

**A RESOLUTION APPROPRIATING \$3,920,000 FOR THE PURCHASE OF VEHICLES  
AND EQUIPMENT FOR THE DEPARTMENT OF PUBLIC WORKS AND  
AUTHORIZING THE ISSUANCE OF BONDS TO FINANCE SUCH APPROPRIATION**

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**RESOLVED:**

1. As recommended by the Board of Finance and the Board of Selectmen, the Town of Fairfield (the "Town") hereby appropriates the sum of Three Million Nine Hundred Twenty Thousand and 00/100 Dollars (\$3,920,000) for costs related to purchasing vehicles and equipment for the Department of Public Works, as listed on the **Exhibit A** attached hereto, as well as, all related administrative, financing, legal, contingency and other soft costs (the "Project").
2. To finance such appropriation and in lieu of a tax therefor, and as recommended by the Board of Finance and the Board of Selectmen, the Town may borrow a sum not to exceed Three Million Nine Hundred Twenty Thousand and 00/100 Dollars (\$3,920,000) and issue its general obligation bonds/bond anticipation notes for such indebtedness under its corporate name and seal and upon the full faith and credit of the Town in an amount not to exceed said sum for the purpose of financing the appropriation for the Project.
3. The Board of Selectmen, the Treasurer and the Chief Fiscal Officer of the Town are hereby appointed a committee (the "Committee") with full power and authority to cause said bonds to be sold, issued and delivered; to determine their form and terms, including provision for redemption prior to maturity; to determine the aggregate principal amount thereof within the amount hereby authorized and the denominations and maturities thereof; to fix the time of issue of each series thereof and the rate or rates of interest thereon as herein provided; to determine whether the interest rate on any series will be fixed or variable and to determine the method by which the variable rate will be determined, the terms of conversion, if any, from one mode to another or from fixed to variable; to set whatever other terms of the bonds they deem necessary, desirable or appropriate; to designate the bank or trust company to certify the issuance thereof and to act as transfer agent, paying agent and as registrar for the bonds, and to designate bond counsel. The Committee shall have all appropriate powers under the Connecticut General Statutes, including Chapter 748 (Registered Public Obligations Act) and Chapter 109 (Municipal Bond Issues) to issue, sell and deliver the bonds and, further, shall have full power and authority to do all that is required under the Internal Revenue Code of 1986, as amended, and under rules of the Securities and Exchange Commission, and other applicable laws and regulations of the United States, to provide for issuance of the bonds in tax exempt form and to meet all requirements which are or may become necessary in and subsequent to the issuance and delivery of the bonds in order that the interest on the bonds be and remain exempt from Federal income taxes, including, without limitation, to covenant and agree to restriction on investment yield of bond proceeds, rebate of arbitrage earnings, expenditure of proceeds within required time limitations, the filing of information reports as and when required,

and the execution of Continuing Disclosure Agreements for the benefit of the holders of the bonds and notes.

4. The First Selectwoman and Treasurer or Chief Fiscal Officer, on behalf of the Town, shall execute and deliver such bond purchase agreements, reimbursement agreements, line of credit agreement, credit facilities, remarketing, standby marketing agreements, standby bond purchase agreements, and any other commercially necessary or appropriate agreements which the Committee determines are necessary, appropriate or desirable in connection with or incidental to the sale and issuance of bonds, and if the Committee determines that it is necessary, appropriate, or desirable, the obligations under such agreements shall be secured by the Town's full faith and credit.
5. The First Selectwoman and Treasurer or Chief Fiscal Officer shall execute on the Town's behalf such interest rate swap agreements or similar agreements related to the bonds for the purpose of managing interest rate risk which the Committee determines are necessary, appropriate or desirable in connection with or incidental to the carrying or selling and issuance of the bonds, and if the Committee determines that it is necessary, appropriate or desirable, the obligations under such interest rate swap agreements shall be secured by the Town's full faith and credit.
6. The bonds may be designated "Public Improvement Bonds of the Town of Fairfield", series of the year of their issuance and may be issued in one or more series, and may be consolidated as part of the same issue with other bonds of the Town; shall be in serial form maturing in not more than twenty (20) annual installments of principal, the first installment to mature not later than three years from the date of issue and the last installment to mature not later than twenty (20) years from the date of issuance or as otherwise provided by statute. The bonds may be sold at an aggregate sales price of not less than par and accrued interest at public sale upon invitation for bids to the responsible bidder submitting the bid resulting in the lowest true interest cost to the Town, provided that nothing herein shall prevent the Town from rejecting all bids submitted in response to any one invitation for bids and the right to so reject all bids is hereby reserved, and further provided that the Committee may sell the bonds on a negotiated basis, as provided by statute. Interest on the bonds shall be payable semi-annually or annually. The bonds shall be signed on behalf of the Town by at least a majority of the Board of Selectmen and the Treasurer, and shall bear the seal of the Town. The signing, sealing and certification of the bonds may be by facsimile as provided by statute.
7. The Committee is further authorized to make temporary borrowings as authorized by the General Statutes and to issue temporary notes of the Town in anticipation of the receipt of proceeds from the sale of the bonds to be issued pursuant to this resolution. Such notes shall be issued and renewed at such time and with such maturities, requirements and limitations as provided by the Connecticut General Statutes. Notes evidencing such borrowings shall be signed by the First Selectwoman and Treasurer or Chief Fiscal Officer, have the seal of the Town affixed, which signing and sealing may be by facsimile as provided by statute, be certified by and payable at a bank or trust company incorporated under the laws of this or any other state, or of the United States, be approved as to their



legality by bond counsel, and may be consolidated with the issuance of other Town bond anticipation notes. The Committee shall determine the date, maturity, interest rates, form and manner of sale, including negotiated sale, and other details of said notes consistent with the provisions of this resolution and the Connecticut General Statutes and shall have all powers and authority as set forth above in connection with the issuance of bonds and especially with respect to compliance with the requirements of the Internal Revenue Code of 1986, as amended, and regulations thereunder in order to obtain and maintain issuance of the notes in tax exempt form.

8. Pursuant to Section 1.150-2, as amended, of the Federal Income Tax Regulations the Town hereby declares its official intent to reimburse expenditures (if any) paid for the Project from its General or Capital Funds, such reimbursement to be made from the proceeds of the sale of bonds and notes authorized herein and in accordance with the time limitations and other requirements of said regulations.
9. The First Selectwoman, Chief Fiscal Officer and Town Treasurer are hereby authorized, on behalf of the Town, to enter into agreements or otherwise covenant for the benefit of bondholders to provide information on an annual or other periodic basis to the Municipal Securities Rulemaking Board (the "MSRB") and to provide notices to the MSRB of material events as enumerated in Securities and Exchange Commission Exchange Act Rule 15c2-12, as amended, as may be necessary, appropriate or desirable to effect the sale of the bonds and notes authorized by this resolution.
10. The Committee is hereby authorized to take all action necessary and proper for the sale, issuance and delivery of the bonds and notes in accordance with the provisions of the Connecticut General Statutes and the laws of the United States. The First Selectwoman is authorized to negotiate and enter into grant agreements on behalf of the Town to fund the Project and to accept on behalf of the Town any grant to fund the Project. The First Selectwoman and other Town officials are authorized to seek grants and other contributions for the costs of the Project and take all such actions necessary or appropriate to obtain such grants and other contributions including execution and delivery of contracts related to such grants. Any such grants or contribution received prior to the issuance of the Bonds authorized herein shall be applied to the costs of the Project or to pay at maturity the principal of any outstanding bond anticipation notes issued pursuant this resolution and shall reduce the amount of the Bonds that can be issued pursuant to this resolution. If such grants and contributions are received after the issuance of the Bonds, they shall be applied to pay the principal on the Bonds or as otherwise authorized by the Board of Selectmen, Board of Finance and Representative Town Meeting provided such application does not adversely affect the tax exempt status of the Bonds or the Town's receipt of such grant or contribution.

**EXHIBIT A**

<b>Five Year Replacement Plan</b>	
<b><u>Equipment</u></b>	<b><u>Equipment Detail</u></b>
6-Wheel Trucks Snow Plows	Replacement Beyond Useful Life Unit 178, Unit 180, Unit 181, Unit #200, Unit #174, Unit #171, Unit #290, Unit #316 and Unit #165
Sweepers	Replacement Beyond Useful Life Unit #97
Bucket Lilt	Replacement Beyond Useful Life Unit #53 and Unit #264
Loaders	Replacement Beyond Useful Life Unit #108 and Unit #109
10-Wheel Trucks	Replacement Beyond Useful Life Unit #114
Flatbed w/Lift Gate	Replacement Beyond Useful Life Unit #201
Chippers	Replacement Beyond Useful Life Unit #299
Backhoes	Replacement Beyond Useful Life Unit #42
Beach Cleaner	Replacement Beyond Useful Life Unit #234

## **DPW Vehicle and Equipment Replacement**

1. **Background:** The DPW heavy equipment fleet consists of many front line types of vehicles and machinery to be able to perform daily work assignments as well as responding to emergencies to keep the Town's 250+ miles of roads and property safe for the public. Ten-Wheel Trucks are equipped with dump bodies, which carry 14 cubic yards of stone, gravel and road materials to and from the job sites. The Six-Wheel Trucks do the same, carrying 5-7 cubic yards of materials. All of the trucks are equipped for winter snow-clearing operations, plowing and salting the roads that consist of 27 plow routes. Two of the Six-Wheelers are equipped with hook lifts. These trucks are able to carry multiple types of bodies. For example: dumpsters, salt spreaders, water tanks and wood chip boxes for tree work. The Wheel Loaders are another versatile piece of machinery in the fleet that are used daily, on the roads as well as in the DPW yard, to load construction materials into the trucks. The Loader stationed in the DPW yard is equipped with a bucket-mounted scale. It weighs materials that come in and go out of the yard for job accountability. The Loaders are also equipped with multiple interchangeable front attachments. For example: 2- and 3- cubic yard buckets, side dump buckets, lifting booms, pallet forks, manhole cutters, claw buckets for brush cleanup and hydraulic multipurpose buckets for log and brush cleanup. All these attachments will interchange between all the Loaders. The Loaders are also front line in the winter. They all have 14-ft. plows to clear the roads. The Backhoes are used daily to dig trenches for drainage and load truck debris from the job site. These machines, like the Loaders, are equipped with multiple purpose buckets that can be changed to the needs of the job assignment. They consist of front four-in-one jaw buckets, rear jaw buckets for grading and brush removal, hydraulic jackhammers and grading buckets. Tree Bucket trucks and chippers are used for daily tree trimming and removal as well as front line for storm damage removal.

2. **Purpose:** The D.P.W. currently has in the heavy equipment fleet:

26 Six-Wheel Dump Trucks  
5 Ten-Wheel Dump Trucks  
5 Wheel Loaders  
4 Backhoes

2 Tree Bucket Trucks  
1 Chip Box Truck  
4 Wood Chippers  
4 Street Sweepers

We would like to get the fleet to be a maximum of 20 years with a future target to be 18 years old currently we have eight vehicles that are 20+ years old and are unreliable limiting their full capacity.

3. **Description of Proposal:** This proposed budget will replace existing vehicles with the same type and size vehicle. The proposed vehicles will be purchased through the State of Connecticut contract pricing or Sourcewell contract pricing (see proposed 2021-22 vehicle and equipment budget for replacement costs).
4. **Reliability of Cost Estimate:** Newly purchased vehicles have a three-year warranty w/option to extend therefore the only cost associated to the vehicle is normal maintenance. For example, oil changes, routine service and annual inspections. The average cost to service is \$1000-\$1500. The older 30 yr. vehicles have a very high maintenance cost to keep them safe for road use and could go as high as \$10,000 for a service and inspection.
5. **Increased Efficiency and Productivity:** This will allow us to continue to perform the construction and maintenance on our Town roads and property in a timely manner by limiting breakdowns of the older pieces of equipment.

6. **Additional Long Range Cost:** There will be a long-term fuel savings due to the efficiency of the newer, cleaner burning diesel engines. These engines are all computer controlled and have a DPF or diesel particulate filter built into the exhaust system as well as a diesel exhaust fluid that is mixed in the exhaust to make it more efficient.
7. **Additional Use or Demand:** No additional use or demand.
8. **Alternatives to This Request:**
9. **Safety:** There are six (6) vehicles out of the eight (8) vehicles that are 20+ years old, that will no longer pass the annual required Department of Transportation motor vehicle inspection.
10. **Environmental Considerations:** The new vehicles are equipped with a lower emission engine as well as a diesel particulate filter that decreases the carbon footprint.
11. **Insurance:** Self -Insured. There is a 3-year vehicle warranty with a 2- year extendable option.
12. **Financing:**
13. **Other Considerations:** None.
14. **Other Approvals:**
  - Board of Selectmen – February, 2021
  - Board of Finance – March, 2021
  - RTM – March, 2021



**2021 – 2022**

**CAPITAL BUDGET REQUEST**



**Unit #53 1999 International 4900 Aerial Tree Bucket Truck**

Miles 90,000

The truck is used for daily tree cutting and pruning it is also a front line truck for debris clearing during a major storm event or hurricane to keep the roads safe and clear for emergency vehicle passage

The truck has major safety issues and will no longer pass the annual safety inspection for the boom and bucket

The truck is constantly being taken out of service for break downs due to its age and usage

The truck is beyond its useful life and will be sold at auction





**Unit #178 1991 Ford LN9000 Dump Truck w/ Snow Plow and Salt Spreader**

**Miles 102,000**

Used for plowing and salting the towns roads and for debris removal after major storm events

Due to the trucks age parts are difficult to purchase

This truck is beyond its useful life and will be sold at auction



**Unit #180** 1990 International 2500 6 Wheel Dump Truck w/all season body and snow plow  
Miles 112,000

This truck is used for plowing and salting the towns roads and storm debris cleanup.

Due to the trucks age parts are difficult to purchase.

The truck is beyond its useful life and will be sold at auction.



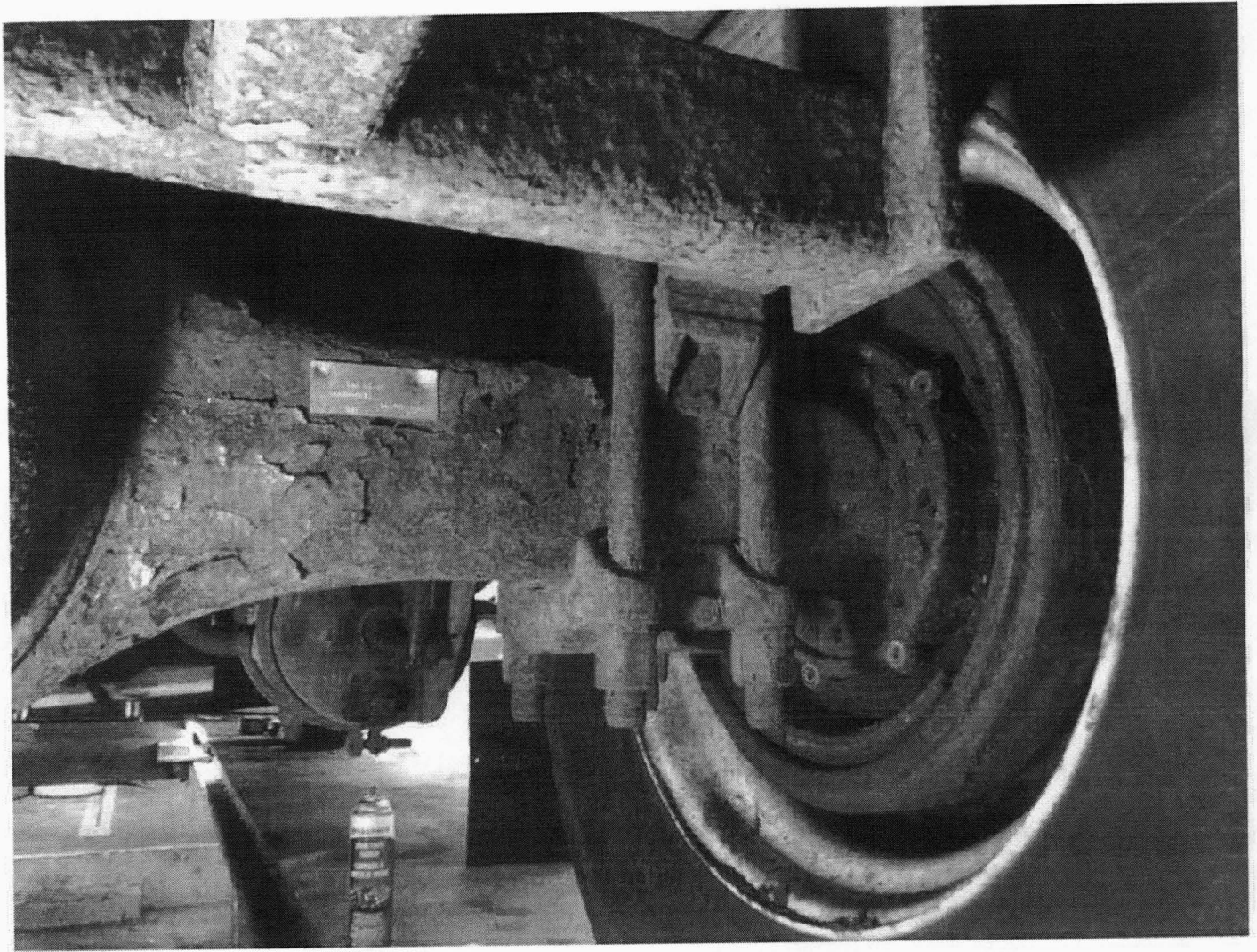


**Unit #181** 1990 International 2500 Six Wheel Truck w/ salt spreader and snow plow  
Miles 120,000

This truck is used for plowing and salting the town's roads

Due to the trucks age parts are difficult to purchase

The truck is beyond its useful life and will be sold at auction



**Unit #181 Under Carriage Note: rusted rear brake mounting assembly and differential**

This truck was repaired and made safe for the winter season

This truck will no longer pass a future D.O.T. safety inspection



**Unit #200** 1996 Ford LN9000 Six Wheel Truck w/ all season body and snow plow

Miles 132,000

This truck is used for plowing and salting the towns roads

Due to the trucks age body parts are difficult to purchase

The truck is beyond its useful life and will be sold at auction





**Unit #201 2004 International 4200 Flat Bed and Lift Gate**

Miles 59,000

This truck is used by multiple depts. for picking up and delivering supplies and equipment to job sites

It is also used in the winter season to transport snow blowers and equipment for winter storm events.

The lift gate and flatbed body are a safety concern and in need of replacement

The truck is beyond its useful life and will be sold at auction.



**Unit #42** 2001 John Deere 310 Backhoe w/ bucket attachments

Hours 13,000

This backhoe is used daily for road repair and also used for brush removal after a major storm

The machine is beyond its useful life and will be sold at auction

## DPW FY 2021-2022 Vehicle & Equipment Replacement Over \$100,000.00

Item 1	Tree Bucket Truck w/70ft. Boom Replaces #53 1999 International 4200 miles 90,000	Beyond its useful life	\$215,000.00
Item 2	Six Wheel Dump Truck w/All Season Body & Snow Plow Replaces #178 1991 Ford LN9000 miles 102,000	Beyond its useful life	\$220,000.00
Item 3	Six Wheel Dump Truck w/All Season Dump Body & Snow Plow Replaces #180 1990 International 2500 miles 112,000	Beyond its useful life	\$220,000.00
Item 4	Six Wheel Dump Truck w/ All Season Dump Body and Snow Plow Replaces #181 1990 International 2500 miles 120,000	Beyond its useful life	\$220,000.00
Item 5	Six Wheel Dump Truck w/All Season Dump Body & Snow Plow Replaces #200 1996 Ford LN9000 miles 132,000	Beyond its useful life	\$220,000.00
Item 6	Flatbed Truck w/Liftgate Replaces #201 2004 International 4200 14ft. Flatbed w/ Lift Gate miles 59,000	Scheduled replacement	\$130,000.00
Item 7	Four Wheel Drive Backhoe w/ Bucket Attachments Replaces #42 2001 John Deere 310 hours 13,000	Beyond its useful life	\$170,000.00
Total			\$1,395,000.00

Five Year Replacement Plan		2021	2022	2023	2024	2025
6-Wheel Trucks Snow Plows	Replacement Beyond Useful Life Unit 178, Unit 180, Unit 181, Unit 200	220 220 220 220	220 220 220	220 220	220	220
Sweepers	Replacement Beyond Useful Life Unit #97			230	230	
Bucket Lift	Replacement Beyond Useful Life Unit #53	215		215		
Loaders	Replacement Beyond Useful Life Unit #108		240	220		
10-Wheel Trucks	Replacement Beyond Useful Life Unit #114		240		240	
Flatbed w/Lift Gate	Replacement Beyond Useful Life Unit #201	130				
Garage Lifts					120	
Chippers				100		100
Backhoes	Replacement Beyond Useful Life Unit #42	170			170	
Beach Cleaner	Replacement Beyond Useful Life Unit #234		180			
See Backup						
Grand Totals		1,395	1,320	1,205	980	320

**A RESOLUTION APPROPRIATING \$1,000,000 FOR COSTS RELATED TO ROAD PAVING AND AUTHORIZING THE ISSUANCE OF BONDS TO FINANCE SUCH APPROPRIATION**

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**RESOLVED:**

1. As recommended by the Board of Finance and the Board of Selectmen, the Town of Fairfield (the "Town") hereby appropriates the sum of One Million and 00/100 Dollars (\$1,000,000) for costs related to paving of Town roads inclusive of design, materials and oversight, as well as, all related administrative, financing, legal, contingency and other soft costs (the "Project").
2. To finance such appropriation and in lieu of a tax therefor, and as recommended by the Board of Finance and the Board of Selectmen, the Town may borrow a sum not to exceed One Million and 00/100 Dollars (\$1,000,000) and issue its general obligation bonds/bond anticipation notes for such indebtedness under its corporate name and seal and upon the full faith and credit of the Town in an amount not to exceed said sum for the purpose of financing the appropriation for the Project.
3. The Board of Selectmen, the Treasurer and the Fiscal Officer of the Town are hereby appointed a committee (the "Committee") with full power and authority to cause said bonds to be sold, issued and delivered; to determine their form and terms, including provision for redemption prior to maturity; to determine the aggregate principal amount thereof within the amount hereby authorized and the denominations and maturities thereof; to fix the time of issue of each series thereof and the rate or rates of interest thereon as herein provided; to determine whether the interest rate on any series will be fixed or variable and to determine the method by which the variable rate will be determined, the terms of conversion, if any, from one mode to another or from fixed to variable; to set whatever other terms of the bonds they deem necessary, desirable or appropriate; to designate the bank or trust company to certify the issuance thereof and to act as transfer agent, paying agent and as registrar for the bonds, and to designate bond counsel. The Committee shall have all appropriate powers under the Connecticut General Statutes, including Chapter 748 (Registered Public Obligations Act) and Chapter 109 (Municipal Bond Issues) to issue, sell and deliver the bonds and, further, shall have full power and authority to do all that is required under the Internal Revenue Code of 1986, as amended, and under rules of the Securities and Exchange Commission, and other applicable laws and regulations of the United States, to provide for issuance of the bonds in tax exempt form and to meet all requirements which are or may become necessary in and subsequent to the issuance and delivery of the bonds in order that the interest on the bonds be and remain exempt from Federal income taxes, including, without limitation, to covenant and agree to restriction on investment yield of bond proceeds, rebate of arbitrage earnings, expenditure of proceeds within required time limitations, the filing of information reports as and when required,



and the execution of Continuing Disclosure Agreements for the benefit of the holders of the bonds and notes.

4. The First Selectwoman and Treasurer or Fiscal Officer, on behalf of the Town, shall execute and deliver such bond purchase agreements, reimbursement agreements, line of credit agreement, credit facilities, remarketing, standby marketing agreements, standby bond purchase agreements, and any other commercially necessary or appropriate agreements which the Committee determines are necessary, appropriate or desirable in connection with or incidental to the sale and issuance of bonds, and if the Committee determines that it is necessary, appropriate, or desirable, the obligations under such agreements shall be secured by the Town's full faith and credit.
5. The First Selectwoman and Treasurer or Fiscal Officer shall execute on the Town's behalf such interest rate swap agreements or similar agreements related to the bonds for the purpose of managing interest rate risk which the Committee determines are necessary, appropriate or desirable in connection with or incidental to the carrying or selling and issuance of the bonds, and if the Committee determines that it is necessary, appropriate or desirable, the obligations under such interest rate swap agreements shall be secured by the Town's full faith and credit.
6. The bonds may be designated "Public Improvement Bonds of the Town of Fairfield", series of the year of their issuance and may be issued in one or more series, and may be consolidated as part of the same issue with other bonds of the Town; shall be in serial form maturing in not more than fifteen (15) annual installments of principal, the first installment to mature not later than three years from the date of issue and the last installment to mature not later than fifteen (15) years from the date of issuance or as otherwise provided by statute. The bonds may be sold at an aggregate sales price of not less than par and accrued interest at public sale upon invitation for bids to the responsible bidder submitting the bid resulting in the lowest true interest cost to the Town, provided that nothing herein shall prevent the Town from rejecting all bids submitted in response to any one invitation for bids and the right to so reject all bids is hereby reserved, and further provided that the Committee may sell the bonds on a negotiated basis, as provided by statute. Interest on the bonds shall be payable semi-annually or annually. The bonds shall be signed on behalf of the Town by at least a majority of the Board of Selectmen and the Treasurer, and shall bear the seal of the Town. The signing, sealing and certification of the bonds may be by facsimile as provided by statute.
7. The Committee is further authorized to make temporary borrowings as authorized by the General Statutes and to issue temporary notes of the Town in anticipation of the receipt of proceeds from the sale of the bonds to be issued pursuant to this resolution. Such notes shall be issued and renewed at such time and with such maturities, requirements and limitations as provided by the Connecticut General Statutes. Notes evidencing such borrowings shall be signed by the First Selectwoman and Treasurer or Fiscal Officer, have the seal of the Town affixed, which signing and sealing may be by facsimile as provided by statute, be certified by and payable at a bank or trust company incorporated under the laws of this or any other state, or of the United States, be approved as to their legality by

bond counsel, and may be consolidated with the issuance of other Town bond anticipation notes. The Committee shall determine the date, maturity, interest rates, form and manner of sale, including negotiated sale, and other details of said notes consistent with the provisions of this resolution and the Connecticut General Statutes and shall have all powers and authority as set forth above in connection with the issuance of bonds and especially with respect to compliance with the requirements of the Internal Revenue Code of 1986, as amended, and regulations thereunder in order to obtain and maintain issuance of the notes in tax exempt form.

8. Pursuant to Section 1.150-2, as amended, of the Federal Income Tax Regulations the Town hereby declares its official intent to reimburse expenditures (if any) paid for the Project from its General or Capital Funds, such reimbursement to be made from the proceeds of the sale of bonds and notes authorized herein and in accordance with the time limitations and other requirements of said regulations.
9. The First Selectwoman, Fiscal Officer and Town Treasurer are hereby authorized, on behalf of the Town, to enter into agreements or otherwise covenant for the benefit of bondholders to provide information on an annual or other periodic basis to the Municipal Securities Rulemaking Board (the "MSRB") and to provide notices to the MSRB of material events as enumerated in Securities and Exchange Commission Exchange Act Rule 15c2-12, as amended, as may be necessary, appropriate or desirable to effect the sale of the bonds and notes authorized by this resolution.
10. The Committee is hereby authorized to take all action necessary and proper for the sale, issuance and delivery of the bonds and notes in accordance with the provisions of the Connecticut General Statutes and the laws of the United States. The First Selectwoman is authorized to negotiate and enter into grant agreements on behalf of the Town to fund the Project and to accept on behalf of the Town any grant to fund the Project. The First Selectwoman and other Town officials are authorized to seek grants and other contributions for the costs of the Project and take all such actions necessary or appropriate to obtain such grants and other contributions including execution and delivery of contracts related to such grants. Any such grants or contribution received prior to the issuance of the Bonds authorized herein shall be applied to the costs of the Project or to pay at maturity the principal of any outstanding bond anticipation notes issued pursuant this resolution and shall reduce the amount of the Bonds that can be issued pursuant to this resolution. If such grants and contributions are received after the issuance of the Bonds, they shall be applied to pay the principal on the Bonds or as otherwise authorized by the Board of Selectmen, Board of Finance and Representative Town Meeting provided such application does not adversely affect the tax exempt status of the Bonds or the Town's receipt of such grant or contribution.

**A RESOLUTION AMENDING AND RESTATING THE RESOLUTION ENTITLED "A RESOLUTION APPROPRIATING \$2,897,276.45 FOR THE COSTS ASSOCIATED WITH ESTABLISHMENT AND OPERATION OF A FAIRFIELD-WESTPORT MULTI-TOWN EMERGENCY COMMUNICATIONS CENTER WITH TOWN OF WESTPORT AND AUTHORIZING THE ISSUANCE OF BONDS TO FINANCE SUCH APPROPRIATION" TO INCREASE THE AMOUNT OF THE APPROPRIATION BY \$1,116,940 TO A TOTAL OF \$4,014,216.**

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**WHEREAS**, in early 2019, the Town of Fairfield (the "Town") entered into negotiations with the Town of Westport (together with the Town, the "Towns") for the establishment and operation of the Fairfield-Westport Multi-town Emergency Communications Center (the "Center"). Effective as of August 6, 2020, the Towns entered into an Interlocal Agreement which governs the terms of the construction and funding of the Center and operation of the regional dispatch services (the "Agreement"). The Center was originally planned to be located on Sacred Heart University's ("SHU") GE campus, but was later relocated to the SHU campus at 5151 Park Avenue, Fairfield, Connecticut (the "Premises"). Under the Agreement, the Town is obligated to contract for and supervise the construction and information technology for the Center and the Town of Westport is obligated to contribute one-half of such costs to the Town with each town responsible for the costs of upgrading its own CAD system; and

**WHEREAS**, the costs of the project were initially anticipated to be \$2,897,276.45; and

**WHEREAS**, upon application, the Towns anticipated receiving from the State of Connecticut (the "State") a grant of \$250,000 per town for their respective share of the costs of establishing the Center; and

**WHEREAS**, the Representative Town Meeting of the Town adopted on June 24, 2019 a resolution entitled "A RESOLUTION APPROPRIATING \$2,897,276.45 FOR THE COSTS ASSOCIATED WITH ESTABLISHMENT AND OPERATION OF A FAIRFIELD-WESTPORT MULTI-TOWN EMERGENCY COMMUNICATIONS CENTER WITH TOWN OF WESTPORT AND AUTHORIZING THE ISSUANCE OF BONDS TO FINANCE SUCH APPROPRIATION" (the "2019 Resolution"); and

**WHEREAS**, on May 20, 2020, the Towns and SHU entered into a lease agreement to operate the Center at the Premises; and

**WHEREAS**, the Town of Westport authorized initial funding for its one-half share of the costs for the Center based on the original project costs; and

**WHEREAS**, since the time the 2019 Resolution was approved, the Town has learned that the estimated costs associated with the project are higher than anticipated and now total \$4,014,216 (the "Amended Appropriation"); and

**WHEREAS**, due to the estimated increase in costs, the Town of Westport intends to seek authorization to fund the increased amount of its one-half share of the costs for the Center; and

**WHEREAS**, in November of 2020, the Towns submitted the Transition Grant Application to the State and are now expecting \$300,000 in grant funds per town given the estimated increased costs of the project; and

**WHEREAS**, it is necessary for the Town to amend and restate the 2019 Resolution to reflect the Amended Appropriation, the current state of the project and funding of same; and

**NOW, THEREFORE, BE IT RESOLVED**, that the 2019 Resolution is hereby amended and restated to provide as follows:

**Resolved:**

1. As recommended by the Board of Selectmen and Board of Finance, the Town appropriates Four Million Fourteen Thousand Two Hundred Sixteen and 00/100 Dollars (\$4,014,216) for costs associated with the establishment of the Center including but not limited to costs of upgrading premises in which Center is located, communication and information equipment, computers, battery back-up systems, and software, work stations, furniture, equipment, design costs, oversight, financing, administrative and other costs related to the foregoing (the "Project").
2. To finance a portion of such appropriation, the Town shall borrow a sum not to exceed Two Million Eight Hundred Ninety-seven Thousand Two Hundred Seventy-six and 45/100 Dollars (\$2,897,276.45) and issue its bonds for such indebtedness under its corporate name and seal and upon the full faith and credit of the Town in an amount not to exceed said sum for the purpose of financing a portion of the appropriation for the Project.
3. The First Selectman and other Town officials are authorized to seek the grant from the State and the reimbursement of costs from the Town of Westport for the costs of the Project. The grant and contributions received by the Town from the State and the Town of Westport after the issuance of the Bonds shall be applied to offset payment on the principal of the Bonds but such offset shall be limited to the amount by which the Town's one-half share of the Project costs has been exceeded by the issuance of bonds of the Town provided such application does not adversely affect the tax-exempt status of the Bonds.
4. The Board of Selectmen, the Treasurer and the Chief Fiscal Officer of the Town are hereby appointed a committee (the "Committee") with full power and authority to cause said bonds to be sold, issued and delivered; to determine their form and terms, including provision for redemption prior to maturity; to determine the aggregate principal amount thereof within the amount hereby authorized and the denominations and maturities

thereof; to fix the time of issue of each series thereof and the rate or rates of interest thereon as herein provided; to determine whether the interest rate on any series will be fixed or variable and to determine the method by which the variable rate will be determined, the terms of conversion, if any, from one mode to another or from fixed to variable; to set whatever other terms of the bonds they deem necessary, desirable or appropriate; to designate the bank or trust company to certify the issuance thereof and to act as transfer agent, paying agent and as registrar for the bonds, and to designate bond counsel. The Committee shall have all appropriate powers under the Connecticut General Statutes, including Chapter 748 (Registered Public Obligations Act) and Chapter 109 (Municipal Bond Issues) to issue, sell and deliver the bonds and, further, shall have full power and authority to do all that is required under the Internal Revenue Code of 1986, as amended, and under rules of the Securities and Exchange Commission, and other applicable laws and regulations of the United States, to provide for issuance of the bonds in tax exempt form and to meet all requirements which are or may become necessary in and subsequent to the issuance and delivery of the bonds in order that the interest on the bonds be and remain exempt from Federal income taxes, including, without limitation, to covenant and agree to restriction on investment yield of bond proceeds, rebate of arbitrage earnings, expenditure of proceeds within required time limitations, the filing of information reports as and when required, and the execution of Continuing Disclosure Agreements for the benefit of the holders of the bonds and notes.

5. The First Selectman and Treasurer or Chief Fiscal Officer, on behalf of the Town, shall execute and deliver such bond purchase agreements, reimbursement agreements, line of credit agreement, credit facilities, remarketing, standby marketing agreements, standby bond purchase agreements, and any other commercially necessary or appropriate agreements which the Committee determines are necessary, appropriate or desirable in connection with or incidental to the sale and issuance of bonds, and if the Committee determines that it is necessary, appropriate, or desirable, the obligations under such agreements shall be secured by the Town's full faith and credit.
6. The bonds may be designated "Public Improvement Bonds of the Town of Fairfield", series of the year of their issuance and may be issued in one or more series, and may be consolidated as part of the same issue with other bonds of the Town. The bonds shall be issued in serial form maturing in not more than twenty (20) annual installments of principal, the first installment to mature not later than three (3) years from the date of issuance and the last installment to mature not later than twenty (20) years from the date of issuance. The bonds may be sold at an aggregate sales price of not less than par and accrued interest at public sale upon invitation for bids to the responsible bidder submitting the bid resulting in the lowest true interest cost to the Town, provided that nothing herein shall prevent the Town from rejecting all bids submitted in response to any one invitation for bids and the right to so reject all bids is hereby reserved, and further provided that the Committee may sell the bonds on a negotiated basis, as provided by statute. Interest on the bonds shall be payable semi-annually or annually. The bonds shall be signed on behalf of the Town by at least a majority of the Board of Selectmen

and the Treasurer, and shall bear the seal of the Town. The signing, sealing and certification of the bonds may be by facsimile as provided by statute.

7. The Committee is further authorized to make temporary borrowings as authorized by the General Statutes and to issue temporary notes of the Town in anticipation of the receipt of proceeds from the sale of the bonds to be issued pursuant to this resolution. Such notes shall be issued and renewed at such time and with such maturities, requirements and limitations as provided by the Connecticut General Statutes. Notes evidencing such borrowings shall be signed by the First Selectman and Treasurer or Chief Fiscal Officer, have the seal of the Town affixed, which signing and sealing may be by facsimile as provided by statute, be certified by and payable at a bank or trust company incorporated under the laws of this or any other state, or of the United States, be approved as to their legality by bond counsel, and may be consolidated with the issuance of other Town bond anticipation notes. The Committee shall determine the date, maturity, interest rates, form and manner of sale, including negotiated sale, and other details of said notes consistent with the provisions of this resolution and the Connecticut General Statutes and shall have all powers and authority as set forth above in connection with the issuance of bonds and especially with respect to compliance with the requirements of the Internal Revenue Code of 1986, as amended, and regulations thereunder in order to obtain and maintain issuance of the notes in tax exempt form.
8. Pursuant to Section 1.150-2, as amended, of the Federal Income Tax Regulations the Town hereby declares its official intent to reimburse expenditures (if any) paid for the Project from its General or Capital Funds, such reimbursement to be made from the proceeds of the sale of bonds and notes authorized herein and in accordance with the time limitations and other requirements of said regulations.
9. The First Selectman, Chief Fiscal Officer and Town Treasurer are hereby authorized, on behalf of the Town, to enter into agreements or otherwise covenant for the benefit of bondholders to provide information on an annual or other periodic basis to the Municipal Securities Rulemaking Board (the "MSRB") and to provide notices to the MSRB of material events as enumerated in Securities and Exchange Commission Exchange Act Rule 15c2-12, as amended, as may be necessary, appropriate or desirable to effect the sale of the bonds and notes authorized by this resolution.
10. The Committee is hereby authorized to take all action necessary and proper for the sale, issuance and delivery of the bonds and notes in accordance with the provisions of the Connecticut General Statutes and the laws of the United States.

# **FAIRFIELD - WESTPORT EMERGENCY COMMUNICATIONS CENTER**

## **2021-2022 BUDGET PROPOSAL**

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## Overview

The Fairfield multi-town communications center will be responsible for receiving 9-1-1 and routine calls for service for Fairfield Police and Fire Departments, Westport Police, Fire, EMS and New Canaan Fire Department. The center is expected to handle over 28,000 9-1-1 calls and 151,000 routine calls annually. Additionally, we anticipate the center to dispatch over 90,000 calls for service annually.

The new consolidated center will employ 22 full-time telecommunicators and will be supervised by a director, who is currently a Fairfield Police Department captain. There will also be an oversight board consisting of the Westport and Fairfield Police and Fire chiefs (or their assigned representatives).

The new center will provide increased capabilities of handling unusual events, increased coordination between agencies, increased inter-operability among participating agencies, and improved overall service to the communities.

## Expenses - Detail

### Regular Payroll (4150-51010)

The Emergency Communications Center (ECC) is increasing the total number of full-time employees from 15 to 22. Additionally, we will be increasing the number of TC-2 positions from 1 to 4. Total employees will be 4-TC-2 and 18 TC-1 positions.

The current contract with the ECC union expired June of 2019. Negotiations are currently underway with the ECC union. For budgeting purposes, the following estimates were made in order to determine the below salaries. These are estimates only and may change based on negotiations with the ECC Union.

Employee	YRS	Salary
Maciver, Anges	36	\$ 59,181.00
Lobo, Maria	31	\$ 65,035.00
Rodriguez, Elizabeth	31	\$ 59,181.00
Rindgen, Robert	30	\$ 59,181.00
Erazmus, Lynn	30	\$ 59,181.00
Kuzco, Martha	17	\$ 59,181.00
DeMoura, Susana	14	\$ 56,295.00
Mulligan, Devin	12	\$ 56,295.00
Atkins, Russell	10	\$ 56,295.00
DiJoseph, Jennifer	10	\$ 56,295.00
Champney, Stuart	9	\$ 54,131.00
Ramsdell, Tom	8	\$ 54,131.00
Butz, Ron	7	\$ 54,131.00
Carideo, John	2	\$ 50,122.00
Quiroz, Fatima	2	\$ 50,122.00
McGovern, Terrence	2	\$ 50,122.00
Brooks, April	2	\$ 50,122.00
Conlin, Katherine	1	\$ 42,100.00
OPEN - TCII		\$ 65,035.00
OPEN - TCII		\$ 65,035.00
OPEN - TCII		\$ 65,035.00
OPEN		\$ 42,100.00
<b>Total Regular Payroll</b>		<b>\$1,228,306.00</b>

It is unknown which employees will be promoted to a TC-2 position. The amount shown above under supervisor promotions will cover the salary increases received by the new TC-2s.

### Overtime Earnings (4150-51050)

The overtime earnings request was calculated by using the average annual percentage of the salary line that has been historically used to pay overtime earnings. Between 2011 and 2020, the average cost was .56% of the overall salary line.

<b><u>Total Salary Line</u></b>	<b><u>Percent</u></b>	<b><u>Total FY 2022 Request</u></b>
\$1,228,306	0.56%	\$6,879

This line also includes holiday bonus pay. Per the union contract, employees who work on Thanksgiving, Christmas and New Year's receive time and one-half for hours worked. The average overtime rate is \$15.00 above the standard rate of pay.

<b><u>Shift</u></b>	<b><u>Staffing</u></b>	<b><u>Hours (8 hour shift x staffing level)</u></b>
Midnights	4	32
Days	6	48
Evenings	5	40
<b>Total Hours per holiday</b>		<b>120</b>
Total Bonus Hours (total hours x 3 holidays)		360
Total pay		\$ 5,400.00

2022 Overtime Earning Request: \$12,279

#### Overtime Replacement (4150-51055)

The overtime replacement request was calculated by using the average annual percentage of the salary line that has been historically used to pay overtime replacement. Between 2011 and 2020, the average cost was 24.13% of the overall salary line.

<b><u>Total Salary Line</u></b>	<b><u>Percent</u></b>	<b><u>Total FY 2022 Request</u></b>
\$1,228,306	24.62%	\$302,409

2022 Overtime Earning Request: \$302,409

#### Holiday Pay (4150-51090)

Per the union contract, employees receive an additional day's pay for 12 holidays per year.

Historically, some employees take compensatory time for several of these holidays, lowering the potential costs. As a result, the holiday pay request was calculated by using the average annual percentage of the salary line that has been historically used for holiday pay. Between 2011 and 2019 the average cost was 3.26% of the overall salary line.

**Total Salary Line**

\$1,228,306

**Percent**

3.2%

**Total FY 2022 Request**

\$39,306

*2022 Holiday Pay Request: \$39,306***Overtime Training (4150-51100)**

The overtime training request was calculated by using the average annual percentage of the salary line that has been historically used to pay overtime training. Between 2011 and 2020, the average cost was 1.59% of the overall salary line.

**Total Salary Line**

\$1,228,306

**Percent**

1.59%

**Total FY 2022 Request**

\$19,530

*2022 Overtime Training Request: \$19,530***Pay Differential (4150-51110)**

The current ECC Union contract provides for additional pay for evening and midnight shifts. The current amounts are: \$0.75 per hour on evenings and \$1.50 per hour on midnights. The amount shown was determined by calculating the number of TCs per applicable shift by the set rates. Associated costs: hold-overs, additional staffing based on work schedule and other times additional staffing is used.

Item	#	Rate	Total
Midnights (2,920 hours annually)	4	\$ 1.50	\$ 17,520
Evenings	5	\$ 0.75	\$ 10,950
Assorted hold-overs/emergencies			\$ 4,062
<b>Total Pay Differential</b>		<b>\$</b>	<b>\$ 32,532</b>

*2022 Pay Differential Request: \$32,532.00***Longevity Pay (4150-51160)**

Per contract, telecommunicators receive longevity pay for years of service with the center based on the following:

5 years of service: \$500.00, 10 Years of service: \$700.00, 15 years of service: \$900.00, 20 years of service: \$1,100.00

2022 Longevity Pay Request: \$11,500.00

Social Security (4150-51160)

<b>Social Security Costs</b>	<b>FICA</b>	<b>Medicare</b>
REGULAR PAYROLL	\$1,228,306	\$1,228,306
OVERTIME EARNINGS	\$12,279	\$12,279
OVERTIME EARNINGS - REPLACEMENT	\$302,409	\$302,409
HOLIDAY PAY	\$39,306	\$39,306
OVERTIME EARNINGS - TRAINING	\$19,530	\$19,530
PAY DIFFERENTIAL	\$32,532	\$32,532
LONGEVITY BONUS	\$11,500	\$11,500
Total	\$ 1,645,862	\$ 1,645,862
% of total	6.20%	1.45%
Estimated Cost	\$ 102,043	\$ 23,865
		\$ 125,908

2022 Social Security Pay Request: \$125,908

Information Technology (4150-53000)

These amounts are for costs related to licenses and support. ***The Center will begin to pay these costs in FY23 and each year thereafter.***

<b>Item</b>	<b>Total</b>
Support Systems (Network Synergy)	\$ 10,000
VM Software Support/License	\$ 3,600
Network Component Support (Firewall)	\$ 32,000
Network Support (Fairfield Switches)	\$ 17,000
Network Support (Westport Switches)	\$ 17,000
Network/Firewall/Routing (ChimeNet)	\$ 10,000
<b>Total Information Technology Costs</b>	<b>\$ 89,600</b>

Fees and Professional Services (4150-53200)

Battery Backup Maintenance	\$4,800
Voice Recorder	\$7,500
Misc. expenses	\$15,000
Cable	\$1,200
APCO EMD	\$10,240
Fire Station Alerting	\$23,000
CEN Internet Back-up	\$9,000
<hr/>	
<b>Total Fees and Professional Services</b>	<b>\$70,740</b>

*2022 Fees and Professional Services Request: \$70,740*

Utilities – Electric (4150-54130)

This is to cover electric costs for the new facility. This cost is an estimate based on electric costs of other emergency communication centers.

*2022 Utilities – Electric Request: \$62,400*

Maintenance and Repair of Equipment (4150-54310)

This line is to cover any repairs to the center's equipment. Although the equipment will be new, it is anticipated that some repairs may be necessary during the first year. This line will likely increase over the next several fiscal years as the equipment begins to age.

*2022 Maintenance of Equipment Request: \$25,000*

Maintenance and Repair – Building and Grounds (4150-54320)

This line covers the costs for routine cleaning and maintenance. The current ECC budget does not have this line as it is part of the police budget. This was added to cover the costs to have a cleaning crew assigned to clean the facility and to cover any repairs that may be needed during the year.

*2022 Maintenance and Repair – Building and Grounds Request: \$21,000*

#### Communications (4150-55300)

The communication line covers land-line telephone system costs, cell phone costs and other related items. Participating municipalities will be responsible to cover any costs to connect from their systems to the ECC.

<u>Item</u>	<u>Total Cost</u>
First Net (4 phones)	\$3,120
Radio Consoles	\$65,000
Cisco Phone System	\$7,200
<b>Total Communications Cost</b>	<b>\$75,320</b>

*2022 Communications Request: \$75,320.00*

#### Communications C-Med (4150-55301)

This line has been moved to Emergency Management.

