

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

Meeting Date: December 8, 2011  
Called to Order: 8:00 a.m.  
Meeting Adjourned: 9:10 a.m.  
Members Present: Laura Andrews, Mary Jo Boynton, Cindy Dumser,  
Rick Maiore, Debbie Nutter  
Other(s) Present: Sue Fitterman, Harald Scheid, Marie Sobalvarro,  
Debbie Thompson, Peter Warren

1. Report on action items from November 17, 2011 Meeting

The group discussed the 12/7/11 draft of the proposed Harvard Bill titled “Home Rule Petition – Means Tested Senior Citizen Property Tax Exemption”.

Section 1: first sentence - replace “more than 0.50 percent” with “more than 50 percent”.

Section 2(a): Harald will add a sentence about an escalator for income levels.

Section 2(c): There was a discussion about deleting paragraph (c) which states “the qualifying real estate is owned and occupied by the applicant or joint applicants at least 6 months plus 1 day each year”. The group agreed to keep the sentence in the proposed bill, but flag it for discussion when reviewing the bill with other committees and groups in town.

Section 3: Harald will add a sentence about funding coming out of the town’s overlay.

The group also agreed to add in comments from Laura Andrews concerning grammar and punctuation.

Another question to research and review is: does a house owned by a trust (rather than an individual) qualify for an exemption?

## 2. Update on plans for the 2012 appeal

Laura Andrews wrote a comprehensive article titled "Many Tax Relief Options Available For Local Seniors" which was published in the "Consider This" column of The Harvard Press on December 2, 2011.

Cindy has reviewed the annual appeals letter, and suggested minor changes in wording. Debbie Nutter will ask Kelley and Ryan to print the appeals letter at no charge like they've done in previous years.

Matt Cook, editor of The Harvard Press, will meet with Debbie Nutter and Rick Maiore (and possibly Debbie Thompson) in December to interview them for an article in the Press.

## 3. Minutes

The minutes from the November 17, 2011 meeting were approved.

## 4. Action Items:

- Peter will prepare an updated draft of the Harvard Bill, incorporating Harald's input.
- Peter will research using CPC funds for the proposed bill, instead of increasing the overlay.
- Rick will set out the goal "thermometer" on the Town Common in mid-December.
- Debbie Nutter will work with Kelley and Ryan to print the appeals letter. The goal is to mail a copy to each household in Harvard before the end of December.
- Rick will email committee members with possible dates and times for the next meeting in January 2012.

Respectfully submitted,

Sue Fitterman  
Assistant Assessor