Meeting Adjourned: 4:30 pm

Members Present: Rick Maiore, Mary Jo Boynton

Other(s): Marie Sobalvarro, Harald Scheid, Sue Fitterman

The group met to review other towns' initiatives and to identify the issues which are pertinent to Harvard introducing an elderly tax assistance initiative.

A discussion was held regarding the timeline of bringing any new program to the 2012 Annual Town Meeting:

- September-November 2011: create draft of program
- December 2011–January 2012: review draft and get input from boards
- February-March 2012: share information with residents

The group discussed the importance of providing tax assistance to keep Harvard's senior residents in their homes, and noted that it keeps the town's population inter-generational, maintains family connections, and is neutral dollars (doesn't cost the town).

The group talked about the pros and cons of 1) attempting a program similar to the one in Hamilton but tailored to Harvard's needs, or 2) expanding or changing the E&DTA Program. The following points were made:

- 242 of the 1700 homes in Harvard are owned by residents who are 70+.
- The average annual tax bill for Harvard is close to \$8,000.
- The E&DTA program has been in Harvard for 8 years; it is flexible but has limited resources; it has an annual campaign to raise funds; the program has provided assistance to 5-10 families per year; and the current demand does not exceed the available money.
- There may be residents who could benefit from the E&DTA program but are hesitant to apply.

The perception is that there's a gap between the current programs:

Real Estate Tax Credit for Persons Age 65 and Older (Known as the Circuit Breaker Credit)

Other Programs (Senior Work-off Program; Statutory Exemptions)

*****GAP*****

E&DTA Program

The group agreed to the following action items regarding data collection:

1. Existing exemptions: Harald will review the exemption levels to see if they are maximized.
2. Council on Aging (COA) input – Marie will speak with the incoming COA Director.
3. Fine tune census information – Rick will speak with Town Clerk Janet Vellante.
4. Value distribution of homes: Harald will review if residents who are 65+ are living in homes of greater or lesser value.

The group will review the information at the next E&DTA Committee meeting.

Respectfully submitted,

Sue Fitterman
Assistant Assessor