#### Printing and Binding (4150-56100)

- Copier Lease and associated costs: \$5,400 (\$300 per month lease, \$150 per month supplies)
- Other Printed Supplies: \$2,700

*2022 Printing and Binding Request: \$8,100*

#### Office Supplies (4150-56110)

The three-year average for the current center was \$3,300. This figure was increased by 1.5 times to adjust for the increased staffing and duties. Additionally, funds were added for items needed to start-up the new center.

*2022 Office Supplies Request: \$5,000*

#### Cleaning and Janitorial Supplies (4150-56130)

This is for assorted cleaning supplies for the center.

- Carpet cleaning - \$1,174
- Paper Goods: \$2,000
- Misc. Cleaning Supplies: \$400

*2022 Cleaning and Janitorial Supplies Request: \$3,574*

#### Special Department Supplies (4150-56140)

This line is for assorted purchases, such as replacement chairs, headsets, batteries, and other items needed for center operations. The current budget is \$8,537. We increased this line by 1.5 to account for increased staffing and equipment.

*2022 Special Department Supplies Request: \$12,806*

#### Capital Outlay (4150-57000)

Currently the ECC budget purchases vehicle computers for PD and radio replacements for FD. These costs will be transferred to those departments. The recommendation is to use this line to fund an account to be used for future equipment replacements. The director will develop a capital replacement plan for all major equipment so funds can be adequately reserved. This will ensure to other municipalities participating in the center that we have the funds needed for critical equipment upgrades and replacements.

*2022 Capital Outlay Request: \$50,000*

#### Education and Membership (4150-58100)

This covers initial and on-going training for center employees. The current budget for this line is \$6,000. This was multiplied by 1.5 to account for the additional staffing.

*2022 Education and Membership Request: \$9,000*

#### Travel and Meeting (4150-58120)

This line covers travel costs (including mileage reimbursement) for training and seminars. The current ECC Budget for this line is \$1,500. This number was increased by 1.5 due to increasing total personnel by this amount.

*2022 Travel and Meeting Request: \$2,250*



## Revenue Detail

### State of Connecticut Annual Subsidy

The State of Connecticut currently provides an annual subsidy of \$136,704. The new center will receive a total subsidy of \$275,278

*2022 State of Connecticut Subsidy: \$275,278*

### New Canaan

The Town of Westport currently provides fire dispatching services to New Canaan Fire Department. It is anticipated that this agreement will continue when the new center opens. The current annual fee for these services is \$70,000.00.

- 33% of the New Canaan revenue will be credited to the Westport costs

*2022 New Canaan Fire Dispatching Fee: \$70,000.00*

### Fairfield – Westport Cost Allocations

The agreement is that all revenue and all expenses are shared based upon the agreed cost share formula (currently 67% Fairfield and 33% Westport.)

	<u>FY 21 Original</u>	<u>FY 22 Requested</u>	<u>Difference</u>
<b>TOTAL BUDGET - ALL ACCOUNTS</b>	<b>\$ 2,796,261</b>	<b>\$ 2,885,967</b>	<b>\$ 89,706</b>
<b>REVENUES OF THE CENTER</b>			
NEW CANAAN SERVICE FEE	\$ 70,000	\$ 70,000	\$ -
STATE GRANT	\$ 252,885	\$ 275,278	\$ 22,393
<b>TOTAL REVENUE</b>	<b>\$ 322,885</b>	<b>\$ 345,278</b>	<b>\$ 22,393</b>
<b>NET COST</b>	<b>\$ 2,473,376</b>	<b>\$ 2,540,689</b>	<b>\$ 67,313</b>
<b>COST ALLOCATIONS</b>			
FAIRFIELD (2/3 of NET COST)	\$ 1,648,917	\$ 1,693,793	\$ 44,875
WESTPORT (1/3 of NET COST)	\$ 824,459	\$ 846,896	\$ 22,438

## Appendix 1: Operating and Administrative Cost Breakdown

### Non-ECC Department Costs

The following expenses are currently paid by the Town of Fairfield to operate the emergency communications center, but the costs are found in other line items of the town budget. These costs will be split with Westport by the agreed cost share.

HEALTH SELF-INSURANCE	\$	458,700
LIFE INSURANCE	\$	2,004
RETIREMENT CONTRIB-401A	\$	71,714
OPEB HEALTH-TOWN RETIREES	\$	70,526
ADMINISTRATIVE EXPENSES	\$	166,063
<b>TOTAL - NON-ECC DEPARTMENT COSTS</b>	<b>\$</b>	<b>769,007</b>

### Administrative Costs

Administrative fees cover the cost to provide administrative functions to the center. The costs were broken out to show what each function costs the town per employee. Then the cost was multiplied by the total number of center employees (22.)

These costs are 33% reimbursable by Westport.

<b><u>Administrative Expenses</u></b>	<b><u>Per employee</u></b>	<b><u>Total Cost</u></b>
Legal	\$212.12	\$4,853
Work Comp	\$547.50	\$12,527
Payroll Processing	\$419.83	\$9,606
Accounts Payable	\$169.95	\$3,888
Personnel Administration	\$595.34	\$13,621
Benefits Administration	\$316.70	\$7,246
Supervision Costs	\$4,996.55	\$114,321
<b>Total Administrative Expenses</b>		<b>\$166,063</b>

**FAIRFIELD – WESTPORT  
MULTI-TOWN EMERGENCY  
COMMUNICATIONS CENTER**

**CAPITAL BUDGET**

Capital Build Budget

Budget Schedules

FAIRFIELD COUNTY DISPATCH CENTER			
CAPITAL COST BREAKDOWN			
INFORMATION TECHNOLOGY	Approved Plan	Revised Plan	Note
Fiber	\$ 50,000	\$ 49,877	Quote from State
Voice Recorder	\$ 115,000	\$ 113,000	
Camera System/Door Access	\$ 40,000	\$ 26,717	Cameras - 17,632 / Doors - 9,085
CCTV Monitors	\$ 14,400	\$ 10,000	1K per for 10
Cable TV	\$ 5,000	\$ -	Move to streaming services
Telephone Systems	\$ 60,000	\$ 31,208	Town/none for 3rd party vendor
Computer Equipment	\$ 28,000	\$ 73,800	Monitors/PC/etc
Software / Network (ATT 911 Relocation)	\$ 50,000	\$ 317,209	Prelim Est (Worst Case) ATT 911 Relocation
Fire Station Alerting System	\$ 259,125	\$ 259,126	Quote from vendor
EMD/EPD/EFD	\$ 93,609	\$ 96,000	Upgrade price to current Wspt system
Radio Consoles	\$ 800,000	\$ 800,000	80K per radio console
Microwave Link		\$ 168,000	911 and center radio redundancy
Remote PC Equipment	\$ 75,488	\$ -	Removed
Scheduling Software	\$ 6,000	\$ -	Removed. Add to PD system for no cost
Total	\$ 1,596,622	\$ 1,944,937	
RENOVATIONS	Approved Plan	Revised Plan	Note
Renovations/Construction		\$ 1,373,085	\$ -
Painting	\$ 23,000		Included in contractor bid
Lighting	\$ 27,500		Included in contractor bid
HVAC	\$ 120,000		Included in contractor bid
Electrical	\$ 100,000		Included in contractor bid
Doors	\$ 15,000		Included in contractor bid
Ballistic Reinforcement	\$ 70,000		Included in contractor bid
Parking Barricades	\$ 13,520		Included in contractor bid
Humidifier	\$ 17,900		Included in contractor bid
Construction	\$ 100,000		Included in contractor bid
Construction Manager	\$ 100,000	\$ 48,500	\$48,500 added for ECC Proj Mgr
Battery Back-up	\$ 100,000		Included in contractor bid
Total	\$ 686,920	\$ 1,421,585	
OUTFITTING	Approved Plan	Revised Plan	Note
Workstations	\$ 216,000	\$ 193,565	10 workstations (HGAC contract pricing)
Furniture /File Cabinets	\$ 64,600	\$ 30,000	20K chairs, 5K file cabinets, 3K desks, 2K misc
Appliances	\$ 3,000	\$ 3,200	Fridge/stove/microwave
Total	\$ 283,600	\$ 226,765	
OTHER	Approved Plan	Revised Plan	Note
Signs	\$ 800	\$ 800	Parking lot
Advertising and Bids	\$ 3,000	\$ 3,000	
Haz-Mat Testing	\$ 12,000	\$ -	Recently done for previous construction
Design	\$ 50,000	\$ 52,200	
Total	\$ 65,800	\$ 56,000	
	\$ 2,632,942	\$ 3,649,287	

CONTINGENCY	Approved Plan	Revised Plan	Note
Contingency	\$ 264,334	\$ 364,929	10% Project Total
Total	\$ 264,334	\$ 364,929	
<b>Grand Total</b>	<b>\$ 2,897,276</b>	<b>\$ 4,014,216</b>	
Difference - Approved Plan vs Revised Plan		\$ 1,116,940	
<b>TOWN COST SHARE BREAKDOWN</b>			
FAIRFIELD	Approved Plan	Revised Plan	Difference from Original
50% Total Cost	\$ 1,448,638	\$ 2,007,108	
State Grant	\$ (250,000)	\$ (300,000)	
	\$ 1,198,638	\$ 1,707,108	\$508,470
<b>WESTPORT</b>	<b>Approved Plan</b>	<b>Revised Plan</b>	
50% Total Cost	\$ 1,448,638	\$ 2,007,108	
State Grant	\$ (250,000)	\$ (300,000)	
	\$ 1,198,638	\$ 1,707,108	\$508,470

## **Section One: Information Technology**

### **Fiber-Optic Communication Lines**

The new center is required to establish connection with The State of Connecticut via the State fiber system for accessing COLLECT and other state and federal systems. The fiber line runs on Easton Turnpike, but the center is required to pay for connecting from the center to Easton Turnpike.

**Total Fiber: \$49,877**

### **Voice Recorder**

The center is required to have a recording system to record all emergency and most non-emergency lines running into the center. Additionally, all radio systems must be recorded.

The existing recording systems must remain with the current agencies to record selected phone lines within each department.

**Total Voice Recorder: \$113,000.00**

### **Camera System and Door Access Controls**

Part of the security plan for the center is to have camera systems that cover the exterior of the center that can be monitored from both within the center and both police departments. Additionally, there will be cameras inside the center being monitored from both police departments. The purpose is to alert police if there is an issue within the center. The cameras will be recorded.

The center will also have a card key access system to limit access to the center.

**Total Camera / Access System: \$26,717 – (Cameras \$17,632 – Doors \$9,085)**

### **CCTV Monitors**

Both Fairfield PD and Westport PD are required to monitor several camera system (holding cells, police facilities, school surveillance systems, etc.) These are large monitors that will be mounted on walls for easy of viewing. Price is based on research showing price per monitor is approximately \$1,000. The center needs 10 monitors.

**Total CCTV Monitors: \$10,000**

### **Telephone Systems**

The Telephone system for the center will be designed and implemented as an extension of the current Town's VOIP system. The current vendor, Total Communications, provided a quote of \$31,208.00

**Total Telephone System: \$31,208.00**

### **Computer Equipment**

The new center will require a minimum of 3 computers and 6 monitors at each workstation to run programs such as LEAS, CAD, camera systems, in-house computer systems, etc.

**Total Computer Equipment: \$78,800.00**

### **Software Licensing/Network Equipment/911 Implementation**

This is a current cost for the various network hardware and software along with computer servers, their respective operating systems and licensing, and threat monitoring and detection. This equipment is necessary to provide a robust and stable network that will accommodate the needs of both Fairfield and Westport now, and any other municipalities seeking to join the center in the future.

**Total Software Licensing/Network Equipment: \$317,209**



### **Fire Station Alerting**

Both Westport and Fairfield fire departments utilize a fire station alerting system. The current systems are reaching end of life and need updating. Additionally, it will be more efficient to use one integrated system for the new center with the capability to expand if required. This amount is from a vendor quote.

**Total Fire Station Alerting: \$259,125.23**

### **EMD/EPD/EFD**

This is software that is integrated with the Computer Aided dispatch system which directs dispatchers on the proper course of action to take and relevant questions to ask during a fire, police, or medical call.

**Total EMD/EPD/EFD: \$96,000**

### **Radio Consoles**

This equipment is for connection to and control of the required radio systems. This is an estimate. There needs to be one unit per workstation. Initial plan is for 8 workstations.

**Total Consoles: \$800,000.00**

### **Microwave Link**

This link is for communication that provide for 911 System and radio system redundancy.

**Total Microwave Link: \$168,000.00**

## **Section 2 - Renovations**

The resulting cost increases were due to the location change. Initial estimates were much lower because the center would be built in a location that had significant parts of the infrastructure in place. When Sacred Heart moved the center's location to the basement of the library, the construction cost rose significantly. An RFP was executed and the resulting cost to build the center was totaled at \$1,373,085.

**Total Renovations: \$1,373,085**

### **Construction Manager**

Due to the size and scope of the project it is necessary to hire a construction manager with expertise in building and outfitting a 911 communications center. This will be a representative from Silver/Petrucelli, the company that designed the new center.

**Total Construction Manager: \$48,500**

## **Section 3: Outfitting**

### **Workstations**

The current workstations are end of life and need replacement. Additionally, the current centers must remain operational until we go live. The workstations will allow different heights to accommodate all employees. They are specifically designed for dispatch centers and recognizing that telecommunicators may be at the station for 8 to 16 hours.

**Total Workstations: \$193,565.00**

### **Furniture/File Cabinets**

The center will need office furniture, file cabinets and other equipment.

**Total Furniture Costs: \$30,000.00**

### **Appliances**

The center has a breakroom. Appliances will require replacement. Cost is an estimate.

**Total Appliances: \$3,200.00**

## **Section 4 : Other/Miscellaneous Costs**

### **Signs**

Signs for new center/parking lot. Cost is an estimate.

**Total Signs: \$800.00**

### **Advertising and Bids**

It will be necessary to advertise bids for equipment and labor. Cost is an estimate.

**Total Advertising and Bids: \$3,000.00**

### **Design**

A designer (Silver/Petrucelli) has been utilized to plan the layout of the center as well as electrical/data cable runs and needs.

**Total design: \$52,200.00**

### Contingency

In order to be prepared for unanticipated costs, a 10% contingency amount is being added to the overall budget.

**Total Contingency: \$364,929.00**

The difference between the initial approved plan and the new revised plan is \$1,116,940. As per the inter-local agreement, the Town of Fairfield and the Town of Westport will share the cost of the center's construction equally. This will result in an increase of \$508,470.00 for each town. It should be noted that the State of Connecticut increased the amount of the grant money provided for the consolidation effort. The new amount is \$300,000 per municipality.

TOWN COST SHARE BREAKDOWN			
	Approved Plan	Revised Plan	Difference from Original
<b>FAIRFIELD</b>			
50% Total Cost	\$ 1,448,638	\$ 2,007,108	
State Grant	\$ (250,000)	\$ (300,000)	
	<b>\$ 1,198,638</b>	<b>\$ 1,707,108</b>	<b>\$508,470</b>
<b>WESTPORT</b>			
50% Total Cost	\$ 1,448,638	\$ 2,007,108	
State Grant	\$ (250,000)	\$ (300,000)	
	<b>\$ 1,198,638</b>	<b>\$ 1,707,108</b>	<b>\$508,470</b>

### ECC Budget Comparison - FY 21 vs FY 22

<u>ACCT#</u>	<u>ACCOUNT NAME</u>	<u>FY 21</u>	<u>FY 22</u>
51010	REGULAR PAYROLL*	\$ 1,234,406	\$ 1,228,306
51050	OVERTIME EARNINGS	\$ 12,643	\$ 12,279
51055	OVERTIME EARNINGS - REPLACEMENT	\$ 318,642	\$ 302,409
51090	HOLIDAY PAY	\$ 42,229	\$ 39,306
51100	OVERTIME EARNINGS - TRAINING	\$ 20,879	\$ 19,530
51110	PAY DIFFERENTIAL	\$ 32,532	\$ 32,532
51160	LONGEVITY BONUS	\$ 12,700	\$ 11,500
52200	SOCIAL SECURITY CONTRIBUTIONS	\$ 125,520	\$ 125,908
53000	INFORMATION TECHNOLOGIES (\$89,600 annually AFTER FY 22)		
53200	FEES AND PROFESSIONAL SERVICES	\$ 37,400	\$ 70,740
54130	UTILITIES	\$ 25,000	\$ 62,400
54310	MAINT/REPAIR EQUIPMENT	\$ 25,000	\$ 25,000
54320	MAINT/BUILDING AND GROUNDS	\$ 18,000	\$ 21,000
55300	COMMUNICATIONS	\$ 37,960	\$ 75,320
56100	PRINTING BINDING & PHOTOGRAPH	\$ 8,100	\$ 8,100
56110	OFFICE SUPPLIES	\$ 5,000	\$ 5,000
56120	CLOTHING AND DRY GOODS	\$ 3,520	
56130	CLEANING AND JANITORIAL SUPPLIES	\$ 3,574	\$ 3,574
56140	SPECIAL DEPARTMENTAL SUPPLIES	\$ 12,806	\$ 12,806
56150	POSTAGE	\$ 150	
57000	CAPITAL OUTLAY	\$ 50,000	\$ 50,000
58100	EDUCATIONAL AND MEMBERSHIPS	\$ 9,000	\$ 9,000
58120	TRAVEL AND MEETINGS	\$ 2,250	\$ 2,250

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<b>TOTAL - ECC DEPARTMENT COSTS</b>	<b>\$ 2,037,311</b>	<b>\$ 2,116,960</b>
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#### NON-ECC DEPARTMENT EXPENSES

52100	HEALTH SELF-INSURANCE	\$ 458,700	\$ 458,700
52120	LIFE INSURANCE	\$ 2,004	\$ 2,004
52312	RETIREMENT CONTRIB-401A	\$ 71,714	\$ 71,714
52105	OPEB HEALTH-TOWN RETIREES	\$ 70,526	\$ 70,526
54000	ADMINISTRATIVE EXPENSES	\$ 159,676	\$ 166,063
	<b>TOTAL - NON-ECC DEPARTMENT COSTS</b>	<b>\$ 762,620</b>	<b>\$ 769,007</b>

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<b>TOTAL OPERATING COSTS</b>	<b>\$ 2,799,931</b>	<b>\$ 2,885,967</b>
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*\*Negotiations are ongoing, and the result will have an impact on the Regular Payroll budget and to a much lesser extent on other related benefit accounts.*

# ECC ALLOCATION CALCULATION FOR FAIRFIELD

	<u>FY 20 Actual</u>	<u>FY 21 Original</u>	<u>FY 22 Requested</u>
TOTAL BUDGET - ALL ACCOUNTS	\$ 1,850,334	\$ 2,799,931	\$ 2,885,967
REVENUES OF THE CENTER			
NEW CANAAN SERVICE FEE	\$ -	\$ 70,000	\$ 70,000
STATE GRANT	\$ 136,704	\$ 252,885	\$ 275,278
TOTAL REVENUE	<u>\$ 136,704</u>	<u>\$ 322,885</u>	<u>\$ 345,278</u>
NET COST	<u>\$ 1,713,630</u>	<u>\$ 2,477,046</u>	<u>\$ 2,540,689</u>
COST ALLOCATION	<i>Net Cost times Two-thirds (in FY 21 and 22)</i>		
FAIRFIELD	\$ 1,713,630	\$ 1,651,364	\$ 1,693,793

**FAIRFIELD COUNTY DISPATCH CENTER  
CAPITAL COST BREAKDOWN**

<b>INFORMATION TECHNOLOGY</b>	<b>Approved Plan</b>	<b>Revised Plan</b>	<b>Note</b>
Fiber	\$ 50,000	\$ 49,877	Quote from State
Voice Recorder	\$ 115,000	\$ 113,000	
Camera System/Doors	\$ 40,000	\$ 26,717	Cameras - 17,632 / Doors - 9,085
CCTV Monitors	\$ 14,400	\$ 10,000	1K per for 10
Cable TV	\$ 5,000	\$ -	Move to streaming services
Telephone System	\$ 60,000	\$ 31,208	Town/none for 3rd party vendor
Computer Equipm	\$ 28,000	\$ 73,800	Monitors/PC/etc
Software / Network	\$ 50,000	\$ 317,209	Prelim Est (Worst Case) ATT 911 Relocation
Fire Station Alerting	\$ 259,125	\$ 259,126	Quote from vendor
EMD/EPD/EFD	\$ 93,609	\$ 96,000	Upgrade price to current Wspt system
Radio Consoles	\$ 800,000	\$ 800,000	80K per radio console
Microwave Link		\$ 168,000	911 and center radio redundancy
Remote PC Equipm	\$ 75,488	\$ -	Removed
Scheduling Software	\$ 6,000	\$ -	Removed. Add to PD system for no cost
<b>Total</b>	<b>\$ 1,596,622</b>	<b>\$ 1,944,937</b>	

<b>RENOVATIONS</b>	<b>Approved Plan</b>	<b>Revised Plan</b>	<b>Note</b>
Renovations/Construction		\$ 1,373,085	Bid from RFP respondent
Painting	\$ 23,000		Included in contractor bid
Lighting	\$ 27,500		Included in contractor bid
HVAC	\$ 120,000		Included in contractor bid
Electrical	\$ 100,000		Included in contractor bid
Doors	\$ 15,000		Included in contractor bid
Ballistic Reinforcer	\$ 70,000		Included in contractor bid
Parking Barricades	\$ 13,520		Included in contractor bid
Humidifier	\$ 17,900		Included in contractor bid
Construction	\$ 100,000		Included in contractor bid
Construction Man:	\$ 100,000	\$ 48,500	\$48,500 added for ECC Proj Mgr
Battery Back-up	\$ 100,000		Included in contractor bid
<b>Total</b>	<b>\$ 686,920</b>	<b>\$ 1,421,585</b>	

<b>OUTFITTING</b>	<b>Approved Plan</b>	<b>Revised Plan</b>	<b>Note</b>
Workstations	\$ 216,000	\$ 193,565	10 workstations (HGAC contract pricing)
Furniture /File Cab	\$ 64,600	\$ 30,000	20K chairs, 5K file cabinets, 3K desks, 2K misc
Appliances	\$ 3,000	\$ 3,200	Fridge/stove/microwave
<b>Total</b>	<b>\$ 283,600</b>	<b>\$ 226,765</b>	

<b>OTHER</b>	<b>Approved Plan</b>	<b>Revised Plan</b>	<b>Note</b>
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Signs	\$	800	\$	800	Parking lot
Advertising and Bi	\$	3,000	\$	3,000	
Haz-Mat Testing	\$	12,000	\$	-	Recently done for previous construction
Design	\$	50,000	\$	52,200	

Total	\$	65,800	\$	56,000
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	\$	2,632,942	\$	3,649,287
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CONTINGENCY	Approved Plan	Revised Plan	Note
Contingency	\$ 264,334	\$ 364,929	10% Project Total
Total	\$ 264,334	\$ 364,929	

Grand Total	\$	2,897,276	\$	4,014,216
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ence - Approved Plan vs Revised Plan \$ 1,116,940

#### TOWN COST SHARE BREAKDOWN

FAIRFIELD	Approved Plan	Revised Plan	Difference from Original
50% Total Cost	\$ 1,448,638	\$ 2,007,108	
State Grant	\$ (250,000)	\$ (300,000)	
	\$ 1,198,638	\$ 1,707,108	\$508,470

WESTPORT	Approved Plan	Revised Plan	
50% Total Cost	\$ 1,448,638	\$ 2,007,108	
State Grant	\$ (250,000)	\$ (300,000)	
	\$ 1,198,638	\$ 1,707,108	\$508,470

**20 YEAR**

**A RESOLUTION APPROPRIATING \$4,303,000 FOR THE COSTS OF CERTAIN  
NONRECURRING CAPITAL PROJECTS AND AUTHORIZING THE ISSUANCE OF  
BONDS TO FINANCE SUCH APPROPRIATION.**

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**Resolved:**

1. As recommended by the Board of Finance and the Board of Selectmen, the Town of Fairfield hereby appropriates the sum of Four Million Three Hundred Three Thousand and 00/100 Dollars (\$4,303,000.00) to fund all costs associated with the nonrecurring capital projects described on **Exhibit A** attached hereto, inclusive of planning, design and engineering fees, other professional fees, demolition, construction and oversight costs and temporary and permanent financing costs (collectively, the “Projects”), in the amount of such appropriation allocated to each Project as set forth in **Exhibit A**. Any reallocation of unused bond proceeds from one project category listed as items 1-14 on **Exhibit A** to a different project category listed on **Exhibit A** that would cause the cost of such project to exceed the cost listed on **Exhibit A** shall require approval by the Board of Selectmen, Board of Finance, and the Representative Town Meeting.
2. To finance such appropriation, and as recommended by the Board of Finance and the Board of Selectmen, the Town of Fairfield shall borrow a sum not to exceed Four Million Three Hundred Three Thousand and 00/100 Dollars (\$4,303,000.00) and issue bonds/bond anticipation notes for such indebtedness under its corporate name and seal and upon the full faith and credit of the Town in an amount not to exceed said sum for the purpose of financing the appropriation for the Projects.
3. The Board of Selectmen, the Treasurer and the Chief Fiscal Officer of the Town are hereby appointed a committee (the “Committee”) with full power and authority to cause said bonds to be sold, issued and delivered; to determine their form and terms, including provision for redemption prior to maturity; to determine the aggregate principal amount thereof within the amount hereby authorized and the denominations and maturities thereof; to fix the time of issue of each series thereof and the rate or rates of interest thereon as herein provided; to determine whether the interest rate on any series will be fixed or variable and to determine the method by which the variable rate will be determined, the terms of conversion, if any, from one interest rate mode to another or from fixed to variable; to set whatever other terms of the bonds they deem necessary, desirable or appropriate; to designate the bank or trust company to certify the issuance thereof and to act as transfer agent, paying agent and as registrar for the bonds, and to designate bond counsel. The Committee shall have all appropriate powers under the Connecticut General Statutes, including Chapter 748 (Registered Public Obligations Act), Chapter 173 (School Building Projects) and Chapter 109 (Municipal Bond Issues) to issue, sell and deliver the bonds and, further, shall have full power and authority to do all that is required under the Internal Revenue Code of 1986, as amended, and under rules of the Securities and Exchange Commission, and other applicable laws and regulations of

the United States, to provide for issuance of the bonds in tax exempt form and to meet all requirements which are or may become necessary in and subsequent to the issuance and delivery of the bonds in order that the interest on the bonds be and remain exempt from Federal income taxes, including, without limitation, to covenant and agree to restriction on investment yield of bond proceeds, rebate of arbitrage earnings, expenditure of proceeds within required time limitations, the filing of information reports as and when required, and the execution of Continuing Disclosure Agreements for the benefit of the holders of the bonds and notes.

4. The First Selectman and Treasurer or Chief Fiscal Officer, on behalf of the Town, shall execute and deliver such bond purchase agreements, reimbursement agreements, line of credit agreement, credit facilities, remarketing agreement, standby marketing agreements, bond purchase agreement, standby bond purchase agreements, and any other commercially necessary or appropriate agreements which the Committee determines are necessary, appropriate or desirable in connection with or incidental to the sale and issuance of bonds, and if the Committee determines that it is necessary, appropriate, or desirable, the obligations under such agreements shall be secured by the Town's full faith and credit.
5. The bonds may be designated "Public Improvement Bonds," series of the year of their issuance and may be issued in one or more series, and may be consolidated as part of the same issue with other bonds of the Town; shall be in serial form maturing in not more than twenty (20) annual installments of principal, the first installment to mature not later than three (3) years from the date of issue and the last installment to mature not later than twenty (20) years from the date of issue. The bonds may be sold at an aggregate sales price of not less than par and accrued interest at public sale upon invitation for bids to the responsible bidder submitting the bid resulting in the lowest true interest cost to the Town, provided that nothing herein shall prevent the Town from rejecting all bids submitted in response to any one invitation for bids and the right to so reject all bids is hereby reserved, and further provided that the Committee may sell the bonds on a negotiated basis, as provided by statute. Interest on the bonds shall be payable semi-annually or annually. The bonds shall be signed on behalf of the Town by at least a majority of the Board of Selectmen and the Treasurer, and shall bear the seal of the Town. The signing, sealing and certification of the bonds may be by facsimile as provided by statute.
6. The Committee is further authorized to make temporary borrowings as authorized by the General Statutes and to issue temporary notes of the Town in anticipation of the receipt of proceeds from the sale of the bonds to be issued pursuant to this resolution. Such notes shall be issued and renewed at such time and with such maturities, requirements and limitations as provided by the Connecticut General Statutes. Notes evidencing such borrowings shall be signed by the First Selectman and Treasurer or Chief Fiscal Officer, have the seal of the Town affixed, which signing and sealing may be by facsimile as provided by statute, be certified by and payable at a bank or trust company incorporated under the laws of this or any other state, or of the United States, be approved as to their

legality by bond counsel, and may be consolidated with the issuance of other Town bond anticipation notes. The Committee shall determine the date, maturity, interest rates, form and manner of sale, including negotiated sale, and other details of said notes consistent with the provisions of this resolution and the General Statutes and shall have all powers and authority as set forth above in connection with the issuance of bonds and especially with respect to compliance with the requirements of the Internal Revenue Code of 1986, as amended, and regulations thereunder in order to obtain and maintain issuance of the notes in tax exempt form.

7. Pursuant to Section 1.150-2 of the Federal Income Tax Regulations, as amended, the Town hereby declares its official intent to reimburse expenditures (if any) paid for the Projects from its General or Capital Funds, such reimbursement to be made from the proceeds of the sale of bonds and notes authorized herein and in accordance with the time limitations and other requirements of said regulations.
8. The First Selectman, Chief Fiscal Officer and Town Treasurer are hereby authorized, on behalf of the Town, to enter into agreements or otherwise covenant for the benefit of bondholders to provide information on an annual or other periodic basis to the Municipal Securities Rulemaking Board (the "MSRB") and to provide notices to the MSRB of material events as enumerated in Securities and Exchange Commission Exchange Act Rule 15c2-12, as amended, as may be necessary, appropriate or desirable to effect the sale of the bonds and notes authorized by this resolution.
9. The Committee is hereby authorized to take all action necessary and proper for the sale, issuance and delivery of the bonds and notes in accordance with the provisions of the Connecticut General Statutes and the laws of the United States.
10. The First Selectman or other proper Town official is hereby authorized to apply for and accept any available State or Federal grant in aid of the financing of any Project, and to take all action necessary and proper in connection therewith.

**EXHIBIT A**  
**TO**  
**A RESOLUTION APPROPRIATING \$4,303,000 FOR THE COSTS OF CERTAIN**  
**NONRECURRING CAPITAL PROJECTS AND AUTHORIZING THE ISSUANCE OF**  
**BONDS TO FINANCE SUCH APPROPRIATION**

<b>TOWN OF FAIRFIELD</b>			
	<b><u>TOWN</u></b>		
	<b><u>Department</u></b>	<b><u>Project</u></b>	<b><u>Project Amount</u></b>
1	DPW	Independence Hall Office Renovations	\$500,000
2	DPW	Town-wide Facility Audit/Plan	\$400,000
3	DPW	Police Department - New HVAC	\$500,000
4	DPW	Flood Control Study (W. Jennings Beach to Rickards Dune)	\$100,000
5	Engineering	Town-wide Guide Rail and Fencing	\$200,000
6	Engineering	Black Rock Tpke Design	\$250,000
7	Engineering	Road Safety Improvements	\$250,000
8	Engineering	Congress St. Bridge Design (Add'l for new bridge)	\$150,000
9	Engineering	Culvert Repair - Reef Road	\$100,000
10	Fire	Pumper - LSN 11	\$725,000
11	Fire	Fire Station Rehabilitation	\$250,000
12	Park & Rec	Pine Creek Park Playground	\$103,000
13	Park & Rec	Lake Mohegan Splash Pad Replacement	\$150,000
	<b>SUBTOTAL NON-RECURRING CAPITAL - TOWN:</b>		<b>\$3,678,000</b>
	<b><u>BOARD OF EDUCATION</u></b>		
	<b><u>School</u></b>	<b><u>Project</u></b>	<b><u>Project Amount</u></b>
14	Districtwide	Retro Commissioning Rebalance of School Mechanical Systems	\$625,000
	<b>SUBTOTAL NON-RECURRING CAPITAL - BOE:</b>		<b>\$625,000</b>
	<b>GRAND TOTAL NON-RECURRING CAPITAL:</b>		<b>\$4,303,000</b>

## TOWN OF FAIRFIELD

## EXHIBIT 1

**NON-RECURRING CAPITAL PROJECTS AND ASSOCIATED BOND ISSUANCE**  
**FOR FISCAL YEAR 2021/2022**

Updated 3-4-2021

<u>TOWN</u>		20 Year Bond
		PRESENTED BY DEPT.
Department	Project	Amount
1 DPW	Independence Hall Office Renovations	\$500,000
2 DPW	Town-wide Facility Audit/Plan	\$400,000
3 DPW	Police Department - New HVAC	\$500,000
4 Engineering	Flood Control Study (W. Jennings Beach to Rickards Dune)	\$100,000
5 Engineering	Town-wide Guide Rail and Fencing	\$200,000
6 Engineering	Black Rock Tpke Design	\$250,000
7 Engineering	Road Safety Improvements	\$250,000
8 Engineering	Congress St. Bridge Design (Add'l for new bridge)	\$150,000
9 Engineering	Culvert Repair - Reef Road	\$100,000
10 Fire	Pumper - LSN 11	\$725,000
11 Fire	Fire Station Rehabilitation	\$250,000
12 Park & Rec	Pine Creek Park Playground	\$103,000
13 Park & Rec	Lake Mohegan Splash Pad Replacement	\$150,000
<b>SUBTOTAL NON-RECURRING CAPITAL - TOWN:</b>		<b>\$3,678,000</b>

<u>BOARD OF EDUCATION</u>		20 Year Bond
		PRESENTED BY DEPT.
School	Project	Amount
14 Districtwide	Retro Commissioning Rebalance of School Mechanical Systems	\$625,000
<b>SUBTOTAL NON-RECURRING CAPITAL - BOE:</b>		<b>\$625,000</b>

<b>GRAND TOTAL TOWN &amp; BOE NON-RECURRING CAPITAL:</b>	<b>\$4,303,000</b>
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## 14-Point Summary

### Non-Recurring Information and Justification Form

#### Sullivan Independence Hall Office Renovations

\$500,000

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1. Background: Sullivan Independence Hall is one of two main administrative buildings of the Town of Fairfield. Built in 1979, the 30,000 plus square foot building holds 12 main departments. Most departments are serving the public with open counter space. Some departments have grown considerably and are much busier than what the department's space was originally designed for. Other departments have evolved where more space is needed for public and private presentations. The interior spaces of the building have, for the most part, been untouched since the building was originally built.
2. Purpose & Justification: The purpose of this project is to coincide with the reorganization efforts for our town government operations and services.
3. Detailed Description of Proposal: Based off a partial space needs assessment performed in January 2020 that compared the existing square footage of some of the departments to the required square footage of these departments it was suggested that we modify some of the office spaces and relocate departments to better utilize all town office space.
4. Reliability of Estimated Cost: Costs rely on the adoption of the final adjacencies plan selected. Best estimate has a reliability of 7 – 8 determined by the level of renovation and relocation outlined in the scope.
5. Increased Efficiency or Productivity: This will provide a more productive, efficient town government as well as better customer service for all our residents.
6. Additional Long-Range Costs: No additional costs.
7. Additional Use or Demand on Existing Facilities: The relocation of some departments to the vacant spaces at Old Town Hall will be utilized.
8. Alternates to this Request: An alternate plan would be to do less at a time. This would disrupt multiple departments for a longer period of time and disrupt the public services that these offices offer and in the long run cost more.

9. Safety and Loss Control: There needs to be careful consideration taken to keep the employees and public safe during town operating hours. Therefore, there also needs to be consideration to relocate the services that deal with the public routinely to keep the revenue sustained.
10. Environmental Considerations: As part of the architectural design services, a full Hazardous Building Materials Investigation will be completed for any of the areas of the building that are proposed to be disturbed as a part of any future renovations. Testing will be completed for asbestos, PCBs, and leadbased paints which may be disturbed during renovations.
11. Insurance: Any contractors hired will be required to hold liability insurance at the limits requested by the Town Purchasing Agent.
12. Financing: 20 Year Bond
13. Other Considerations: The Department will seek cost effective alternatives to reduce the financial impact of construction that may be recommended as a result of this study and architectural design.
14. Other Approvals: Board of Selectmen — February 1 2021  
Board of Finance — March 2 2021  
RTM - March 22 2021

## 14-Point Summary

### Town-wide Facility Audit/Plan

\$400,000

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1. **Background** – There are a total of 19 large Town of Fairfield Municipal Buildings under the care of the Public Works Building Maintenance Department. In these larger buildings, there are approximately 28 departments and/or public services. The Town-Wide Facility Audit/Plan will provide a long-range capital expenditure plan that will include but not be limited to Mechanical Assets, Life Safety, Energy Efficiency, and ADA Compliance to ensure efficient utilization of physical assets.
2. **Purpose and Justification** – The purpose of this audit/plan is to align facility master planning with the Town-wide plans. This proposal should enable coordinated planning efforts amongst all Town offices, thus avoiding duplication of efforts, subtle overlaps of services, and waste of valuable resources.
3. **Detailed Description of Proposal** – The project will involve engaging an architect/engineering firm through a Request for Proposal to perform an assessment of Town Facilities and provide a comprehensive report and prioritized schedule of repairs and/or replacement of mechanical assets. This audit should include a list of 19 facilities and the period for the projected repairs would be ten years. Some of the primary systems that will be included in the assessment are:
  - Roofing
  - Heating, Ventilation & Air Conditioning (HVAC)
  - Windows
  - Life safety
  - Electrical
  - Accessibility
  - Underground storage tanks (USTs)
  - Generators
  - Elevators
4. **Reliability of Cost Estimate** – on a scale of 0 to 10, the reliability of the estimate is 6.0. The estimate was based on research of projects like this from other communities. No specific engineering or architectural work has been performed like this to obtain an opinion of probable cost.
5. **Increased Efficiency or Productivity** – There are several facilities that would benefit from energy efficient upgrades, particularly by replacing their windows and HVAC systems.
6. **Additional Long Range Costs** – If the total amount of repairs compared to the value of the existing building raises questions as to the soundness of further investment, the Town should perform a more in-depth study to fully consider a broad range of options from renovation to new construction.
7. **Additional Use or Demand on Existing Facilities** – TBD
8. **Alternatives to this Request** – None

9. **Safety and Loss Control** – At this point in time, there are no anticipated safety or loss control aspects of the project since this is a planning and building design project.
10. **Environmental Considerations** – As part of the architectural design services, a full Hazardous Building Materials Investigation will be completed for any of the areas of the buildings that are proposed to be disturbed, as part of any future renovations. Testing will be completed for Asbestos, PCBs, and Lead Based Paints which may be disturbed during renovations.
11. **Insurance** – Any architect or engineer hired to the feasibility assessment and interior renovation design will be required to hold liability insurance at the limits requested by the Town's Purchasing Agent.
12. **Financing** – Funding for subsequent construction phases will be requested in future Capital Budget requests. The Department of Public Works will look to obtain federal or state grants or CDBG funding to offset the Town-side construction costs.
13. **Other Considerations**: The Department will seek cost-effective alternatives to reduce the financial impact of construction that may be recommended as a result of this study and architectural design.
14. **Other Approvals**: Board of Selectmen – February 1, 2021  
Board of Finance – March 2, 2021  
RTM – March 22, 2021

## 14-Point Summary

### Non-Recurring Information and Justification Form

#### Police Department HVAC

\$500,000

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1. **Background:** The Fairfield Police department Headquarters at 100 Reef road was built in 1976. The 40,000 sq ft building is home to many divisions of our Police department including but not limited to the Patrol, Investigation, Public Affairs, Records & Evidence, Training, Crash investigation and Traffic safety. This past summer was a very taxing season on the HVAC system for this very busy building. The building operates on a 24-7 operating schedule and the 2 existing 40 Ton Air cooled condensing units on the roof of the Police department are approximately 12 years old. It would be fair to say, that because of the extended runtime of these units they run as if they were twice their age.
  2. **Purpose & Justification:** The purpose of the project is to become more efficient, lower expected repair costs, improve indoor air quality and reduce the cooling load.
  3. **Detailed Description of Proposal:** The project will involve engaging an architect/engineering firm to develop a plan to help guide the planning, design, bid, construction, and commissioning stages of replacing the main Components of the HVAC system located on the roof.
    1. Replacement of 2 40 ton Condensing units
    2. Replacement of 2 evaporator coils
    3. Replace Supply Fan and return Fan VFD's
    4. Replacement of 1 20 ton Chiller
    5. Replacement of 1 cooling tower
    6. Intergrade Building Management Controls
  4. **Reliability of Estimated Cost:** on a scale of 0 to 10, the reliability of the estimate at 7.0. Have quotes for each item. Adding 20% for prevailing wage and 10% contingency.
  5. **Increased Efficiency or Productivity:** Efficiency will be increased in many ways. Replacing these main components could reduce the energy used by 30 percent. The 20 ton chiller will help cool the building during the spring and fall shoulder months of the cooling season keeping the larger units off until they are absolutely needed.
  6. **Additional Long-Range Costs:** Expect lower repair costs. By replacing these units we will no longer need to pursue the increasingly costly and hard to find R22 refrigerant that these older units use.
  7. **Additional Use or Demand on Existing Facilities:** Timing of this project has to be coordinated with the police department administration with a combined effort to keep the day to day operations fluid.

8. **Alternates to this Request:** At this time, we do not see any other alternatives that would be of any more cost savings due to the age and use of this facility. A phased in process would disrupt operations multiple years in a row and ultimately be more costly.
9. **Safety and Loss Control:** There needs to be careful consideration taken to keep the employees and public safe during operating hours. Possible road closures during crane operating hours.
10. **Environmental Considerations:** The bulk of this project is proposed to take place outside on the roof. The removal of all existing refrigeration equipment will take proper precautions and follow EPA standards to not allow any refrigerant to be released into the atmosphere. All recovery, reclaiming and recycling of the existing refrigerant will be the responsibility of the awarded contractor. The new units are expected to have R410A which doesn't cause ozone depletion when it leaks and is not a danger to the health of our planet.
11. **Insurance:** Any contractors hired will be required to hold liability insurance at the limits requested by the Town Purchasing Agent.
12. **Financing:** The project will be bonded as part of the Non-recurring Capital budget of 2021-22
13. **Other Considerations:** The Department will seek cost effective alternatives to reduce the financial impact of construction that may be recommended as a result of the planning and design.
14. **Other Approvals:**
  - Board of Selectmen – February 1 2021
  - Board of Finance – March 2 2021
  - RTM – March 22 2021



FLOOD CONTROL DESIGN – from west end Jennings Beach Dune to East end of Rickards Beach Dune

PROJECT COST: \$100,000

1. BACKGROUND – Located between the two town owned beaches on Long Island Sound, Penfield and Jennings Beaches lies a strip of privately owned beach front properties. This strip of land contains four separate parcels of land, three with private residential structures and one with a private beach club. While dunes exist adjacent to the town's beaches, they provide flood protection to the neighborhoods found to the north. This cannot be said for these privately owned beach front properties. When a coastal storm event hits Fairfield, the point of entry for the storm surge is located between the two Town beaches. One of these properties known as the Fairfield Beach Club is currently the lowest point and flood waters flow through this property, continues flowing northward and inundates the Beach Road and Fairfield Beach Road communities. The three remaining properties are residential and are higher elevations than the Beach Club property but are still lower than the adjacent dunes to the west by 2 to 4 feet. The Beach Club property is approximately 6 feet lower than the adjacent dunes found to the east of this property.
2. PURPOSE AND JUSTIFICATION - This Flood Control Project request is endorsed by the Town of Fairfield's Flood and Erosion Control Board and is a segment of their overall flood protection/resiliency plan. The request is to provide an engineered plan that will close a large gap of approximately 1500 feet that currently exists between the two town owned beaches and dunes. Proposed design(s) would involve the property owners affected and provide the flood protection the town is seeking to establish. The cost to provide the needed flood protection to the neighboring homes is small in comparison to the cost of the damage incurred to these homes and properties. In addition, emergency services cannot be provided to this area when the town's road network is inundated with two to three feet of floodwater compromising the life, welfare and safety of the town's residents and first responders.
3. DETAILED DESCRIPTION OF PROPOSAL - Expenditure in amount of \$100,000 will include cost to prepare required permits to CT DEEP and to provide two different options to achieve the flood protection the Town is seeking. One option would be to construct a hybrid design of a permissible berm and flood wall and flood gate to be located across these properties. Second option would include a design of a flood wall that would be placed along Fairfield Beach Road, much like a 6 foot high privacy fence and would also include flood gates at the entrance to each of these four properties. These two options would be vetted by the residents and Town officials and one design solution would be selected, which would then proceed to design completion. The outcome of this process would also establish an elevation that this flood control project could be constructed to that is acceptable to all. The berms and or flood wall could then be tied

into the existing dune structures found to the east and west of these four properties, thus eliminating the low point of entry that currently exists between these dune structures that are quite effective in holding back the tidal surge.

4. RELIABILITY OF COST ESTIMATE - The cost for professional design services is reliable based on previous design fees. The Town Of Fairfield Engineering Department feels \$100,000 is an adequate sum to take this project to final design and provide bid documents and to obtain all necessary permits required for such a project. Reliability is considered 8 out of scale of 10.
5. INCREASED EFFICIENCY AND PRODUCTIVITY - This project expects to provide protection from coastal storm events. It will be determined what level of protection the residents are willing to achieve, but would strongly encourage that the design be based on the 100 year storm event (1% chance of annual occurrence).
6. ADDITIONAL LONG RANGE COSTS - If project is ultimately constructed cost of a 1500 foot long flood control project could range from \$1.2 million to \$2.25 million, dependent on type of structures are selected for use.
7. ADDITIONAL USE OR DEMAND - None but very long term maintenance.
8. ALTERNATIVES - Doing nothing is counterproductive, as steps proposed under this request is for pre-disaster mitigation. The properties and the town's roadways will continue to flood.
9. SAFETY AND LOSS CONTROL - By providing some level of protection properties will experience a lesser amount of flood events, less damage from flooding, less chance of loss of property and loss of life due to emergency/first responders being prevented from reaching those in need during a coastal flood event.
10. ENVIRONMENTAL CONSIDERATION - No environmental considerations, structure will be constructed adjacent to roadway and/or from elevation 10 and higher, well above the CT DEEP's Coastal Jurisdiction Line. Local, State, and federal permits apply for flood control structures.
11. INSURANCE - Structure not covered by insurance but Contractors will be required to meet all insurance and liability standards through Purchasing Department bid process.
12. FINANCING -  
Total Design Project costs -  
\$100,000  
Bonded as part of Non recurring Capital Budget of 2022.
13. OTHER CONSIDERATIONS - It has been determined that Sea Level will rise 20" by 2050. This rise in sea level will only make coastal storm events more severe as the extent of damage will go

well beyond what we know today. In addition, it has been over 8 years since Superstorm Sandy, and is only a matter of time before the next coastal storm or hurricane hits the Connecticut shoreline again. Protection in some manner should be provided to protect the town's citizens, their properties and the Town Of Fairfield infrastructure.

14. <u>APPROVALS</u> -	Board of Selectman	Feb 2021
	Board of Finance	Feb 2021
	RTM	Feb 2021



## Town of Fairfield

## Flood Control Plan-Jennings Beach to Penfield Beach Sheet 2



- Legend**
- House Number
  - Parcels
  - Watershed Outline
  - Streams
  - Wetland Buffer
  - Wetlands

1: 1,200



200.0 0 100.00 200.0 Feet

This map is a user generated static output from an Internet mapping site and is for reference only. Data layers that appear on this map may or may not be accurate, current, or otherwise reliable.

