

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

Meeting Date: October 20, 2011
Called to Order: 9:00 a.m.
Meeting Adjourned: 10:25 a.m.
Members Present: Laura Andrews, Rick Maiore, Debbie Nutter
Other(s) Present: Sue Fitterman, Marie Sobalvarro, Peter Warren

1. The minutes from 8/31/11 meeting were approved.
2. Plans for the 2012 Appeal include:
 - a. Review last year's appeal letter before the next E&DTA meeting (Debbie Nutter and Cindy Dumser).
 - b. Use colored paper for the appeal letter.
 - c. Do a town-wide mailing to residents of Harvard and Still River (and possibly Harvard businesses) before Thanksgiving 2011.
 - d. Use the appeal letter as a flyer and place copies in the General Store, Dunkin Donuts, Post Offices, etc.
 - e. Publish a "Consider This" newspaper article in The Harvard Press in mid-November publicizing tax-assistance programs currently available in Harvard (Laura Andrews).
 - f. Publish an interview with Rick Maiore and Debbie Nutter in The Harvard Press in mid-November.
 - g. In early December create a "Progress Poster" for the Town Common to track donations vs. E&DTA goal of \$20,000 (Rick Maiore and Peter Warren).
 - h. Use front page of town website to publicize the annual appeal.
3. Debbie Nutter reported donations of \$975 between July-October 2011.
4. The group discussed how Massachusetts General Law requires that the E&DTA Committee be comprised of the Town Treasurer, Chairperson of Board of Assessors, and three residents. The group feels it would be helpful to change the makeup of Harvard's E&DTA Committee to: Council on Aging (COA) Director; Town Treasurer; member from the Board of Assessors, and three or four residents (for 3-year terms). This issue will be addressed again at future meetings.
5. Sudbury Bill

The group reviewed copies of "Article 2 – Home Rule Petition – Means Tested Senior Citizen Tax Exemption" that was recently passed at a Special Town Meeting in Sudbury, MA.

Some points from the discussion include:

- a. The Sudbury Bill uses the average assessed value in town plus 10%.
- b. Residents must understand up front that money to fund a new bill comes out of the tax rate. Currently the E&DTA fund gives money to residents from donations, and this does not affect the taxes of residents.
- c. A public meeting needs to be held at some point to get the public involved and on board.
- d. The group agreed in general to use the Sudbury Bill as a template, noting that the Hamilton Bill is also an available data source.
- e. The group would ask the Board of Selectmen (BOS) to sponsor a warrant article for the new bill at the Annual Town Meeting next spring. The warrant article needs to be ready for review by the BOS, Finance Committee and others by the end of February or early March.
- f. Committee members will review the Sudbury Bill to identify what is applicable to Harvard and what needs to be changed (see Action Items). Peter Warren asked members to email their sections and comments to him at chief&june@charter.net.
- g. The goal is to have the first draft in 3 or 4 weeks, and the final bill by January 31, 2012.

6. Action Items

- a. Review overdue tax bills (Debbie Nutter).
- b. Call COA Director in Hamilton (Debbie Thompson and Marie Sobalvarro).
- c. Review E&DTA Application Form (Peter Warren).
- d. Review Sudbury bill:
 - Section 1 - Cindy Dumser
 - Section 2 – Sue Fitterman
 - Section 3 – Rick Maiore
 - Sections 4 & 5 – Debbie Nutter
 - Section 6 – Rick Maiore
 - Sections 7 & 8 - All

7. The next meeting is tentatively scheduled for Wednesday, November 9th at 9:00 a.m.

Respectfully submitted,

Sue Fitterman
Assistant Assessor