WGS\_1984\_Web\_Mercator\_Auxiliary\_Sphere  
Created by Greater Bridgeport Regional Council



THIS MAP IS NOT TO BE USED FOR NAVIGATION

**Town wide Guard rail (aka Guide rail) and fencing Improvements. = \$200,000 for Construction Improvements.**

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1. **Background** – The Town of Fairfield infrastructure is aging and in many cases roads and bridges do not comply with current codes or roadway standards. Over the past few years, the state and Town consultants have issued bridge and culvert reports that list current conditions and provide some short and long term repair solutions. Based on these reports, many roadway bridge approaches are lacking proper guiderails or have aging rails or fencing that need replacement. There are also some roadside guiderails that are damaged by trees or vehicles. Over time, DPW has performed triage regarding repairs/replacements based on Town inspections, public complaints or accident reports. DPW typically replaces a few sections of railing per year. Unfortunately, there has been no plan in place for significant replacements until now.
2. **Purpose and Justification** – The purpose of the project is to address many State and Consultant directives or recommendations listed in bridge reports, roadway inspections or occasional public complaint. Based on these directives and recommendations, almost 4000 linear feet of guiderail sections for 65 bridges and about a dozen roadways sections have been listed. The request of \$ 200,000 would cover approximately a third to one half of the higher priority locations, depending on railing material, location, potential consultant design and if railing is repair or code complaint replacement.
3. **Detailed Description of Proposal** – The proposal includes repair or replacement of outdated guiderail, posts or fencing system. The Engineer and/or Consultant will provide plans and specifications for DPW in house work and contract bid, splitting the workload. Funding will be utilized for guiderail systems that include railing, anchoring, bridge attachment system, removal and disposal of old guiderail system, safety fencing, maintenance protection of traffic, reflectors and erosion control if applicable.
4. **Reliability of Cost Estimate** – Based on recent Department of Transportation cost estimates and recent state projects drainage projects and current cost of materials the reliability of costs on a scale of 0 to 10 is estimated at 8 based on whether DPW performs some of the work or if some of the work is contracted out. If costs increase, less improvements will be performed at this time and if costs are less than estimated, more bridge and roadways can be addressed.
5. **Increased Efficiency or Productivity** – Allow the traveling public and commerce safer access and should reduce liability by having guiderail systems repaired and replaced.
6. **Additional Long Range Costs** – Typical Maintenance costs. Short and longer term maintenance costs should be reduced with repair and replacements. Slight increased long range costs associated with the project for new installations.
7. **Additional Use or Demand on Existing Facilities** –None.
8. **Alternatives to this Request** –The “Do nothing” option won’t improve safety or reduce liability. Reduction in amount requested will reduce amount of work and installations that can be performed.
9. **Safety and Loss Control** – Allow the traveling public and commerce safer access.
10. **Environmental Considerations** – All projects will investigate environment impacts-although most will involve locations at the road edge within the public right of way. No environmental permits are anticipated unless a special condition structure or fencing impacting wetlands or watercourses.
11. **Insurance** – Any selected contractors will be required to carry the necessary insurance prescribed by the Purchasing Department.



12. **Financing** – Project bonding listed as part of the Non-Recurring Capital budget of 2022.

13. **Other Considerations**: Public safety, aesthetics and potential opposition by abutting property owners. Unfortunately, most guiderail systems are not aesthetically pleasing. Some property owners do not want guiderails and some prefer only timber guiderails. In some cases, repairs may be applicable but most existing guiderail systems are not up to current crashworthy standards and should be brought up to current roadway standards.

14. **Other Approvals**:

Board of Selectman	-	Jan 2021
Board of Finance	-	Feb 2021
RTM	-	Feb-Mar 2021

Current Request for Black Rock Turnpike Safety improvements Design= \$ 250,000

FOURTEEN POINTS OF INFORMATION AND JUSTIFICATION FOR THE  
BLACK ROCK TURNPIKE SAFETY IMPROVEMENTS PROJECT LOTCIP GRANT  
FUNDING

Total Project Costs = \$ 2,050,800

Total Design Costs = \$ 250,000 RE: NON RECURRING CAPITAL

Grant paid up front = up to \$ 2,050,800 paid to Town before Construction\*

\$ 250,000 for Design with an up to \$ 2,050,800\* upfront lump sum payment to Town once contract bids are opened. \* Latest Construction cost estimate plus contingencies and incidentals per grant.

1. **Background:** The Black Rock Turnpike Safety Improvements project timeline is currently in the State review process. The Regional Planning Agency has approved and recommended this project to the State DOT for final acceptance. The Town was one of a few municipalities to be selected for this grant in the MetroCOG region. Design phase can begin once final agreements and funding are in place. Construction is planned for late 2022 or 2023. The project involves new concrete sidewalks, curbs, pedestrian signals, some signal and lane modifications, radius realignment, potential calming bulbouts, ADA compliant ramps, and turf establishment.

The highly competitive LOTCIP Grant program requires Municipalities' to design the project meeting State DOT criteria with 100% of the eligible construction costs being paid upfront to the Town, pending final agreement, once the project contract bids are approved.

2. **Purpose and Justification:** The purpose of the project is to reduce the number of accidents along this very busy corridor and encourage alternative means of transportation in this portion of the Black Rock Turnpike Business District, along route 58 from Brookside to Stillson Road. Main Construction components are concrete sidewalks, concrete curbs, ADA compliant Handicap Ramps, pedestrian signals and to investigate bicycle routes and bike/ pedestrian amenities in the area. Also included will be new pedestrian signals, HAWK, or Rapid Rectangular Flashing Beacons (RRFBs), sections of median, curb bulbouts or reducing curb radii, pavement markings, and crosswalks to create improved safety, aesthetics and more pedestrian friendly environment. There are several areas of existing sidewalk that are in poor condition and can be considered narrow in some places. Although one can argue about spending local match in tough economic times, the area lacks sidewalks to access transit stops, local businesses, shopping centers, and local neighborhoods. The Town has hosted three public informational meetings on traffic and safety issues with the Black Rock Turnpike neighborhoods and some business property owners. About a year and a half ago, the regional Planning Agency MetroCOG with



assistance from the Town of Fairfield conducted and published the Black Rock Turnpike safety report, which lists many potential elements of this and future projects in this area.

3. **Detailed Description of Project:** The project area covers mainly the Central Black Rock Turnpike Business District and neighborhoods along Route 58 from Brookside road to (and including) Stillson Road. Minor extensions into neighborhoods are also listed. New sidewalks are proposed where needed along both the north and south sides of Black Rock Turnpike and small sections of Brookside Drive, Fairfield Woods Road and Stillson Road for better pedestrian access, safety and aesthetics. Bicycle amenities could be included wherever practical. Some sections of sidewalks have significant gaps in the network, narrow widths, present potential trip hazards and contain substandard handicap ramps. Based on the \$ 2,050,800 of grant money available, the actual project construction limits will be based on contract bids, with add alternates listed to maximize the grant without jeopardizing additional Town costs. The Town is responsible for Design costs, estimated to be \$ 250,000. Construction Costs based on contract bid will contain a 100% upfront lump sum payment component, including 10% contingency and 10% incidentals. Therefore up to \$ 250,000 would cover the Town's participation costs in the Enhancement Grant program. Inspection, Construction Administration and testing are eligible for construction phase costs, covered by the grant.
4. **Reliability of Estimated Costs:** Cost estimates have been performed by the Town based on previous projects and have been checked by MetroCOG. The costs are considered relatively accurate but there are some unknown costs such as utility relocation, potential Right of Way/ easement costs, subsurface issues and actual contract bid costs. Design and contract bid documents should be able to control costs within grant parameters.
5. **Efficiencies:** The expenditure is conducive to increase alternate modes of transportation and increasing safety of these modes. From an economic standpoint the proposed cost-sharing program saves the Town most of the costs that would be required should the Town elect to perform this project under its own direction, in the future. In some areas sidewalks are substandard to today's code and some panels are have a limited remaining service life or are in fair-poor condition.
6. **Additional Long Range Costs:** The Town would pay for maintenance costs for the project: sidewalk, pavement markings and signs, etc., which it currently performs already. Based on past agreements with the State DOT, pay items such as curbs and pavement markings that meet DOT specifications, DOT will continue to maintain. It is unknown at this time if DOT will maintain pedestrian signal or RRFBs. As for any proposed special aesthetic features, State must approve and typically passes the maintenance onto the Municipality. Current proposal is for standard safety features and not ornamental streetlights, extra landscaping etc.

7. **Additional Use or Demands:** The project is expected to encourage increased usage of alternate modes of transportation with vehicular and pedestrian safety improvements that should provide a beneficial impact to the neighborhood.
8. **Alternates:** Alternates consist of reducing scope of project or denying the grant. Any sidewalks not covered in the project, would eventually be constructed by DPW based on Safety Audit and public requests within the next few years with no reimbursement. It would also hurt chances of getting additional grant funding under this program.
9. **Safety and Loss Control:** A Consultant will perform continual on site inspections for the construction and installation of the project. It is required that all Local, State and Federal standards, codes and procedures will be enforced.
10. **Environmental Considerations:** No significant environmental impacts are expected.
11. **Insurance:** Town and State Contract procedures require the Contractor to have licenses, bonds and insurance.
12. **Financing:** Only the Design Costs for the project will appropriated. When final project agreement has been signed, parameters will be set forth providing the Town with up to \$ 2,050,800 of lump sum direct payment based on an approved contract bid. Design phase and process will begin once project agreement is signed, anticipated in Spring/Summer 2021. Current Design estimate is \$ 250,000 with no reimbursement. The grant covers 100% of Construction costs up to \$ 2.05 Million. Project is listed on previous and current waterfall charts.
13. **Other Considerations:** Future State agreements forthcoming that will follow Town approval process of going back to all 3 Town boards.

14. **Approvals:**

Committees/ Commissions	Approval Date
Board of Selectmen	February 2021
Board of Finance	February 2021
R.T.M.	Feb/March 2021

Estimated Schedule:  
 Design Phase Completed 2022.  
 Construction Fall 2022-2023.

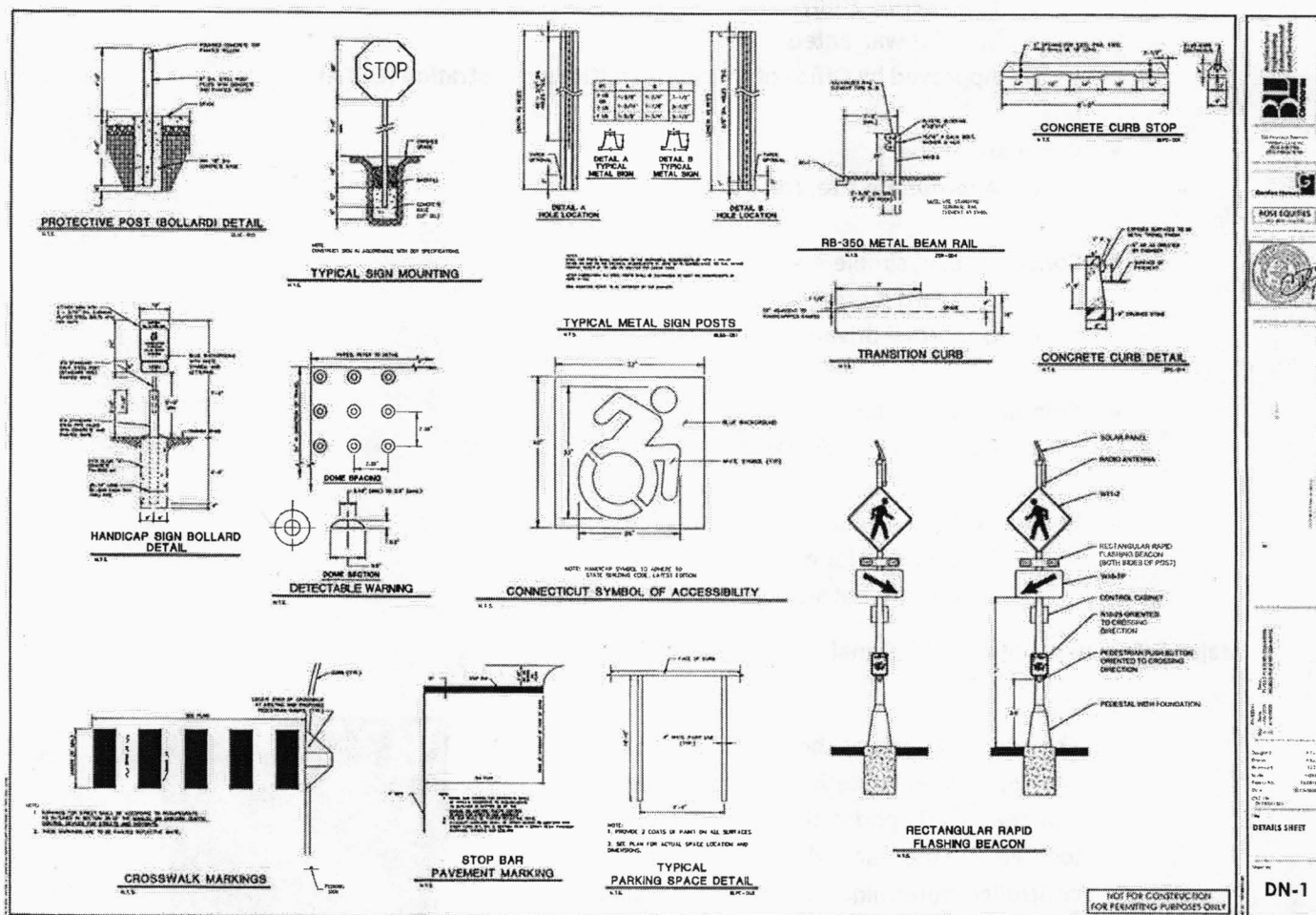
Road Safety Improvements = \$250,000 for Construction Improvements and implementing traffic signal management plans.

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1. **Background** – Several Neighborhood Associations have met with the Fairfield Police Department and the Engineering Department to discuss potential solutions to improve vehicular, bicycle and pedestrian safety on Town streets. We have also received emails and phone calls concerning pedestrian safety. Speeding, lack of signs, lack of lighting, increased pedestrian activity, signal problems, increase in crashes/accidents are issues residents want resolved. Periodically the Town also reviews Police accident records and CT crash repository for problematic locations that Police actions or engineered solutions could improve conditions. Most of these locations involve intersections including signalized intersections. Over time, DPW has performed triage regarding replacements or repair usually based on inspections, public complaints or accident report usually making a few improvements per year. The Town has 15 Traffic Signal Controllers at 17 intersections. State signals are not included in this request.
2. **Purpose and Justification** – In the interest of public safety, the Town has an obligation to improve safety for pedestrians, cyclists and motorists. Almost every day/week, DPW, Police and Engineering receive requests to improve roadway or pedestrian safety regarding speeding, dangerous or confusing road conditions, request for signal repairs, signalized and unsignalized intersection issues, pedestrian and bike concerns, child safety, requests to provide safer routes to school and complaints about volumes of traffic. Over the past few years, MetroCOG and the Town have developed a master plan for Bicycles and Pedestrians and have been implementing some of its recommendations but would like to perform these type of improvements at a faster rate. The Town has seen a tremendous increase in pedestrian activity and many neighborhoods are demanding safety improvements. The Town is also developing a signal management plan for Town owned signals to improve traffic light function, reduce down time for repairs and improve overall safety. This proposed plan will list signal equipment, inventory, objectives, improvement strategies and performance of the signals.
3. **Detailed Description of Proposal** – This proposal includes purchase and installation of Rectangular Rapid Flash Beacons (to alert drivers in high pedestrian activity crosswalks) and associated signs and pavement markings. Other safety improvements include construction low to moderate intersection redesigns, road and curb realignments, hiring a consultant to perform signal equipment inventory and preventive maintenance plan, traffic signal equipment upgrades, develop traffic signal management plan, potential centerline rumblestrips, radar feedback signs, special pavement markings or roadway treatments. The Engineering Dept. and/or Consultant will provide concepts, plans, details and specifications (if applicable) for DPW service work and contract bid, splitting the workload. Some of the safety measures listed in the police/Engineers “toolbox” are small sidewalk improvements, crosswalks, handicap ramps, bulbouts, signs, enforcement, education, pedestrian enhancements, pedestrian signals including HAWK or RRFB types, traffic signal improvements, traffic signal management plan, Safety plans, road safety audits, pavement markings, radar feedback signs, tighter intersection radius, potential centerline rumblestrips, curbing and minor intersection realignment. Please note speed humps, new traffic signals, major intersection redesign/reconstruction and major curve realignment require more engineering design, townwide studies and more funding that are not included in this request.
4. **Reliability of Cost Estimate** – Based on recent Department of Transportation cost estimates and recent improvements in the Town and region. The reliability of costs on a scale of 0 to 10 is estimated at 7 based on whether DPW performs some of the work or if some of the work is contracted out. If costs increase, less improvements will be performed at this time and if costs are less than estimated, more improvements can be addressed.
5. **Increased Efficiency or Productivity** – Improve overall roadway and pedestrian safety. Reduce crash potential and improve conditions for traveling public and all users. By implementing traffic signal management plan, safety will be improved along with increased efficiency and reduced liability.

6. **Additional Long Range Costs** – Typical Maintenance costs. Short and longer term maintenance costs should be reduced with repair and replacements. Slight increase projected for long range costs associated with the project for any new installations.
7. **Additional Use or Demand on Existing Facilities** –An increase pedestrian activity is expected. Safer travel conditions with improvements.
8. **Alternatives to this Request** –The “Do nothing” option won’t improve safety or reduce liability. DPW will continue to perform safety improvements at a much slower scale. Reduction in amount requested will reduce amount of work and installations performed or spread out.
9. **Safety and Loss Control** – Allow the traveling public and pedestrians safer access.
10. **Environmental Considerations** – All projects will investigate environmental impacts. Although for most cases, little or no impacts expected. No environmental permits are anticipated unless a special condition structure or encroachment beyond right of way that impacts wetlands or watercourses.
11. **Insurance** – Any selected contractors will be required to carry the necessary insurance prescribed by the Purchasing Department.
12. **Financing** – Project bonded as part of the Non-Recurring Capital budget of 2022.
13. **Other Considerations**: Engineering has discussed proposal with the Fairfield Police Traffic Unit who supports this request.
14. **Other Approvals**:

Board of Selectman	-	Jan 2021
Board of Finance	-	Feb 2021
RTM	-	Feb-Mar 2021



## Sample improvements

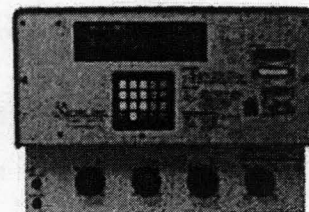
## 5 Basic Requirements for Traffic Control Devices

- Fulfill a need
  - Engineering study
  - Signal is warranted
  - Approved by Office of the State Traffic Administration (OSTA)
- Command respect
  - Appropriate size, color, shape
- Convey a clear, simple message
  - Standard messaging
  - Uniform – drivers know what to expect
- Command attention
  - Device can be clearly seen, even from a distance
- Provide adequate time for proper response
  - Signs placed far enough in advance
  - Drivers are not stuck in the “dilemma zone”

### Major Components of a Traffic Signal

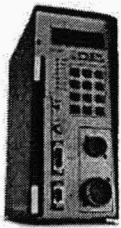
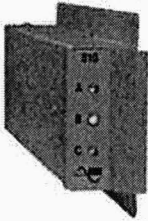
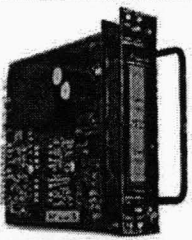
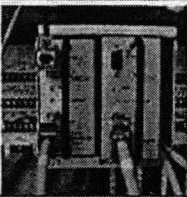
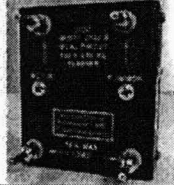

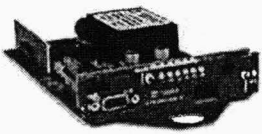
- Controller

The controller acts as the “brain” of the traffic signal, changing signal indications based on user needs. You can see in this photo that the controller cabinet is located at the far side of the intersection. The controller determines when the indication for an approach will change and how much time will be given to each movement. A controller is housed in a cabinet along with other electronic components.



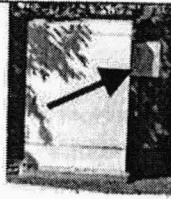
Controller



<b>Conflict Monitor</b> 	<p>The conflict monitor continually checks for the presence of conflicting signal indications or improper operating voltages and provides an output to the controller in response to the problem. Depending on the type of controller you're using, this may also be called a malfunction management unit.</p>
<b>Load Switch</b> 	<p>Controllers run on 24 volt DC current. A load switch is used to switch power to the signal indications, which operate on 120 volt AC current. Each load switch can control up to three indications, typically the red, green, and yellow indications of a single face.</p>
<b>Detector Amplifier</b> 	<p>An electrical device used to sense electrical load changes on the inductive loop detectors and provide an output to the controller for vehicle detection.</p>
<b>BIU (Business Unit Interface)</b> 	<p>Interface between the Controller Unit and other devices in the cabinet assembly.</p>
<b>Flasher</b> 	<p>Generates a flashing signal independent of the controller, so the signals can still flash if the controller itself goes down.</p>
<b>Power Supply</b> 	<p>Supplies power to the traffic signal cabinet</p>
<b>Pre-Emption Detector Card</b> 	<p>An electrical device used to detect optical inputs to the sensor and provide an output to the controller for emergency vehicle pre-emption.</p>



#### Auxiliary Equipment Cabinet



Cabinet that houses separate devices used to add supplementary features to a controller assembly. Typically a municipality's pre-emption equipment will be located here, or if the police have a manual override for the controller it will be placed in the auxiliary cabinet.

- **Display**

Used to communicate to the users of the roadway. Elements of the display include the signal heads and pedestrian signals. This also includes audio cues which may be given to blind pedestrians where audible pedestrian signals are installed.

#### Parts of a Signal Head

**Section or Indication**



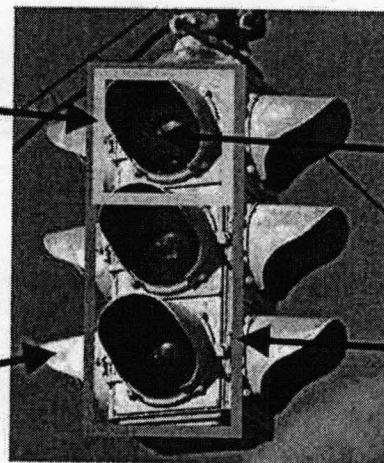
**Lens**



**Visor**



**Face**



- **Supports**

- Span Poles
- Mast Arms
- Pedestals

- **Detection**

Detectors are used to identify the presence of one or more vehicles in a specific area or the passage of a vehicle past a specific point.

## Department of Public Works Traffic Control Signal Maintenance Checklist

Intersection (number / major street / minor street):	Performed By:	Date:												
<b>CABINET</b> <b>Controller Information</b> <input type="checkbox"/> Naztec      Model/Part No: _____ Manufacture Date: _____ <input type="checkbox"/> Econolite      Serial No.: _____ Program No.(Econolite): _____ <input checked="" type="checkbox"/> <i>Peek</i> <input type="checkbox"/> Vacuum Cabinet <input type="checkbox"/> Check for insects / animals <input type="checkbox"/> Check seal at base <input type="checkbox"/> Good Condition <input type="checkbox"/> Re-Caulk <input type="checkbox"/> Water/Moisture in Cabinet <input type="checkbox"/> Check ground rod, clamps & wire <input type="checkbox"/> Check wiring for loose wires and/or corrosion <input type="checkbox"/> Check / replace duct sealant at conduits <input type="checkbox"/> Check fan <input type="checkbox"/> Check / replace lamp <input type="checkbox"/> Check and record current at circuit breaker _____ <input type="checkbox"/> Check / replace load switches and relays <input type="checkbox"/> Check detector amplifiers      Note approaches not working properly: _____ <input type="checkbox"/> Lubricate hinges and lock <input type="checkbox"/> Replace filter      filter size: _____ <input type="checkbox"/> Remove spare parts (relays, load switches, etc) <input type="checkbox"/> Check for graffiti on cabinet exterior <input type="checkbox"/> no graffiti <input type="checkbox"/> wash off graffiti <input type="checkbox"/> repaint cabinet <input type="checkbox"/> Remove / Trim brush vegetation														
<b>HANDHOLES</b> <input type="checkbox"/> Check cover (including screws) <input type="checkbox"/> Check integrity of the splices <input type="checkbox"/> Check ground clamps and wire <input type="checkbox"/> Check for abnormal amount of water														
<b>MAST ARM ASSEMBLIES / SPAN POLES / PEDESTALS</b> <table style="width: 100%; border: none;"> <tr> <td style="width: 33%;"><input type="checkbox"/> Check overall mast arm / span pole</td> <td style="width: 33%;"><input type="checkbox"/> pole leaning</td> <td style="width: 33%;"><input type="checkbox"/> repaint pole</td> </tr> <tr> <td><input type="checkbox"/> Inspect anchor bolts for rust and tightness</td> <td><input type="checkbox"/> excessive rust</td> <td><input type="checkbox"/> missing cover(s)</td> </tr> <tr> <td><input type="checkbox"/> Inspect poles at base plate</td> <td><input type="checkbox"/> excessive rust</td> <td><input type="checkbox"/> sections of steel rotted through</td> </tr> <tr> <td><input type="checkbox"/> Inspect poles/arms for rust and corrosion</td> <td><input type="checkbox"/> excessive rust</td> <td><input type="checkbox"/> dents</td> </tr> </table>			<input type="checkbox"/> Check overall mast arm / span pole	<input type="checkbox"/> pole leaning	<input type="checkbox"/> repaint pole	<input type="checkbox"/> Inspect anchor bolts for rust and tightness	<input type="checkbox"/> excessive rust	<input type="checkbox"/> missing cover(s)	<input type="checkbox"/> Inspect poles at base plate	<input type="checkbox"/> excessive rust	<input type="checkbox"/> sections of steel rotted through	<input type="checkbox"/> Inspect poles/arms for rust and corrosion	<input type="checkbox"/> excessive rust	<input type="checkbox"/> dents
<input type="checkbox"/> Check overall mast arm / span pole	<input type="checkbox"/> pole leaning	<input type="checkbox"/> repaint pole												
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<input type="checkbox"/> Inspect poles at base plate	<input type="checkbox"/> excessive rust	<input type="checkbox"/> sections of steel rotted through												
<input type="checkbox"/> Inspect poles/arms for rust and corrosion	<input type="checkbox"/> excessive rust	<input type="checkbox"/> dents												

LOTICIP Grant for Congress St. Bridge over Mill River = additional \$ 150,000 to cover complete design of a NEW Bridge.  
Note: Town approved \$ 180,000 FY 20 for repair of beam and parapet wall. Last summer the bridge became eligible for LOTICIP grant covering total bridge replacement.

---

1. **Background** – Congress Street is an east/west collector road which serves as a local route and an alternate route for the Merritt Parkway. The bridge crossing over the Mill River was constructed in 1935. The bridge # 04196 is approximately 30' in width, has a 22-27 ft roadway width and no sidewalk. The bridge is a total of 35' in length, supported by concrete abutments on both ends. The bridge has been rated by the Connecticut DOT as being in poor condition since 2016 and during the most recent inspection in 2020, the parapet wall and steel beams girders have sectional loss are rated in poor condition. In addition to extensive corrosion on the beam(s) which have reduced its strength, the bridge has also been rated as scour critical, which means that the river currents can possibly threaten the concrete foundation which supports the bridge.  
As the Engineering Department was at the 70% design stage for repair, MetroCOG contacted the Town and announced that the bridge had become LOTICIP grant eligible. In summary, LOTICIP grant covers 100% of eligible construction costs with the Town paying for Design of a new bridge.
2. **Purpose and Justification** – The purpose of the project is to now replace the bridge based on the latest bridge report from the State-poor condition and availability of a LOTICIP grant. Originally, the Town was to perform beam # 1 and parapet wall repair of this structure, thereby extending its service life ten or twenty years but with a new proposed bridge, the service life is calculated at 75 years or more. When completed the Project will allow commuter, commercial and general public traffic to access businesses, highways, and local roads in this section of Town. Quote from 2020 CT DOT bridge report: "This bridge # 04196 is rated poor and requires rehabilitation or replacement due to section loss on the steel beams. Since the process to rehabilitate or replace a bridge can take five to ten years to complete, the Town is advised to engage the services of a professional engineering firm immediately. This action is required so plans necessary for rehabilitation or replacement of the structures can be prepared prior to the bridges degrading further and jeopardizing the safety of the traveling public". It is important to note that LOTICIP design timeline is significantly shorter than the Federal Local Bridge program schedule, hence a shorter design phase period, usually resulting in design cost savings as well.
3. **Detailed Description of Proposal** – The bridge is rated in poor condition. The bonding proposal will cover design of the bridge, new bridge structure type analysis, survey, permits, soil borings and testing, traffic analysis, plans, details and specifications, bid documents and other typical design requirements. As per LOTICIP grant requirements the Town is responsible for all design costs.

Not included in this request but listed for informational purposes, eligible Bridge construction costs are 100% covered and paid upfront to the Town, under the grant. Construction phase is estimated in the \$ 2.5 - \$ 3 Million range. The project includes replacement of the bridge and may require the bridge be constructed in two phases. Closing the bridge with any proposed detour will most likely result in excessive travel times and inconvenience.

4. **Reliability of Cost Estimate** – Based on recent bridge projects, on a scale of 0 to 10 the reliability of the estimate is 8.0 based on past bridge design projects. In the past five years bridge designs have ranged from \$ 180,000 to \$ 350,000 depending on the span of the bridge, location and grant funding mechanism.
5. **Increased Efficiency or Productivity** – Allow the public and commerce safe and efficient access to and from their homes, businesses and destination points traversing a new bridge. The new bridge can expect to have a service life of over 75 years vs 10-20 year service life with repair.

6. **Additional Long Range Costs** –The long range costs will include maintenance of the bridge similar to any bridge. As with any long term capital infrastructure replacement project, the first decade or so should result in significantly less maintenance costs than with the repair of the bridge.
7. **Additional Use or Demand on Existing Facilities** – None Anticipated.
8. **Alternatives to this Request** – The Bridge does not meet current bridge standards. The Town could elect to repair bridge as proposed in FY 20. This will extend service life but Town would have missed opportunity to have 100% of eligible construction costs of a new bridge with a much longer service life covered by the grant. If Town passes on the grant, another municipality will most likely scoop up funding for this highly competitive grant.
9. **Safety and Loss Control** –Further deterioration of bridge will first limit weights and then could lead to further limitations and then eventual closure. New project will include deeper foundation for better scour protection and potential alignment improvements not considered in the original repair request.
10. **Environmental Considerations** – All environmental permits will be secured including obtaining USACE, CT DEEP and a local Fairfield Inland Wetlands permits.
11. **Insurance** – The selected Consultant and future contractor will be required to carry the necessary insurance prescribed by the Purchasing Department.
12. **Financing** – Project will be bonded as part of the Non-Recurring Capital budget of FY 2022.
13. **Other Considerations**: None.

**Other Approvals:**

Board of Selectman	-	Feb 2021
Board of Finance	-	Feb 2021
RTM	-	Feb-Mar 2021

**From:** [Hurley, William](#)  
**To:** [Saxl, Concetta](#)  
**Subject:** Fwd: Congress st br  
**Date:** Wednesday, December 2, 2020 3:03:51 PM

---

See photos

Begin forwarded message:

**From:** "Hurley, William"  
**Date:** December 1, 2020 at 6:49:46 PM EST  
**To:** "Hurley, William"  
**Subject:** Congress st be











Inspection Type: Routine



## BRIDGE NO.04196

26620 - FAIRFIELD  
CONGRESS STREET #2  
over  
MILL RIVER

Routine Inspection

7/01/2019

Inspected by: TranSystems



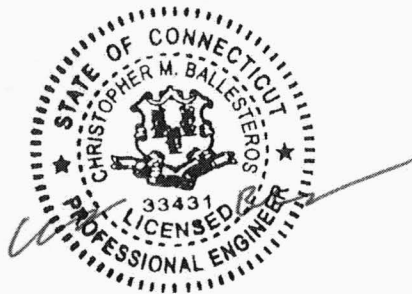
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Structure Inventory and Appraisal (BRI-19)	3
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Bridge No. 04196, Congress Street #2 over Mill River, Fairfield

Inspected By: TranSystems Corporation      Date: 7/01/19



*Professional Certification: I hereby certify that this report, including all of its contents, has been approved by me, and that I am a duly licensed professional engineer under the laws of the State of Connecticut.*

Signature: *Chris Ballesteros*

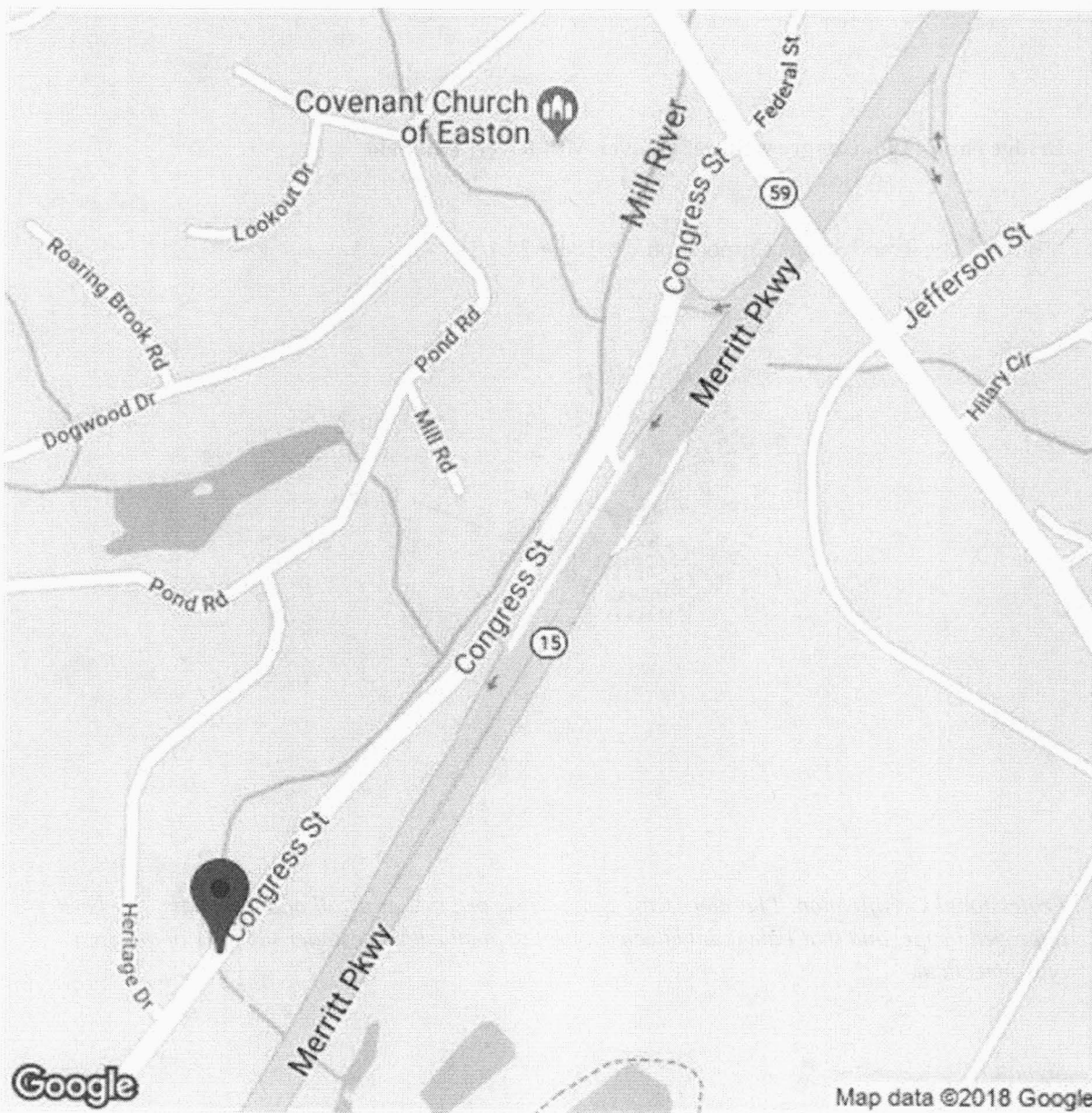
License No.: 33431

Date: 7/27/2019

Form: Location  
Inspection type: Routine  
Inspection Date: 7/01/2019  
Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
Carried: CONGRESS STREET #2  
Crossed: MILL RIVER  
Inventory Route: Non-NHS



Location Map # 1  
0.5 miles West of Route 59 {Easton Turnpike}

Form: BRI-19, Rev. 2/15  
Inspection type: Routine  
Inspection Date: 7/01/2019  
Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
Carried: CONGRESS STREET #2  
Crossed: MILL RIVER  
Inventory Route: Non-NHS

## STRUCTURE INVENTORY & APPRAISAL

### INSPECTION

Structurally Deficient  Functionally Obsolete   
Sufficiency Rating   
(90) Inspection Date  (91) Frequency   
Indepth Insp  Proposed next Indepth Year   
Deck Survey Date  Class   
Access  Flagman   

	Frequency	Date	Type
Fracture	<input type="text"/>	<input type="text"/>	<input type="text"/>
Underwater	<input type="text"/>	<input type="text"/>	<input type="text"/>
Special	<input type="text" value="12"/>	<input type="text"/>	<input type="text"/>

### IDENTIFICATION

Bridge Name   
Town Code - Name   
(5) Inventory Route  
(A) Record Type   
(B) Signing Prefix   
(C) Level of Service   
(D) Route Number.   
(E) Dir Suffix   
(6A) Featured Intersected   
(6B) Critical Facility Indicator   
(7) Facility Carried   
(9) Location   
(11) Mile Post  Miles  
(16) Latitude  Deg.  Min.  Sec.  
(17) Longitude  Deg.  Min.  Sec.  
(98) Border Bridge  
(A) State Code  (B) Percent Responsibility  %  
(C) Border Town Name   
(99) Border Bridge Structure No.

### STRUCTURE TYPE & MATERIALS

(43) Structure Type, Main  
A) Material   
B) Design Type   
(44) Structure Type, Approach  
A) Material   
B) Design Type   
(45) Number of Spans, Main Unit   
(46) Number of Approach Spans   
(107) Deck Structure Type   
(108) Wearing Surface/Protection Systems  
A) Type of Wearing Surface   
B) Type of Membrane   
C) Type of Deck Protection   
Substructure  
A) Material   
B) Design Type   
Paint  
Type   
Year   
Comment

### GEOMETRIC DATA

(48) Length of Maximum Span  ft.  
(49) Structure Length  ft.  
(50) Curb or Sidewalk Widths  
A) Left  ft.  in. B) Right  ft.  in.  
(51) Bridge Roadway Width Curb to Curb  ft.  in.  
(52) Deck Width, Out to Out  ft.  in.  
(32) Approach Roadway Width  ft.

Form: BRI-19, Rev. 2/15  
Inspection type: Routine  
Inspection Date: 7/01/2019  
Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
Carried: CONGRESS STREET #2  
Crossed: MILL RIVER  
Inventory Route: Non-NHS

(33) Bridge Median   
Deck Area  sq. ft.  
(34) Skew Angle  deg.  
(35) Structure Flared   
(10) Inv. Rte. Min. Vert. Clearance  ft.  in.  
(47) Inv. Rte. Total Horiz. Clr.  ft.  in.  
Log Inv. Rte. Total Horiz. Clr.  ft.  in.  
RLog Inv. Rte. Total Horiz. Clr.  ft.  in.  
(53) Min. Vert. Clearance Over Bridge  ft.  in.  
(54) Log-Min. Vert. Underclearance  ref.  ft.  in.  
(55) Min. Lat Underclearance on Right  ref.  ft.  in.  
(56) Min. Lat Underclearance on Left  ft.  in.

#### CONDITION

(58) Deck   
(59) Superstructure   
(60) Substructure   
(61) Channel & Channel Protections   
(62) Culverts   
(36) Traffic Safety Features  
A) Bridge Railings   
B) Transitions   
C) Approach Guardrail   
D) Approach Guardrail Ends

#### WATERWAY

Drainage Basin Waterway   
(38) Navigation Control   
(39) Navigation Vertical Clearance  ft.  
(40) Navigation Horiz. Clr.  ft.  
(111) Pier/Abutment Navigation   
(116) Vert-Lift Brg Nav Min  ft.  in.

#### AGE AND SERVICE

Year Built  (106) Year Reconstructed   
(42) Type of Service  
A) On   
B) Under   
(28) Number of Lanes  
A) On  B) Under   
(29) Average Daily Traffic   
Is Above Half ADT?   
(109) Percent Truck  %  
(30) Years of ADT   
(19) Bypass, Detour Length  Miles

#### APPRAISALS

(67) Structural Evaluation   
(68) Deck Geometry   
(69) Underclearances, Vert. & Horiz.   
(71) Waterway Adequacy   
(72) Approach Roadway Alignment   
(113) Scour Critical

#### COMMENTS

ADT based on 1% increase per year from 2013 ADT log.

#### CLASSIFICATION

(112) NBIS Bridge Length   
(104) Highway System   
(26) Functional Class   
(100) Defense Highway   
(101) Parallel Structure   
(102) Direction of Traffic

Form: BRI-19, Rev. 2/15  
Inspection type: Routine  
Inspection Date: 7/01/2019  
Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
Carried: CONGRESS STREET #2  
Crossed: MILL RIVER  
Inventory Route: Non-NHS

(103) Temporary Structure   
(110) Designated National Network   
(20) Toll   
(21) Maintain   
(22) Owner   
Report Class   
(37) Historical Significance

#### POSTED SIGNS

Other Posted Sign 1   
Other Posted Sign 2   

	Actual	Recomended	
Posted Load Single Unit Truck	<input type="text"/>	<input type="text"/>	tons
Posted Load Semi-Trailer Truck	<input type="text"/>	<input type="text"/>	tons
Posted Load 4 Axle Truck	<input type="text"/>	<input type="text"/>	tons
Posted Load 3S2 Truck	<input type="text"/>	<input type="text"/>	tons
All Vehicles	<input type="text"/>	<input type="text"/>	tons
Posted Vert. Clearance on Bridge	<input type="text"/> ft.	<input type="text"/> in.	
Posted Vert. Underclearance	<input type="text"/> ft.	<input type="text"/> in.	
Posted Speed Limit on Bridge	<input type="text"/> m.p.h.		

#### OTHER FEATURES

Fence Required   
Fence Present   
Fence Type   
Fence Height   
Fence Material   
Fence Top Type   
Barrel Ladders   
Stand Pipes   
Catwalks   
Moveable Inspection System   
Haunches Present over Roadway   
Utilities

#### PROPOSED IMPROVEMENTS

(75A) Type of Work Proposed   
(75B) Work Done By   
(76) Length of Structure Improvement  ft.  
(94) Bridge Improvement Cost \$   
(95) Roadway Improvement Cost \$   
(96) Total Project Cost \$   
(97) Year of Improvement Estimate   
(114) Future ADT   
(115) Year of Future ADT   
DOT Bridge Program List No   
Project No   
Advertised Date

#### LOAD RATING & POSTING

(31) Design Load   
(63) Operating Rating Type   
(64) Operating Rating   
(65) Inventory Rating Type   
(66) Inventory Rating   
Evaluation Code   
Year of Evaluation   
(70) Bridge Posting   
(41) Structure Status



Form: BRI-19, Rev. 2/15  
Inspection type: Routine  
Inspection Date: 7/01/2019  
Inspected by: TranSystems

:Bridge No 04196


Town: FAIRFIELD  
Carried: CONGRESS STREET #2  
Crossed: MILL RIVER  
Inventory Route: Non-NHS

INSPECTOR'S SIGNATURES:

1)  Date: 07/18/2019

P.E. SIGNATURE:

Date: 07/22/2019

2)  Date: 07/21/2019

P.E. #

0033431

Reviewed By:

Date: 09/09/2019

3) \_\_\_\_\_ Date:

  
Carl DeLucia

4) \_\_\_\_\_ Date:

Form: BRI-18, Rev. 1/14  
Inspection type: Routine  
Inspection Date: 7/01/2019  
Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
Carried: CONGRESS STREET #2  
Crossed: MILL RIVER  
Inventory Route: Non-NHS

## FIELD INSPECTION REPORT

Location: 0.5 MI W OF ROUTE 59 Year Built: 1935 Snooper Required: ☐  
Main Material: 3 - Steel Year Rebuilt: ☐ Snooper Used: ☐  
Main Design: 02 - Stringer/Multi-beam or

### Inspectors:

Lead Inspector: Johnny Marquez  
Inspector: Task:  
Area, 16 BSE - Inspector  
Marquez, Johnny BSE - Inspector  
Rail - Inspector  
Shiring, Patrick BSE - Inspector

### Visits:

Visit Date: Temp: Start Time: End Time:  
07/01/2019 85 02:00 PM 04:00 PM

58. DECK:

Overall Rating: 7

### Rating

Overlay: 8 No notable deficiencies.  
See Top of Deck sketch and photo 8.  
Deck - Str. Condition: 7 The underside of deck has an isolated 6' long x 1' wide area of map cracking in bay 7 at abutment 2.  
The total under side of deck deterioration is approximately 1%.  
See Underside of Deck and Framing sketch and photo 8.  
Curbs: N  
Median: N  
Sidewalks: N  
Parapet: 5 The stone masonry parapets have:  
- Cracked stones and full width x 1/8" wide transverse cracks in the cap stones.  
- Areas of missing/cracked mortar with voids up to 1' wide x 1" high x 2" deep.  
- A stone on the outside face of the south parapet is pushed out 2" (photo 10).  
See Top of Deck sketch.  
Railing: N  
Paint: N  
Fence: N  
Drains: N  
Lighting Standard: N

Overall Utility Condition Rating N - Not Applicable

Utility Type/Size

N | No Utilities present

Construction Joints: N

Expansion Joint: N

Form: BRI-18, Rev. 1/14  
Inspection type: Routine  
Inspection Date: 7/01/2019  
Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
Carried: CONGRESS STREET #2  
Crossed: MILL RIVER  
Inventory Route: Non-NHS

Haunches Present over travelway? NO

APPROACH CONDITION:

Overall Rating: 8

Rating

Approach Slab:	N	
Relief Joints:	N	
Approach Guide Rail:	5	<ul style="list-style-type: none"><li>- There is a metal beam rail at the northeast, southeast and southwest with areas of minor collision damage and scrapes up to 12' long.</li><li>- There is a timber railing at the northwest approach with a disconnected top rail that is partially laying on the ground (photo 11).</li></ul> See Top of Deck sketch.
Approach Pavement:	8	No notable deficiencies.
Approach Embankment:	7	<ul style="list-style-type: none"><li>- The southwest embankment has a 10' long x 10' wide x 2' deep area of erosion.</li><li>- The northwest embankment has an 8' long x 4' wide x 1' deep area of erosion.</li><li>- The southwest approach has a 5'-6" long x 3'-2" wide x 1'-2" deep area of erosion (photo 12). The CTDOT was made aware of this condition via email on 7/22/19.</li></ul> **The Town of Fairfield was notified on 7/22/19 via email by L.W.C. See Top of Deck sketch.

Traffic Safety Features

Bridge Railings:	0	- Masonry parapet.
Transitions:	0	- Approach rails are not connected to the bridge.
Approach Guardrails:	0	<ul style="list-style-type: none"><li>- Metal beam rail does not have block outs.</li><li>- Timber rail at northwest approach.</li></ul>
Approach Guardrail Ends:	0	- Tapered ends in the clear zone.

59. SUPERSTRUCTURE:

Overall Rating: 4

Rating

Bearing Devices:	N	Not visible. Girder ends are embedded in the backwalls.
Stringers:	N	
Girders:	4	<p>The concrete encased steel girders have:</p> <ul style="list-style-type: none"><li>- Spalls up to 3'-6" long x full width x 1-1/2" deep exposing the bottom flanges in girders 1-3, 10 and 11 (worst at girder 1). The exposed girder 1 bottom flange has as little as 1/4" remaining (10% section loss at midspan) (photo 14) and as little as 1/4" remaining at abutment 2 (non-critical area) (photo 13). The remaining exposed bottom flanges have moderate to heavy laminated rust.</li><li>- Concrete encasement with hollow areas up to full length in the bottom surface extended up to 6" at the vertical faces (photo 15).</li><li>- Longitudinal cracks up to 10' long x 1/8" wide in concrete encasements in the bottom surface and vertical faces.</li></ul> See Underside of Deck and Framing sketch and photo 9.
Floor Beams:	N	
Trusses - General:	N	
Trusses - Portals:	N	
Trusses - Bracing:	N	

Form: BRI-18, Rev. 1/14  
 Inspection type: Routine  
 Inspection Date: 7/01/2019  
 Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
 Carried: CONGRESS STREET #2  
 Crossed: MILL RIVER  
 Inventory Route: Non-NHS

Paint:	N	
Rust:	3	See "Girders" item above.
Machinery Movable Span:	N	
Rivets & Bolts:	N	
Welds - Cracks:	N	
Timber Decay:	N	
Concrete Cracking:	5	See "Girders" item above.
Collision Damage:	8	
Member Alignment:	8	
Deflection Under Load:	N	Normal (N); Excessive (E)
Vibration Under Load:	N	Normal (N); Excessive (E)
Stand Pipes:	N	
Catwalks:	N	
Movable Inspection System:	N	
Barrel Ladders:	N	
Are Barrel Ladders OSHA Compliant?		N/A

#### 60. SUBSTRUCTURE:

Overall Rating: 5

Rating	
Abutments - Stem:	5 The abutment stems have: - Spalls up to 1' wide x 2" high x 3/4" deep. - Isolated full height vertical cracks up to 1/16" wide. - Light scale along the waterline and an isolated area of 6" diameter x 2-1/2" deep scale on abutment 2. - Random areas of honeycombing up to 1/2" deep and efflorescence stains. - An isolated 8" long x 5" high x 3" deep void on abutment 2 under girder 11.  See Abutment sketches and photo 16
Abutments - Backwall:	7 - The backwalls have random horizontal hairline cracks and efflorescence stains.  See Abutment sketches.
Abutments - Footings:	7 - The abutment 1 footing is exposed up to 17" high with light scale and rip rap along footing. - Abutment 2 is dry for the entire length.  See Top of Footing to Channel Bottom and Abutment sketches.
Abutments - Settlement:	8
Abutments - Wingwalls:	7 Wingwalls have: - Isolated hairline cracks up to 2' long. - Areas of light scale. - Wingwalls 1A and 1B footings are exposed up to 11" high x full width. - Tree growth behind wingwall 2A.  See Top of Footing to Channel Bottom, Wingwall sketches and photo 17.
Piers/Bents - Caps:	N
Piers/Bents - Pile Bent:	N
Piers/Bents - Columns:	N
Piers/Bents - Footings:	N
Piers/Bents - Settlement:	N

Form: BRI-18, Rev. 1/14  
Inspection type: Routine  
Inspection Date: 7/01/2019  
Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
Carried: CONGRESS STREET #2  
Crossed: MILL RIVER  
Inventory Route: Non-NHS

Erosion - Scour: 5	Scour (Rated- 5): There is scour along the abutment 1, wingwall 1A and wingwall 1B exposing the footing up to full length x full width x 17" high. There is rip rap along the footing at abutment 1.  Erosion (Rated - 6): There is erosion along Wingwall 2B that is exposing the footing up to 6' long x full width x 1" high.  See Wingwall and Top of Footing to Channel Bottom sketches.
Concrete Crack - Spall: 7	See "Abutments - Stem" and "Abutments - Backwall" items above.
Steel Corrosion: N	
Paint: N	
Timber Decay: N	
Collision Damage: 8	
Debris: 8	None noted.

#### 61. CHANNEL AND CHANNEL PROTECTION:

Overall Rating: 5

##### Rating

Channel - Scour: 5	<ul style="list-style-type: none"><li>- There is a 20' wide x 3'-6" long x 2'-4" deep scour hole near midspan.</li><li>- Abutment 1 footing is exposed up to 17" high x full width and is lined with rip rap.</li><li>- There is aggradation along abutment 2 up to 7' wide x 2" high.</li><li>- There are large rocks in the channel upstream diverting flow.</li></ul> See Channel Diagram sketch and photos 18 and 19.
Embankment - Erosion: 6	<ul style="list-style-type: none"><li>- The channel embankments have minor undercutting with exposed tree roots.</li></ul> See Channel Diagram sketch and photos 18 and 19.
Debris: 8	None noted.
Vegetation: 8	
Channel Change: 5	<ul style="list-style-type: none"><li>- Large rocks upstream from structure are diverting flow and catching debris.</li></ul> See Channel Diagram sketch and photos 18 and 19.
Fender - System: N	
Spur Dikes and Jetties: N	
Rip Rap: 6	<ul style="list-style-type: none"><li>- Rip rap is present along abutment 1 is sliding into the channel away from the abutment.</li></ul> See Abutment 1 and Channel Diagram sketches.

#### 62. CULVERTS AND RETAINING WALLS:

Overall Rating: N

##### Rating

Barrel: N
Concrete: N
Steel: N
Timber: N
Headwall: N
Cutoff Wall: N
Debris: N
Retaining Wall System: N

Form: BRI-18, Rev. 1/14  
Inspection type: Routine  
Inspection Date: 7/01/2019  
Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
Carried: CONGRESS STREET #2  
Crossed: MILL RIVER  
Inventory Route: Non-NHS

Footing: N

LOAD POSTING:

Rating

Single Unit (Tons):

Semi Trailer (Tons):

4 Axle (Tons):

3S2 (Tons):

All Vehicles:

Advanced Warning:

Warning At Bridge:

Legibility:

Visibility:

VERTICAL CLEARANCE POSTING

Min. Vert Under Clearance: Ft In Structure spans a waterway.

Posted Clearance Under Bridge: Ft In

Posted Clearance On Bridge: Ft In

Advanced Warning:

Warning At Bridge:

Legibility:

Visibility:

NOTES / COMMENTS:

Character of Traffic: Light moderate volume, mostly cars.

Additional Notes:

- Bridge ID is located on the northeast parapet and is legible (photo 1).
- Bridge is logged from west to east with girder 1 at the north fascia which is consistent with the previous inspection report.
- Bridge was inspected with waders.

Additional Comments:

- Consideration should be given to using a D-Meter for the 2021 inspection to verify section properties and losses.

National Bridge Elements  
 Inspection type: Routine  
 Inspection Date: 7/01/2019  
 Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
 Carried: CONGRESS STREET #2  
 Crossed: MILL RIVER  
 Inventory Route: Non-NHS

	Environment	Total Quantity	Units	Condition State 1	Condition State 2	Condition State 3	Condition State 4
12 - Reinforced Concrete Deck	Mod.	1076	sq. ft.	1070	6	0	0
1130 - Cracking (RC and Other)		6		0	6	0	0
510 - Wearing Surfaces		968	sq. ft.	968	0	0	0
107 - Steel Open Girder/Beam	Mod.	420	ft.	415	2	3	0
1000 - Corrosion		5		0	2	3	0
215 - Reinforced Concrete Abutment	Mod.	66	ft.	0	65	1	0
1080 - Delamination/Spall/Patched Area		3		0	2	1	0
1130 - Cracking (RC and Other)		3		0	3	0	0
1190 - Abrasion/Wear (PSC/RC)		60		0	60	0	0
220 - Reinforced Concrete Pile Cap/Footing	Mod.	33	ft.	0	0	33	0
6000 - Scour		33		0	0	33	0
333 - Other Bridge Railing	Mod.	69	ft.	61	8	0	0
1010 - Cracking		5		0	5	0	0
1080 - Delamination/Spall/Patched Area		2		0	2	0	0
1900 - Distortion		1		0	1	0	0



Sketches

Inspection type: Routine  
 Inspection Date: 7/01/2019  
 Inspected by: TranSystems

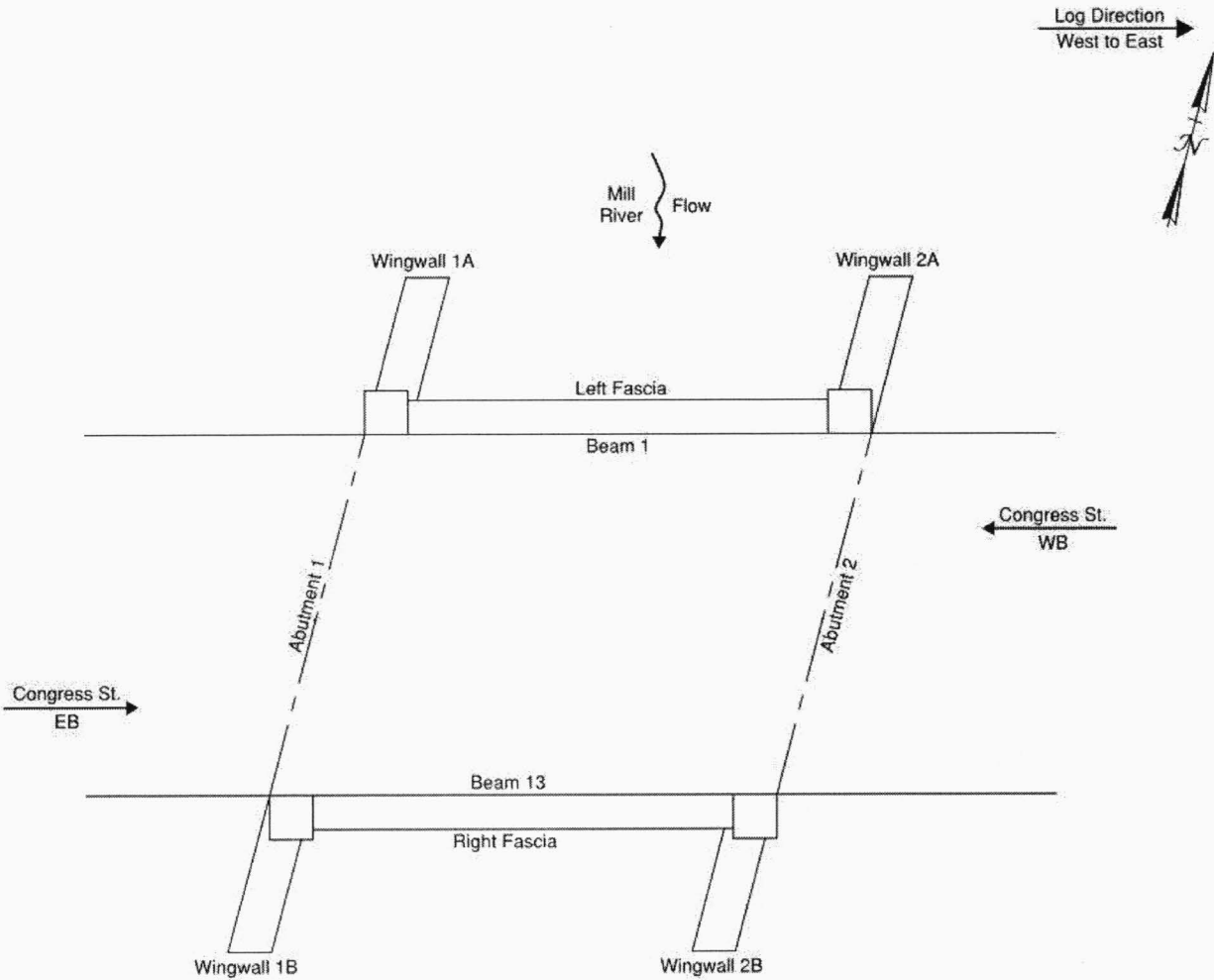
:Bridge No 04196

Town: FAIRFIELD  
 Carried: CONGRESS STREET #2  
 Crossed: MILL RIVER  
 Inventory Route: Non-NHS





CREW: JSM, PDS (TSC)

DATE: 07/01/2019

BRIDGE NO.: 04196



Key Plan  
 N.T.S.

REVISION 	DATE:	CREW:	REVISION 	DATE:	CREW:
REVISION 	DATE:	CREW:	REVISION 	DATE:	CREW:

Sketches

Inspection type: Routine  
 Inspection Date: 7/01/2019  
 Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
 Carried: CONGRESS STREET #2  
 Crossed: MILL RIVER  
 Inventory Route: Non-NHS

CREW: JSM, PDS (TSC)	DATE: 07/01/2019	BRIDGE NO.: 04196
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Log Direction  
 West to East →

Top of Deck  
N.T.S.

REVISION	DATE:	CREW:	REVISION	DATE:	CREW:
REVISION	DATE:	CREW:	REVISION	DATE:	CREW:

**LEGEND:**  
 HOLLOW AREA  
 SHALLOW REBAR  
 SPALL AREA  
 SPALL AREA WITH EXPOSED REBAR  
 MAP CRACKS  
 HAIRLINE CRACKS  
 HONEYCOMB AREA  
 SCALE AREA  
 EFFLORESCE PRESENT  
 DYL Double Yellow Line

General Notes

- Overlay and approach pavements have no notable deficiencies.
- Stone masonry parapets have areas of missing/cracked mortar with voids up to 1' wide x 1" high x 2" deep, cracked stones and full width x 1/8" wide transverse cracks in the cap stones.
- Metal beam rail at the northeast, southeast, and southwest areas of minor collision damage and scrapes up to 12' long.

Sketches

Inspection type: Routine

Inspection Date: 7/01/2019

Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD

Carried: CONGRESS STREET #2

Crossed: MILL RIVER

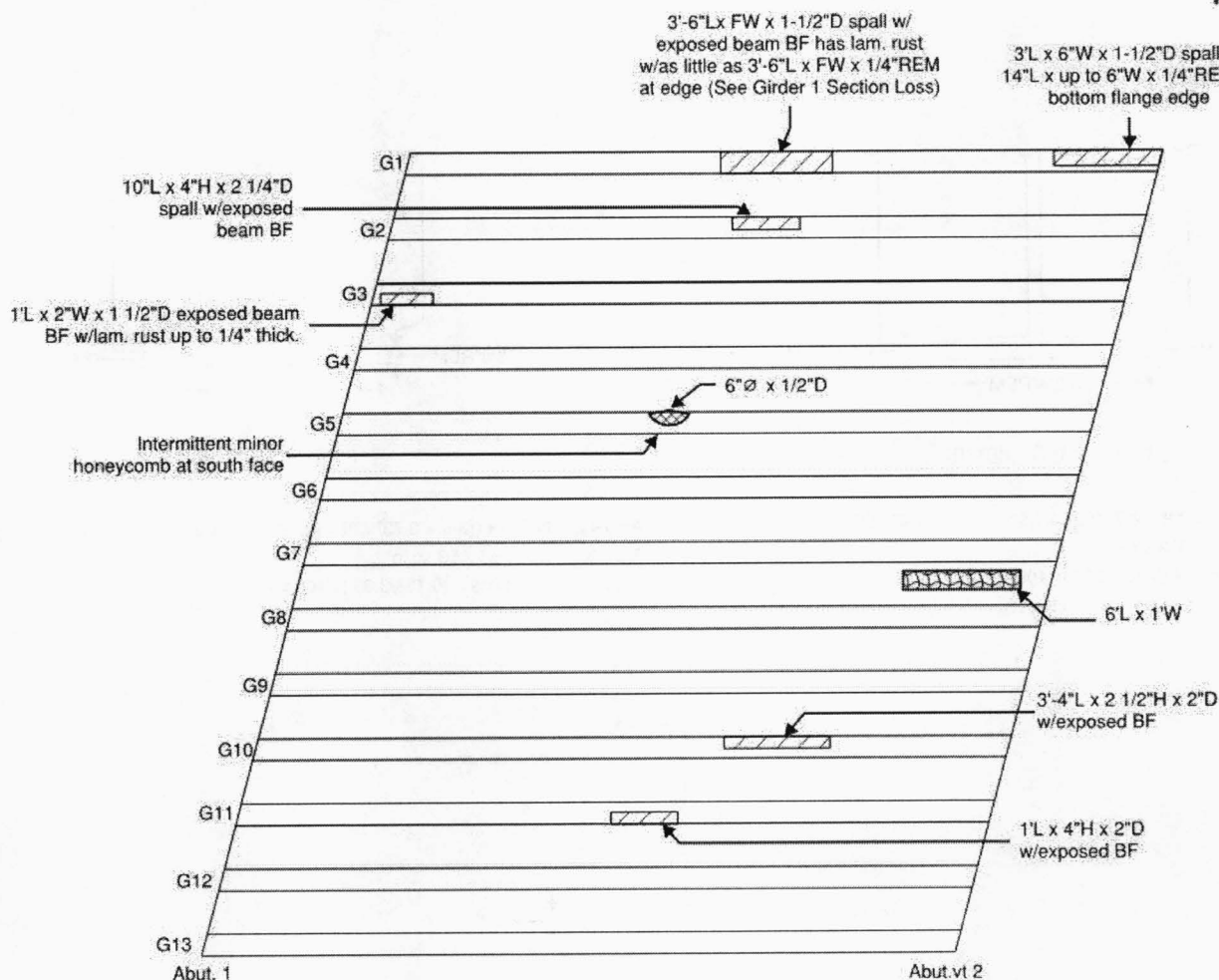
Inventory Route: Non-NHS

CREW: JSM, PDS (TSC)

DATE: 07/01/2019

BRIDGE NO.: 04196

Log Direction  
West to East



#### General Notes

- Exposed bottom flanges typically have moderate to heavy laminated rust.
- Longitudinal cracks up to 10' long x 1/8" wide in concrete encasement in the bottom surface and vertical faces.
- Concrete encasements with hollow areas up to full length in the bottom surface extending up to 6" at the vertical faces.
- Top of concrete encasement at fascia girders with spalls up to 4" high x 2" deep x full length.

#### LEGEND:

- HOLLOW AREA
- SHALLOW REBAR
- SPALL AREA
- SPALL AREA WITH EXPOSED REBAR
- MAPCRACKS
- HAIRLINE CRACKS
- HONEYCOMB AREA
- SCALE AREA
- EFFLORESCENCE PRESENT

Underside of Deck and Framing  
N.T.S.

REVISION	DATE:	CREW:	REVISION	DATE:	CREW:
REVISION	DATE:	CREW:	REVISION	DATE:	CREW:

# Sketches

Inspection type: Routine  
 Inspection Date: 7/01/2019  
 Inspected by: TranSystems

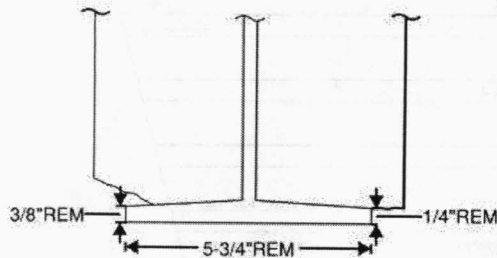
:Bridge No 04196

Town: FAIRFIELD  
 Carried: CONGRESS STREET #2  
 Crossed: MILL RIVER  
 Inventory Route: Non-NHS

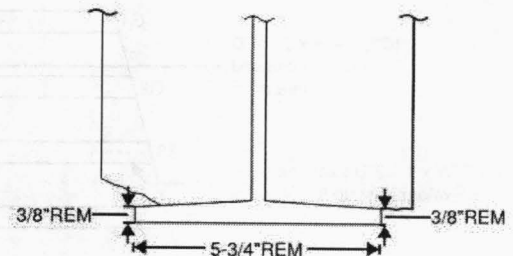
CREW: JSM, PDS (TSC)

DATE: 07/01/2019

BRIDGE NO.: 04196



16'-6" from Abutment 2



18' from Abutment 2

$$A_{REM} = [(5-3/4"/2) \times ((3/8" + 0.73")/2)] + [(5-3/4"/2) \times ((1/4" + 0.73")/2)] = 2.997 \text{ sq in}^2$$

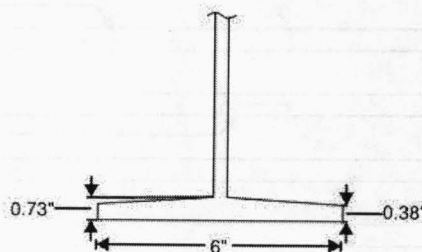
$$A_{SL} = 3.33 - 2.997 = 0.333 \text{ sq in}^2$$

$$\text{Percent Flange Loss} = (0.333/3.33) \times 100 = 10\%$$

$$A_{REM} = [(5-3/4"/2) \times ((3/8" + 0.73")/2)] + [(5-3/4"/2) \times ((3/8" + 0.73")/2)] = 3.177 \text{ sq in}^2$$

$$A_{SL} = 3.33 - 3.177 = 0.153 \text{ sq in}^2$$

$$\text{Percent Flange Loss} = (0.153/3.33) \times 100 = 4.6\%$$



Original Section per 1997  
 Load Rating Report

$$A_{ORIGINAL} = 6" \times (0.38" + 0.73)/2 = 3.33 \text{ sq in}^2$$

Girder 1 Section Loss  
 N.T.S.

REVISION	DATE:	CREW:	REVISION	DATE:	CREW:
REVISION	DATE:	CREW:	REVISION	DATE:	CREW:

Sketches

Inspection type: Routine  
 Inspection Date: 7/01/2019  
 Inspected by: TranSystems

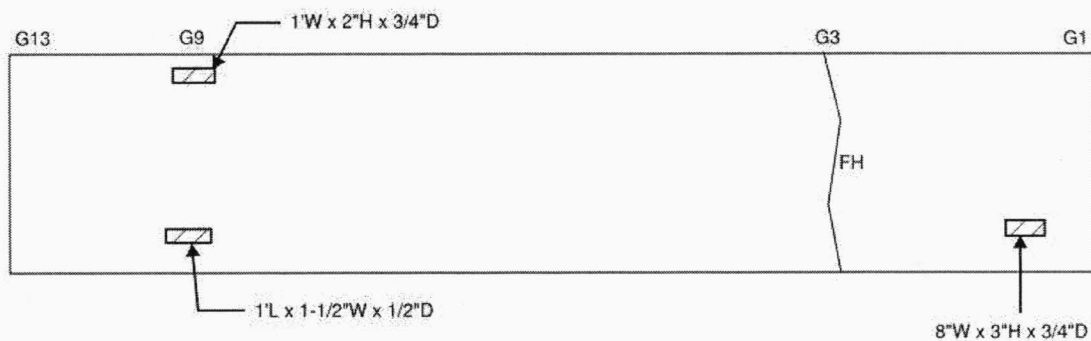
:Bridge No 04196

Town: FAIRFIELD  
 Carried: CONGRESS STREET #2  
 Crossed: MILL RIVER  
 Inventory Route: Non-NHS

CREW: PDS, JSM (TSC)

DATE: 07/01/2019

BRIDGE NO.: 04196



General Notes:

- Light scale at the waterline.
- Backwalls have random horizontal hairline cracks.
- Footing exposed up to full width x 17" high.
- Rip rap along footing is sliding into the channel away from the abutment.

LEGEND:

- HOLLOW AREA
- SHALLOW REBAR
- SPALL AREA
- SPALL AREA WITH EXPOSED REBAR
- MAPCRACKS
- HAIRLINE CRACKS
- HONEYCOMB AREA
- SCALE AREA
- EFFLORESCENCE PRESENT

Abutment 1

N.T.S.

REVISION	DATE:	CREW:	REVISION	DATE:	CREW:
REVISION	DATE:	CREW:	REVISION	DATE:	CREW:

Sketches

Inspection type: Routine  
 Inspection Date: 7/01/2019  
 Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
 Carried: CONGRESS STREET #2  
 Crossed: MILL RIVER  
 Inventory Route: Non-NHS

CREW: PDS, JSM (TSC)	DATE: 07/01/2019	BRIDGE NO.:04196
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G1


G7

G8


G11

G13

FH x  
1/16"W



Isolated 6"Ø x 2-1/2"D  
heavy scale












8"L x 5"H x 3"D void





General Notes:

- There is light scale along the waterline and efflorescence stains at the south end.
- Random areas of honeycombing up to 1/2" deep.
- Backwalls have random horizontal hairline cracks.
- Abutment is dry along entire length.

**LEGEND:**

-  HOLLOW AREA
-  SHALLOW REBAR
-  SPALL AREA
-  SPALL AREA WITH EXPOSED REBAR
-  MAP CRACKS
-  HAIRLINE CRACKS
-  HONEYCOMB AREA
-  SCALE AREA
-  EFFLORESCECE PRESENT

Abutment 2  
 N.T.S.

REVISION 	DATE:	CREW:	REVISION 	DATE:	CREW:
REVISION 	DATE:	CREW:	REVISION 	DATE:	CREW:

Sketches

Inspection type: Routine  
 Inspection Date: 7/01/2019  
 Inspected by: TranSystems

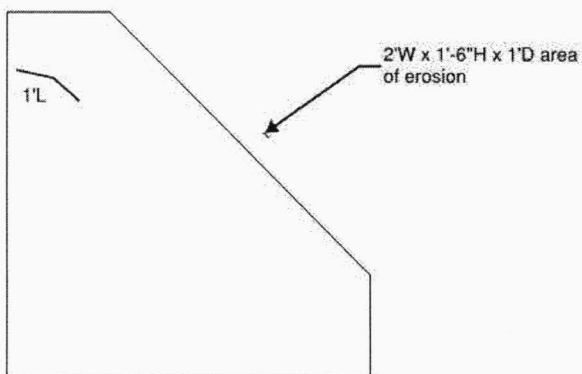
:Bridge No 04196

Town: FAIRFIELD  
 Carried: CONGRESS STREET #2  
 Crossed: MILL RIVER  
 Inventory Route: Non-NHS

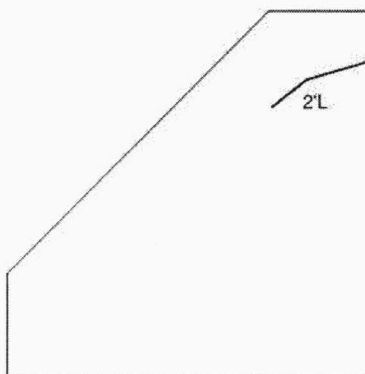
CREW: JSM, PDS

DATE: 07/01/2019

BRIDGE NO.: 04196



Wingwall 1A  
 N.T.S.



Wingwall 1B  
 N.T.S.

LEGEND:

- HOLLOW AREA
- SHALLOW REBAR
- SPALL AREA
- SPALL AREA WITH EXPOSED REBAR
- MAPCRACKS
- HAIRLINE CRACKS
- HONEYCOMB AREA
- SCALE AREA
- EFFLORESCENCE PRESENT

General Notes:

- Wingwalls have areas of light scale.

REVISION	DATE:	CREW:	REVISION	DATE:	CREW:
REVISION	DATE:	CREW:	REVISION	DATE:	CREW:

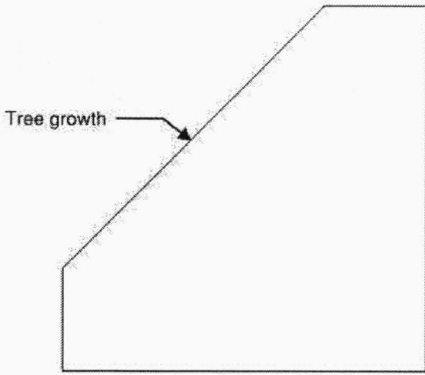
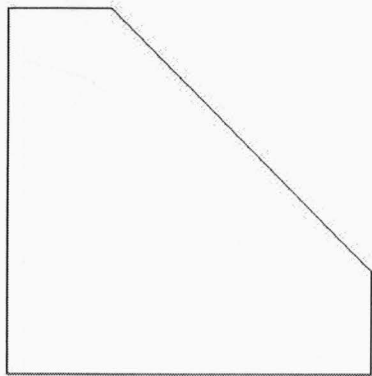


Sketches

Inspection type: Routine  
 Inspection Date: 7/01/2019  
 Inspected by: TranSystems

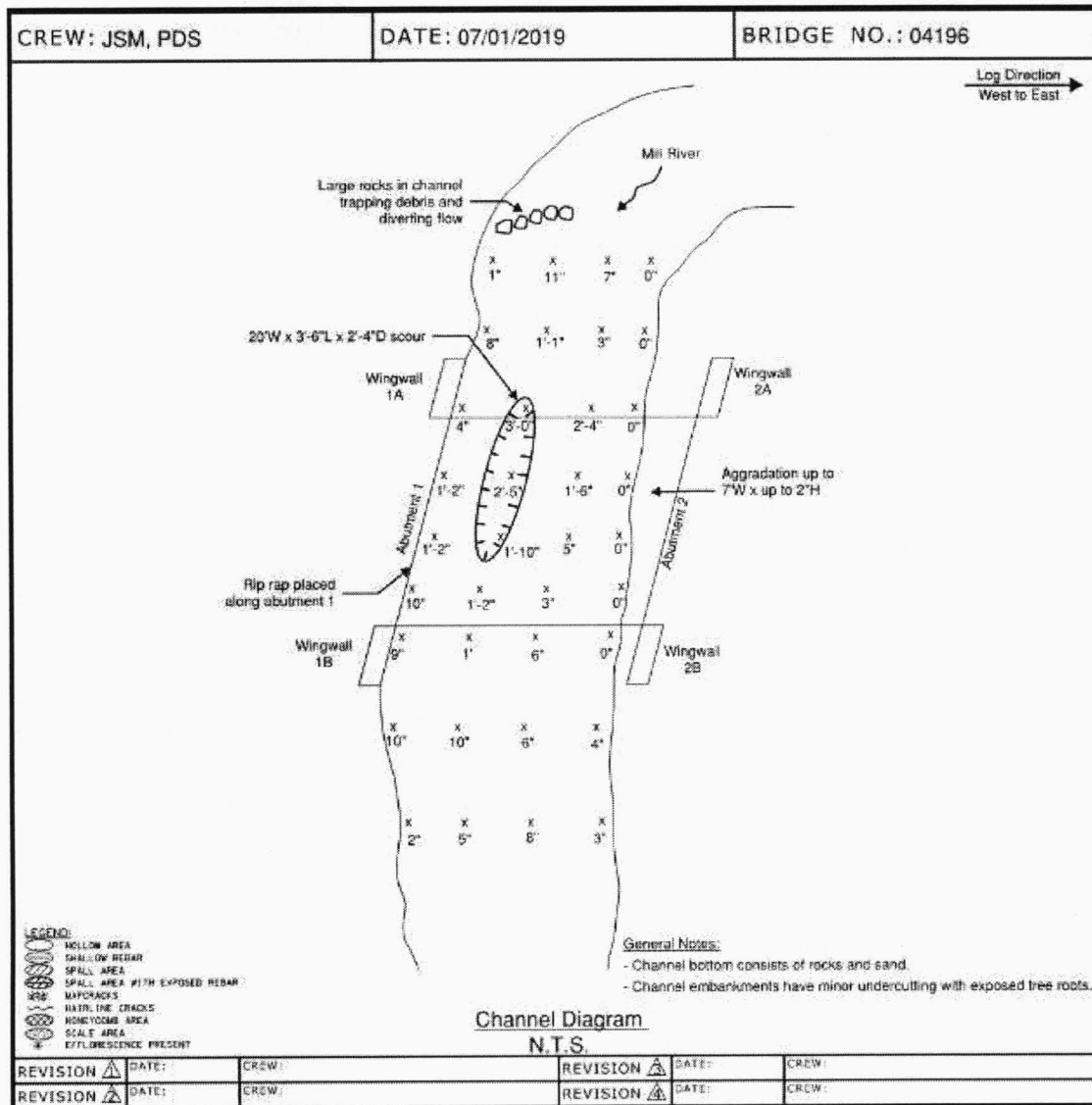
:Bridge No 04196

Town: FAIRFIELD  
 Carried: CONGRESS STREET #2  
 Crossed: MILL RIVER  
 Inventory Route: Non-NHS

CREW: PDS, JSM (TSC)	DATE: 07/01/2019	BRIDGE NO.: 04196
<div style="text-align: center; margin-bottom: 40px;">  <p><u>Wingwall 2A</u> N.T.S.</p> </div> <div style="text-align: center;">  <p><u>Wingwall 2B</u> N.T.S.</p> </div> <div style="margin-top: 20px;"> <p><b>LEGEND:</b></p> <ul style="list-style-type: none"> <li> HOLLOW AREA</li> <li> SHALLOW REBAR</li> <li> SPALL AREA</li> <li> SPALL AREA WITH EXPOSED REBAR</li> <li> MAPCRACKS</li> <li> HAIRLINE CRACKS</li> <li> HONEYCOMB AREA</li> <li> SCALE AREA</li> <li> EFFLORESCENCE PRESENT</li> </ul> </div> <div style="margin-top: 20px;"> <p><u>General Notes:</u></p> <ul style="list-style-type: none"> <li>- Wingwalls have areas of light scale.</li> <li>- There is erosion along Wingwall 2B that is exposing the footing 6' long x full width x 1" high.</li> </ul> </div>		
REVISION	DATE:	CREW:
REVISION	DATE:	CREW:

Inspection type: Routine  
Inspection Date: 7/01/2019  
Inspected by: TranSystems

Town: FAIRFIELD  
Carried: CONGRESS STREET #2  
Crossed: MILL RIVER  
Inventory Route: Non-NHS



Sketches

Inspection type: Routine  
 Inspection Date: 7/01/2019  
 Inspected by: TranSystems

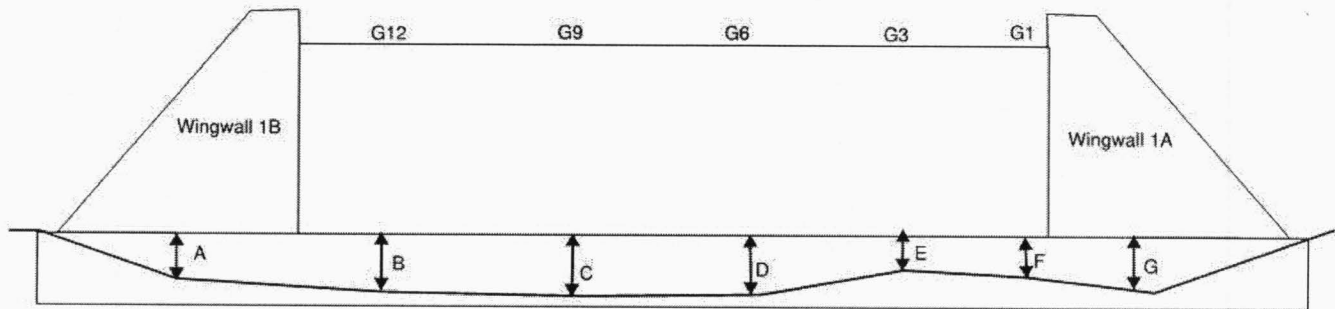
:Bridge No 04196

Town: FAIRFIELD  
 Carried: CONGRESS STREET #2  
 Crossed: MILL RIVER  
 Inventory Route: Non-NHS

CREW: PDS, JSM

DATE: 07/01/2019

BRIDGE NO.: 04196



	2017	2019	2021	2023	2025	2027
A	9"	11"				
B	16"	15"				
C	18"	17"				
D	18"	16"				
E	6"	8"				
F	8"	8"				
G	16"	9"				

General Notes:

- Exposed footing with light scale and rip rap along footing.

Top of Footing to Channel Bottom Abutment 1  
and Wingwalls 1A and 1B

N.T.S.

REVISION	DATE:	CREW:	REVISION	DATE:	CREW:
REVISION	DATE:	CREW:	REVISION	DATE:	CREW:

Sketches

Inspection type: Routine

Inspection Date: 7/01/2019

Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD

Carried: CONGRESS STREET #2

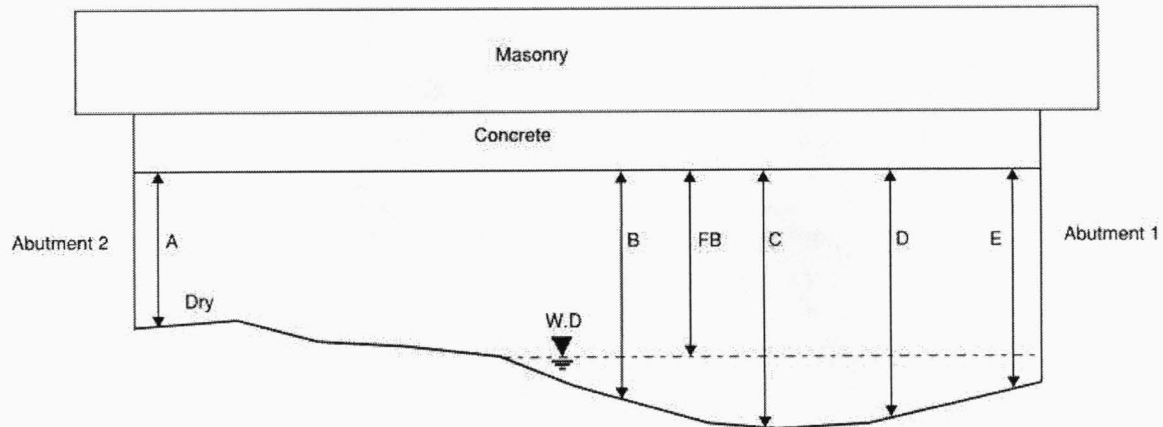
Crossed: MILL RIVER

Inventory Route: Non-NHS

CREW: JSM, PDS

DATE: 07/01/2019





BRIDGE NO.: 04196



	2019				
A	5'-4"				
B	8'-9"				
C	10'-0"				
D	8'-8"				
E	6'-9"				
FB	6'-4"				

North (Profile) Elevation Inlet

N.T.S.

REVISION 	DATE:	CREW:	REVISION 	DATE:	CREW:
REVISION 	DATE:	CREW:	REVISION 	DATE:	CREW:

Form: Asset Photos  
Inspection type: Routine  
Inspection Date: 7/01/2019  
Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
Carried: CONGRESS STREET #2  
Crossed: MILL RIVER  
Inventory Route: Non-NHS

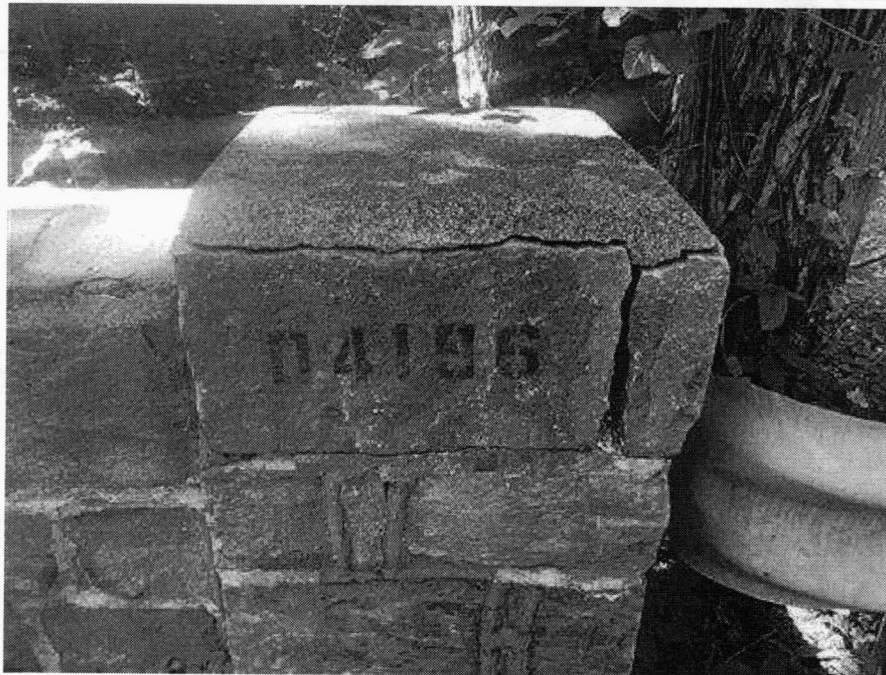


Photo Number: 1

Photo Taken: 07/01/2019

Bridge ID on northeast parapet. Note cracked mortar.



Photo Number: 2

Photo Taken: 07/01/2019

North elevation.

Form: Asset Photos  
Inspection type: Routine  
Inspection Date: 7/01/2019  
Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
Carried: CONGRESS STREET #2  
Crossed: MILL RIVER  
Inventory Route: Non-NHS

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Photo Number: 3

Photo Taken: 07/01/2019

South elevation.



Photo Number: 4

Photo Taken: 07/01/2019

Bridge from west approach.



Form: Asset Photos  
Inspection type: Routine  
Inspection Date: 7/01/2019  
Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
Carried: CONGRESS STREET #2  
Crossed: MILL RIVER  
Inventory Route: Non-NHS



Photo Number: 5

Photo Taken: 07/01/2019

Bridge from east approach.



Photo Number: 6

Photo Taken: 07/01/2019

West approach from bridge.



Form: Asset Photos  
Inspection type: Routine  
Inspection Date: 7/01/2019  
Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
Carried: CONGRESS STREET #2  
Crossed: MILL RIVER  
Inventory Route: Non-NHS



Photo Number: 7

Photo Taken: 07/01/2019

East approach from bridge.



Photo Number: 8

Photo Taken: 07/01/2019

Typical top of deck, looking northeast.

Form: Asset Photos  
Inspection type: Routine  
Inspection Date: 7/01/2019  
Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
Carried: CONGRESS STREET #2  
Crossed: MILL RIVER  
Inventory Route: Non-NHS

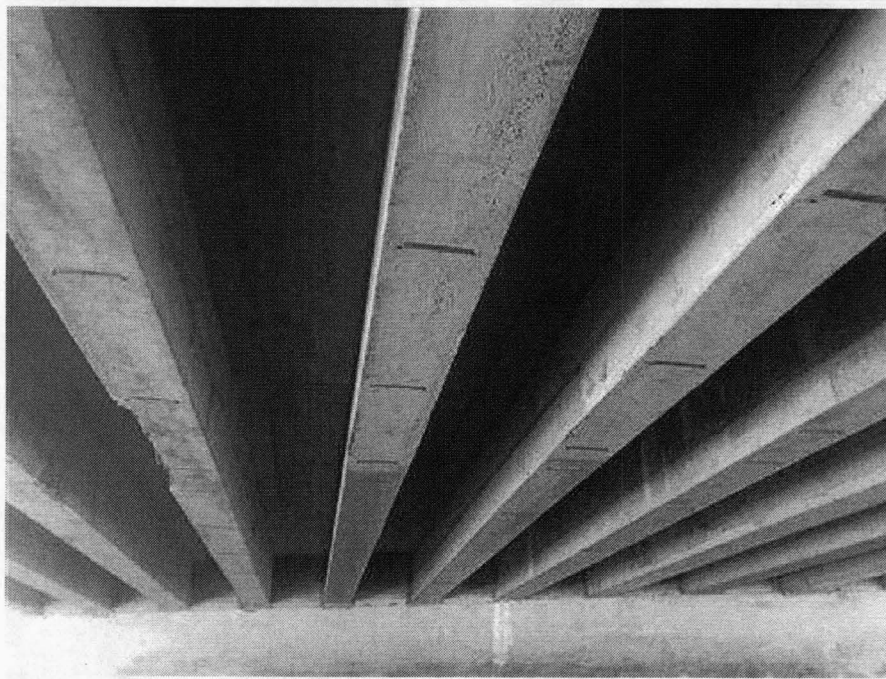


Photo Number: 9

Photo Taken: 07/01/2019

Typical underside of superstructure, looking west.



Photo Number: 10

Photo Taken: 07/01/2019

West end of south parapet. Note stone pushed out.

Form: Asset Photos  
Inspection type: Routine  
Inspection Date: 7/01/2019  
Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
Carried: CONGRESS STREET #2  
Crossed: MILL RIVER  
Inventory Route: Non-NHS



Photo Number: 11

Photo Taken: 07/01/2019

Northwest timber approach rail. Note disconnected top rail that is partially laying on the ground.



Photo Number: 12

Photo Taken: 07/01/2019

Southwest approach edge of pavement. Note erosion.



Form: Asset Photos  
Inspection type: Routine  
Inspection Date: 7/01/2019  
Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
Carried: CONGRESS STREET #2  
Crossed: MILL RIVER  
Inventory Route: Non-NHS



Photo Number: 13

Photo Taken: 07/01/2019

Girder 1 at abutment 2, looking northeast. Note spall with exposed bottom flange and section loss.



Photo Number: 14

Photo Taken: 07/01/2019

Girder 1 at midspan. Note spall with exposed bottom flange and section loss.

Form: Asset Photos  
Inspection type: Routine  
Inspection Date: 7/01/2019  
Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
Carried: CONGRESS STREET #2  
Crossed: MILL RIVER  
Inventory Route: Non-NHS

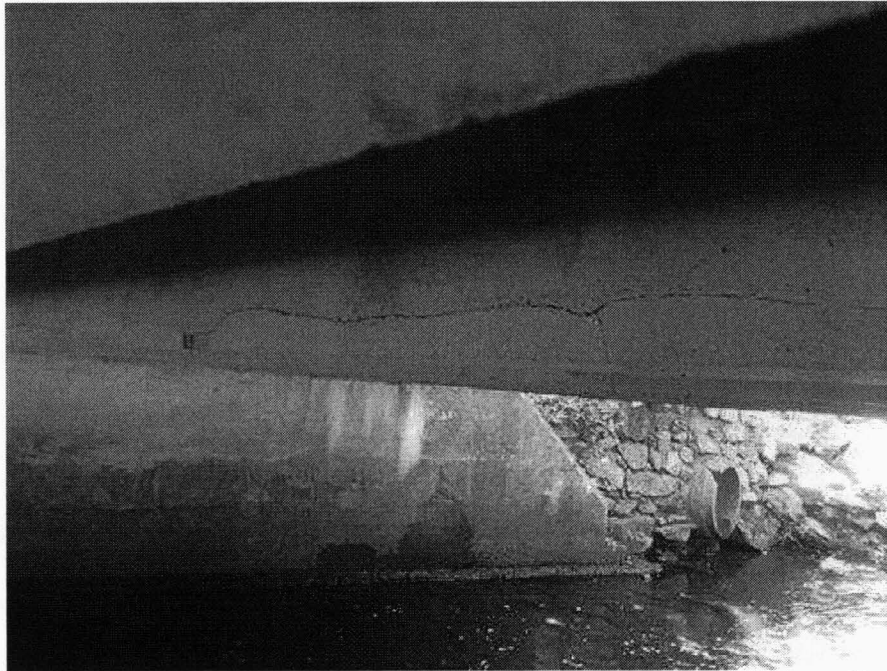


Photo Number: 15

Photo Taken: 07/01/2019

Girder 6, south face, looking northwest. Note hollow area along bottom of encasement.

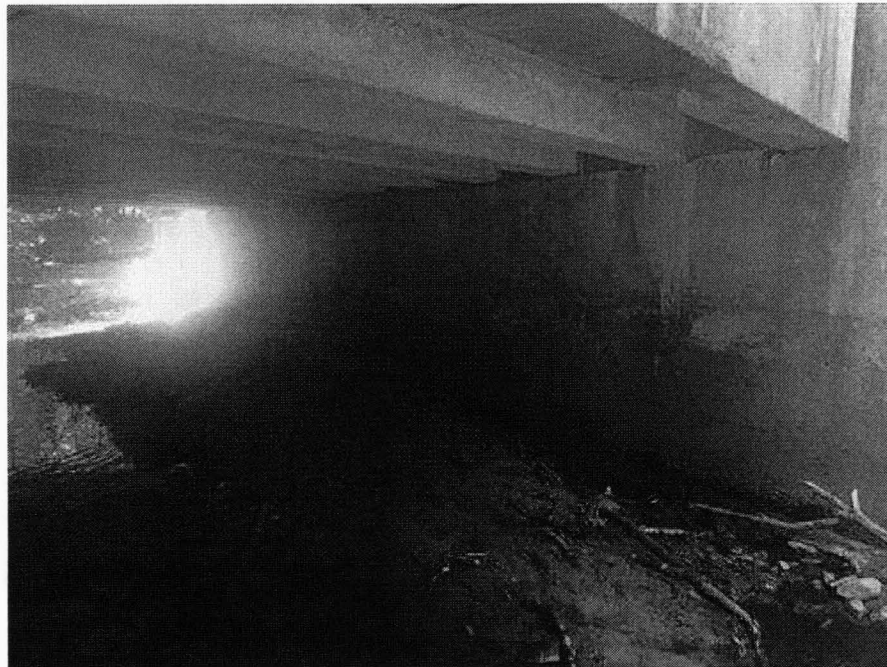


Photo Number: 16

Photo Taken: 07/01/2019

Typical abutment 2, looking northeast..

Form: Asset Photos  
Inspection type: Routine  
Inspection Date: 7/01/2019  
Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
Carried: CONGRESS STREET #2  
Crossed: MILL RIVER  
Inventory Route: Non-NHS

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Photo Number: 17

Photo Taken: 07/01/2019

Wingwall 1B.



Photo Number: 18

Photo Taken: 07/01/2019

Channel looking upstream (north).

Form: Asset Photos  
Inspection type: Routine  
Inspection Date: 7/01/2019  
Inspected by: TranSystems

:Bridge No 04196

Town: FAIRFIELD  
Carried: CONGRESS STREET #2  
Crossed: MILL RIVER  
Inventory Route: Non-NHS

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Photo Number: 19

Channel looking downstream (south).

Photo Taken: 07/01/2019



**Culvert Repair and replacements. = \$100,000 for Construction Improvements.**

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1. **Background** – The Town of Fairfield infrastructure is aging and there are a few culverts under Town roads that need repair or replacement. DPW and Engineering have identified Reef Road as a priority for culvert replacement. DPW has performed repairs on this culvert the past few years but now the culvert condition has worsened and must be replaced. There are other culverts in Town that require only minor repairs that could be done by Town resources and other culverts that require replacement (which funding will be requested in the future). Over the past few years, the state has submitted culvert reports that list current conditions and provide some short and long term options. The Town has also performed its own inspection on some of these culverts and other culverts as well. Based on these reports and inspections, The Town has compiled a priority list for repairs and replacements for the short term and will compile a list for long term improvements, repairs and replacements for future funding, when applicable.
2. **Purpose and Justification** – The purpose of the project is to replace the Reef Road culvert. Approximately two years ago, a sinkhole formed in the roadway and DPW had to place a steel plate over the settled area. Later with favorable weather, DPW performed repairs to the existing Reef Road Culvert and installed a new section of pipe. Unfortunately, another sink hole has formed in a different location and during a preliminary investigation, DPW determined that the pipe has corroded to a point beyond repair. Therefore, a new culvert, headwalls and connecting stub pipes will have to be installed as soon as possible.
3. **Detailed Description of Proposal** – The proposal includes replacement of the existing culvert with a new similar sized culvert (due to utility conflicts), headwalls, pipe stub connections, guiderail, posts or fencing system. Engineering and/or a Consultant will provide plans and specifications for DPW to perform work or for contract bid, if DPW schedule is stretched. Soil testing will be performed to determine if proposed excavated material require special handling. Engineering anticipates having to obtain a certificate of permission from the DEEP, having obtained one about a decade ago.
4. **Reliability of Cost Estimate** – The request is based on past project cost estimates that are beginning to get outdated. The reliability of costs on a scale of 0 to 10 is estimated at 6 based on whether DPW performs some of the work or if some of the work is contracted out. Testing may also impacts costs to a degree. Piles may be required for headwall installation. There are utilities located in and around the culvert crossing.
5. **Increased Efficiency or Productivity** – Allow the traveling public and commerce safer access and provide additional environmental improvements through tidal conveyance than today.
6. **Additional Long Range Costs** – Typical Maintenance costs. Short and longer term maintenance costs should be reduced with replacement.
7. **Additional Use or Demand on Existing Facilities** –None.
8. **Alternatives to this Request** –Permanent closure of the road is not a viable option the high volume roadway.
9. **Safety and Loss Control** – Allow the traveling public and commerce safer access. Testing soil samples for proposed excavated materials. Propose work during favorable tides.
10. **Environmental Considerations** – As mentioned previously, the projects will require an environmental permit. Engineering anticipates a Certificate of permission requirement based on similar work about a decade ago. Plan proposes to collect soil samples for testing and proper disposal, if applicable. Soil and erosion control measures are required.

11. **Insurance** – Any selected contractors will be required to carry the necessary insurance prescribed by the Purchasing Department.
12. **Financing** – Project will be bonded as part of the Non-Recurring Capital budget of 2022.
13. **Other Considerations**: Access to the site for headwall construction may require easement. Driveways, property lines, retaining walls may dictate access and the amount of excavation performed. Upgrade Guiderail systems, where applicable.
14. **Other Approvals**:

Board of Selectman	-	Jan 2021
Board of Finance	-	Feb 2021
RTM	-	Feb-Mar 2021

**From:** Hurley, William  
**To:** Hurley, William  
**Subject:** Reef rd culvert  
**Date:** Tuesday, December 1, 2020 6:53:40 PM

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## **Fairfield Fire Department**

140 Reef Road  
Fairfield, CT 06824-5997

*Administrative Office*

*Office (203) 254-4713  
Office (203) 254-4720  
Fax (203) 254-4724*

**Pumper - \$725,000**

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### **1. Background-**

In accordance with the Fairfield Fire Department apparatus replacement program, the department is requesting the replacement of a LSN 11, a 2004 Pierce pumper-type fire truck (Pumper). A Pumper carries water, hose, various fire extinguishers, ground ladders and personnel to the scene of a fire and is the workhorse of the fire service. It is also equipped with an Automatic External Defibrillator (AED), a Cardiac Compression Device, medical equipment and oxygen. At any one time, there are a minimum of five (5) Pumpers in service in the Town of Fairfield positioned strategically in each of the department's five (5) fire stations. Based on the manpower distribution and the standard tactical capabilities/limitations, a typical building fire requires the predetermined response of 4 Pumpers along with 1 Ladder truck, 1 Rescue truck and a Shift Commander to ensure adequate personnel and equipment are on scene to protect the public and conduct safe operations.

Fire apparatus are specialized vehicles that are designed and constructed for specific firefighting functions. The construction of fire apparatus is more similar to building a house than that of a vehicle. All fire apparatus must meet rigid national safety standards and are not purchased as a standard item due to the many local variables including climate, hose threads, and local department needs. The reliability of fire apparatus and the installed equipment directly impacts the fire department's ability to accomplish its mission of saving lives and property.

The need for replacement of this vehicle and the entire fire apparatus replacement program was presented to the BOS, BOF and RTM committees during the 2014/15 budget cycle. As noted in the department's apparatus replacement program, the replacement of this apparatus is on schedule.

### **2. Purpose and Justification-**

The current 17 year old vehicle is assigned to the Southport Fire station, has 119,680 miles, over 9,819 engine operating hours and more than 749 hours of pump operation. Differing from standard vehicles, fire apparatus often operate at emergency scenes for many hours on end under less than ideal conditions. Truck manufacturers have developed a calculation based on 1 hour = 50 road miles to account for this type of wear and tear. Based on this formula, this truck's engine hours are the equivalent of 490,950 road miles and takes into account that, unlike over the road trucks, fire apparatus spend the vast amount of operating time making relatively short responses with most time in stationary or pump operation. In 2015, the truck was out of service for more than 50 separate repairs of varying severity due to mechanical breakdowns and preventative maintenance. The apparatus has been involved in a number of minor accidents in its life span and received significant burn damage to the cab at the scene of a residential fire and like most apparatus have had numerous parts and cosmetic repairs throughout the course of its service life.



Being 17 years old, the current Engine 4 is out of compliance with the most current NFPA apparatus standards however is equipped with critical safety features such as anti-lock brakes but is lacking passenger compartment airbags. Fire apparatus are custom designed vehicles based on very specific criteria. As such, the manufacturing process takes up to 1 year from the time the bid is awarded. This delay requires planning and adherence to the replacement schedule to avoid apparatus shortages.

### **3. Detailed Description of Proposal-**

The need for apparatus replacement is well documented in the current department apparatus replacement program which was distributed to all members in prior budget cycles and is available upon requested. Based on the replacement schedule, the department's apparatus design committee has begun developing basic specifications for a replacement pumper to meet the long term needs of the organization and is incorporating the quint specifications.

This proposal is to utilize the extant Fairfield pumper design and purchase a replacement Class A, 1,250 GPM fire pumper.

Cost Estimate, including design, construction and ancillary equipment: \$725,000

### **4. Reliability of Cost Estimate-**

On a scale of 1 to 10, the reliability of this estimate is a 9.0.

### **5. Increased Efficiency and Productivity-**

Our proposed pumper will be in compliance with current EPA requirements for pollution and fuel efficiency. The truck will be designed so as not to require additional staffing beyond the 3 members currently assigned and will accommodate up to four in the event of significant storm or natural disaster.

The company that manufactured the current apparatus remains in business as a sole source provider. Due to the age of the truck and the custom nature of fire apparatus, replacement parts are increasingly more difficult to locate. As a result, apparatus down time and repair hours are higher than that of a new apparatus. All new apparatus purchases are specified with a 5 year bumper to bumper warrantee to reduce potential costs of major component failures and freeing up maintenance personnel.

### **6. Additional Long Range Costs-**

There will initially be some reduction in maintenance costs, as this will be a new piece of equipment. Sticking to the apparatus replacement program allows for a more balanced and predictable bonding cycle due to the minimization of multiple apparatus purchases in a single budget.

Due to the existing limitations of the size of the truck bay at the Southport fire station, the department continues to explore options including but not limited to modification of facilities, apparatus rotations, and relocation. Other future expenses include the possible costs of building modification to accommodate standard apparatus.

### **7. Additional Use or Demand-**

N/A

### **8. Alternatives to This Request-**

This request represents the best alternative for the department.

#### **9. Safety-**

As Stated under justification, the current pumper is out of compliance with NFPA standards for fire apparatus. Requirements for new apparatus include passenger air bags, improved seat belt systems, additional safety marking and several structural changes to the design and construction of this equipment. The current pumper remains a safe apparatus and will serve the department well over the next 12 years as a reserve truck.

This modern fire apparatus will allow the department to operate effectively and improve fire ground survivability.

#### **10. Environmental Considerations-**

New diesel engines must comply with significantly more stringent rules governing exhaust emissions than the current in service pumper. These engines burn cleaner and hotter through the use a diesel exhaust fluid and high temp run cycles to incinerate toxins more effectively. The reduction of black diesel fumes near and the around the truck is the most significant observable improvement,

#### **11. Insurance-** N/A

#### **12. Financing-**

Project bonded as part of non-recurring capital budget for 2016

#### **13. Other Considerations-**

The apparatus replacement program was revised as a result of department experience and other variables such as caustic road treatments. It was updated in 2020 to reflect recent purchases and surplusings of older equipment. While recent information from State DOT suggests truck replacement schedules being reduced from 12 years to 8 years due to

#### **14. Approvals-**

Board of Selectmen, Board of Finance, RTM

**Fire Station Rehabilitation Program Year 2:  
Overhead Doors, Exhaust Systems and Design Work**

**\$250,000**

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**1. Background**

This project is Phase 2 of a multiyear project to rehabilitate the five Fairfield Fire Stations. This effort will address the major living and operating spaces critical to efficient, safe and healthy working conditions. The first five years of the program will address bathrooms, overhead doors, vehicle apparatus bay exhaust systems, apparatus maintenance facilities, ADA compliance, security initiatives, infrastructure and continuity of operations systems, window replacement and a kitchen renovation. It is expected that by instituting a comprehensive Station Rehabilitation Program we will preserve the operating effectiveness of our facilities for decades.

**2. Purpose and Justification**

This Project includes three major elements.

- 1) Rehabilitation or replacement of the overhead doors in Stations 1, 2, 3 and 5. In these buildings the existing overhead doors are decades old. The existing safety interlocks do not meet current standards and create a hazard for the public entering and exiting these spaces. These visitors often include families with young children. The existing door operating mechanisms including springs and motors have frequent failures.
- 2) Replace or rehabilitate the vehicle exhaust systems in all five fire stations. These systems remove diesel exhaust from the building utilizing direct capture hoses, piping and exhaust fans. The importance of these systems are paramount to health and safety of our firefighters. Fire stations include apparatus garages adjacent to living spaces including kitchens, offices, dormitories and exercise gyms. Removal of carcinogenic exhaust is required by OSHA and other National Codes.
- 3) Design Service for Phase 3 (FY 23) Renovations to Apparatus Maintenance at Station 2 and renovations to Station 4. The department has considered multiple options for these projects including relocation that would require costly property acquisition. Our updated plan would be to renovate/add to existing Station 2 and Station 4 reducing the overall cost while insuring decades of efficient services.
- 4) Rehabilitate the apparatus floor surface at Station 3. The current concrete floor has an epoxy coating on it that is breaking up causing a tripping hazard.

**3. Detailed Description of Proposal**

## Project Elements

1. Overhead Door Replacement
  - a. Station 1: 6 overhead doors complete
  - b. Station 2: 6 overhead doors complete
  - c. Station 3: 3 overhead doors springs and motor only
  - d. Station 5: 2 overhead doors complete
2. Vehicle Exhaust Systems
  - a. Station 1: 3 bay exhaust systems
  - b. Station 2: 6 bay exhaust systems
  - c. Station 3: 2 bay exhaust systems
  - d. Station 5: 2 bay exhaust systems
3. Design Services
  - a. Develop schematic design and preliminary budget for renovation and building addition for Apparatus Maintenance Facility at Station 2
  - b. Develop schematic design and preliminary budget for renovation of Station 4.
4. Rehabilitate the Station 3 concrete apparatus floor

## **4. Reliability of Cost Estimate**

Project budget is based on estimates provided in January 2021. Design services will be conducted by architectural firms retained by the Purchasing Department through an RFP process in 2020. This project is part of a comprehensive multiyear station improvement plan. This project encompasses 11 different sub projects in three buildings. Any budget shortfall will result in a portion of the project suspended a year later and subsequent budget approvals.

## **5. Increased Efficiency and Productivity**

The existing equipment and spaces are highly inefficient and unreliable. These spaces were built 50 to 66 years ago.

## **6. Additional Long Range Costs**

The department expects reduced long term maintenance costs as the existing equipment is subject to failures requiring costly emergency repairs by contractors.

## **7. Additional Use or Demand**

These projects are part of the comprehensive multiyear station improvement plan and will provide safe and efficient fire station services for 30-40 years.

#### **8. Alternatives to This Request**

The proposal makes the best use of capital funding by combining closely related projects in multiple stations under a single contract. Alternatively the project could be spread out over time but would result in higher operating and repair costs and higher overall replacement costs.

#### **9. Safety**

This project is expected to considerably improve the health and safety conditions.

#### **10. Environmental Considerations**

The station air quality will be positively impacted though the upgrade of the station exhaust systems.

#### **11. Insurance**

N/A

#### **12. Financing**

Bonding per Town Policy.

#### **13. Other Considerations**

##### **Fire Department Five-Year Facilities Renovation Project**

The Fire Department proposes to renovate each of its five Fire Stations over the next five fiscal years. This proposal comes after annual assessments of our facilities beginning in 2016. Over this period the department, with the assistance of the DPW, has evaluated the conditions of the stations and has highlighted the priority projects that cannot be completed without capital budget investments.

The department respectfully requests a five-year investment in our stations. In FY 21, 22, 24 and 25 capital budget appropriations of \$250,000 will allow the department to restore our facilities to a safe, healthy, code-compliant and energy-efficient condition.

These projects include repair, renovation or replacement of the spaces and systems. They include:

- FY 21 Bathrooms Stations 1, 2 and 5
- FY 22 Overhead Doors, Exhaust Systems, Apparatus Floor Repairs, Design Funding for Construction in '23
- FY 23 Station 4, Apparatus Maintenance and Elevator (currently in Waterfall Budget)
- FY 24 Renovation of Administrative Offices and Fire Sprinklers at Headquarters
- FY 25 Kitchen Upgrade, Storage Space Addition, Cameras, Security and Generators.

Each of these projects address specific issues and are grouped to achieve economy of scale. The projects are sequenced to insure that no portion of a project would be duplicative or require further investments. Through careful design and selection of durable, cost effective and easy to maintain materials each project is expected to have long service life extending for decades.

In FY 23, the third year of this five year process, the department has an existing waterfall request of \$3,000,000 to address the major space issues we have. In that budget year we will renovate the Southport Fire Station and construct an addition to the Fire Apparatus Maintenance Facility at Station 2 on Jennings Road.

The completion of this Five-Year Fire Station Rehabilitation Project will address the major shortcomings plaguing our facilities. It is expected that following the completion of this project, the department will maintain its facilities with normal operating budget appropriations for building maintenance.

#### **14. Approvals**

BOS, BOF, RTM



# **PINE CREEK PARK**

## **PLAYGROUND REPLACEMENT**

**NON-RECURRING CAPITAL REQUEST**

**FY 2021**



# Town of Fairfield – Pine Creek Park Playground Replacement

## **1. Background:**

Pine Creek Park is a 1.5 acre piece of property located at 155 Pine Creek Avenue. This park is similar to many of the Town's inventory of parks as this is a neighborhood park. The park consists of a covered pavilion with a picnic table, a couple benches, and an outdated playground. The playground includes an original swing set with six swings, a slide, an old seesaw, and a dated merry-go-round. Tomlinson Middle School Tennis Courts consist of four playing courts. We are requesting \$103,000 for funding the replacement of the playground equipment, upgrades to the covered pavilion, and to add additional picnic tables and benches.

## **2. Purpose & Justification:**

The condition of the existing playground is considered poor and continues to deteriorate to the point that the equipment is unsafe. Many repairs, fixes and new paintings have been performed over the years but current examination by a professional certified playground safety inspector has clearly identified that it is time for a full replacement.

## **3. Detailed Description of Proposal:**

The expenditure would cover the total costs for demolition and removal of existing playground equipment. It would also cover the complete installation of the new equipment and wood fiber surfacing.

## **4. Reliability of Estimated Cost**

The cost of materials and installation was estimated by KOMPAN. The new playground would meet all playground safety requirements.

## **5. Increase Efficiency or Productivity**

These terms don't directly apply to this type of project.

## **6. Additional Long Range Costs**

I do not see any long range costs associated with this project outside of normal maintenance.

## **7. Additional Use or Demand on Existing Facilities**

This project would not contribute to additional use or demand of the neighborhood park.

## **8. Alternatives to this request**

The alternative to this request is to do nothing. While the park is currently functional, there will come a point where equipment will fail and need to be removed and/or replaced. The cost of doing nothing also runs the risk of potential lawsuits for injuries on noncompliant playground equipment.

## **9. Safety & loss Control**

This project would enhance safety and loss control by drastically reducing the risk of the public getting hurt on the existing deteriorating playground equipment.

#### **10. Environmental Considerations**

This project work will meet all environment requirements and considerations.

#### **11. Insurance**

Contractor will be required to carry insurance coverage.

#### **12. Financing**

This project would not proceed without funding approval. This project will be bonded.

#### **13. Other Considerations**

None

#### **14. Other Approvals**

Board of Selectman

Board of Finance

RTM





# LAKE MOHEGAN

## SPLASH PAD REPLACEMENT

NON-RECURRING CAPITAL REQUEST

FY 2021



# Town of Fairfield – Lake Mohegan Splash Pad Replacement

## **1. Background:**

Lake Mohegan is a 170.4 acre piece of property located at 960 Morehouse Highway. This park is one of the largest and most popular parks in the Town of Fairfield. The Park and Open Space consist of many walking trails, fishing spots, and a beach area. The beach area is comprised of a covered pavilion with a picnic tables, a couple benches, a fire pit, a playground, and a splash pad.

The splash pad was originally installed in 1999 and is currently at the end of its useful life. We are requesting \$150,000 for funding the replacement of the splash pad.

## **2. Purpose & Justification:**

The condition of the existing splash pad is considered poor and continues to deteriorate to the point that the equipment is unsafe. Many repairs and fixes have been performed over the years but current examination by professional aquatic engineers has clearly identified that it is time for a full replacement.

## **3. Detailed Description of Proposal:**

The expenditure would cover the total costs for demolition and removal of existing splash pad equipment. It would also cover the complete installation of the new equipment and surfacing.

## **4. Reliability of Estimated Cost**

The cost of materials and installation was estimated by Fountain People. The new splash pad would meet all safety requirements.

## **5. Increase Efficiency or Productivity**

These terms don't directly apply to this type of project.

## **6. Additional Long Range Costs**

I do not see any long range costs associated with this project outside of normal maintenance.

## **7. Additional Use or Demand on Existing Facilities**

This project would not contribute to additional use or demand of the neighborhood park.

## **8. Alternatives to this request**

The alternative to this request is to do nothing. While the park is currently functional, there will come a point where equipment will fail and need to be removed and/or replaced. The cost of doing nothing also runs the risk of potential lawsuits for injuries on noncompliant playground equipment.

## **9. Safety & loss Control**

This project would enhance safety and loss control by drastically reducing the risk of the public getting hurt on the existing deteriorating splash pad equipment.

#### **10. Environmental Considerations**

This project work will meet all environment requirements and considerations.

#### **11. Insurance**

Contractor will be required to carry insurance coverage.

#### **12. Financing**

This project would not proceed without funding approval. This project will be bonded.

#### **13. Other Considerations**

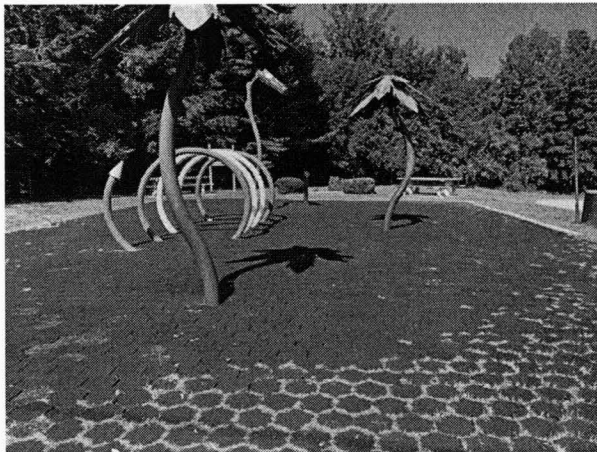
None

#### **14. Other Approvals**

Board of Selectman

Board of Finance

RTM





15 YEAR

**A RESOLUTION APPROPRIATING \$1,750,000 FOR THE COSTS OF A BUILDING AUTOMATION SYSTEM UPGRADE AT FAIRFIELD LUDLOWE HIGH SCHOOL AND AUTHORIZING THE ISSUANCE OF BONDS TO FINANCE SUCH APPROPRIATION.**

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**Resolved:**

1. As recommended by the Board of Finance and the Board of Selectmen, the Town of Fairfield hereby appropriates the sum of One Million Seven Hundred Fifty Thousand and 00/100 Dollars (\$1,750,000.00) to fund costs associated with a Building Automation System upgrade at Fairfield Ludlowe High School which costs include, but are not limited to, planning, design and engineering fees, other professional fees, demolition, construction and oversight costs and temporary and permanent financing costs (the "Project"), in the amount of such appropriation allocated to the Project.
2. To finance such appropriation, and as recommended by the Board of Finance and the Board of Selectmen, the Town of Fairfield shall borrow a sum not to exceed One Million Seven Hundred Fifty Thousand and 00/100 Dollars (\$1,750,000.00) and issue bonds/bond anticipation notes for such indebtedness under its corporate name and seal and upon the full faith and credit of the Town in an amount not to exceed said sum for the purpose of financing the appropriation for the Project.
3. The Board of Selectmen, the Treasurer and the Chief Fiscal Officer of the Town are hereby appointed a committee (the "Committee") with full power and authority to cause said bonds to be sold, issued and delivered; to determine their form and terms, including provision for redemption prior to maturity; to determine the aggregate principal amount thereof within the amount hereby authorized and the denominations and maturities thereof; to fix the time of issue of each series thereof and the rate or rates of interest thereon as herein provided; to determine whether the interest rate on any series will be fixed or variable and to determine the method by which the variable rate will be determined, the terms of conversion, if any, from one interest rate mode to another or from fixed to variable; to set whatever other terms of the bonds they deem necessary, desirable or appropriate; to designate the bank or trust company to certify the issuance thereof and to act as transfer agent, paying agent and as registrar for the bonds, and to designate bond counsel. The Committee shall have all appropriate powers under the Connecticut General Statutes, including Chapter 748 (Registered Public Obligations Act), Chapter 173 (School Building Projects) and Chapter 109 (Municipal Bond Issues) to issue, sell and deliver the bonds and, further, shall have full power and authority to do all that is required under the Internal Revenue Code of 1986, as amended, and under rules of the Securities and Exchange Commission, and other applicable laws and regulations of the United States, to provide for issuance of the bonds in tax exempt form and to meet all requirements which are or may become necessary in and subsequent to the issuance and delivery of the bonds in order that the interest on the bonds be and remain exempt from

Federal income taxes, including, without limitation, to covenant and agree to restriction on investment yield of bond proceeds, rebate of arbitrage earnings, expenditure of proceeds within required time limitations, the filing of information reports as and when required, and the execution of Continuing Disclosure Agreements for the benefit of the holders of the bonds and notes.

4. The First Selectman and Treasurer or Chief Fiscal Officer, on behalf of the Town, shall execute and deliver such bond purchase agreements, reimbursement agreements, line of credit agreement, credit facilities, remarketing agreement, standby marketing agreements, bond purchase agreement, standby bond purchase agreements, and any other commercially necessary or appropriate agreements which the Committee determines are necessary, appropriate or desirable in connection with or incidental to the sale and issuance of bonds, and if the Committee determines that it is necessary, appropriate, or desirable, the obligations under such agreements shall be secured by the Town's full faith and credit.
5. The bonds may be designated "Public Improvement Bonds," series of the year of their issuance and may be issued in one or more series, and may be consolidated as part of the same issue with other bonds of the Town; shall be in serial form maturing in not more than fifteen (15) annual installments of principal, the first installment to mature not later than three (3) years from the date of issue and the last installment to mature not later than fifteen (15) years from the date of issue. The bonds may be sold at an aggregate sales price of not less than par and accrued interest at public sale upon invitation for bids to the responsible bidder submitting the bid resulting in the lowest true interest cost to the Town, provided that nothing herein shall prevent the Town from rejecting all bids submitted in response to any one invitation for bids and the right to so reject all bids is hereby reserved, and further provided that the Committee may sell the bonds on a negotiated basis, as provided by statute. Interest on the bonds shall be payable semi-annually or annually. The bonds shall be signed on behalf of the Town by at least a majority of the Board of Selectmen and the Treasurer, and shall bear the seal of the Town. The signing, sealing and certification of the bonds may be by facsimile as provided by statute.
6. The Committee is further authorized to make temporary borrowings as authorized by the General Statutes and to issue temporary notes of the Town in anticipation of the receipt of proceeds from the sale of the bonds to be issued pursuant to this resolution. Such notes shall be issued and renewed at such time and with such maturities, requirements and limitations as provided by the Connecticut General Statutes. Notes evidencing such borrowings shall be signed by the First Selectman and Treasurer or Chief Fiscal Officer, have the seal of the Town affixed, which signing and sealing may be by facsimile as provided by statute, be certified by and payable at a bank or trust company incorporated under the laws of this or any other state, or of the United States, be approved as to their legality by bond counsel, and may be consolidated with the issuance of other Town bond anticipation notes. The Committee shall determine the date, maturity, interest rates, form and manner of sale, including negotiated sale, and other details of said notes consistent

with the provisions of this resolution and the General Statutes and shall have all powers and authority as set forth above in connection with the issuance of bonds and especially with respect to compliance with the requirements of the Internal Revenue Code of 1986, as amended, and regulations thereunder in order to obtain and maintain issuance of the notes in tax exempt form.

7. Pursuant to Section 1.150-2 of the Federal Income Tax Regulations, as amended, the Town hereby declares its official intent to reimburse expenditures (if any) paid for the Project from its General or Capital Funds, such reimbursement to be made from the proceeds of the sale of bonds and notes authorized herein and in accordance with the time limitations and other requirements of said regulations.
8. The First Selectman, Chief Fiscal Officer and Town Treasurer are hereby authorized, on behalf of the Town, to enter into agreements or otherwise covenant for the benefit of bondholders to provide information on an annual or other periodic basis to the Municipal Securities Rulemaking Board (the "MSRB") and to provide notices to the MSRB of material events as enumerated in Securities and Exchange Commission Exchange Act Rule 15c2-12, as amended, as may be necessary, appropriate or desirable to effect the sale of the bonds and notes authorized by this resolution.
9. The Committee is hereby authorized to take all action necessary and proper for the sale, issuance and delivery of the bonds and notes in accordance with the provisions of the Connecticut General Statutes and the laws of the United States.
10. The First Selectman or other proper Town official is hereby authorized to apply for and accept any available State or Federal grant in aid of the financing of the Project, and to take all action necessary and proper in connection therewith.

20 YEAR

**A RESOLUTION APPROPRIATING \$3,653,150 FOR THE COSTS OF VARIOUS BOARD OF EDUCATION CAPITAL PROJECTS AND AUTHORIZING THE ISSUANCE OF BONDS TO FINANCE SUCH APPROPRIATION.**

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**Resolved:**

1. As recommended by the Board of Finance and the Board of Selectmen, the Town of Fairfield hereby appropriates the sum of Three Million Six Hundred Fifty-Three Thousand One Hundred-Fifty and 00/100 Dollars (\$3,653,150.00) to fund all costs associated with various Board of Education capital projects described on **Exhibit A** attached hereto, inclusive of planning, design and engineering fees, other professional fees, demolition, construction and oversight costs and temporary and permanent financing costs (collectively, the "Projects"), in the amount of such appropriation allocated to each Project as set forth in **Exhibit A**. Any reallocation of unused bond proceeds from one project category listed as items 1-2 on **Exhibit A** to a different project category listed on **Exhibit A** that would cause the cost of such project to exceed the cost listed on **Exhibit A** shall require approval by the Board of Selectmen, Board of Finance, and the Representative Town Meeting.
2. To finance such appropriation, and as recommended by the Board of Finance and the Board of Selectmen, the Town of Fairfield shall borrow a sum not to exceed Three Million Six Hundred Fifty-Three Thousand One Hundred-Fifty and 00/100 Dollars (\$3,653,150.00) and issue bonds/bond anticipation notes for such indebtedness under its corporate name and seal and upon the full faith and credit of the Town in an amount not to exceed said sum for the purpose of financing the appropriation for the Projects.
3. The Board of Selectmen, the Treasurer and the Chief Fiscal Officer of the Town are hereby appointed a committee (the "Committee") with full power and authority to cause said bonds to be sold, issued and delivered; to determine their form and terms, including provision for redemption prior to maturity; to determine the aggregate principal amount thereof within the amount hereby authorized and the denominations and maturities thereof; to fix the time of issue of each series thereof and the rate or rates of interest thereon as herein provided; to determine whether the interest rate on any series will be fixed or variable and to determine the method by which the variable rate will be determined, the terms of conversion, if any, from one interest rate mode to another or from fixed to variable; to set whatever other terms of the bonds they deem necessary, desirable or appropriate; to designate the bank or trust company to certify the issuance thereof and to act as transfer agent, paying agent and as registrar for the bonds, and to designate bond counsel. The Committee shall have all appropriate powers under the Connecticut General Statutes, including Chapter 748 (Registered Public Obligations Act), Chapter 173 (School Building Projects) and Chapter 109 (Municipal Bond Issues) to issue, sell and deliver the bonds and, further, shall have full power and authority to do all that is required under the Internal Revenue Code of 1986, as amended, and under rules of

the Securities and Exchange Commission, and other applicable laws and regulations of the United States, to provide for issuance of the bonds in tax exempt form and to meet all requirements which are or may become necessary in and subsequent to the issuance and delivery of the bonds in order that the interest on the bonds be and remain exempt from Federal income taxes, including, without limitation, to covenant and agree to restriction on investment yield of bond proceeds, rebate of arbitrage earnings, expenditure of proceeds within required time limitations, the filing of information reports as and when required, and the execution of Continuing Disclosure Agreements for the benefit of the holders of the bonds and notes.

4. The First Selectman and Treasurer or Chief Fiscal Officer, on behalf of the Town, shall execute and deliver such bond purchase agreements, reimbursement agreements, line of credit agreement, credit facilities, remarketing agreement, standby marketing agreements, bond purchase agreement, standby bond purchase agreements, and any other commercially necessary or appropriate agreements which the Committee determines are necessary, appropriate or desirable in connection with or incidental to the sale and issuance of bonds, and if the Committee determines that it is necessary, appropriate, or desirable, the obligations under such agreements shall be secured by the Town's full faith and credit.
5. The bonds may be designated "Public Improvement Bonds," series of the year of their issuance and may be issued in one or more series, and may be consolidated as part of the same issue with other bonds of the Town; shall be in serial form maturing in not more than twenty (20) annual installments of principal, the first installment to mature not later than three (3) years from the date of issue and the last installment to mature not later than twenty (20) years from the date of issue. The bonds may be sold at an aggregate sales price of not less than par and accrued interest at public sale upon invitation for bids to the responsible bidder submitting the bid resulting in the lowest true interest cost to the Town, provided that nothing herein shall prevent the Town from rejecting all bids submitted in response to any one invitation for bids and the right to so reject all bids is hereby reserved, and further provided that the Committee may sell the bonds on a negotiated basis, as provided by statute. Interest on the bonds shall be payable semi-annually or annually. The bonds shall be signed on behalf of the Town by at least a majority of the Board of Selectmen and the Treasurer, and shall bear the seal of the Town. The signing, sealing and certification of the bonds may be by facsimile as provided by statute.
6. The Committee is further authorized to make temporary borrowings as authorized by the General Statutes and to issue temporary notes of the Town in anticipation of the receipt of proceeds from the sale of the bonds to be issued pursuant to this resolution. Such notes shall be issued and renewed at such time and with such maturities, requirements and limitations as provided by the Connecticut General Statutes. Notes evidencing such borrowings shall be signed by the First Selectman and Treasurer or Chief Fiscal Officer, have the seal of the Town affixed, which signing and sealing may be by facsimile as provided by statute, be certified by and payable at a bank or trust company incorporated



under the laws of this or any other state, or of the United States, be approved as to their legality by bond counsel, and may be consolidated with the issuance of other Town bond anticipation notes. The Committee shall determine the date, maturity, interest rates, form and manner of sale, including negotiated sale, and other details of said notes consistent with the provisions of this resolution and the General Statutes and shall have all powers and authority as set forth above in connection with the issuance of bonds and especially with respect to compliance with the requirements of the Internal Revenue Code of 1986, as amended, and regulations thereunder in order to obtain and maintain issuance of the notes in tax exempt form.

7. Pursuant to Section 1.150-2 of the Federal Income Tax Regulations, as amended, the Town hereby declares its official intent to reimburse expenditures (if any) paid for the Projects from its General or Capital Funds, such reimbursement to be made from the proceeds of the sale of bonds and notes authorized herein and in accordance with the time limitations and other requirements of said regulations.
8. The First Selectman, Chief Fiscal Officer and Town Treasurer are hereby authorized, on behalf of the Town, to enter into agreements or otherwise covenant for the benefit of bondholders to provide information on an annual or other periodic basis to the Municipal Securities Rulemaking Board (the "MSRB") and to provide notices to the MSRB of material events as enumerated in Securities and Exchange Commission Exchange Act Rule 15c2-12, as amended, as may be necessary, appropriate or desirable to effect the sale of the bonds and notes authorized by this resolution.
9. The Committee is hereby authorized to take all action necessary and proper for the sale, issuance and delivery of the bonds and notes in accordance with the provisions of the Connecticut General Statutes and the laws of the United States.
10. The First Selectman or other proper Town official is hereby authorized to apply for and accept any available State or Federal grant in aid of the financing of any Project, and to take all action necessary and proper in connection therewith.

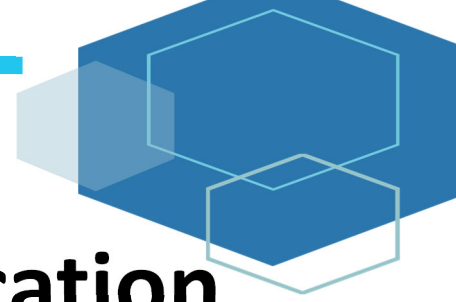


**EXHIBIT A**

**TO**

**A RESOLUTION APPROPRIATING \$3,653,150 FOR THE COSTS OF VARIOUS  
BOARD OF EDUCATION CAPITAL PROJECTS AND AUTHORIZING THE  
ISSUANCE OF BONDS TO FINANCE SUCH APPROPRIATION**

TOWN OF FAIRFIELD			
	<b><u>BOARD OF EDUCATION</u></b>		
	<b><u>School</u></b>	<b><u>Project</u></b>	<b><u>Project Amount</u></b>
1	Burr Elementary School	Full Roof Replacement	\$1,542,150
2	Fairfield Ludlowe High School	Student Bathroom	\$2,111,000
	<b>GRAND TOTAL CAPITAL COSTS:</b>		<b>\$3,653,150</b>

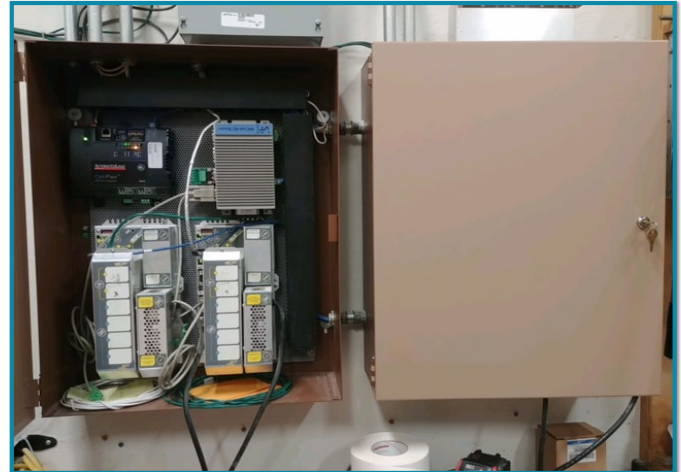


# Fairfield Board of Education Proposed Capital & Non-Recurring Projects 2021 – 2022

**Districtwide HVAC Retro-Commission:  
Rebalance of School Mechanical Systems**



**Fairfield Ludlowe High School  
Building Automation System Upgrade**



**Fairfield Ludlowe High School Student  
Bathroom Renovation**



**Burr Full Roof Replacement**

Approved by the Board of Education  
on  
January 28, 2021





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January 11, 2021

Dear Board of Education Members:

This booklet provides an overview of the following 2021-2022 Proposed Capital Non-Recurring and Capital Project Requests:

Capital Non-Recurring Projects:

1. Districtwide HVAC Retro-Commissioning

Capital Projects:

1. Fairfield Ludlowe High School Student Bathroom Project
2. Burr Elementary School Roof Replacement Project
3. Fairfield Ludlowe High School-Building Automation System Upgrade

I have included all of the above projects in the Fairfield Public Schools' Facilities Plan. Information for each project is provided using the 12-point format devised by the Town of Fairfield and includes:

- Justification and background information;
- A cost estimate that includes previous project information, verbal quotations, and/or written proposals;
- Photographs of projects in existing conditions; and
- Photos of expected new conditions.

We hope you find this information helpful, and we are confident it will answer many of your questions as we begin the budget discussions. Thank you for your continued support.

Sincerely,



Michael Cummings  
Superintendent of Schools

MC:mb



**Fairfield Public Schools  
2021-2022  
Capital & Non-Recurring Projects**

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<b>Total</b>		<b>\$ 6,028,150</b>	





## Non-Recurring Projects



## Districtwide

### **Retro-Commissioning: Rebalancing of School Mechanical Systems**

**\$ 625,000**

Background: The COVID-19 pandemic has necessitated the need to evaluate and make changes to the schools' mechanical systems. The proposed work is based on the recommendations of ASHRAE and guidance from the State of Connecticut.

The American Society of Heating and Air Conditioning Engineers (ASHRAE) focuses on building systems, energy efficiency, indoor air quality, refrigeration, and sustainability within the industry. ASHRAE has published over 4000 standards for the design and maintenance of indoor environments. ANSI/ASHRAE Standards Standard 62.1-2016 and 62.2-2016 are written in enforceable mandatory language to facilitate adoption into building codes.

Their position regarding the transmission of SARS-CoV-2 and the operation of HVAC systems during the COVID-19 pandemic is that the transmission of SARS-CoV-2 through the air is sufficiently likely that airborne exposure to the virus should be controlled. Changes to building operations, including the process of heating, ventilating, and air conditioning systems, can reduce airborne exposures. Ventilation and filtration provided by heating, ventilating, and air conditioning systems can reduce the airborne concentration of SARS-CoV-2 and thus the risk of transmission through the air.

This project's primary goal is to evaluate existing ventilation and filtration air systems at the Fairfield Public School buildings, make recommendations for improvement, and implement the recommendations.

Due to the sudden emergence of the COVID-19 pandemic, adequate ventilation and air filtration in densely occupied interior spaces are essential to reduce the spread of airborne particles that transmit SARS-CoV-2. This virus causes COVID-19 disease, as well as other airborne contaminants. Since the SARS-CoV-2 virus developed suddenly over a few months, prior knowledge of how this virus spread was initially unavailable. Current building codes are not yet updated to reduce the transmission of the SARS-CoV-2 particles. However, the American Society of Heating, Refrigeration, and Air Conditioning Engineers (ASHRAE), a governing body for the design, operation, and maintenance of HVAC systems, has been investigating the transmission of SARS-CoV-2 through HVAC systems. They have made recommendations on adapting existing HVAC systems to minimize the virus' transmission, causing the COVID-19 disease. This project aims to determine the current effectiveness of ventilation and air filtration for occupied spaces within school buildings in relation to ASHRAE recommendations to reduce the transmission of the SARS-Cov-2 virus. In areas where ventilation or filtration does not meet either code requirements or ASHRAE SARS-CoV-2

mitigation recommendations, Van Zelm will make recommendations on how to meet those requirements or recommendations.

Purpose & Justification: The State of Connecticut issued a Guidance for School Systems for the Operation of Central and Non-Central Ventilation Systems during the COVID-19 Pandemic document dated June 22, 2020. The first recommendation in it to Commission the building mechanical systems.

With the schools now open and occupied, there is a need for immediate results. Van Zelm's approach to this project is to make changes that increase the quantity of outside air as we perform each building's study. Therefore, implementing the ventilation and operational improvements will begin shortly after the project's start rather than at the end of the project.

The study will analyze the existing HVAC units throughout the buildings, with respect to how well these units may prevent the transmission of airborne viruses. The units' performance will be compared to guidance released by ASHRAE on air distribution systems' operation to minimize the transmission of airborne contaminants.

Detailed Description:

- Commissioning work will be performed at all schools except Mill Hill and Holland Hill, which have been excluded at the request of Fairfield Public Schools. Testing, Adjusting, and Balancing (TAB) work will be performed at all schools within the scope.
- The project aims to verify system operation and improve the ventilation and air filtration of the mechanical systems.
- The amount of code required for ventilation air will be calculated and documented.
- The ventilation air quantity will be increased to the extent possible while still allowing the HVAC units to control the environmental conditions in the areas served.
- The TAB contractor will measure and verify the airflow of each unit.
- All COVID related changes will be documented so that the systems can be restored to pre-pandemic (code required) values in the future.

Estimated Cost: The cost of this funding request is \$625,000.

Long Range Costs: There should be no additional long-range costs. Pandemic related changes would be considered short term, and there may be potentially long term savings through energy conservation measures.

Demand on Existing Facilities: This project would increase the equipment's mechanical efficiency due to the repair and implementation of deferred maintenance. The energy consumption will likely increase due to extended run times and increased ventilation air.

However, other energy-saving opportunities may be proposed to offset some of the increases and have lasting savings.

Security, Safety, and Loss Control: This project would increase safety for the school district by increasing the air filtration capability and outside air quantity to the building where possible.

Environmental Considerations: This project is intended to reduce the possible transmission of airborne pathogens related to viruses such as SARS-Cov-2.

Funding, Financing & Office of School Construction Grants Review (OSCG&R): This project would not proceed without funding approval. There are no State or Federal regulations that require this project to be undertaken. This project is not eligible for reimbursement through OSCG&R.

Schedule, Phasing & Timing: This project's schedule would have all the work completed as soon as possible. Work in classrooms or offices will need to be scheduled around building occupancy.

Other Considerations: This work will be bid out by the Town Purchasing Department and performed by an outside professional licensed contractor.

Alternates to The Request: The alternate to this request would be to do nothing or reduce the level of services provided.



## Districtwide

### Retro-Commissioning

### Rebalancing of the School Mechanical Systems

\$ 625,000

### Details

#### Consultant for Professional Services

Prepared by: Van Zelm Engineers

#### Breakdown:

Retro-Commissioning (RCx) Services to be provided to investigate mechanical systems related to improving ventilation and air filtration. Implementation of recommendations shall be done concurrently with the RCx work to expedite the improvement in the environmental conditions. Testing, Adjusting, and Balancing (TAB) will be performed as part of the overall process work performed in the following schools.

<b>Burr Elementary School</b> 1960 Burr Street Fairfield, CT 06824 203-255-7385	<b>Osborn Hill Elementary School</b> 760 Stillson Road Fairfield, CT 06824 203-255-8340
<b>Dwight Elementary School</b> 1600 Redding Road Fairfield, CT 06824 203- 255-8312	<b>Riverfield Elementary School</b> 1625 Mill Plain Road Fairfield, CT 06824 203-255-8328
<b>Jennings Elementary School</b> 31 Palm Drive Fairfield, CT 06825 203- 255-8316	<b>Roger Sherman Elementary School</b> 250 Fern Street Fairfield, CT 06824 203-255-8330
<b>McKinley Elementary School</b> 60 Thompson Street Fairfield, CT 06825 203-255-8318	<b>Stratfield Elementary School</b> 1407 Melville Avenue Fairfield, CT 06825 203-255-8332
<b>North Stratfield Elementary School</b> 190 Putting Green Road Fairfield, CT 06825-1199 203-255-8322	<b>Fairfield Ludlowe High School</b> 785 Unquowa Road Fairfield, CT 06824 203- 255-7201
<b>Fairfield Woods Middle School</b> 1115 Fairfield Woods Road Fairfield, CT 06825 203-255-8334	<b>Tomlinson Middle School</b> 200 Unquowa Road Fairfield, CT 06824 203- 255-8336
<b>Roger Ludlowe Middle School</b> 689 Unquowa Rd, Fairfield CT 06824 203-255-8345	<b>Fairfield Warde High School</b> 755 Melville Avenue Fairfield, CT 06825 203-255-8354

The following steps will be undertaken to complete the study:

1. Review the existing HVAC documentation for the buildings noted above.
2. Meet with facilities staff and review any problems or concerns with existing HVAC systems.
3. Review/develop summary spreadsheets indicating, by building, HVAC system type, age, heating/cooling service, airflow, filtration, outside air quantity, exhaust capability, etc.
4. Undertake fieldwork to observe the condition, operation, and controls of all existing HVAC systems. Document condition and any observed operational issues.
5. Remote monitoring of the Building Automation Systems (BAS).
6. Review existing industry standards regarding the transmission of infectious disease via HVAC systems and recommendations to minimize transmission potential related to observed conditions.
7. Calculate the required ventilation quantities for each space if design documents are not available with this information. Information will be given to TAB Contractor to allow for proper air balancing (water balancing has not been included).
8. Engage the services of a TAB Contractor.
9. Develop and evaluate options to improve indoor air quality and minimize the potential for transmission of infectious disease with a minimum impact on environmental comfort, including:
  - Improved filter efficiency
  - Alternative filtration approaches (bi-polar ionization, electrostatic, etc.)
  - Increase airflow and/or ventilation rates
  - Demand-controlled ventilation
  - Ultraviolet sterilization/Bi-Polar Ionization
10. Implement increased ventilation to the extent possible.
11. Coordinate work with BAS, TAB, and Mechanical Contractors.
12. Review options with Fairfield Public School staff and develop final recommendations.
13. Develop a summary report with all findings, recommendations, and conclusions.

\$ 250,000

**Testing, Adjusting, and Balancing Contractor****Prepared by:** Van Zelm Engineers**Breakdown:**

Carry a budget for the TAB Contractor to measure and adjust airflows at the direction of the RCx Provider.

1. Measure and adjust HVAC unit airflows as required.
2. Measure and adjust the diffuser airflows as required.

\$ 325,000

**Controls Contractor****Prepared by:** Van Zelm Engineers**Breakdown:**

Carry a budget for the Building Automation Contractor to make programming changes in the direction of the RCx Provider.

1. Work directly with RCx Provider to adjust the HVAC controls.
2. Implement programming changes to revise the sequence of operations as directed by the RCx Provider.

\$ 30,000

**Contingency****Prepared by:** Van Zelm Engineers**Breakdown:**

Carry a contingency for unforeseen conditions requiring mechanical repair work.

\$ 20,000

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**Total****\$ 625,000**



## **Districtwide Retro-Commissioning: Rebalance of the School Mechanical Systems**

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# Capital Projects





## **Burr Elementary School**

### **Full Roof Replacement Project**

**\$ 1,542,150**

Background: Burr Elementary school was a newly constructed building in 2004. With a roof warranty that expired in May of 2019. The roof has been showing signs of failing for approximately one year. We have had several roofing contractors out to look at and make repairs to the roof. With the continuation of water penetration, we feel the best next step is to replace the roof.

Purpose & Justification: Failure to replace this roof may result in water infiltration to the building. If the water gets into the building, it will likely result in an internal air quality (IAQ) issue, creating a potential health issue in the building.

Detailed Description: This expenditure would cover the total cost of the project. This includes all labor and material to remove roofing down to the metal decking. Once removed, a new roofing system will be installed.

Estimated Cost: The cost of this funding request is \$1,542,150. This number was arrived at by working with a roofing contractor who has been awarded several town bids for similar projects along with a professional licensed engineering firm in CT, using the industry standard.

Long Range Costs: Once completed, the new roof will carry a warranty for 20 years. There will be minor upkeep and cleaning requirements.

Demand on Existing Facilities: This project would reduce the cost of maintaining the roof as it would reduce service calls caused by water intrusion.

Security, Safety, and Loss Control: This project would enhance safety by the hardening of the building shell. A compromised roofing system can allow moisture into the building, creating numerous IAQ concerns.

Environmental Considerations: The IAQ is compromised when a roof has a continued leaking failure.

Funding, Financing & SDE Reimbursement: This project would not proceed without funding approval. This project will be assigned to the Town's special standing building committee and will apply for funding reimbursement from the state's Office of School Construction Grants Review (OSCG&R) program.

Schedule, Phasing & Timing: The schedule is to have all this work done in the summer of 2021 and completed for school to open in September of 2021.

Other Considerations: The work will be bid out by the Town Purchasing Department and performed by outside professional licensed contractors.

Alternates to the Request: The alternate to this request is to do nothing. This alternative will delay the needed repairs to the roofing system and could affect the ability of the school to operate safely.

## **Burr Elementary School**

### **Full Roof Replacement**

**\$ 1,542,150**

#### **Details**

#### **Licensed Contractor to Provide Labor and Materials**

**Prepared by:** Silktown Roofing

#### **Breakdown:**

Set-up safety for associates to perform their scope of work, and to protect the occupants of the property.

Remove the existing roofing system down to the existing metal deck.

Install new pressure treated wood blocking to the height of the new perimeter edges.

Install new Polyisocyanurate insulation including ¼" per foot-tapered system with an average R-36 value to be in compliance with 2015 IECC guidelines.

Install new two-ply SBS Modified Bitumen roofing membrane system in cold applied adhesive with a granulated cap sheet.

Install all flashings per manufacturer's specification.

Remove and replace existing drain bowl assemblies.

Install new extruded metal siding with Kynar finish over masonry walls within the depressed rooftop mechanical area.

Install new extruded metal edges with Kynar coated color cover plate that has been pretested and approved per ANSI -SPRI ES-1 specifications. (Color will be selected from standard color selections)

Install new expansion joints to replace existing.

Fabricate and install new counter flashings as needed for proper termination.

Clean up and dispose of all debris from the above scope of work.

Provide a 20-year No Dollar Limit (NDL) warranty that includes the cost of both labor and material to repair any leaks or material failures during the warranty period.

**\$ 1,341,000**

**Consultant for Professional Services**

**Prepared by:** Fairfield Public Schools Central Office

**Breakdown:**

Architect will provide the following professional services related to the scope of work described in this proposal:

Review original Contract Documents and previous reports as such documents relate to conditions described in the Scope of Work and are supplied to architect by the Fairfield Public Schools.

Visit the site to verify existing conditions and construction details. Coordinate with a Contractor retained by The Town of Fairfield Public Schools to perform exploratory openings so as to examine concealed conditions.

Based upon the results of architects' field verification activities and the established scope of work, provide a proposed roof replacement system and scope of work for review and approval by the Fairfield Public Schools and Building Committee.

Meet with the CTDAS Office of School Construction Grants and Review for a pre-review evaluation meeting to review requirements for submission of the project.

Based on the agreed upon scope of work, prepare Contract Documents consisting of drawings and specifications, setting forth in detail the requirements for construction of the project.

Meet with the CTDAS Office of School Construction Grants and Review to review the 100% Contract Documents (Plan Completion Test) for comments and approval.

Respond to CTDAS Office of School Construction Grants and Review comments as required.

Assist in the preparation of the necessary bidding information, bidding forms, conditions of the Contract and Form of Agreement between Owner and Contractor.

Assist the Town of Fairfield Public Schools in obtaining bids.

Prepare an agenda for a pre-bid conference at the site.

Conduct a pre-bid conference at the site.

Prepare minutes from the pre-bid conference.

Respond to contractor questions and prepare addenda, as necessary.

Assist the Fairfield Public Schools in evaluating bids and in awarding construction contract.

Conduct a meeting with a representative from the Fairfield Public Schools, Building Committee, and the Contractor prior to the commencement of the work, to review the Contractor's proposal for compliance with the requirements of the Contract Documents.

Review and take appropriate action on Contractor's submittals such as shop drawings, product data and samples, to establish their conformance with the design concept expressed in the Contract Documents; forward to the Town of Fairfield Public Schools, for review and record, written warranties and related documents required by the Contract Documents and assembled by the Contractor.

Visit the site four (4) times during construction to become familiar with the progress and quality of work and to determine if the work is being performed in general compliance with the Contract Documents.

Conduct meetings in conjunction with site visits to assess the progress of the work. Prepare field observation reports following site visits to document progress and quality of the Contractor's work.

Authorize minor changes in the work if they are necessary and do not involve adjustment to the contract sum or extension of the contract time.

Review and certify amounts due the Contractor.

Visit the site to develop a punch list and again to conduct a final inspection with the Manufacturer's representative.

Determine the date of final completion.

Certify Contractor's requisition for Final Payment based upon the final inspection indicating the work is in general compliance with the requirements of the Contract Documents.

\$ 67,050

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**Contingency**

**Prepared by:** Fairfield Public Schools Central Office

**Breakdown:**

Carry a contingency for unforeseen conditions during demolition of old roofing materials down to the existing roof deck.

\$ 134,100

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**Total**

**\$ 1,542,150**



**Burr Elementary School – Full Roof Replacement**

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## Fairfield Ludlowe High School

### **Fairfield Ludlowe High School Student Bathroom Renovations**

**\$2,111,000**

Background: Fairfield Ludlowe High School was initially constructed in 1950 and underwent renovations and additions in 1963, 1972, 1995, 2005, and 2015. Over the years, the bathrooms have received cosmetic makeovers, but have not received complete renovations in over seventy years of operation. The bathrooms are becoming more challenging and cost-prohibitive to keep up and running.

Purpose & Justification: The Fairfield Ludlowe High School bathrooms have a failing infrastructure. The piping in the bathrooms has become older and brittle, causing leaks and increasing the cost to keep them open and running safely for students. Also, many of the bathrooms do not meet the newer code requirements for ADA compliance. Many of the fixtures are showing signs of age and chipping, making them dangerous for students (along with the chipping of the paint on the tiles) and the paint chipping off the tiles.

Detailed Description: This expenditure would cover the total cost of the architectural design, permits, construction and renovation, and Certificate of Occupancy.

Estimated Cost: The cost of this funding request is \$2,111,000. This number was arrived at using industry standards for construction pricing and working with Colliers International, our project owners representative for many of our school projects.

Long Range Costs: The only long-range cost would be routine maintenance of student bathrooms.

Demand on Existing Facilities: This project would decrease the demand on facilities by having all new lower maintenance equipment, including, but not limited to, fixtures and behind the wall piping.

Security, Safety, and Loss Control: The newly renovated bathrooms would increase safety by offering new piping and fixtures, decreasing water leaks and posable injuries from old broken, cracked fixtures. Security would also be incorporated in the design safe for locks down and student activities, providing new piping and fixtures that would decrease water leaks and possible injuries from broken and cracked fixtures. The new designs incorporate enhanced safety features during lockdowns and student activities.

Environmental Considerations: This project will include a look at all environmental impacts and the ability to make the bathrooms energy efficient while keeping them operational for the constant daily use they receive.



Funding, Financing & Office of School Construction Grants Review (OSCG&R)): This project would not proceed without funding approval. There are no State or Federal regulations that require this project to be undertaken. This project is not eligible for reimbursement through OSCG&R.

Schedule, Phasing & Timing: This project's schedule would be to have all the work completed during the summer recess of 2021, allowing for occupancy for the 21-22 school year with fully functioning bathrooms.

Other Considerations: This work will be bid out by the Town Purchasing Department and performed by a licensed professional contractor.

Alternates to The Request: The alternative to this request would be to keep performing regular maintenance and repairs to failing infrastructure at a higher cost to the Board of Education Operating Maintenance Budget.

## Fairfield Ludlowe High School

<b>Student Bathroom Renovations</b>	<b>\$ 2,111,000</b>
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### Details

#### Architectural Firm:

TBD	\$234,600
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#### Licensed Contractor to Provide Labor and Materials

TBD/ By Town bidding process

#### Break Down

Renovation	
Demolitions	
Removal and disposal of all materials	
FFE	\$1,641,000

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Contingency	\$209,700
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Unforeseen Hazardous Materials	\$25,700
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<b>Total</b>	<b>\$ 2,111,000</b>
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**Fairfield Ludlowe High School – Student Bathroom  
Renovation**

## **Fairfield Public Schools**

### **Fairfield Ludlowe High School-Building Automation System Upgrade**

**\$ 1,750,000**

Background: The school currently has a 1999 vintage JCI Metasys® Building Automation System (BAS) with a standard array of controlling devices. Some of the main control components include:

- Network Control Units (NCU)
- Metasys System Devices (DX-9100)
- Unitary Controllers (UNT)
- Variable Air Volume Modular Assembly (VMA)

As part of a recent project to address network security concerns, the existing XP Metasys workstation and global controllers were replaced with new Automated Logic communication gateways, system integrators and new WebCRL operators front end software. The new system integrators, known as the “S4 BACnet-N2 Router”, is a 3rd party integration device that allows legacy JCI N2 controllers to communicate with and be controlled by Automated Logic.

Please note: this S4 overlay system was always meant to be an interim solution to the network security concern. It was always anticipated that a new BAS system would be installed in the future to address the condition and age of the end devices.

#### Purpose & Justification:

The Building Automation system is a key component in the management of information and performance of the wide variety of Mechanical Systems that the Facilities Department is responsible for maintaining. It should provide an optimum interface and control to all building Mechanical Systems.

It is worth noting that vanZelm Engineers had thoroughly evaluated the current condition and effectiveness of the JCI control system, as far back as 2009.

The existing JCI control system, as it stands, should be replaced. Some of the reasons are as follows:

1. Service Life: as with most systems, there is a service life for a BAS (typically no more than 15-20years).
2. Parts: It has become increasing difficult and costly to obtain replacement parts for the system. This poses a significant risk to the School should a major failure occur with the BAS.
3. Performance: Existing Equipment Controllers become less reliable and are very limited in their ability to incorporate changes in control sequences of operations that could save energy, improve comfort and address building ventilation.
4. Energy Usage: the limited functionality of the current system does not allow for complex control strategies related to energy conservation. A full BAS Upgrade would allow the

school to take advantage of the modern BAS to potentially achieve significant energy savings.

5. Standalone HVAC system: there are also various pieces of HVAC equipment currently in place that are essentially “stand-alone” systems, with little or no connectivity to the BAS. Upgrading the BAS would allow for this equipment to be connected to the BAS, which would greatly improve the operation and troubleshooting of these HVAC systems.

#### Detailed Description:

##### 1 Design Phase

Engineer will prepare bid documents for the purpose of identifying the necessary components in need of upgrading.

##### 2 Construction Phase

Once project has been awarded, the successful bidder will systematically install new components throughout the school based on an agreed phasing schedule under the guidance and direction of Owners Project Manager.

##### 3 Commissioning Phase

As each phase of the project has been completed by the installing Contractor, the Cx Agent will ensure that the completed system performs to standards set forth in the design documents and that the Owner’s Operations and Maintenance Personnel are fully trained in system operation.

Estimated Cost: The cost of this funding request is \$ 1,765,000.

Long Range Costs: The long range costs will yearly Preventative Maintenance/Service Contracts. Other potential long range costs could include Mechanical costs associated with valve and or damper replacement, duct cleaning, air balancing and ultimately old equipment upgrade or replacement.

Demand on Existing Facilities: This completed project would allow for easier access and use of the BAS by the facilities department. The overall space condition monitoring the school by the Facilities group, will be greatly improved.

Security, Safety, and Loss Control: This project would increase safety for the school district by allowing for improved control strategies that deal with indoor air quality.

Environmental Considerations: This project is intended to improve the overall environment conditions in the school.

Funding, Financing & OSCG&R: This project would not proceed without funding approval. There are no State or Federal regulations that require this project to be undertaken. This Project is not eligible for reimbursement through OSCG&R.

Schedule, Phasing & Timing: The schedule for this project would have all the work completed as soon as possible. Work in classrooms or offices will need to be scheduled around building

occupancy. If funded this project would run through summer of 2021 and complete in summer for 2022.

Other Considerations: This work will be bid out by the Town Purchasing Department and performed by an outside professional licensed Building Automation System Contractor.

Alternates to The Request: The alternate to this request would be to do nothing and continue to support antiquated equipment.

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## Fairfield Public Schools

### Fairfield Ludlowe High School-Building Automation System Upgrade

\$ 1,765,000

## Details

### Breakdown:

Design Services to be provided to address the removal of the existing Building Automation System (BAS) and the installation of a new modern, up to date system.

Work to be performed in the following schools:

<b>Fairfield Ludlowe High School</b> 785 Unquowa Road Fairfield, CT 06824 203- 255-7201	
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The following steps will be undertaken to complete the BAS upgrade:

#### 1 Design Phase

Budget costs for Engineer Services related to the design phase of the project:

- a. Conduct site visits to confirm As-Built conditions.
- b. Prepare bid documents for the purpose of identifying the necessary components in need of upgrading.
- c. Provide simple floor plans to depict the locations of the equipment and identify the extent of the BAS upgrade.
- d. Provide updated sequences of operation for all systems affected by the upgrade project.
- e. Design of power feeds to new components associated with the BAS replacement.
- f. Work with Utility Company for rebates and incentives.
- g. Attend pre-bid meetings and address Requests for Information.

\$ 55,000

Building Automation System Contractor

### Breakdown:

Budget costs for Contractor to upgrade BAS.

1. Prepare phasing schedule.
2. Provide shop drawings to Engineer for review and approval.
3. Install new BAS and communication trunks devices.
4. Modify sequences of operation per design documents.
5. Create new graphics as required.
6. Point to point checkout for all new points.
7. Work with Engineer to fully test all upgraded systems.

\$ 1,500,000

**Breakdown:**

Key commissioning elements include:

- Conduct Commissioning Meetings and Issues Minutes.
- Perform Installation Inspections.
- Develop custom Functional Test Procedures.
- Schedule Functional Performance Testing with BAS Contractor.
- Provide Commissioning Personnel to conduct Functional Performance Testing of all modified equipment and systems throughout the School.
- Maintain Issues Log and Support Correction of Deficiencies.
- Review of the Contractor provided O&M manual and as-built drawings prior to training of the Owner's O&M Personnel.
- Assist with Owner Training.
- Prepare and issues of a final Commissioning report detailing the process and results.

\$ 64,000

Contingency

**Breakdown:**

Carry a contingency for unforeseen conditions requiring mechanical repair work.

\$ 131,000

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**Total**

**\$ 1,769,000**

## **SENIOR AND DISABLED TAX RELIEF**

**§ 95-7** Enactment of tax relief; purpose; effective date.

The Town of Fairfield hereby enacts a tax relief program for elderly homeowners or permanently and totally disabled homeowners pursuant to Section 12-129n of the Connecticut General Statutes for eligible residents of the Town of Fairfield on the terms and conditions provided herein. This article is enacted for the purpose of assisting elderly or permanently disabled homeowners with a portion of the costs of property taxation. This program shall become effective for the assessment year commencing October 1, 2012.

**§ 95-8** Conditions for eligibility.

A. Any person who owns real property in the Town of Fairfield or is liable for payment of taxes thereon pursuant to Section 12-48 of the Connecticut General Statutes and who occupies said real property as a residence and fulfills the following eligibility requirements shall be entitled to tax relief on the Grand List immediately preceding the application period provided for in § 95-9 below. The reference to "person" pursuant to this subsection shall hereinafter mean either "applicant" or "recipient."

B. After the applicant's claim has been filed and approved, such applicant shall be required to file such an application biannually. All persons receiving Town tax relief under the article on the October 1, 2011, Grand List shall refile for such tax relief for October 1, 2012, and biennially thereafter based on the year of the initial claim. If a tax payer's initial year of filing was for an odd-numbered grand list year, refiling will occur for an odd-numbered Grand List year. If a tax payer's initial year of filing was for an even-numbered Grand List year, refiling will occur for an even-numbered grand list year."

C. The applicant shall be entitled to tax relief if all the following conditions are met:

(1) Such applicant (or a spouse domiciled with such applicant) has attained age 65 or over at the end of the preceding calendar year or is 60 years of age or over and the surviving spouse of a taxpayer qualified for tax relief under this program at the time of his or her death; or has not attained the age of 65 years and is eligible in accordance with the federal regulations to receive permanent total disability benefits under social security or has not been engaged in employment covered by social security and accordingly has not qualified for benefits thereunder, but has qualified for permanent total disability benefits under any federal, state or local government retirement or disability plan, including the Railroad Retirement Act and any teacher's retirement plan in which requirements with respect to qualifications for such permanent total disability benefits are comparable to such requirements under social security.

(2) Such applicant shall have been a taxpayer of the Town of Fairfield and have paid taxes for at least one year as of October 1 of the current Grand List year.

[Amended 5-29-2018]

(3) The property for which the benefit is claimed is the legal residence of such applicant and is occupied for than 183 days of each year by such applicant.

[Amended 5-29-2018]

(4) Such applicant(s) shall have applied for property tax relief under any state statutes applicable to persons 65 and over and the permanently and totally disabled for which he or she is eligible. If such

applicant has not applied for tax relief under any state statutes because he or she is not eligible, he or she shall so certify by filing on a form acceptable to the Assessor an affidavit attesting to his or her inability.

(5) Such persons shall have individually, if unmarried, or jointly, if married, qualifying income in an amount not to exceed limits described below for each program for the tax year ending immediately preceding the application for tax relief benefits. "Qualifying income" is defined as adjusted gross income, as defined in the Internal Revenue Code of 1986, as may be amended from time to time, plus the nontaxable portion of any social security benefits, railroad retirement benefits, any tax shelter losses, income from other tax-exempt retirements and annuity sources and income from tax-exempt bonds and any other income not includable in adjusted gross income. Unreimbursed gross medical and dental expenses shall be deducted from income in calculating the applicant's Qualifying Income, as long as such unreimbursed gross medical and dental expenses are included on the applicant's federal income tax return of the calendar year immediately preceding the year of application as an itemized deduction and qualify as a medical deduction under Section 213(a) of the Internal Revenue Code of 1986, as may be amended.

(6) Such person shall have applied or reapplied in person to the Assessor for the tax relief during the application period established in § 95-9 below.

[Amended 5-29-2018]

(7) Benefits granted under this article shall be prorated by the office of the Assessor in the event of the sale or transfer of the affected real estate or the death of the applicant and the surviving spouse, if applicable.

(8) [1]Any application and spouse who qualify for property tax relief under this article shall have a qualifying total asset value (QTAV) not exceeding \$650,000. Qualifying total asset value shall consist of any and all assets of the applicant and spouse as of the date of application but shall specifically exclude the value of the applicant's primary legal residence and all tangible personal property contained therein. Each applicant to whom QTAV applies shall make a sworn statement in a form satisfactory to the Assessor that such applicant's QTAV does not exceed \$650,000.

*[1] Editor's Note: Former Subsection C(8), which stated that taxpayers shall not be delinquent in payment of real property, personal, or motor vehicle taxes, sewer use charges, or sewer assessments for any period extending back more than one year immediately preceding the date of their application, was repealed 5-29-2018. This ordinance also renumbered former Subsection C(9) as Subsection C(8).*

D. A married homeowner whose spouse is a resident of a health-care facility or nursing home in Connecticut that is receiving payment related to such spouse under Title XIX (Medicaid) need not declare the spouse's social security income. Proof that the spouse is in a facility must be provided, including the period of time said spouse was in the facility, the time that Title XIX commenced, and the name and address of the facility. The statement of proof must be on the facility's letterhead and signed by the administrator or other official of the facility.

**§ 95-9 Application.**

***[Amended 5-29-2018]***

In order to be entitled to the tax relief provided herein, an application must be filed with the Assessor not earlier than February 1 and not later than May 15 preceding the fiscal year in which the tax is payable.

A. Any eligible taxpayer, or his/her authorized agent, shall file applications for tax relief and tax deferral under this chapter with the Town of Fairfield Assessor, any time from the first of February to the 15th day of May, prior to the commencement of the tax year for which tax relief is claimed, on a form or forms prescribed and furnished by the Town of Fairfield. In making such application, the taxpayer shall present to the Assessor, in substantiation of his/her application, a copy of his/her federal income tax return for the calendar year immediately preceding the year of application, a copy of the Social Security Act Administration Form 1099, or, if not required to file a return, such other evidence of qualifying income which the Assessor may reasonably require to establish compliance with the income qualifications provided in § 95-15 of this article. The applicant, or his/her authorized agent, shall sign a sworn affidavit in the presence of the Assessor affirming the accuracy of the statements in the application.

B. When the Assessor is satisfied that the applying taxpayer qualifies under this article, he/she shall compute the amount of such tax relief and tax deferral and cause certificates of tax credit and tax deferral to be issued in such form as to permit the Tax Collector to reduce the amount of tax levied against the taxpayer and make proper record thereof, and a copy thereof shall be delivered to the applicant. Neither the Assessor nor the Tax Collector shall unreasonably withhold the issuance of such a tax credit and tax deferral to a properly qualifying taxpayer. The tax credit shall be applied to the tax payments.

C. Affidavits or applications or other documents presented in support of the application for tax relief or tax deferral shall not be open for public inspection and shall not be disclosed except in connection with claims of fraud.

D. An eligible taxpayer may make his/her application for tax relief or tax deferral to the Assessor up until August 15th of the claim year if approved for extension by the Assessor. The Assessor may grant such extension in the case of extenuating circumstance due to illness or incapacitation as evidenced by a [physician's] certificate signed by a physician or an advanced practice registered nurse, or if the Assessor determines there is good cause for doing so. Reference Public Act 12-197 amending 12-170w of the Connecticut General Statutes.

**§ 95-10** Amount of tax relief per person limited.

***[Amended 5-29-2018]***

No property tax relief provided for any person shall exceed in the aggregate 75% of the tax which would, except for the benefits provided by state statutes and the program(s), be laid against such person.

**§ 95-11** Amount of relief granted through program limited.

The total of all relief granted under the provisions of these programs shall not exceed an amount equal to 2.5% of the total real property tax levied in Fairfield in the preceding fiscal year. The total amount

that can be deferred under § 95-15B is limited to a maximum of \$500,000 in any tax year. In the event that either foregoing limitation on relief is reached, relief shall be prorated among qualified applicants.

**§ 95-12** Relief per parcel of property limited to eligible persons.

***[Amended 5-29-2018]***

Only one tax relief benefit shall be allowed for each parcel of real property eligible for tax relief under the programs. In the event that title to real property is recorded in the name of the taxpayer or his or her spouse who are eligible for tax relief and any other person or persons, the tax relief under the programs shall be prorated to allow a tax relief benefit equivalent to the fractional share in the property of such taxpayer or spouse, and the person or persons not eligible shall not receive any tax relief.

**§ 95-13** Effect on other benefits.

***[Amended 5-29-2018]***

The tax relief provided to any person under the programs shall not disqualify such person with respect to any benefits for which such person is eligible under any state statute, and any tax relief provided under the article shall be in addition to any such benefits.

**§ 95-14** Partial waiver of lien rights.

The Town of Fairfield hereby waives any lien rights given to it by Section 12-129n of the Connecticut General Statutes with respect to the tax freeze and tax credit programs but will exercise such rights as provided below with respect to the tax deferral program.

**§ 95-15** Tax relief programs.

An applicant may not apply, in any assessment year, for more than one of the following Town tax relief programs:

A. Tax freeze. Any taxpayer meeting the eligibility requirements of § 95-8 and having qualifying income not exceeding \$50,600 may elect to apply for a freeze under which such taxpayer shall pay the gross tax levied on applicable property, calculated for the first year the application is granted (the "freeze amount") and shall be entitled to continue to pay no more than the freeze amount for each subsequent year in which the taxpayer, or his surviving spouse, continues to meet such qualifications, subject to the following:

- (1) In the event that the applicant shall make improvements to his property resulting in an increase in his assessment, an amount calculated by multiplying the increase in the taxpayer's assessment attributable to the improvement by the mill rate in effect in the year such reassessment takes place shall be added to the freeze amount then applicable to obtain a revised freeze amount which will be the freeze amount for subsequent assessment years;
- (2) The applicant or his or her spouse must be at least 65 years of age at the time of such application;
- (3) Relief under this tax freeze is limited to not more than six consecutive years (not including the initial year that is used as the year to determine the freeze amount). Should the applicant choose to apply for the tax deferral program, described below, in the year following the last year of tax freeze eligibility, the freeze amount shall be used as the deferral base under that program;

(4) An applicant and/or his or her spouse may only receive tax relief under the tax freeze program once during his or her life with an individual also being deemed to have received such tax relief under the tax freeze program if their spouse received such benefits while they were married;

(5) The qualifying income threshold of \$50,600 for the tax freeze program indicated in § 95-15A above shall be adjusted in the same manner as described in § 95-15C(2) with respect to the tax credit program; and

(6) If a decrease in the mill rate lowers the normal tax bill below the original frozen tax level, the applicant will pay the normal tax. When the normal tax bill exceeds the original frozen tax bill, the applicant will pay his original frozen tax bill. The counting of the six-year period specified in § 95-15A(3) shall be suspended during the period in which the applicant pays the normal tax.

B. Tax deferral. Any taxpayer age 75 or older at the end of the preceding calendar year and meeting the eligibility requirements of § 95-8 and having qualifying income not exceeding \$80,000 may elect to apply for a deferral of up to 50% of the gross tax levied on applicable property each year in which the taxpayer, or his surviving spouse, continues to meet such eligibility requirements, subject to the following:

(1) The recipient shall enter into a written agreement with the Town providing for reimbursement, which shall be recorded in the land records of the Town and shall constitute a lien on the property payable upon death or conveyance.

(2) All deferral benefits plus interest shall be reimbursed to the Town:

a) one year after the recipient's death, unless the recipient's surviving spouse applies for benefits under this program and also qualifies under [§ 95-8](#);

b) Upon conveyance of the real property subject to taxation; or

c) Upon the property no longer being the recipient's principal residence.

(3) All benefits shall be subject to an interest charge at the greater of the annual percentage rate of 3% or the rate on ten-year United States Treasury Notes. The rate for the purposes of this subsection shall be set by the Chief Fiscal Officer of the Town of Fairfield on January 31 in each calendar year or, if such day is a day on which the fiscal office of the Town of Fairfield is not open, on the next prior day on which it is open. Such rate shall be effective for the following year. Such interest shall be simple interest, not compounded, and shall accrue from the date of deferral until the date of repayment.

(4) Total deferments, including accrued interest, for all years shall not exceed 70% of the most recent assessed value of the real property.

(5) The qualifying income threshold of \$80,000 for the tax deferral program indicated in § 95-15B above shall be adjusted in the same manner as described in § 95-15C(2) with respect to the tax credit program.

(6) If a decrease in the mill rate lowers the normal tax bill below the original deferral base, the applicant will pay the normal tax. When the normal tax bill exceeds the original deferral base, the applicant will pay the original deferral base.



(7) Taxpayers between the age 65 and 75 who had participated in the tax deferral option as of the 2012 Grand List may reapply for their original deferral base (deferring tax above that base), provided their qualifying income for the preceding year did not exceed \$80,000.

#### C. Tax credit.

(1) Any applicant meeting the eligibility requirements of § 95-8 and having qualifying income shown in the table below, adjusted annually as provided in Subsection C(2) below, shall be entitled to a tax credit of up to a maximum (as limited by § 95-10) provided in the following table, effective for the assessment year beginning October 1, ~~2012~~2019, and for each assessment year thereafter:

Qualifying Income <u>(as of 2019)</u>			
Over	To	Tax Credit (percentage of tax due)	Cap (not to exceed)
\$0	<del>\$16,700</del> <u>18,600</u>	<del>67</del> <u>75</u> %	<del>\$5,000</del> <u>7,500</u>
<del>\$16,700</del> <u>18,600</u>	<del>\$23,900</del> <u>25,500</u>	<del>60</del> <u>65</u> %	<del>\$4,500</del> <u>6,500</u>
<del>\$23,900</del> <u>26,500</u>	<del>\$29,500</del> <u>32,700</u>	<del>50</del> <u>55</u> %	<del>\$3,700</del> <u>5,500</u>
<del>\$29,500</del> <u>32,700</u>	<del>\$35,300</del> <u>39,000</u>	<del>42</del> <u>45</u> %	<del>\$3,500</del> <u>4,500</u>
<del>\$35,300</del> <u>39,300</u>	<del>\$43,400</del> <u>48,000</u>	<del>33</del> <u>35</u> %	<del>\$2,700</del> <u>3,500</u>
<del>\$43,400</del> <u>48,000</u>	<del>\$50,600</del> <u>56,000</u>	25%	<del>\$2,000</del> <u>2,500</u>
<del>\$50,600</del> <u>56,000</u>	<del>\$70,000</del> <u>77,300</u>	15%	<del>\$1,400</del> <u>1,500</u>

*For prior credit option participants, tax credit will not be less than calculated for 2012/2013, based upon 2012/2013 qualification levels.*

(2) The amounts of qualifying income shown in the above table shall be adjusted annually in a uniform manner to reflect the annual inflation adjustment in social security income, with each adjustment of qualifying income determined to the nearest \$100. Each such adjustment shall be prepared by the Secretary of the Office of Policy and Management, State of Connecticut, in relation to the annual inflation adjustment in social security, if any, becoming effective at any time during the twelve-month period immediately preceding the first of October of each year, and shall be the amount of such adjustment which is distributed to the Assessor as of December 31 next following. Adjustments for any bracket of qualifying income not included in the adjustments made by the Secretary of the Office of Policy and Management shall be made by the Assessor by applying the same percentage used by the Secretary of the Office of Policy and Management in making its adjustments and with each adjustment of qualifying income determined to the nearest \$100.

#### § 95-15.1 Report by Assessor.

The Assessor shall report to the RTM and the Board of Finance every June on the tax relief program established under Article III of Chapter 95.

#### § 95-15.2 Severability.

Commented [DC1]: Updated date

Commented [DC2]: Clarification of date when data is relevant

Commented [DC3]: Added BOF review

In the event that any provision of §§ 95-7 through 95-15 of the Fairfield Town Code is found to be unlawful, only such unlawful provision shall be ineffective, and all other provisions shall remain in full force and effect.

**§ 95-15.3 When effective.**

The amendments to §§ 95-7 through 95-15.2 shall become effective immediately after the period for subjecting them to a referendum has expired.

**§ 95-15.4 S&DTR Review Committee Initiation**

When either the Assessor, the Board of Finance or the Representative Town Meeting (in each case by majority vote) believes revisions should be made to Article III of Chapter 95 of the Town Code, Tax Relief for Elderly and Disabled Homeowners ("Chapter 95, Article III"), he/she or it shall make a request for the Board of Finance (BOF) to review the same. The BOF shall create a three-person BOF Chapter 95, Article III Review Committee, no more than two members of which shall be from the same political party, and make a recommendation to the entire BOF of whether any revisions should be made, and if so, what recommendations should be made. If the BOF determines that changes are necessary to Chapter 95, Article III, a joint Senior & Disabled Tax Relief Committee (S&DTRC) shall be formed and tasked with recommending changes to the BOF. The joint S&DTRC will consist of the three members of the BOF Chapter 95, Article III review committee and two members of the Representative Town Meeting (RTM). The two RTM members shall be appointed by the Special Legislative Management Committee ("Committee on Committees") of the RTM and may not be from the same political party. The BOF will review the recommended changes proposed by the S&DTRC and vote on a recommendation of changes to Chapter 95, Tax Relief for Elderly and Disabled Homeowners. The recommendation approved by the BOF will then be sent to the RTM for approval pursuant to its approval process.

**~~§ 95-15.4 RTM Review Committee.~~**

At its first regularly scheduled meeting of each calendar year, the Representative Town Meeting shall convene a special committee to review Article III of Chapter 95, Tax Relief for Elderly and Disabled Homeowners.

For February 2021 meeting vote on Senior and Disabled Tax Relief ordinance:

Applicable Language in Connecticut General Statutes:

**Sec. 12-129n. Optional municipal property tax relief program for certain homeowners age sixty-five or over or permanently and totally disabled.**

\*\*\*\*

(b) .... After the initial approval of such property tax relief by the legislative body of such municipality, ***such plan may be amended from time to time by vote of its legislative body on recommendation of its board of finance or equivalent body*** without compliance with the requirements of this subsection applicable to such initial approval.

To: Members of the Representative Town Meeting

From: Chris Dewitt, Vice Chairman, Board of Finance

Date: February 2021

Subject: Senior and Disabled Tax Relief Recommendations

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For your consideration, below please find the changes unanimously recommended by the Board of Finance and subsequently put forward by the RTM Legislative and Administrative Committee. Changes are marked by redline.

The L&A Committee voted 5-3 to enact additional changes to Section 95-15.4 Review Committee Initiation that were discussed by the Board of Finance, but not adopted. Those changes are highlighted below.

#### **SENIOR AND DISABLED TAX RELIEF**

##### **§ 95-7** Enactment of tax relief; purpose; effective date.

The Town of Fairfield hereby enacts a tax relief program for elderly homeowners or permanently and totally disabled homeowners pursuant to Section 12-129n of the Connecticut General Statutes for eligible residents of the Town of Fairfield on the terms and conditions provided herein. This article is enacted for the purpose of assisting elderly or permanently disabled homeowners with a portion of the costs of property taxation. This program shall become effective for the assessment year commencing October 1, 2012.

##### **§ 95-8** Conditions for eligibility.

A. Any person who owns real property in the Town of Fairfield or is liable for payment of taxes thereon pursuant to Section 12-48 of the Connecticut General Statutes and who occupies said real property as a residence and fulfills the following eligibility requirements shall be entitled to tax relief on the Grand List immediately preceding the application period provided for in § 95-9 below. The reference to "person" pursuant to this subsection shall hereinafter mean either "applicant" or "recipient."

B. After the applicant's claim has been filed and approved, such applicant shall be required to file such an application biannually. All persons receiving Town tax relief under the article on the October 1, 2011, Grand List shall refile for such tax relief for October 1, 2012, and biennially thereafter based on the year of the initial claim. If a tax payer's initial year of filing was for an odd-numbered grand list year, refiling will occur for an odd-numbered Grand List year. If a tax payer's initial year of filing was for an even-numbered Grand List year, refiling will occur for an even-numbered grand list year."

C. The applicant shall be entitled to tax relief if all the following conditions are met:

(1) Such applicant (or a spouse domiciled with such applicant) has attained age 65 or over at the end of the preceding calendar year or is 60 years of age or over and the surviving spouse of a taxpayer qualified for tax relief under this program at the time of his or her death; or has not attained the age of 65 years and is eligible in accordance with the federal regulations to receive permanent total disability benefits under social security or has not been engaged in employment covered by social security and accordingly has not qualified for benefits thereunder, but has

qualified for permanent total disability benefits under any federal, state or local government retirement or disability plan, including the Railroad Retirement Act and any teacher's retirement plan in which requirements with respect to qualifications for such permanent total disability benefits are comparable to such requirements under social security.

(2) Such applicant shall have been a taxpayer of the Town of Fairfield and have paid taxes for at least one year as of October 1 of the current Grand List year.

[Amended 5-29-2018]

(3) The property for which the benefit is claimed is the legal residence of such applicant and is occupied for than 183 days of each year by such applicant.

[Amended 5-29-2018]

(4) Such applicant(s) shall have applied for property tax relief under any state statutes applicable to persons 65 and over and the permanently and totally disabled for which he or she is eligible. If such applicant has not applied for tax relief under any state statutes because he or she is not eligible, he or she shall so certify by filing on a form acceptable to the Assessor an affidavit attesting to his or her inability.

(5) Such persons shall have individually, if unmarried, or jointly, if married, qualifying income in an amount not to exceed limits described below for each program for the tax year ending immediately preceding the application for tax relief benefits. "Qualifying income" is defined as adjusted gross income, as defined in the Internal Revenue Code of 1986, as may be amended from time to time, plus the nontaxable portion of any social security benefits, railroad retirement benefits, any tax shelter losses, income from other tax-exempt retirements and annuity sources and income from tax-exempt bonds and any other income not includable in adjusted gross income. Unreimbursed gross medical and dental expenses shall be deducted from income in calculating the applicant's Qualifying Income, as long as such unreimbursed gross medical and dental expenses are included on the applicant's federal income tax return of the calendar year immediately preceding the year of application as an itemized deduction and qualify as a medical deduction under Section 213(a) of the Internal Revenue Code of 1986, as may be amended.

(6) Such person shall have applied or reapplied in person to the Assessor for the tax relief during the application period established in § 95-9 below.

[Amended 5-29-2018]

(7) Benefits granted under this article shall be prorated by the office of the Assessor in the event of the sale or transfer of the affected real estate or the death of the applicant and the surviving spouse, if applicable.

(8) [1]Any application and spouse who qualify for property tax relief under this article shall have a qualifying total asset value (QTAV) not exceeding \$650,000. Qualifying total asset value shall consist of any and all assets of the applicant and spouse as of the date of application but shall specifically exclude the value of the applicant's primary legal residence and all tangible personal property contained therein. Each applicant to whom QTAV applies shall make a sworn statement in a form satisfactory to the Assessor that such applicant's QTAV does not exceed \$650,000.

*[1] Editor's Note: Former Subsection C(8), which stated that taxpayers shall not be delinquent in payment of real property, personal, or motor vehicle taxes, sewer use charges, or sewer assessments for any period extending back more than one year immediately preceding the date of their application, was repealed 5-29-2018. This ordinance also renumbered former Subsection C(9) as Subsection C(8).*

D. A married homeowner whose spouse is a resident of a health-care facility or nursing home in Connecticut that is receiving payment related to such spouse under Title XIX (Medicaid) need not declare the spouse's social security income. Proof that the spouse is in a facility must be provided, including the period of time said spouse was in the facility, the time that Title XIX commenced, and the name and address of the facility. The statement of proof must be on the facility's letterhead and signed by the administrator or other official of the facility.

#### **§ 95-9 Application.**

***[Amended 5-29-2018]***

In order to be entitled to the tax relief provided herein, an application must be filed with the Assessor not earlier than February 1 and not later than May 15 preceding the fiscal year in which the tax is payable.

A. Any eligible taxpayer, or his/her authorized agent, shall file applications for tax relief and tax deferral under this chapter with the Town of Fairfield Assessor, any time from the first of February to the 15th day of May, prior to the commencement of the tax year for which tax relief is claimed, on a form or forms prescribed and furnished by the Town of Fairfield. In making such application, the taxpayer shall present to the Assessor, in substantiation of his/her application, a copy of his/her federal income tax return for the calendar year immediately preceding the year of application, a copy of the Social Security Act Administration Form 1099, or, if not required to file a return, such other evidence of qualifying income which the Assessor may reasonably require to establish compliance with the income qualifications provided in § 95-15 of this article. The applicant, or his/her authorized agent, shall sign a sworn affidavit in the presence of the Assessor affirming the accuracy of the statements in the application.

B. When the Assessor is satisfied that the applying taxpayer qualifies under this article, he/she shall compute the amount of such tax relief and tax deferral and cause certificates of tax credit and tax deferral to be issued in such form as to permit the Tax Collector to reduce the amount of tax levied against the taxpayer and make proper record thereof, and a copy thereof shall be delivered to the applicant. Neither the Assessor nor the Tax Collector shall unreasonably withhold the issuance of such a tax credit and tax deferral to a properly qualifying taxpayer. The tax credit shall be applied to the tax payments.

C. Affidavits or applications or other documents presented in support of the application for tax relief or tax deferral shall not be open for public inspection and shall not be disclosed except in connection with claims of fraud.

D. An eligible taxpayer may make his/her application for tax relief or tax deferral to the Assessor up until August 15th of the claim year if approved for extension by the Assessor. The Assessor may grant such extension in the case of extenuating circumstance due to illness or incapacitation as evidenced by a [physician's] certificate signed by a physician or an advanced practice registered nurse, or if the Assessor

determines there is good cause for doing so. Reference Public Act 12-197 amending 12-170w of the Connecticut General Statutes.

**§ 95-10** Amount of tax relief per person limited.

**[Amended 5-29-2018]**

No property tax relief provided for any person shall exceed in the aggregate 75% of the tax which would, except for the benefits provided by state statutes and the program(s), be laid against such person.

**§ 95-11** Amount of relief granted through program limited.

The total of all relief granted under the provisions of these programs shall not exceed an amount equal to 2.5% of the total real property tax levied in Fairfield in the preceding fiscal year. The total amount that can be deferred under § 95-15B is limited to a maximum of \$500,000 in any tax year. In the event that either foregoing limitation on relief is reached, relief shall be prorated among qualified applicants.

**§ 95-12** Relief per parcel of property limited to eligible persons.

**[Amended 5-29-2018]**

Only one tax relief benefit shall be allowed for each parcel of real property eligible for tax relief under the programs. In the event that title to real property is recorded in the name of the taxpayer or his or her spouse who are eligible for tax relief and any other person or persons, the tax relief under the programs shall be prorated to allow a tax relief benefit equivalent to the fractional share in the property of such taxpayer or spouse, and the person or persons not eligible shall not receive any tax relief.

**§ 95-13** Effect on other benefits.

**[Amended 5-29-2018]**

The tax relief provided to any person under the programs shall not disqualify such person with respect to any benefits for which such person is eligible under any state statute, and any tax relief provided under the article shall be in addition to any such benefits.

**§ 95-14** Partial waiver of lien rights.

The Town of Fairfield hereby waives any lien rights given to it by Section 12-129n of the Connecticut General Statutes with respect to the tax freeze and tax credit programs but will exercise such rights as provided below with respect to the tax deferral program.

**§ 95-15** Tax relief programs.

An applicant may not apply, in any assessment year, for more than one of the following Town tax relief programs:

A. Tax freeze. Any taxpayer meeting the eligibility requirements of § 95-8 and having qualifying income not exceeding \$50,600 may elect to apply for a freeze under which such taxpayer shall pay the gross tax levied on applicable property, calculated for the first year the application is granted (the "freeze amount") and shall be entitled to continue to pay no more than the freeze amount for each subsequent year in



which the taxpayer, or his surviving spouse, continues to meet such qualifications, subject to the following:

- (1) In the event that the applicant shall make improvements to his property resulting in an increase in his assessment, an amount calculated by multiplying the increase in the taxpayer's assessment attributable to the improvement by the mill rate in effect in the year such reassessment takes place shall be added to the freeze amount then applicable to obtain a revised freeze amount which will be the freeze amount for subsequent assessment years;
- (2) The applicant or his or her spouse must be at least 65 years of age at the time of such application;
- (3) Relief under this tax freeze is limited to not more than six consecutive years (not including the initial year that is used as the year to determine the freeze amount). Should the applicant choose to apply for the tax deferral program, described below, in the year following the last year of tax freeze eligibility, the freeze amount shall be used as the deferral base under that program;
- (4) An applicant and/or his or her spouse may only receive tax relief under the tax freeze program once during his or her life with an individual also being deemed to have received such tax relief under the tax freeze program if their spouse received such benefits while they were married;
- (5) The qualifying income threshold of \$50,600 for the tax freeze program indicated in § 95-15A above shall be adjusted in the same manner as described in § 95-15C(2) with respect to the tax credit program; and
- (6) If a decrease in the mill rate lowers the normal tax bill below the original frozen tax level, the applicant will pay the normal tax. When the normal tax bill exceeds the original frozen tax bill, the applicant will pay his original frozen tax bill. The counting of the six-year period specified in § 95-15A(3) shall be suspended during the period in which the applicant pays the normal tax.

B. Tax deferral. Any taxpayer age 75 or older at the end of the preceding calendar year and meeting the eligibility requirements of § 95-8 and having qualifying income not exceeding \$80,000 may elect to apply for a deferral of up to 50% of the gross tax levied on applicable property each year in which the taxpayer, or his surviving spouse, continues to meet such eligibility requirements, subject to the following:

- (1) The recipient shall enter into a written agreement with the Town providing for reimbursement, which shall be recorded in the land records of the Town and shall constitute a lien on the property payable upon death or conveyance.
- (2) All deferral benefits plus interest shall be reimbursed to the Town:
  - a) one year after the recipient's death, unless the recipient's surviving spouse applies for benefits under this program and also qualifies under § 95-8;
  - b) Upon conveyance of the real property subject to taxation; or
  - c) Upon the property no longer being the recipient's principal residence.
- (3) All benefits shall be subject to an interest charge at the greater of the annual percentage rate of 3% or the rate on ten-year United States Treasury Notes. The rate for the purposes of this

subsection shall be set by the Chief Fiscal Officer of the Town of Fairfield on January 31 in each calendar year or, if such day is a day on which the fiscal office of the Town of Fairfield is not open, on the next prior day on which it is open. Such rate shall be effective for the following year. Such interest shall be simple interest, not compounded, and shall accrue from the date of deferral until the date of repayment.

(4) Total deferments, including accrued interest, for all years shall not exceed 70% of the most recent assessed value of the real property.

(5) The qualifying income threshold of \$80,000 for the tax deferral program indicated in § 95-15B above shall be adjusted in the same manner as described in § 95-15C(2) with respect to the tax credit program.

(6) If a decrease in the mill rate lowers the normal tax bill below the original deferral base, the applicant will pay the normal tax. When the normal tax bill exceeds the original deferral base, the applicant will pay the original deferral base.

(7) Taxpayers between the age 65 and 75 who had participated in the tax deferral option as of the 2012 Grand List may reapply for their original deferral base (deferring tax above that base), provided their qualifying income for the preceding year did not exceed \$80,000.

#### C. Tax credit.

(1) Any applicant meeting the eligibility requirements of § 95-8 and having qualifying income shown in the table below, adjusted annually as provided in Subsection C(2) below, shall be entitled to a tax credit of up to a maximum (as limited by § 95-10) provided in the following table, effective for the assessment year beginning October 1, ~~2012~~2019, and for each assessment year thereafter:

Qualifying Income <del>(as of 2012)</del> <u>(as of 2019)</u>			
Over	To	Tax Credit (percentage of tax due)	Cap (not to exceed)
\$0	<del>\$16,700</del> <u>\$18,600</u>	<del>67</del> <u>75</u> %	<del>\$5,000</del> <u>7,500</u>
<del>\$16,701</del> <u>\$18,601</u>	<del>\$23,900</del> <u>\$25,500</u>	<del>60</del> <u>65</u> %	<del>\$4,500</del> <u>6,500</u>
<del>\$23,901</del> <u>\$26,501</u>	<del>\$29,500</del> <u>\$32,700</u>	<del>50</del> <u>55</u> %	<del>\$3,700</del> <u>5,500</u>
<del>\$29,501</del> <u>\$32,701</u>	<del>\$35,300</del> <u>\$39,000</u>	<del>42</del> <u>45</u> %	<del>\$3,500</del> <u>4,500</u>
<del>\$35,301</del> <u>\$39,301</u>	<del>\$43,400</del> <u>\$48,000</u>	<del>33</del> <u>35</u> %	<del>\$2,700</del> <u>3,500</u>
<del>\$43,401</del> <u>\$48,001</u>	<del>\$50,600</del> <u>\$56,000</u>	25%	<del>\$2,000</del> <u>2,500</u>
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*For prior credit option participants, tax credit will not be less than calculated for 2012/2013, based upon 2012/2013 qualification levels.*

(2) The amounts of qualifying income shown in the above table shall be adjusted annually in a uniform manner to reflect the annual inflation adjustment in social security income, with each adjustment of qualifying income determined to the nearest \$100. Each such adjustment shall be prepared by the Secretary of the Office of Policy and Management, State of Connecticut, in relation to the annual inflation adjustment in social security, if any, becoming effective at any time during the twelve-month period immediately preceding the first of October of each year, and shall

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**Commented [DC2]:** Clarification of date when data is relevant

be the amount of such adjustment which is distributed to the Assessor as of December 31 next following. Adjustments for any bracket of qualifying income not included in the adjustments made by the Secretary of the Office of Policy and Management shall be made by the Assessor by applying the same percentage used by the Secretary of the Office of Policy and Management in making its adjustments and with each adjustment of qualifying income determined to the nearest \$100.

**§ 95-15.1 Report by Assessor.**

The Assessor shall report to the RTM and the Board of Finance every June on the tax relief program established under Article III of Chapter 95.

**Commented [DC3]:** Added BOF review

**§ 95-15.2 Severability.**

In the event that any provision of §§ 95-7 through 95-15 of the Fairfield Town Code is found to be unlawful, only such unlawful provision shall be ineffective, and all other provisions shall remain in full force and effect.

**§ 95-15.3 When effective.**

The amendments to §§ 95-7 through 95-15.2 shall become effective immediately after the period for subjecting them to a referendum has expired.

**§ 95-15.4 S&DTR Review Committee Initiation**

**§ 95-15.4 RTM Review Committee.**

[Amended 2-23-2015; 5-29-2018]

When the Town Tax Assessor believes revisions should be made to Senior and Disabled Tax Relief Program, he/she shall make a request for the Board of Finance (BOF) to review the same. The BOF shall create a three-person Chapter 95, Tax Relief for Elderly and Disabled Homeowners Review Committee and make a recommendation to the entire BOF of whether any revisions should be made, and if so, what recommendations should be made. If the BOF determines that a change(s) are necessary to Chapter 95, Tax Relief for Elderly and Disabled Homeowners, a joint Senior & Disabled Tax Relief Committee (S&DTRC) shall be formed and tasked with recommending changes to the BOF. The joint S&DTRC will consist of the three members from the BOF review committee and two members of the Representative Town Meeting (RTM). The two RTM members shall be appointed by the Special Legislative Management Committee ("Committee on Committees") and may not be from the same political party. The BOF will review the recommended changes proposed by the S&DTRC and vote on a recommendation of changes to Chapter 95, Tax Relief for Elderly and Disabled Homeowners, to the RTM for approval pursuant to its approval process.

At its first regularly scheduled meeting in January 2020, the Representative Town Meeting shall convene a special committee to review Article III of Chapter 95, Tax Relief for Elderly and Disabled Homeowners.

**Commented [CD4]:** Approved by BOF, rejected by RTM L&A

*Changes Initiated by RTM L&A*

**§ 95-15.4 S&DTR Review Committee Initiation**

When either the Assessor, the Board of Finance or the Representative Town Meeting (in each case by majority vote) believes revisions should be made to Article III of Chapter 95 of the Town Code, Tax Relief for Elderly and Disabled Homeowners ("Chapter 95, Article III"), he/she or it shall make a request for the Board of Finance (BOF) to review the same. The BOF shall create a three-person BOF Chapter 95, Article III Review Committee, no more than two members of which shall be from the same political party, and make a recommendation to the entire BOF of whether any revisions should be made, and if so, what recommendations should be made. If the BOF determines that changes are necessary to Chapter 95, Article III, a joint Senior & Disabled Tax Relief Committee (S&DTRC) shall be formed and tasked with recommending changes to the BOF. The joint S&DTRC will consist of the three members of the BOF Chapter 95, Article III review committee and two members of the Representative Town Meeting (RTM). The two RTM members shall be appointed by the Special Legislative Management Committee ("Committee on Committees") of the RTM and may not be from the same political party. The BOF will review the recommended changes proposed by the S&DTRC and vote on a recommendation of changes to Chapter 95, Tax Relief for Elderly and Disabled Homeowners. The recommendation approved by the BOF will then be sent to the RTM for approval pursuant to its approval process.

~~**§ 95-15.4 RTM Review Committee.**~~

~~At its first regularly scheduled meeting of each calendar year, the Representative Town Meeting shall convene a special committee to review Article III of Chapter 95, Tax Relief for Elderly and Disabled Homeowners.~~

To: Members of the Representative Town Meeting

From: Chris Dewitt, Vice Chairman, Board of Finance

Date: February 2021

Subject: Senior and Disabled Tax Relief Recommendations

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For your consideration, below please find the changes unanimously recommended by the Board of Finance and subsequently put forward by the RTM Legislative and Administrative Committee. Changes are marked by redline.

The L&A Committee voted 5-3 to enact additional changes to Section 95-15.4 Review Committee Initiation that were discussed by the Board of Finance, but not adopted. Those changes are highlighted below.

#### **SENIOR AND DISABLED TAX RELIEF**

##### **§ 95-7** Enactment of tax relief; purpose; effective date.

The Town of Fairfield hereby enacts a tax relief program for elderly homeowners or permanently and totally disabled homeowners pursuant to Section 12-129n of the Connecticut General Statutes for eligible residents of the Town of Fairfield on the terms and conditions provided herein. This article is enacted for the purpose of assisting elderly or permanently disabled homeowners with a portion of the costs of property taxation. This program shall become effective for the assessment year commencing October 1, 2012.

##### **§ 95-8** Conditions for eligibility.

A. Any person who owns real property in the Town of Fairfield or is liable for payment of taxes thereon pursuant to Section 12-48 of the Connecticut General Statutes and who occupies said real property as a residence and fulfills the following eligibility requirements shall be entitled to tax relief on the Grand List immediately preceding the application period provided for in § 95-9 below. The reference to "person" pursuant to this subsection shall hereinafter mean either "applicant" or "recipient."

B. After the applicant's claim has been filed and approved, such applicant shall be required to file such an application biannually. All persons receiving Town tax relief under the article on the October 1, 2011, Grand List shall refile for such tax relief for October 1, 2012, and biennially thereafter based on the year of the initial claim. If a tax payer's initial year of filing was for an odd-numbered grand list year, refiling will occur for an odd-numbered Grand List year. If a tax payer's initial year of filing was for an even-numbered Grand List year, refiling will occur for an even-numbered grand list year."

C. The applicant shall be entitled to tax relief if all the following conditions are met:

(1) Such applicant (or a spouse domiciled with such applicant) has attained age 65 or over at the end of the preceding calendar year or is 60 years of age or over and the surviving spouse of a taxpayer qualified for tax relief under this program at the time of his or her death; or has not attained the age of 65 years and is eligible in accordance with the federal regulations to receive permanent total disability benefits under social security or has not been engaged in employment covered by social security and accordingly has not qualified for benefits thereunder, but has

qualified for permanent total disability benefits under any federal, state or local government retirement or disability plan, including the Railroad Retirement Act and any teacher's retirement plan in which requirements with respect to qualifications for such permanent total disability benefits are comparable to such requirements under social security.

(2) Such applicant shall have been a taxpayer of the Town of Fairfield and have paid taxes for at least one year as of October 1 of the current Grand List year.

[Amended 5-29-2018]

(3) The property for which the benefit is claimed is the legal residence of such applicant and is occupied for than 183 days of each year by such applicant.

[Amended 5-29-2018]

(4) Such applicant(s) shall have applied for property tax relief under any state statutes applicable to persons 65 and over and the permanently and totally disabled for which he or she is eligible. If such applicant has not applied for tax relief under any state statutes because he or she is not eligible, he or she shall so certify by filing on a form acceptable to the Assessor an affidavit attesting to his or her inability.

(5) Such persons shall have individually, if unmarried, or jointly, if married, qualifying income in an amount not to exceed limits described below for each program for the tax year ending immediately preceding the application for tax relief benefits. "Qualifying income" is defined as adjusted gross income, as defined in the Internal Revenue Code of 1986, as may be amended from time to time, plus the nontaxable portion of any social security benefits, railroad retirement benefits, any tax shelter losses, income from other tax-exempt retirements and annuity sources and income from tax-exempt bonds and any other income not includable in adjusted gross income. Unreimbursed gross medical and dental expenses shall be deducted from income in calculating the applicant's Qualifying Income, as long as such unreimbursed gross medical and dental expenses are included on the applicant's federal income tax return of the calendar year immediately preceding the year of application as an itemized deduction and qualify as a medical deduction under Section 213(a) of the Internal Revenue Code of 1986, as may be amended.

(6) Such person shall have applied or reapplied in person to the Assessor for the tax relief during the application period established in § 95-9 below.

[Amended 5-29-2018]

(7) Benefits granted under this article shall be prorated by the office of the Assessor in the event of the sale or transfer of the affected real estate or the death of the applicant and the surviving spouse, if applicable.

(8) [1]Any application and spouse who qualify for property tax relief under this article shall have a qualifying total asset value (QTAV) not exceeding \$650,000. Qualifying total asset value shall consist of any and all assets of the applicant and spouse as of the date of application but shall specifically exclude the value of the applicant's primary legal residence and all tangible personal property contained therein. Each applicant to whom QTAV applies shall make a sworn statement in a form satisfactory to the Assessor that such applicant's QTAV does not exceed \$650,000.

*[1] Editor's Note: Former Subsection C(8), which stated that taxpayers shall not be delinquent in payment of real property, personal, or motor vehicle taxes, sewer use charges, or sewer assessments for any period extending back more than one year immediately preceding the date of their application, was repealed 5-29-2018. This ordinance also renumbered former Subsection C(9) as Subsection C(8).*

D. A married homeowner whose spouse is a resident of a health-care facility or nursing home in Connecticut that is receiving payment related to such spouse under Title XIX (Medicaid) need not declare the spouse's social security income. Proof that the spouse is in a facility must be provided, including the period of time said spouse was in the facility, the time that Title XIX commenced, and the name and address of the facility. The statement of proof must be on the facility's letterhead and signed by the administrator or other official of the facility.

#### **§ 95-9 Application.**

***[Amended 5-29-2018]***

In order to be entitled to the tax relief provided herein, an application must be filed with the Assessor not earlier than February 1 and not later than May 15 preceding the fiscal year in which the tax is payable.

A. Any eligible taxpayer, or his/her authorized agent, shall file applications for tax relief and tax deferral under this chapter with the Town of Fairfield Assessor, any time from the first of February to the 15th day of May, prior to the commencement of the tax year for which tax relief is claimed, on a form or forms prescribed and furnished by the Town of Fairfield. In making such application, the taxpayer shall present to the Assessor, in substantiation of his/her application, a copy of his/her federal income tax return for the calendar year immediately preceding the year of application, a copy of the Social Security Act Administration Form 1099, or, if not required to file a return, such other evidence of qualifying income which the Assessor may reasonably require to establish compliance with the income qualifications provided in § 95-15 of this article. The applicant, or his/her authorized agent, shall sign a sworn affidavit in the presence of the Assessor affirming the accuracy of the statements in the application.

B. When the Assessor is satisfied that the applying taxpayer qualifies under this article, he/she shall compute the amount of such tax relief and tax deferral and cause certificates of tax credit and tax deferral to be issued in such form as to permit the Tax Collector to reduce the amount of tax levied against the taxpayer and make proper record thereof, and a copy thereof shall be delivered to the applicant. Neither the Assessor nor the Tax Collector shall unreasonably withhold the issuance of such a tax credit and tax deferral to a properly qualifying taxpayer. The tax credit shall be applied to the tax payments.

C. Affidavits or applications or other documents presented in support of the application for tax relief or tax deferral shall not be open for public inspection and shall not be disclosed except in connection with claims of fraud.

D. An eligible taxpayer may make his/her application for tax relief or tax deferral to the Assessor up until August 15th of the claim year if approved for extension by the Assessor. The Assessor may grant such extension in the case of extenuating circumstance due to illness or incapacitation as evidenced by a [physician's] certificate signed by a physician or an advanced practice registered nurse, or if the Assessor



determines there is good cause for doing so. Reference Public Act 12-197 amending 12-170w of the Connecticut General Statutes.

**§ 95-10** Amount of tax relief per person limited.

**[Amended 5-29-2018]**

No property tax relief provided for any person shall exceed in the aggregate 75% of the tax which would, except for the benefits provided by state statutes and the program(s), be laid against such person.

**§ 95-11** Amount of relief granted through program limited.

The total of all relief granted under the provisions of these programs shall not exceed an amount equal to 2.5% of the total real property tax levied in Fairfield in the preceding fiscal year. The total amount that can be deferred under § 95-15B is limited to a maximum of \$500,000 in any tax year. In the event that either foregoing limitation on relief is reached, relief shall be prorated among qualified applicants.

**§ 95-12** Relief per parcel of property limited to eligible persons.

**[Amended 5-29-2018]**

Only one tax relief benefit shall be allowed for each parcel of real property eligible for tax relief under the programs. In the event that title to real property is recorded in the name of the taxpayer or his or her spouse who are eligible for tax relief and any other person or persons, the tax relief under the programs shall be prorated to allow a tax relief benefit equivalent to the fractional share in the property of such taxpayer or spouse, and the person or persons not eligible shall not receive any tax relief.

**§ 95-13** Effect on other benefits.

**[Amended 5-29-2018]**

The tax relief provided to any person under the programs shall not disqualify such person with respect to any benefits for which such person is eligible under any state statute, and any tax relief provided under the article shall be in addition to any such benefits.

**§ 95-14** Partial waiver of lien rights.

The Town of Fairfield hereby waives any lien rights given to it by Section 12-129n of the Connecticut General Statutes with respect to the tax freeze and tax credit programs but will exercise such rights as provided below with respect to the tax deferral program.

**§ 95-15** Tax relief programs.

An applicant may not apply, in any assessment year, for more than one of the following Town tax relief programs:

A. Tax freeze. Any taxpayer meeting the eligibility requirements of § 95-8 and having qualifying income not exceeding \$50,600 may elect to apply for a freeze under which such taxpayer shall pay the gross tax levied on applicable property, calculated for the first year the application is granted (the "freeze amount") and shall be entitled to continue to pay no more than the freeze amount for each subsequent year in

which the taxpayer, or his surviving spouse, continues to meet such qualifications, subject to the following:

- (1) In the event that the applicant shall make improvements to his property resulting in an increase in his assessment, an amount calculated by multiplying the increase in the taxpayer's assessment attributable to the improvement by the mill rate in effect in the year such reassessment takes place shall be added to the freeze amount then applicable to obtain a revised freeze amount which will be the freeze amount for subsequent assessment years;
- (2) The applicant or his or her spouse must be at least 65 years of age at the time of such application;
- (3) Relief under this tax freeze is limited to not more than six consecutive years (not including the initial year that is used as the year to determine the freeze amount). Should the applicant choose to apply for the tax deferral program, described below, in the year following the last year of tax freeze eligibility, the freeze amount shall be used as the deferral base under that program;
- (4) An applicant and/or his or her spouse may only receive tax relief under the tax freeze program once during his or her life with an individual also being deemed to have received such tax relief under the tax freeze program if their spouse received such benefits while they were married;
- (5) The qualifying income threshold of \$50,600 for the tax freeze program indicated in § 95-15A above shall be adjusted in the same manner as described in § 95-15C(2) with respect to the tax credit program; and
- (6) If a decrease in the mill rate lowers the normal tax bill below the original frozen tax level, the applicant will pay the normal tax. When the normal tax bill exceeds the original frozen tax bill, the applicant will pay his original frozen tax bill. The counting of the six-year period specified in § 95-15A(3) shall be suspended during the period in which the applicant pays the normal tax.

B. Tax deferral. Any taxpayer age 75 or older at the end of the preceding calendar year and meeting the eligibility requirements of § 95-8 and having qualifying income not exceeding \$80,000 may elect to apply for a deferral of up to 50% of the gross tax levied on applicable property each year in which the taxpayer, or his surviving spouse, continues to meet such eligibility requirements, subject to the following:

- (1) The recipient shall enter into a written agreement with the Town providing for reimbursement, which shall be recorded in the land records of the Town and shall constitute a lien on the property payable upon death or conveyance.
- (2) All deferral benefits plus interest shall be reimbursed to the Town:
  - a) one year after the recipient's death, unless the recipient's surviving spouse applies for benefits under this program and also qualifies under § 95-8;
  - b) Upon conveyance of the real property subject to taxation; or
  - c) Upon the property no longer being the recipient's principal residence.
- (3) All benefits shall be subject to an interest charge at the greater of the annual percentage rate of 3% or the rate on ten-year United States Treasury Notes. The rate for the purposes of this

subsection shall be set by the Chief Fiscal Officer of the Town of Fairfield on January 31 in each calendar year or, if such day is a day on which the fiscal office of the Town of Fairfield is not open, on the next prior day on which it is open. Such rate shall be effective for the following year. Such interest shall be simple interest, not compounded, and shall accrue from the date of deferral until the date of repayment.

(4) Total deferments, including accrued interest, for all years shall not exceed 70% of the most recent assessed value of the real property.

(5) The qualifying income threshold of \$80,000 for the tax deferral program indicated in § 95-15B above shall be adjusted in the same manner as described in § 95-15C(2) with respect to the tax credit program.

(6) If a decrease in the mill rate lowers the normal tax bill below the original deferral base, the applicant will pay the normal tax. When the normal tax bill exceeds the original deferral base, the applicant will pay the original deferral base.

(7) Taxpayers between the age 65 and 75 who had participated in the tax deferral option as of the 2012 Grand List may reapply for their original deferral base (deferring tax above that base), provided their qualifying income for the preceding year did not exceed \$80,000.

#### C. Tax credit.

(1) Any applicant meeting the eligibility requirements of § 95-8 and having qualifying income shown in the table below, adjusted annually as provided in Subsection C(2) below, shall be entitled to a tax credit of up to a maximum (as limited by § 95-10) provided in the following table, effective for the assessment year beginning October 1, ~~2012~~2019, and for each assessment year thereafter:

Qualifying Income <del>(as of 2012)</del> <u>(as of 2019)</u>			
Over	To	Tax Credit (percentage of tax due)	Cap (not to exceed)
\$0	<del>\$16,700</del> <u>\$18,600</u>	<del>67</del> <u>75</u> %	<del>\$5,000</del> <u>7,500</u>
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*For prior credit option participants, tax credit will not be less than calculated for 2012/2013, based upon 2012/2013 qualification levels.*

(2) The amounts of qualifying income shown in the above table shall be adjusted annually in a uniform manner to reflect the annual inflation adjustment in social security income, with each adjustment of qualifying income determined to the nearest \$100. Each such adjustment shall be prepared by the Secretary of the Office of Policy and Management, State of Connecticut, in relation to the annual inflation adjustment in social security, if any, becoming effective at any time during the twelve-month period immediately preceding the first of October of each year, and shall

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be the amount of such adjustment which is distributed to the Assessor as of December 31 next following. Adjustments for any bracket of qualifying income not included in the adjustments made by the Secretary of the Office of Policy and Management shall be made by the Assessor by applying the same percentage used by the Secretary of the Office of Policy and Management in making its adjustments and with each adjustment of qualifying income determined to the nearest \$100.

**§ 95-15.1 Report by Assessor.**

The Assessor shall report to the RTM and the Board of Finance every June on the tax relief program established under Article III of Chapter 95.

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**§ 95-15.2 Severability.**

In the event that any provision of §§ 95-7 through 95-15 of the Fairfield Town Code is found to be unlawful, only such unlawful provision shall be ineffective, and all other provisions shall remain in full force and effect.

**§ 95-15.3 When effective.**

The amendments to §§ 95-7 through 95-15.2 shall become effective immediately after the period for subjecting them to a referendum has expired.

**§ 95-15.4 S&DTR Review Committee Initiation**

**§ 95-15.4 RTM Review Committee.**

[Amended 2-23-2015; 5-29-2018]

When the Town Tax Assessor believes revisions should be made to Senior and Disabled Tax Relief Program, he/she shall make a request for the Board of Finance (BOF) to review the same. The BOF shall create a three-person Chapter 95, Tax Relief for Elderly and Disabled Homeowners Review Committee and make a recommendation to the entire BOF of whether any revisions should be made, and if so, what recommendations should be made. If the BOF determines that a change(s) are necessary to Chapter 95, Tax Relief for Elderly and Disabled Homeowners, a joint Senior & Disabled Tax Relief Committee (S&DTRC) shall be formed and tasked with recommending changes to the BOF. The joint S&DTRC will consist of the three members from the BOF review committee and two members of the Representative Town Meeting (RTM). The two RTM members shall be appointed by the Special Legislative Management Committee ("Committee on Committees") and may not be from the same political party. The BOF will review the recommended changes proposed by the S&DTRC and vote on a recommendation of changes to Chapter 95, Tax Relief for Elderly and Disabled Homeowners, to the RTM for approval pursuant to its approval process.

At its first regularly scheduled meeting in January 2020, the Representative Town Meeting shall convene a special committee to review Article III of Chapter 95, Tax Relief for Elderly and Disabled Homeowners.

**Commented [CD4]:** Approved by BOF, rejected by RTM L&A

**Changes Initiated by RTM L&A**

**§ 95-15.4 S&DTR Review Committee Initiation**

When either the Assessor, the Board of Finance or the Representative Town Meeting (in each case by majority vote) believes revisions should be made to Article III of Chapter 95 of the Town Code, Tax Relief for Elderly and Disabled Homeowners ("Chapter 95, Article III"), he/she or it shall make a request for the Board of Finance (BOF) to review the same. The BOF shall create a three-person BOF Chapter 95, Article III Review Committee, no more than two members of which shall be from the same political party, and make a recommendation to the entire BOF of whether any revisions should be made, and if so, what recommendations should be made. If the BOF determines that changes are necessary to Chapter 95, Article III, a joint Senior & Disabled Tax Relief Committee (S&DTRC) shall be formed and tasked with recommending changes to the BOF. The joint S&DTRC will consist of the three members of the BOF Chapter 95, Article III review committee and two members of the Representative Town Meeting (RTM). The two RTM members shall be appointed by the Special Legislative Management Committee ("Committee on Committees") of the RTM and may not be from the same political party. The BOF will review the recommended changes proposed by the S&DTRC and vote on a recommendation of changes to Chapter 95, Tax Relief for Elderly and Disabled Homeowners. The recommendation approved by the BOF will then be sent to the RTM for approval pursuant to its approval process.

~~**§ 95-15.4 RTM Review Committee**~~

~~At its first regularly scheduled meeting of each calendar year, the Representative Town Meeting shall convene a special committee to review Article III of Chapter 95, Tax Relief for Elderly and Disabled Homeowners.~~

## QTAV SUMMARY

QTAV—Qualifying Total Asset Value—not to exceed \$650K (which EXCLUDES value of home)

Why is the committee proposing to eliminate QTAV?

- 1) Tax Assessor recommended elimination of QTAV in August 2017
  - a. Overly complex
  - b. Difficult to ascertain an applicant's total assets
  - c. Definitional problems resulting both in lack of transparency and inequities
  - d. CONCLUDED THAT QTAV HAD NO LIMITING EFFECT ON THE PROGRAM, as only 4 people were disallowed for excess assets, out of 1343 (0.3%)
- 2) 3 other prior tax relief committees have flagged QTAV and problems with defining assets and applying the test equitably
- 3) The majority of other towns in CT do NOT use asset tests
- 4) Concerns related to inequities in applying the asset test would require auditing
- 5) Assessor's office, which performs many other duties for the town, is not in a position to investigate and verify 1500 applicants' asset values

## ASSESSMENT LIMIT

Limits participation based on the assessment value of applicants' homes.

- 1) Simple to administer, which makes it more efficient
- 2) More transparent, which will likely make it easier to apply
- 3) Our proposal: \$750,000 assessment limit
  - a. Translates to \$1,071,428 in appraised value
  - b. Would grandfather 17 current participants

5 other towns use assessment limits: Darien, Greenwich, New Canaan, Newtown and Weston

- 1) Darien--\$800,000
- 2) Greenwich--\$1,328,000
- 3) New Canaan--\$1,618,344
- 4) Newtown--\$461,340
- 5) Weston--\$1,000,000

NOT INTENDED AS A LIMITING FACTOR:

- 1) The committee did not want to constrict participation in setting an assessment limit.
  - a. Seniors with higher valued homes suffer as much, if not more, under a property tax burden.
  - b. There are seniors in lower income brackets who own higher assessed homes.
  - c. These seniors are validly and rightfully in the program; and should continue to be accepted into the program.
- 2) We used current assessment values as a guide for setting our limit. The need to grandfather too many existing participants signaled that the limit was too low and too restrictive. The \$750K limit would require grandfathering 17 current participants.

- 3) We used other towns' limits as a guide, trying to place ourselves somewhere between Newtown and Greenwich.
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#### ELIMINATION OF FREEZE

- 1) Tax Assessor recommended elimination in August 2017
- 2) Zero participation in FY 2019 and FY 2018
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#### CREDIT PROGRAM INCOME LIMIT

- 1) Credit program is the most popular program—85% participate in credit program
  - a. Current limit is \$75,100 for FY 2020
- 2) Significant attrition from the program since 2015

#### Historic Look at Participation and **NET CHANGE**

	FY 2019	FY 2018	FY 2017	FY 2016	FY 2015	FY 2014	<b>FY 2013</b>	FY 2012	FY 2011	FY 2010	FY 2009
# OF PARTICIPANTS	<b>1343</b>	1438	1475	1542	1612	1611	1578	1620	1656	1629	1566
NET CHANGE	<b>-95</b>	-37	-65	-70	+1	+33	-42	-38	+27	+63	-4

-Program amended in 2013

-FY 2019 had the lowest participation in 10 years. FY 2019 saw the greatest amount of attrition in 10 years. There has been a 17% decline in participation since FY 2015.

-The addition of the \$75,100-90,000 bracket would return the program to the levels of participation that existed in 2008 through 2016. Note that many of those years (2010, 2011, 2012, 2014, 2015) EXCEEDED this number of participation.

- 3) Much of the attrition is due to EXCESS INCOME
  - a. 51 seniors who were participants in 2017 were kicked out of the program in 2018, because they exceeded the income limit
  - b. 3 seniors who were new applicants in 2018 were barred from the program, because they exceeded the income limit
  - c. This correlates to economic data showing that more seniors are retiring later in life (due to economic necessity); more seniors are struggling under higher medical costs and other higher costs of living; and the minimum distribution requirement at 70 ½ likely pushes many out of the program, when these seniors have no ability to reject this distribution.
- 4) Past tax relief committees have identified the drop in participation as a problem to correct

- a. Past tax relief committee proposed to raise the income level by \$6,500 in September 2017 [would've moved the limit to \$78,000 and then would've increased from COLA this year to approximately \$80,000]
- b. Failed in L&A due to a failure to provide cost analysis

5) Comps

	US	CT	Fairfield	Easton	Newtown	Redding	Ridgefield	Wilton
Householder median income	\$60K	\$74K	\$139K	\$132K	\$124K	\$149K	\$162K	\$191K
Max income		\$43K	\$75K	\$85K	\$70K	NONE	NONE	\$81K

Note that NY State Enhanced STAR (School Tax Relief) Program entitles all NY State seniors with incomes up to \$86,300 to credits on school district taxes, on a sliding scale; NY towns also offer additional local exemptions. The average benefit is \$1,400. Approximately 650,000 senior in NY receive this STAR credit for school taxes.

- 6) The average income of those disallowed due to EXCESS INCOME was \$97,000.
- 7) Applying the affordable housing formula to Fairfield, those earning up to \$97,000 would be eligible for affordable housing.

CREDIT PROGRAM TAX CREDIT % AND BENEFIT CAPS

Income	% Credit Current	% Credit Proposed	Current Cap	Proposed Cap
75,100	15%	17%	1,400	1,900
54,500	25%	28%	2,000	2,500
46,600	33%	36%	2,700	3,200
37,900	42%	46%	3,500	4,000
31,700	50%	55%	3,700	4,200
25,700	60%	66%	4,500	5,000
18,100	67%	75%	5,000	5,500

- 1) Benefits are not increased by COLA annually and so have not kept pace with cost of living increases.
- 2) The committee has sought to increase benefits for all income brackets, as well as increase the amount of low-income participants receiving the maximum allowable benefits



Rounded Summary of Average Benefits:

Incomes	# in category	Current Average benefit	<b>Proposed Average benefit</b>	Difference	Current # at 25% minimum	<b>Proposed # at 25% minimum</b>
75,100-90,000	185	\$0	<b>\$1,100</b>	+1,100	0	0
54,500-75,100	296	\$1,200	<b>\$1,400</b>	+200	0	0
46,600-54,500	159	\$1,700	<b>\$2,000</b>	+300	0	0
37,900-46,600	192	\$2,300	<b>\$2,600</b>	+300	0	0
31,700-37,900	185	\$2,900	<b>\$3,200</b>	+300	1	1
25,700-31,700	180	\$3,200	<b>\$3,600</b>	+400	1	1
18,100-25,700	210	\$3,700	<b>\$4,000</b>	+300	28	116
0-18,100	139	\$3,800	<b>\$4,000</b>	+200	89	103
Total					119	<b>221*</b>

Total Current Expenditure: \$3.5 million

Total Proposed Expenditure: \$4 million

\* 102 additional participants in the lowest brackets would receive max benefits [“25% minimum” refers to the requirement that all participants pay at least 25% of their tax bill; this minimum includes both benefits from the state and local relief, which means that those in the lower income brackets with lower assessed home values are generally ALREADY receiving the max amount of benefits permissible under the law. **Our changes would increase the number of participants receiving max benefits in the lowest income brackets by 87%, reaching more of those with higher assessed home values.**]

Possible changes to caps for lower income brackets to increase avg benefits for these brackets:

Income	Cap on benefits	Avg benefit	Additional cost	# at 25% min
\$18,100-25,700	\$5,300	\$4,100	\$17,000	120
\$0-18,100	NO CAP	\$4,400	\$62,000	131
Total				251*

Total expenditure would be: \$4.1 million

\* 32 additional participants in the lowest income brackets would receive max benefits, for an additional revenue loss of \$79,000

Reduction of total cap on tax relief from 2.5% of total real property tax levied to 1.6%

- 1) Safety measure to ensure that these revisions do not produce greater budget impact than expected
- 2) Recommended by Bob Mayer
- 3) Current 2.5% cap = \$6.5 million; Proposed 1.6% cap = \$4.186 million
- 4) Last year, \$3.638 million was budgeted for senior tax relief
  - a. With cap, relief will not exceed \$4.186 million
  - b. \$549,000 increase from last year's budget
  - c. .22% tax increase
  - d. Mill rate would go from 26.36 to 26.42
- 5) In 2015 the town budgeted \$4.255 million for senior tax relief
- 6) In 2016 and 2017 the town budgeted \$4.183 million for senior tax relief
- 7) The committee is merely asking that we return relief to those levels

Justification for Revisions:

- 1) We have found deficiencies:
  - a. Administrative burdens
  - b. Opacity, complexity and potential abuse/inequity
  - c. Participation declines, which means less and less seniors are receiving relief—300 less seniors TODAY receive help from the town than in 2011
  - d. Failure of relief to keep in line with cost of living, with the changes in the SALT deduction hitting this year and likely to exacerbate this problem
- 2) Comparative analysis with other towns supports revision
  - a. Redding, Ridgefield, Easton and Wilton all extend relief programs to seniors with higher income than us
  - b. Newtown and Redding both spend more on senior tax relief than us
  - c. Redding and Ridgefield have much higher participation rates
- 3) Demographic analysis supports revision
  - a. We are the only town studied in this area that has experienced a decline in the percentage of seniors since 1990. In 1990, seniors were 17% of the population; today, they are only 15% of the population. Every other town besides us has had the opposite trend: Darien, Easton, Farmington, Glastonbury, Greenwich, New Canaan, Newtown, Redding, Ridgefield, Trumbull, Weston, Westport and Wilton ALL have MORE seniors as a percentage of their populations today than they did 20 years ago.
  - b. Interestingly, the 2 towns that spent the highest percentage of their budgets on senior tax relief have a correspondingly higher retention rate for seniors. Newtown, with 1.31% of its budget for senior tax relief, and Redding, with 3.5% of its budget, have both experienced the greatest growth in their senior populations—each have nearly doubled since 2000.
  - c. Redding officials viewed “keeping seniors in town” as a “major benefit” for the town as a whole, and to that end, established a new relief program for all of its seniors with NO INCOME LIMIT. The avg benefit in Redding last year was \$2,500. Redding now has the highest percentage of seniors of any town studied by the

committee. Redding purposefully invested in its senior tax relief program, and it seems to have been successful.

- 4) The economics of losing a senior and potentially gaining a family supports investing in relief programs for seniors
  - a. Seniors use less town services than families.
  - b. Each child attending public school cost the town \$17,000 to educate
  - c. When a senior leaves Fairfield, there is a 70% likelihood that a family will move in, causing educational costs to increase for the town
  - d. FSA estimates the cost of losing a senior household to be \$10,000/yr
  - e. Investment in our relief programs and our seniors is smart for the town's longterm health
- 5) Taxes cause exit, so the corollary, RELIEF, should effect retention

THE BOTTOM LINE IS:

We need to address the declining participation in our relief programs. We have not acted on this clear need to improve our programs for far too many years. We need to act before we lose more of our seniors, and jeopardize the town's long-term sustainability.

The kind of analysis that FT is asking that the committee provide would take several years. We don't have that time to waste. By the time it takes to do that analysis, many seniors will have already left; and it will have been a decade of stasis on this important issue—this important investment.

## QTAV SUMMARY

QTAV—Qualifying Total Asset Value—not to exceed \$650K (which EXCLUDES value of home)

Why is the committee proposing to eliminate QTAV?

- 1) Tax Assessor recommended elimination of QTAV in August 2017
  - a. Overly complex
  - b. Difficult to ascertain an applicant's total assets
  - c. Definitional problems resulting both in lack of transparency and inequities
  - d. CONCLUDED THAT QTAV HAD NO LIMITING EFFECT ON THE PROGRAM, as only 4 people were disallowed for excess assets, out of 1343 (0.3%)
- 2) 3 other prior tax relief committees have flagged QTAV and problems with defining assets and applying the test equitably
- 3) The majority of other towns in CT do NOT use asset tests
- 4) Concerns related to inequities in applying the asset test would require auditing
- 5) Assessor's office, which performs many other duties for the town, is not in a position to investigate and verify 1500 applicants' asset values

## ASSESSMENT LIMIT

Limits participation based on the assessment value of applicants' homes.

- 1) Simple to administer, which makes it more efficient
- 2) More transparent, which will likely make it easier to apply
- 3) Our proposal: \$750,000 assessment limit
  - a. Translates to \$1,071,428 in appraised value
  - b. Would grandfather 17 current participants

5 other towns use assessment limits: Darien, Greenwich, New Canaan, Newtown and Weston

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**From:** [Karen Wackerman](#)  
**To:** [Iacono, Pamela](#)  
**Cc:** [Browne, Betsy](#); [DeWitt, Christopher](#)  
**Subject:** Re: Senior and Disabled Tax Relief Report Information  
**Date:** Monday, February 8, 2021 4:43:49 PM  
**Attachments:** [S&DTR Meeting Proposed Changes for 2.3.21 meeting passed redlined.docx](#)

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To the RTM:

As you might expect, there is much more to the story than Representative Iacono relates.

While Mr. DeWitt highlighted the small portion of language in the L&A approved version that you can see in what Representative Iacono attached, you can also see that he did not include any comment explaining why that particular language was highlighted. I asked Mr. DeWitt for permission to delete the highlighting because it suggested that the highlighted language was the only language changed and I believed it was confusing and misleading to both the RTM and the public. However, I never got a response to my specific question. In order to finalize the materials that had to be sent to the RTM today, I deleted the highlighting. Every other part of Mr. DeWitt's memo that is in your materials is exactly as he submitted it to me.

I attach a redlined version of what L&A voted to recommend to the RTM, comparing the approved version to what the BOF sent to us. As you can see from the redline, there are many changes, including another change that Rep. Iacono called "substantive" during the L&A meeting (the requirement that the BOF committee have no more than two members of the same party) but which was not highlighted in Mr. DeWitt's version.

I strongly suggest that if you are interested in this matter you listen to the recorded L&A meeting to hear the full discussion.

As moderator, I will object to and exclude or correct misleading materials from the backup for meetings, as I did today. I often discuss materials submitted by town staff if I have a question or correction so that we can ensure all materials are accurate, and there is always a productive give-and-take, which is what I expected in this case.

Betsy, please include this email and Representative Iacono's in the materials for the meeting, as I feel it is inappropriate for these matters to be discussed in emails and not in the RTM meeting. I suggest that any further discussion be done during the RTM meeting when the public can listen.

Karen

Karen  
Karen Wackerman  
RTM Moderator  
RTM District 7 Representative  
203-984-1673

On Mon, Feb 8, 2021 at 4:14 PM Pamela Iacono <[pamelaiacono4fairfield@gmail.com](mailto:pamelaiacono4fairfield@gmail.com)> wrote:

| Dear RTM Members

Last week L&A met to hear the recommendations from the BOF regarding Senior and Disabled Tax Relief. The Assessor and many elected officials spent a great deal of time putting this proposal together for your consideration.

At our committee meeting on February 10, L&A took up language changes to the "review committee for tax relief" portion of the ordinance (last page of the document). Mr. Dewitt, who chaired the BOF tax relief committee, presented changes to this section that were unanimously approved by the Board of Finance. L&A then discussed the recommendations, and voted to make substantive and non-substantive changes to the recommendation that came from the BOF. The non-substantive changes were made to maintain continuity, these were all redlined in the back up documents. The substantive change was to add in language that the Board of Finance discussed at their meeting, but ultimately did not adopt, this was highlighted in yellow in the original documents that Mr. Dewitt sent over to be included in our back up materials. This "redline" and "highlight" were just a means of differentiating recommendations.

After speaking with Jeff Steele, we think you all need to know the documents you received in your back up materials were not the originals sent by Chris DeWitt. Instead, they are a new version edited by the Moderator to remove the yellow highlight because as she stated in an email to Mr. Dewitt and myself, she thought that Mr. Dewitt was highlighting something he "didn't like." That is simply not true. All Mr. Dewitt was doing was pointing out that the highlighted language was the part that was discussed and rejected by BOF and then added in by L&A. The redline portion wasn't discussed by the BOF, but was changed for continuity's sake by L&A. For transparency, shouldn't all RTM members know that?? Remember, this motion that is before us is a recommendation from the Board of Finance. If you don't clearly differentiate what is a recommendation from your own Board and that of the L&A committee how is that fair to the Body you are representing?

This is a unique situation in that we are receiving recommendations to change an ordinance from the Board of Finance, rather than our traditional sponsors. Navigating the procedures here have been sticky due to that uniqueness. Regardless, presenters ought not have their back up materials subject to Moderator edits.

In the interest of presenting everything in an open light, we felt it important to point this all out for the record.

Sincerely,

Pamela Iacono  
RTM Republican Caucus Leader

Jeff Steele  
RTM Deputy Republican Caucus Leader

## **SENIOR AND DISABLED TAX RELIEF**

**§ 95-7** Enactment of tax relief; purpose; effective date.

The Town of Fairfield hereby enacts a tax relief program for elderly homeowners or permanently and totally disabled homeowners pursuant to Section 12-129n of the Connecticut General Statutes for eligible residents of the Town of Fairfield on the terms and conditions provided herein. This article is enacted for the purpose of assisting elderly or permanently disabled homeowners with a portion of the costs of property taxation. This program shall become effective for the assessment year commencing October 1, 2012.

**§ 95-8** Conditions for eligibility.

A. Any person who owns real property in the Town of Fairfield or is liable for payment of taxes thereon pursuant to Section 12-48 of the Connecticut General Statutes and who occupies said real property as a residence and fulfills the following eligibility requirements shall be entitled to tax relief on the Grand List immediately preceding the application period provided for in § 95-9 below. The reference to "person" pursuant to this subsection shall hereinafter mean either "applicant" or "recipient."

B. After the applicant's claim has been filed and approved, such applicant shall be required to file such an application biannually. All persons receiving Town tax relief under the article on the October 1, 2011, Grand List shall refile for such tax relief for October 1, 2012, and biennially thereafter based on the year of the initial claim. If a tax payer's initial year of filing was for an odd-numbered grand list year, refiling will occur for an odd-numbered Grand List year. If a tax payer's initial year of filing was for an even-numbered Grand List year, refiling will occur for an even-numbered grand list year."

C. The applicant shall be entitled to tax relief if all the following conditions are met:

(1) Such applicant (or a spouse domiciled with such applicant) has attained age 65 or over at the end of the preceding calendar year or is 60 years of age or over and the surviving spouse of a taxpayer qualified for tax relief under this program at the time of his or her death; or has not attained the age of 65 years and is eligible in accordance with the federal regulations to receive permanent total disability benefits under social security or has not been engaged in employment covered by social security and accordingly has not qualified for benefits thereunder, but has qualified for permanent total disability benefits under any federal, state or local government retirement or disability plan, including the Railroad Retirement Act and any teacher's retirement plan in which requirements with respect to qualifications for such permanent total disability benefits are comparable to such requirements under social security.

(2) Such applicant shall have been a taxpayer of the Town of Fairfield and have paid taxes for at least one year as of October 1 of the current Grand List year.

[Amended 5-29-2018]

(3) The property for which the benefit is claimed is the legal residence of such applicant and is occupied for than 183 days of each year by such applicant.

[Amended 5-29-2018]

(4) Such applicant(s) shall have applied for property tax relief under any state statutes applicable to persons 65 and over and the permanently and totally disabled for which he or she is eligible. If such

applicant has not applied for tax relief under any state statutes because he or she is not eligible, he or she shall so certify by filing on a form acceptable to the Assessor an affidavit attesting to his or her inability.

(5) Such persons shall have individually, if unmarried, or jointly, if married, qualifying income in an amount not to exceed limits described below for each program for the tax year ending immediately preceding the application for tax relief benefits. "Qualifying income" is defined as adjusted gross income, as defined in the Internal Revenue Code of 1986, as may be amended from time to time, plus the nontaxable portion of any social security benefits, railroad retirement benefits, any tax shelter losses, income from other tax-exempt retirements and annuity sources and income from tax-exempt bonds and any other income not includable in adjusted gross income. Unreimbursed gross medical and dental expenses shall be deducted from income in calculating the applicant's Qualifying Income, as long as such unreimbursed gross medical and dental expenses are included on the applicant's federal income tax return of the calendar year immediately preceding the year of application as an itemized deduction and qualify as a medical deduction under Section 213(a) of the Internal Revenue Code of 1986, as may be amended.

(6) Such person shall have applied or reapplied in person to the Assessor for the tax relief during the application period established in § 95-9 below.

[Amended 5-29-2018]

(7) Benefits granted under this article shall be prorated by the office of the Assessor in the event of the sale or transfer of the affected real estate or the death of the applicant and the surviving spouse, if applicable.

(8) [1]Any application and spouse who qualify for property tax relief under this article shall have a qualifying total asset value (QTAV) not exceeding \$650,000. Qualifying total asset value shall consist of any and all assets of the applicant and spouse as of the date of application but shall specifically exclude the value of the applicant's primary legal residence and all tangible personal property contained therein. Each applicant to whom QTAV applies shall make a sworn statement in a form satisfactory to the Assessor that such applicant's QTAV does not exceed \$650,000.

*[1] Editor's Note: Former Subsection C(8), which stated that taxpayers shall not be delinquent in payment of real property, personal, or motor vehicle taxes, sewer use charges, or sewer assessments for any period extending back more than one year immediately preceding the date of their application, was repealed 5-29-2018. This ordinance also renumbered former Subsection C(9) as Subsection C(8).*

D. A married homeowner whose spouse is a resident of a health-care facility or nursing home in Connecticut that is receiving payment related to such spouse under Title XIX (Medicaid) need not declare the spouse's social security income. Proof that the spouse is in a facility must be provided, including the period of time said spouse was in the facility, the time that Title XIX commenced, and the name and address of the facility. The statement of proof must be on the facility's letterhead and signed by the administrator or other official of the facility.

**§ 95-9 Application.**

***[Amended 5-29-2018]***

In order to be entitled to the tax relief provided herein, an application must be filed with the Assessor not earlier than February 1 and not later than May 15 preceding the fiscal year in which the tax is payable.

A. Any eligible taxpayer, or his/her authorized agent, shall file applications for tax relief and tax deferral under this chapter with the Town of Fairfield Assessor, any time from the first of February to the 15th day of May, prior to the commencement of the tax year for which tax relief is claimed, on a form or forms prescribed and furnished by the Town of Fairfield. In making such application, the taxpayer shall present to the Assessor, in substantiation of his/her application, a copy of his/her federal income tax return for the calendar year immediately preceding the year of application, a copy of the Social Security Act Administration Form 1099, or, if not required to file a return, such other evidence of qualifying income which the Assessor may reasonably require to establish compliance with the income qualifications provided in § 95-15 of this article. The applicant, or his/her authorized agent, shall sign a sworn affidavit in the presence of the Assessor affirming the accuracy of the statements in the application.

B. When the Assessor is satisfied that the applying taxpayer qualifies under this article, he/she shall compute the amount of such tax relief and tax deferral and cause certificates of tax credit and tax deferral to be issued in such form as to permit the Tax Collector to reduce the amount of tax levied against the taxpayer and make proper record thereof, and a copy thereof shall be delivered to the applicant. Neither the Assessor nor the Tax Collector shall unreasonably withhold the issuance of such a tax credit and tax deferral to a properly qualifying taxpayer. The tax credit shall be applied to the tax payments.

C. Affidavits or applications or other documents presented in support of the application for tax relief or tax deferral shall not be open for public inspection and shall not be disclosed except in connection with claims of fraud.

D. An eligible taxpayer may make his/her application for tax relief or tax deferral to the Assessor up until August 15th of the claim year if approved for extension by the Assessor. The Assessor may grant such extension in the case of extenuating circumstance due to illness or incapacitation as evidenced by a [physician's] certificate signed by a physician or an advanced practice registered nurse, or if the Assessor determines there is good cause for doing so. Reference Public Act 12-197 amending 12-170w of the Connecticut General Statutes.

**§ 95-10** Amount of tax relief per person limited.

***[Amended 5-29-2018]***

No property tax relief provided for any person shall exceed in the aggregate 75% of the tax which would, except for the benefits provided by state statutes and the program(s), be laid against such person.

**§ 95-11** Amount of relief granted through program limited.

The total of all relief granted under the provisions of these programs shall not exceed an amount equal to 2.5% of the total real property tax levied in Fairfield in the preceding fiscal year. The total amount

that can be deferred under § 95-15B is limited to a maximum of \$500,000 in any tax year. In the event that either foregoing limitation on relief is reached, relief shall be prorated among qualified applicants.

**§ 95-12** Relief per parcel of property limited to eligible persons.

***[Amended 5-29-2018]***

Only one tax relief benefit shall be allowed for each parcel of real property eligible for tax relief under the programs. In the event that title to real property is recorded in the name of the taxpayer or his or her spouse who are eligible for tax relief and any other person or persons, the tax relief under the programs shall be prorated to allow a tax relief benefit equivalent to the fractional share in the property of such taxpayer or spouse, and the person or persons not eligible shall not receive any tax relief.

**§ 95-13** Effect on other benefits.

***[Amended 5-29-2018]***

The tax relief provided to any person under the programs shall not disqualify such person with respect to any benefits for which such person is eligible under any state statute, and any tax relief provided under the article shall be in addition to any such benefits.

**§ 95-14** Partial waiver of lien rights.

The Town of Fairfield hereby waives any lien rights given to it by Section 12-129n of the Connecticut General Statutes with respect to the tax freeze and tax credit programs but will exercise such rights as provided below with respect to the tax deferral program.

**§ 95-15** Tax relief programs.

An applicant may not apply, in any assessment year, for more than one of the following Town tax relief programs:

A. Tax freeze. Any taxpayer meeting the eligibility requirements of § 95-8 and having qualifying income not exceeding \$50,600 may elect to apply for a freeze under which such taxpayer shall pay the gross tax levied on applicable property, calculated for the first year the application is granted (the "freeze amount") and shall be entitled to continue to pay no more than the freeze amount for each subsequent year in which the taxpayer, or his surviving spouse, continues to meet such qualifications, subject to the following:

- (1) In the event that the applicant shall make improvements to his property resulting in an increase in his assessment, an amount calculated by multiplying the increase in the taxpayer's assessment attributable to the improvement by the mill rate in effect in the year such reassessment takes place shall be added to the freeze amount then applicable to obtain a revised freeze amount which will be the freeze amount for subsequent assessment years;
- (2) The applicant or his or her spouse must be at least 65 years of age at the time of such application;
- (3) Relief under this tax freeze is limited to not more than six consecutive years (not including the initial year that is used as the year to determine the freeze amount). Should the applicant choose to apply for the tax deferral program, described below, in the year following the last year of tax freeze eligibility, the freeze amount shall be used as the deferral base under that program;

(4) An applicant and/or his or her spouse may only receive tax relief under the tax freeze program once during his or her life with an individual also being deemed to have received such tax relief under the tax freeze program if their spouse received such benefits while they were married;

(5) The qualifying income threshold of \$50,600 for the tax freeze program indicated in § 95-15A above shall be adjusted in the same manner as described in § 95-15C(2) with respect to the tax credit program; and

(6) If a decrease in the mill rate lowers the normal tax bill below the original frozen tax level, the applicant will pay the normal tax. When the normal tax bill exceeds the original frozen tax bill, the applicant will pay his original frozen tax bill. The counting of the six-year period specified in § 95-15A(3) shall be suspended during the period in which the applicant pays the normal tax.

B. Tax deferral. Any taxpayer age 75 or older at the end of the preceding calendar year and meeting the eligibility requirements of § 95-8 and having qualifying income not exceeding \$80,000 may elect to apply for a deferral of up to 50% of the gross tax levied on applicable property each year in which the taxpayer, or his surviving spouse, continues to meet such eligibility requirements, subject to the following:

(1) The recipient shall enter into a written agreement with the Town providing for reimbursement, which shall be recorded in the land records of the Town and shall constitute a lien on the property payable upon death or conveyance.

(2) All deferral benefits plus interest shall be reimbursed to the Town:

a) one year after the recipient's death, unless the recipient's surviving spouse applies for benefits under this program and also qualifies under [§ 95-8](#);

b) Upon conveyance of the real property subject to taxation; or

c) Upon the property no longer being the recipient's principal residence.

(3) All benefits shall be subject to an interest charge at the greater of the annual percentage rate of 3% or the rate on ten-year United States Treasury Notes. The rate for the purposes of this subsection shall be set by the Chief Fiscal Officer of the Town of Fairfield on January 31 in each calendar year or, if such day is a day on which the fiscal office of the Town of Fairfield is not open, on the next prior day on which it is open. Such rate shall be effective for the following year. Such interest shall be simple interest, not compounded, and shall accrue from the date of deferral until the date of repayment.

(4) Total deferments, including accrued interest, for all years shall not exceed 70% of the most recent assessed value of the real property.

(5) The qualifying income threshold of \$80,000 for the tax deferral program indicated in § 95-15B above shall be adjusted in the same manner as described in § 95-15C(2) with respect to the tax credit program.

(6) If a decrease in the mill rate lowers the normal tax bill below the original deferral base, the applicant will pay the normal tax. When the normal tax bill exceeds the original deferral base, the applicant will pay the original deferral base.



(7) Taxpayers between the age 65 and 75 who had participated in the tax deferral option as of the 2012 Grand List may reapply for their original deferral base (deferring tax above that base), provided their qualifying income for the preceding year did not exceed \$80,000.

#### C. Tax credit.

(1) Any applicant meeting the eligibility requirements of § 95-8 and having qualifying income shown in the table below, adjusted annually as provided in Subsection C(2) below, shall be entitled to a tax credit of up to a maximum (as limited by § 95-10) provided in the following table, effective for the assessment year beginning October 1, ~~2012~~2019, and for each assessment year thereafter:

Qualifying Income <del>(as of 2012)</del> <u>(as of 2019)</u>			
Over	To	Tax Credit (percentage of tax due)	Cap (not to exceed)
\$0	<del>\$16,700</del> <u>\$18,600</u>	<del>67</del> <u>75</u> %	<del>\$5,000</del> <u>\$7,500</u>
<del>\$16,701</del> <u>\$18,601</u>	<del>\$23,900</del> <u>\$25,500</u>	<del>60</del> <u>65</u> %	<del>\$4,500</del> <u>\$6,500</u>
<del>\$23,901</del> <u>\$26,501</u>	<del>\$29,500</del> <u>\$32,700</u>	<del>50</del> <u>55</u> %	<del>\$3,700</del> <u>\$5,500</u>
<del>\$29,501</del> <u>\$32,701</u>	<del>\$35,300</del> <u>\$39,000</u>	<del>42</del> <u>45</u> %	<del>\$3,500</del> <u>\$4,500</u>
<del>\$35,301</del> <u>\$39,301</u>	<del>\$43,400</del> <u>\$48,000</u>	<del>33</del> <u>35</u> %	<del>\$2,700</del> <u>\$3,500</u>
<del>\$43,401</del> <u>\$48,001</u>	<del>\$50,600</del> <u>\$56,000</u>	25%	<del>\$2,000</del> <u>\$2,500</u>
<del>\$50,601</del> <u>\$56,001</u>	<del>\$70,000</del> <u>\$77,300</u>	15%	<del>\$1,400</del> <u>\$1,500</u>

*For prior credit option participants, tax credit will not be less than calculated for 2012/2013, based upon 2012/2013 qualification levels.*

(2) The amounts of qualifying income shown in the above table shall be adjusted annually in a uniform manner to reflect the annual inflation adjustment in social security income, with each adjustment of qualifying income determined to the nearest \$100. Each such adjustment shall be prepared by the Secretary of the Office of Policy and Management, State of Connecticut, in relation to the annual inflation adjustment in social security, if any, becoming effective at any time during the twelve-month period immediately preceding the first of October of each year, and shall be the amount of such adjustment which is distributed to the Assessor as of December 31 next following. Adjustments for any bracket of qualifying income not included in the adjustments made by the Secretary of the Office of Policy and Management shall be made by the Assessor by applying the same percentage used by the Secretary of the Office of Policy and Management in making its adjustments and with each adjustment of qualifying income determined to the nearest \$100.

#### § 95-15.1 Report by Assessor.

The Assessor shall report to the RTM ~~and the Board of Finance~~ every June on the tax relief program established under Article III of Chapter 95.

#### § 95-15.2 Severability.

Commented [DC1]: Updated date

Commented [DC2]: Clarification of date when data is relevant

Commented [DC3]: Added BOF review

In the event that any provision of §§ 95-7 through 95-15 of the Fairfield Town Code is found to be unlawful, only such unlawful provision shall be ineffective, and all other provisions shall remain in full force and effect.

**§ 95-15.3 When effective.**

The amendments to §§ 95-7 through 95-15.2 shall become effective immediately after the period for subjecting them to a referendum has expired.

**§ 95-15.4 S&DTR Review Committee Initiation**

When either the Assessor, the Board of Finance or the Representative Town Meeting (in each case by majority vote) believes revisions should be made to Article III of Chapter 95 of the Town Code, Tax Relief for Elderly and Disabled Homeowners ("Chapter 95, Article III"), he/she or it shall make a request for the Board of Finance (BOF) to review the same. The BOF shall create a three-person BOF Chapter 95, Article III Review Committee, no more than two members of which shall be from the same political party, and make a recommendation to the entire BOF of whether any revisions should be made, and if so, what recommendations should be made. If the BOF determines that changes are necessary to Chapter 95, Article III, a joint Senior & Disabled Tax Relief Committee (S&DTRC) shall be formed and tasked with recommending changes to the BOF. The joint S&DTRC will consist of the three members of the BOF Chapter 95, Article III review committee and two members of the Representative Town Meeting (RTM). The two RTM members shall be appointed by the Special Legislative Management Committee ("Committee on Committees") of the RTM and may not be from the same political party. The BOF will review the recommended changes proposed by the S&DTRC and vote on a recommendation of changes to Chapter 95, Tax Relief for Elderly and Disabled Homeowners. The recommendation approved by the BOF will then be sent to the RTM for approval pursuant to its approval process.

**~~§ 95-15.4 RTM Review Committee.~~**

At its first regularly scheduled meeting of each calendar year, the Representative Town Meeting shall convene a special committee to review Article III of Chapter 95, Tax Relief for Elderly and Disabled Homeowners.

For February 2021 meeting vote on Senior and Disabled Tax Relief ordinance:

Applicable Language in Connecticut General Statutes:

**Sec. 12-129n. Optional municipal property tax relief program for certain homeowners age sixty-five or over or permanently and totally disabled.**

\*\*\*\*

(b) .... After the initial approval of such property tax relief by the legislative body of such municipality, ***such plan may be amended from time to time by vote of its legislative body on recommendation of its board of finance or equivalent body*** without compliance with the requirements of this subsection applicable to such initial approval.

**From:** [Karen Wackerman](#)  
**To:** [Iacono, Pamela](#)  
**Cc:** [Browne, Betsy](#); [DeWitt, Christopher](#)  
**Subject:** Re: Senior and Disabled Tax Relief Report Information  
**Date:** Monday, February 8, 2021 4:43:49 PM  
**Attachments:** [S&DTR Meeting Proposed Changes for 2.3.21 meeting passed redlined.docx](#)

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To the RTM:

As you might expect, there is much more to the story than Representative Iacono relates.

While Mr. DeWitt highlighted the small portion of language in the L&A approved version that you can see in what Representative Iacono attached, you can also see that he did not include any comment explaining why that particular language was highlighted. I asked Mr. DeWitt for permission to delete the highlighting because it suggested that the highlighted language was the only language changed and I believed it was confusing and misleading to both the RTM and the public. However, I never got a response to my specific question. In order to finalize the materials that had to be sent to the RTM today, I deleted the highlighting. Every other part of Mr. DeWitt's memo that is in your materials is exactly as he submitted it to me.

I attach a redlined version of what L&A voted to recommend to the RTM, comparing the approved version to what the BOF sent to us. As you can see from the redline, there are many changes, including another change that Rep. Iacono called "substantive" during the L&A meeting (the requirement that the BOF committee have no more than two members of the same party) but which was not highlighted in Mr. DeWitt's version.

I strongly suggest that if you are interested in this matter you listen to the recorded L&A meeting to hear the full discussion.

As moderator, I will object to and exclude or correct misleading materials from the backup for meetings, as I did today. I often discuss materials submitted by town staff if I have a question or correction so that we can ensure all materials are accurate, and there is always a productive give-and-take, which is what I expected in this case.

Betsy, please include this email and Representative Iacono's in the materials for the meeting, as I feel it is inappropriate for these matters to be discussed in emails and not in the RTM meeting. I suggest that any further discussion be done during the RTM meeting when the public can listen.

Karen

Karen  
Karen Wackerman  
RTM Moderator  
RTM District 7 Representative  
203-984-1673

On Mon, Feb 8, 2021 at 4:14 PM Pamela Iacono <[pamelaiacono4fairfield@gmail.com](mailto:pamelaiacono4fairfield@gmail.com)> wrote:

| Dear RTM Members

Last week L&A met to hear the recommendations from the BOF regarding Senior and Disabled Tax Relief. The Assessor and many elected officials spent a great deal of time putting this proposal together for your consideration.

At our committee meeting on February 10, L&A took up language changes to the "review committee for tax relief" portion of the ordinance (last page of the document). Mr. Dewitt, who chaired the BOF tax relief committee, presented changes to this section that were unanimously approved by the Board of Finance. L&A then discussed the recommendations, and voted to make substantive and non-substantive changes to the recommendation that came from the BOF. The non-substantive changes were made to maintain continuity, these were all redlined in the back up documents. The substantive change was to add in language that the Board of Finance discussed at their meeting, but ultimately did not adopt, this was highlighted in yellow in the original documents that Mr. Dewitt sent over to be included in our back up materials. This "redline" and "highlight" were just a means of differentiating recommendations.

After speaking with Jeff Steele, we think you all need to know the documents you received in your back up materials were not the originals sent by Chris DeWitt. Instead, they are a new version edited by the Moderator to remove the yellow highlight because as she stated in an email to Mr. Dewitt and myself, she thought that Mr. Dewitt was highlighting something he "didn't like." That is simply not true. All Mr. Dewitt was doing was pointing out that the highlighted language was the part that was discussed and rejected by BOF and then added in by L&A. The redline portion wasn't discussed by the BOF, but was changed for continuity's sake by L&A. For transparency, shouldn't all RTM members know that?? Remember, this motion that is before us is a recommendation from the Board of Finance. If you don't clearly differentiate what is a recommendation from your own Board and that of the L&A committee how is that fair to the Body you are representing?

This is a unique situation in that we are receiving recommendations to change an ordinance from the Board of Finance, rather than our traditional sponsors. Navigating the procedures here have been sticky due to that uniqueness. Regardless, presenters ought not have their back up materials subject to Moderator edits.

In the interest of presenting everything in an open light, we felt it important to point this all out for the record.

Sincerely,

Pamela Iacono  
RTM Republican Caucus Leader

Jeff Steele  
RTM Deputy Republican Caucus Leader

**From:** [Karen Wackerman](#)  
**To:** [Wackerman, Karen](#)  
**Cc:** [Browne, Betsy](#)  
**Subject:** Fwd: RTM Senior & Disabled Tax Relief Committee's proposed revisions to Tax Relief for Elderly and Disabled Homeowners--  
**Date:** Tuesday, February 16, 2021 4:16:57 PM  
**Attachments:** [Sr Tax Summary for RTM Presentation.docx](#)

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To the RTM -

See below an email from Representative Vergara providing some background about the Senior and Disabled Tax relief ordinance amendments. The presentation on the amendments will be provided next week at our RTM meeting.

I ask that the Town Clerk please add these materials to the backup for next week's meeting.

Please note that the Town Clerk sent the WebEx and dial-in instructions for the meetings last week, on February 9.

Karen  
**Karen Wackerman**  
RTM Moderator  
RTM District 7 Representative  
203-984-1673

----- Forwarded message -----

**From:** **Jill Vergara** <[jillvergara@gmail.com](mailto:jillvergara@gmail.com)>  
**Date:** Tue, Feb 16, 2021 at 11:28 AM  
**Subject:** RTM Senior & Disabled Tax Relief Committee's proposed revisions to Tax Relief for Elderly and Disabled Homeowners--  
**To:** Karen Wackerman <[karenrtm7@gmail.com](mailto:karenrtm7@gmail.com)>

Madame Moderator, I ask that the following documents be shared with the full RTM. As many know, revisions to the town's tax relief ordinance is something that has been contemplated for many years now. The RTM's Senior and Disabled Tax Relief Committee proposed changes to the tax relief ordinance in November 2018; modified its proposal in December 2018 due to eleventh hour concerns raised by the town's Finance director (Bob Mayer); and proposed further changes that would increase benefits to low income seniors in January 2019.

After realizing that the state statute requires that the Board of Finance recommend changes to the tax relief ordinance before the RTM can vote, the RTM postponed its vote in January 2019 for Board of Finance review and recommendation. Such postponement for BoF review and recommendation had been done several times in the past; and such review and recommendation had been accomplished in a month's time. (BoF review seems to have fallen out of the process with the 2012/13 revisions.)

In the ordinance's 40-year history, a BoF subcommittee has never before been convened to review the ordinance and propose changes. This history is consistent with the prescribed roles of the RTM and BoF respectively--the RTM is the sole legislative body, and having the BoF write language in any way directly conflicts with the roles established in both the State's Constitution and the Town's Charter.

I am grateful for the work that the BoF subcommittee has done on senior and disabled tax relief (after meeting 7 times from June 2019 through February 2020, their work culminated in the current recommendation). The BoF subcommittee certainly did a lot of work, but so had the RTM subcommittee, having met 20 times and conducting several public informational sessions (which

entailed work by the 5-member bipartisan committee as well as the Tax Assessor and the public) from Feb 2018 through September 2019. The RTM's Senior and Disabled Tax Relief Committee accomplished a tremendous amount: it made important administrative changes to the ordinance in May 2018 (just 3 months after its formation); it proposed changes directly addressing the Assessor's recommended changes as well as the declining participation in November 2018; and it addressed and corrected problems with the medical deduction language as well as deferral lien in August 2019. I feel compelled to acknowledge all of that work; and also note that the 3-year revision process has been fraught with inefficiencies and waste. The public interest would be best served by correcting that inefficient process.

As FSA pointed out in its recent letter, more (and continued) work is needed on this tax relief ordinance.

The following are documents providing the foundation for the RTM subcommittee's proposed revisions:

Tax Assessor recommended changes--August 2017--grounded RTM committee's proposals  
[https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/Ross\\_Murray\\_suggested\\_revisions--August\\_2017.pdf](https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/Ross_Murray_suggested_revisions--August_2017.pdf)

FSA recommended changes--September 2018--also informed RTM proposal  
<https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/FSArecommendations.pdf>

RTM Senior & Disabled Tax Relief Proposal--November 2018  
[https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/SrTaxMemo\\_updated\\_11.26.2018.pdf](https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/SrTaxMemo_updated_11.26.2018.pdf)

December 2018 revision in response to Bob Mayer's concerns  
[https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/SUPPLEMENTAL\\_Memo12.2.18.pdf](https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/SUPPLEMENTAL_Memo12.2.18.pdf)

Summary of revised RTM proposal--December 2018  
[https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/Proposed\\_Tax\\_Relief\\_Changes\\_12-4-2018.pdf](https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/Proposed_Tax_Relief_Changes_12-4-2018.pdf)

Proposed increase to tax relief for bottom income brackets--January 2019  
[https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/Average\\_benefit\\_comparison--sr\\_tax3.pdf](https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/Average_benefit_comparison--sr_tax3.pdf)

Additional summary attached (from my presentation to the RTM in January 2019)

**From:** [Karen Wackerman](#)  
**To:** [Wackerman, Karen](#)  
**Cc:** [Browne, Betsy](#)  
**Subject:** Fwd: RTM Senior & Disabled Tax Relief Committee's proposed revisions to Tax Relief for Elderly and Disabled Homeowners--  
**Date:** Tuesday, February 16, 2021 4:16:57 PM  
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Karen  
**Karen Wackerman**  
RTM Moderator  
RTM District 7 Representative  
203-984-1673

----- Forwarded message -----

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**Date:** Tue, Feb 16, 2021 at 11:28 AM  
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Madame Moderator, I ask that the following documents be shared with the full RTM. As many know, revisions to the town's tax relief ordinance is something that has been contemplated for many years now. The RTM's Senior and Disabled Tax Relief Committee proposed changes to the tax relief ordinance in November 2018; modified its proposal in December 2018 due to eleventh hour concerns raised by the town's Finance director (Bob Mayer); and proposed further changes that would increase benefits to low income seniors in January 2019.

After realizing that the state statute requires that the Board of Finance recommend changes to the tax relief ordinance before the RTM can vote, the RTM postponed its vote in January 2019 for Board of Finance review and recommendation. Such postponement for BoF review and recommendation had been done several times in the past; and such review and recommendation had been accomplished in a month's time. (BoF review seems to have fallen out of the process with the 2012/13 revisions.)

In the ordinance's 40-year history, a BoF subcommittee has never before been convened to review the ordinance and propose changes. This history is consistent with the prescribed roles of the RTM and BoF respectively--the RTM is the sole legislative body, and having the BoF write language in any way directly conflicts with the roles established in both the State's Constitution and the Town's Charter.

I am grateful for the work that the BoF subcommittee has done on senior and disabled tax relief (after meeting 7 times from June 2019 through February 2020, their work culminated in the current recommendation). The BoF subcommittee certainly did a lot of work, but so had the RTM subcommittee, having met 20 times and conducting several public informational sessions (which



entailed work by the 5-member bipartisan committee as well as the Tax Assessor and the public) from Feb 2018 through September 2019. The RTM's Senior and Disabled Tax Relief Committee accomplished a tremendous amount: it made important administrative changes to the ordinance in May 2018 (just 3 months after its formation); it proposed changes directly addressing the Assessor's recommended changes as well as the declining participation in November 2018; and it addressed and corrected problems with the medical deduction language as well as deferral lien in August 2019. I feel compelled to acknowledge all of that work; and also note that the 3-year revision process has been fraught with inefficiencies and waste. The public interest would be best served by correcting that inefficient process.

As FSA pointed out in its recent letter, more (and continued) work is needed on this tax relief ordinance.

The following are documents providing the foundation for the RTM subcommittee's proposed revisions:

Tax Assessor recommended changes--August 2017--grounded RTM committee's proposals  
[https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/Ross\\_Murray\\_suggested\\_revisions--August\\_2017.pdf](https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/Ross_Murray_suggested_revisions--August_2017.pdf)

FSA recommended changes--September 2018--also informed RTM proposal  
<https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/FSArecommendations.pdf>

RTM Senior & Disabled Tax Relief Proposal--November 2018  
[https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/SrTaxMemo\\_updated\\_11.26.2018.pdf](https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/SrTaxMemo_updated_11.26.2018.pdf)

December 2018 revision in response to Bob Mayer's concerns  
[https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/SUPPLEMENTAL\\_Memo12.2.18.pdf](https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/SUPPLEMENTAL_Memo12.2.18.pdf)

Summary of revised RTM proposal--December 2018  
[https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/Proposed\\_Tax\\_Relief\\_Changes\\_12-4-2018.pdf](https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/Proposed_Tax_Relief_Changes_12-4-2018.pdf)

Proposed increase to tax relief for bottom income brackets--January 2019  
[https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/Average\\_benefit\\_comparison--sr\\_tax3.pdf](https://www.fairfieldct.org/filestorage/79/193/35465/1065/65208/Average_benefit_comparison--sr_tax3.pdf)

Additional summary attached (from my presentation to the RTM in January 2019)

To: Members of the Representative Town Meeting

From: Chris Dewitt, Vice Chairman, Board of Finance

Date: February 2021

Subject: Senior and Disabled Tax Relief Recommendations

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For your consideration, below please find the changes unanimously recommended by the Board of Finance and subsequently put forward by the RTM Legislative and Administrative Committee. Changes are marked by redline.

The L&A Committee voted 5-3 to enact additional changes to Section 95-15.4 Review Committee Initiation that were discussed by the Board of Finance, but not adopted. Those changes are highlighted below.

#### **SENIOR AND DISABLED TAX RELIEF**

##### **§ 95-7** Enactment of tax relief; purpose; effective date.

The Town of Fairfield hereby enacts a tax relief program for elderly homeowners or permanently and totally disabled homeowners pursuant to Section 12-129n of the Connecticut General Statutes for eligible residents of the Town of Fairfield on the terms and conditions provided herein. This article is enacted for the purpose of assisting elderly or permanently disabled homeowners with a portion of the costs of property taxation. This program shall become effective for the assessment year commencing October 1, 2012.

##### **§ 95-8** Conditions for eligibility.

A. Any person who owns real property in the Town of Fairfield or is liable for payment of taxes thereon pursuant to Section 12-48 of the Connecticut General Statutes and who occupies said real property as a residence and fulfills the following eligibility requirements shall be entitled to tax relief on the Grand List immediately preceding the application period provided for in § 95-9 below. The reference to "person" pursuant to this subsection shall hereinafter mean either "applicant" or "recipient."

B. After the applicant's claim has been filed and approved, such applicant shall be required to file such an application biannually. All persons receiving Town tax relief under the article on the October 1, 2011, Grand List shall refile for such tax relief for October 1, 2012, and biennially thereafter based on the year of the initial claim. If a tax payer's initial year of filing was for an odd-numbered grand list year, refiling will occur for an odd-numbered Grand List year. If a tax payer's initial year of filing was for an even-numbered Grand List year, refiling will occur for an even-numbered grand list year."

C. The applicant shall be entitled to tax relief if all the following conditions are met:

(1) Such applicant (or a spouse domiciled with such applicant) has attained age 65 or over at the end of the preceding calendar year or is 60 years of age or over and the surviving spouse of a taxpayer qualified for tax relief under this program at the time of his or her death; or has not attained the age of 65 years and is eligible in accordance with the federal regulations to receive permanent total disability benefits under social security or has not been engaged in employment covered by social security and accordingly has not qualified for benefits thereunder, but has

qualified for permanent total disability benefits under any federal, state or local government retirement or disability plan, including the Railroad Retirement Act and any teacher's retirement plan in which requirements with respect to qualifications for such permanent total disability benefits are comparable to such requirements under social security.

(2) Such applicant shall have been a taxpayer of the Town of Fairfield and have paid taxes for at least one year as of October 1 of the current Grand List year.

[Amended 5-29-2018]

(3) The property for which the benefit is claimed is the legal residence of such applicant and is occupied for than 183 days of each year by such applicant.

[Amended 5-29-2018]

(4) Such applicant(s) shall have applied for property tax relief under any state statutes applicable to persons 65 and over and the permanently and totally disabled for which he or she is eligible. If such applicant has not applied for tax relief under any state statutes because he or she is not eligible, he or she shall so certify by filing on a form acceptable to the Assessor an affidavit attesting to his or her inability.

(5) Such persons shall have individually, if unmarried, or jointly, if married, qualifying income in an amount not to exceed limits described below for each program for the tax year ending immediately preceding the application for tax relief benefits. "Qualifying income" is defined as adjusted gross income, as defined in the Internal Revenue Code of 1986, as may be amended from time to time, plus the nontaxable portion of any social security benefits, railroad retirement benefits, any tax shelter losses, income from other tax-exempt retirements and annuity sources and income from tax-exempt bonds and any other income not includable in adjusted gross income. Unreimbursed gross medical and dental expenses shall be deducted from income in calculating the applicant's Qualifying Income, as long as such unreimbursed gross medical and dental expenses are included on the applicant's federal income tax return of the calendar year immediately preceding the year of application as an itemized deduction and qualify as a medical deduction under Section 213(a) of the Internal Revenue Code of 1986, as may be amended.

(6) Such person shall have applied or reapplied in person to the Assessor for the tax relief during the application period established in § 95-9 below.

[Amended 5-29-2018]

(7) Benefits granted under this article shall be prorated by the office of the Assessor in the event of the sale or transfer of the affected real estate or the death of the applicant and the surviving spouse, if applicable.

(8) [1]Any application and spouse who qualify for property tax relief under this article shall have a qualifying total asset value (QTAV) not exceeding \$650,000. Qualifying total asset value shall consist of any and all assets of the applicant and spouse as of the date of application but shall specifically exclude the value of the applicant's primary legal residence and all tangible personal property contained therein. Each applicant to whom QTAV applies shall make a sworn statement in a form satisfactory to the Assessor that such applicant's QTAV does not exceed \$650,000.

*[1] Editor's Note: Former Subsection C(8), which stated that taxpayers shall not be delinquent in payment of real property, personal, or motor vehicle taxes, sewer use charges, or sewer assessments for any period extending back more than one year immediately preceding the date of their application, was repealed 5-29-2018. This ordinance also renumbered former Subsection C(9) as Subsection C(8).*

D. A married homeowner whose spouse is a resident of a health-care facility or nursing home in Connecticut that is receiving payment related to such spouse under Title XIX (Medicaid) need not declare the spouse's social security income. Proof that the spouse is in a facility must be provided, including the period of time said spouse was in the facility, the time that Title XIX commenced, and the name and address of the facility. The statement of proof must be on the facility's letterhead and signed by the administrator or other official of the facility.

#### **§ 95-9 Application.**

***[Amended 5-29-2018]***

In order to be entitled to the tax relief provided herein, an application must be filed with the Assessor not earlier than February 1 and not later than May 15 preceding the fiscal year in which the tax is payable.

A. Any eligible taxpayer, or his/her authorized agent, shall file applications for tax relief and tax deferral under this chapter with the Town of Fairfield Assessor, any time from the first of February to the 15th day of May, prior to the commencement of the tax year for which tax relief is claimed, on a form or forms prescribed and furnished by the Town of Fairfield. In making such application, the taxpayer shall present to the Assessor, in substantiation of his/her application, a copy of his/her federal income tax return for the calendar year immediately preceding the year of application, a copy of the Social Security Act Administration Form 1099, or, if not required to file a return, such other evidence of qualifying income which the Assessor may reasonably require to establish compliance with the income qualifications provided in § 95-15 of this article. The applicant, or his/her authorized agent, shall sign a sworn affidavit in the presence of the Assessor affirming the accuracy of the statements in the application.

B. When the Assessor is satisfied that the applying taxpayer qualifies under this article, he/she shall compute the amount of such tax relief and tax deferral and cause certificates of tax credit and tax deferral to be issued in such form as to permit the Tax Collector to reduce the amount of tax levied against the taxpayer and make proper record thereof, and a copy thereof shall be delivered to the applicant. Neither the Assessor nor the Tax Collector shall unreasonably withhold the issuance of such a tax credit and tax deferral to a properly qualifying taxpayer. The tax credit shall be applied to the tax payments.

C. Affidavits or applications or other documents presented in support of the application for tax relief or tax deferral shall not be open for public inspection and shall not be disclosed except in connection with claims of fraud.

D. An eligible taxpayer may make his/her application for tax relief or tax deferral to the Assessor up until August 15th of the claim year if approved for extension by the Assessor. The Assessor may grant such extension in the case of extenuating circumstance due to illness or incapacitation as evidenced by a [physician's] certificate signed by a physician or an advanced practice registered nurse, or if the Assessor

determines there is good cause for doing so. Reference Public Act 12-197 amending 12-170w of the Connecticut General Statutes.

**§ 95-10** Amount of tax relief per person limited.

**[Amended 5-29-2018]**

No property tax relief provided for any person shall exceed in the aggregate 75% of the tax which would, except for the benefits provided by state statutes and the program(s), be laid against such person.

**§ 95-11** Amount of relief granted through program limited.

The total of all relief granted under the provisions of these programs shall not exceed an amount equal to 2.5% of the total real property tax levied in Fairfield in the preceding fiscal year. The total amount that can be deferred under § 95-15B is limited to a maximum of \$500,000 in any tax year. In the event that either foregoing limitation on relief is reached, relief shall be prorated among qualified applicants.

**§ 95-12** Relief per parcel of property limited to eligible persons.

**[Amended 5-29-2018]**

Only one tax relief benefit shall be allowed for each parcel of real property eligible for tax relief under the programs. In the event that title to real property is recorded in the name of the taxpayer or his or her spouse who are eligible for tax relief and any other person or persons, the tax relief under the programs shall be prorated to allow a tax relief benefit equivalent to the fractional share in the property of such taxpayer or spouse, and the person or persons not eligible shall not receive any tax relief.

**§ 95-13** Effect on other benefits.

**[Amended 5-29-2018]**

The tax relief provided to any person under the programs shall not disqualify such person with respect to any benefits for which such person is eligible under any state statute, and any tax relief provided under the article shall be in addition to any such benefits.

**§ 95-14** Partial waiver of lien rights.

The Town of Fairfield hereby waives any lien rights given to it by Section 12-129n of the Connecticut General Statutes with respect to the tax freeze and tax credit programs but will exercise such rights as provided below with respect to the tax deferral program.

**§ 95-15** Tax relief programs.

An applicant may not apply, in any assessment year, for more than one of the following Town tax relief programs:

A. Tax freeze. Any taxpayer meeting the eligibility requirements of § 95-8 and having qualifying income not exceeding \$50,600 may elect to apply for a freeze under which such taxpayer shall pay the gross tax levied on applicable property, calculated for the first year the application is granted (the "freeze amount") and shall be entitled to continue to pay no more than the freeze amount for each subsequent year in

which the taxpayer, or his surviving spouse, continues to meet such qualifications, subject to the following:

- (1) In the event that the applicant shall make improvements to his property resulting in an increase in his assessment, an amount calculated by multiplying the increase in the taxpayer's assessment attributable to the improvement by the mill rate in effect in the year such reassessment takes place shall be added to the freeze amount then applicable to obtain a revised freeze amount which will be the freeze amount for subsequent assessment years;
- (2) The applicant or his or her spouse must be at least 65 years of age at the time of such application;
- (3) Relief under this tax freeze is limited to not more than six consecutive years (not including the initial year that is used as the year to determine the freeze amount). Should the applicant choose to apply for the tax deferral program, described below, in the year following the last year of tax freeze eligibility, the freeze amount shall be used as the deferral base under that program;
- (4) An applicant and/or his or her spouse may only receive tax relief under the tax freeze program once during his or her life with an individual also being deemed to have received such tax relief under the tax freeze program if their spouse received such benefits while they were married;
- (5) The qualifying income threshold of \$50,600 for the tax freeze program indicated in § 95-15A above shall be adjusted in the same manner as described in § 95-15C(2) with respect to the tax credit program; and
- (6) If a decrease in the mill rate lowers the normal tax bill below the original frozen tax level, the applicant will pay the normal tax. When the normal tax bill exceeds the original frozen tax bill, the applicant will pay his original frozen tax bill. The counting of the six-year period specified in § 95-15A(3) shall be suspended during the period in which the applicant pays the normal tax.

B. Tax deferral. Any taxpayer age 75 or older at the end of the preceding calendar year and meeting the eligibility requirements of § 95-8 and having qualifying income not exceeding \$80,000 may elect to apply for a deferral of up to 50% of the gross tax levied on applicable property each year in which the taxpayer, or his surviving spouse, continues to meet such eligibility requirements, subject to the following:

- (1) The recipient shall enter into a written agreement with the Town providing for reimbursement, which shall be recorded in the land records of the Town and shall constitute a lien on the property payable upon death or conveyance.
- (2) All deferral benefits plus interest shall be reimbursed to the Town:
  - a) one year after the recipient's death, unless the recipient's surviving spouse applies for benefits under this program and also qualifies under § 95-8;
  - b) Upon conveyance of the real property subject to taxation; or
  - c) Upon the property no longer being the recipient's principal residence.
- (3) All benefits shall be subject to an interest charge at the greater of the annual percentage rate of 3% or the rate on ten-year United States Treasury Notes. The rate for the purposes of this

subsection shall be set by the Chief Fiscal Officer of the Town of Fairfield on January 31 in each calendar year or, if such day is a day on which the fiscal office of the Town of Fairfield is not open, on the next prior day on which it is open. Such rate shall be effective for the following year. Such interest shall be simple interest, not compounded, and shall accrue from the date of deferral until the date of repayment.

(4) Total deferments, including accrued interest, for all years shall not exceed 70% of the most recent assessed value of the real property.

(5) The qualifying income threshold of \$80,000 for the tax deferral program indicated in § 95-15B above shall be adjusted in the same manner as described in § 95-15C(2) with respect to the tax credit program.

(6) If a decrease in the mill rate lowers the normal tax bill below the original deferral base, the applicant will pay the normal tax. When the normal tax bill exceeds the original deferral base, the applicant will pay the original deferral base.

(7) Taxpayers between the age 65 and 75 who had participated in the tax deferral option as of the 2012 Grand List may reapply for their original deferral base (deferring tax above that base), provided their qualifying income for the preceding year did not exceed \$80,000.

#### C. Tax credit.

(1) Any applicant meeting the eligibility requirements of § 95-8 and having qualifying income shown in the table below, adjusted annually as provided in Subsection C(2) below, shall be entitled to a tax credit of up to a maximum (as limited by § 95-10) provided in the following table, effective for the assessment year beginning October 1, ~~2012~~2019, and for each assessment year thereafter:

Qualifying Income <del>(as of 2012)</del> <u>(as of 2019)</u>			
Over	To	Tax Credit (percentage of tax due)	Cap (not to exceed)
\$0	<del>\$16,700</del> <u>\$18,600</u>	<del>67</del> <u>75</u> %	<del>\$5,000</del> <u>\$7,500</u>
<del>\$16,701</del> <u>\$18,601</u>	<del>\$23,900</del> <u>\$25,500</u>	<del>60</del> <u>65</u> %	<del>\$4,500</del> <u>\$6,500</u>
<del>\$23,901</del> <u>\$26,501</u>	<del>\$29,500</del> <u>\$32,700</u>	<del>50</del> <u>55</u> %	<del>\$3,700</del> <u>\$5,500</u>
<del>\$29,501</del> <u>\$32,701</u>	<del>\$35,300</del> <u>\$39,000</u>	<del>42</del> <u>45</u> %	<del>\$3,500</del> <u>\$4,500</u>
<del>\$35,301</del> <u>\$39,301</u>	<del>\$43,400</del> <u>\$48,000</u>	<del>33</del> <u>35</u> %	<del>\$2,700</del> <u>\$3,500</u>
<del>\$43,401</del> <u>\$48,001</u>	<del>\$50,600</del> <u>\$56,000</u>	25%	<del>\$2,000</del> <u>\$2,500</u>
<del>\$50,601</del> <u>\$56,001</u>	<del>\$70,000</del> <u>\$77,300</u>	15%	<del>\$1,400</del> <u>\$1,500</u>

*For prior credit option participants, tax credit will not be less than calculated for 2012/2013, based upon 2012/2013 qualification levels.*

(2) The amounts of qualifying income shown in the above table shall be adjusted annually in a uniform manner to reflect the annual inflation adjustment in social security income, with each adjustment of qualifying income determined to the nearest \$100. Each such adjustment shall be prepared by the Secretary of the Office of Policy and Management, State of Connecticut, in relation to the annual inflation adjustment in social security, if any, becoming effective at any time during the twelve-month period immediately preceding the first of October of each year, and shall

**Commented [DC1]:** Updated date

**Commented [DC2]:** Clarification of date when data is relevant

be the amount of such adjustment which is distributed to the Assessor as of December 31 next following. Adjustments for any bracket of qualifying income not included in the adjustments made by the Secretary of the Office of Policy and Management shall be made by the Assessor by applying the same percentage used by the Secretary of the Office of Policy and Management in making its adjustments and with each adjustment of qualifying income determined to the nearest \$100.

**§ 95-15.1 Report by Assessor.**

The Assessor shall report to the RTM and the Board of Finance every June on the tax relief program established under Article III of Chapter 95.

**Commented [DC3]:** Added BOF review

**§ 95-15.2 Severability.**

In the event that any provision of §§ 95-7 through 95-15 of the Fairfield Town Code is found to be unlawful, only such unlawful provision shall be ineffective, and all other provisions shall remain in full force and effect.

**§ 95-15.3 When effective.**

The amendments to §§ 95-7 through 95-15.2 shall become effective immediately after the period for subjecting them to a referendum has expired.

**§ 95-15.4 S&DTR Review Committee Initiation**

**§ 95-15.4 RTM Review Committee.**

[Amended 2-23-2015; 5-29-2018]

When the Town Tax Assessor believes revisions should be made to Senior and Disabled Tax Relief Program, he/she shall make a request for the Board of Finance (BOF) to review the same. The BOF shall create a three-person Chapter 95, Tax Relief for Elderly and Disabled Homeowners Review Committee and make a recommendation to the entire BOF of whether any revisions should be made, and if so, what recommendations should be made. If the BOF determines that a change(s) are necessary to Chapter 95, Tax Relief for Elderly and Disabled Homeowners, a joint Senior & Disabled Tax Relief Committee (S&DTRC) shall be formed and tasked with recommending changes to the BOF. The joint S&DTRC will consist of the three members from the BOF review committee and two members of the Representative Town Meeting (RTM). The two RTM members shall be appointed by the Special Legislative Management Committee ("Committee on Committees") and may not be from the same political party. The BOF will review the recommended changes proposed by the S&DTRC and vote on a recommendation of changes to Chapter 95, Tax Relief for Elderly and Disabled Homeowners, to the RTM for approval pursuant to its approval process.

At its first regularly scheduled meeting in January 2020, the Representative Town Meeting shall convene a special committee to review Article III of Chapter 95, Tax Relief for Elderly and Disabled Homeowners.

**Commented [CD4]:** Approved by BOF, rejected by RTM L&A



*Changes Initiated by RTM L&A*

**§ 95-15.4 S&DTR Review Committee Initiation**

When either the Assessor, the Board of Finance or the Representative Town Meeting (in each case by majority vote) believes revisions should be made to Article III of Chapter 95 of the Town Code, Tax Relief for Elderly and Disabled Homeowners ("Chapter 95, Article III"), he/she or it shall make a request for the Board of Finance (BOF) to review the same. The BOF shall create a three-person BOF Chapter 95, Article III Review Committee, no more than two members of which shall be from the same political party, and make a recommendation to the entire BOF of whether any revisions should be made, and if so, what recommendations should be made. If the BOF determines that changes are necessary to Chapter 95, Article III, a joint Senior & Disabled Tax Relief Committee (S&DTRC) shall be formed and tasked with recommending changes to the BOF. The joint S&DTRC will consist of the three members of the BOF Chapter 95, Article III review committee and two members of the Representative Town Meeting (RTM). The two RTM members shall be appointed by the Special Legislative Management Committee ("Committee on Committees") of the RTM and may not be from the same political party. The BOF will review the recommended changes proposed by the S&DTRC and vote on a recommendation of changes to Chapter 95, Tax Relief for Elderly and Disabled Homeowners. The recommendation approved by the BOF will then be sent to the RTM for approval pursuant to its approval process.

~~**§ 95-15.4 RTM Review Committee.**~~

At its first regularly scheduled meeting of each calendar year, the Representative Town Meeting shall convene a special committee to review Article III of Chapter 95, Tax Relief for Elderly and Disabled Homeowners.

To: Members of the Representative Town Meeting

From: Chris Dewitt, Vice Chairman, Board of Finance

Date: February 2021

Subject: Senior and Disabled Tax Relief Recommendations

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For your consideration, below please find the changes unanimously recommended by the Board of Finance and subsequently put forward by the RTM Legislative and Administrative Committee. Changes are marked by redline.

The L&A Committee voted 5-3 to enact additional changes to Section 95-15.4 Review Committee Initiation that were discussed by the Board of Finance, but not adopted. Those changes are highlighted below.

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B. After the applicant's claim has been filed and approved, such applicant shall be required to file such an application biannually. All persons receiving Town tax relief under the article on the October 1, 2011, Grand List shall refile for such tax relief for October 1, 2012, and biennially thereafter based on the year of the initial claim. If a tax payer's initial year of filing was for an odd-numbered grand list year, refiling will occur for an odd-numbered Grand List year. If a tax payer's initial year of filing was for an even-numbered Grand List year, refiling will occur for an even-numbered grand list year."

C. The applicant shall be entitled to tax relief if all the following conditions are met:

(1) Such applicant (or a spouse domiciled with such applicant) has attained age 65 or over at the end of the preceding calendar year or is 60 years of age or over and the surviving spouse of a taxpayer qualified for tax relief under this program at the time of his or her death; or has not attained the age of 65 years and is eligible in accordance with the federal regulations to receive permanent total disability benefits under social security or has not been engaged in employment covered by social security and accordingly has not qualified for benefits thereunder, but has

qualified for permanent total disability benefits under any federal, state or local government retirement or disability plan, including the Railroad Retirement Act and any teacher's retirement plan in which requirements with respect to qualifications for such permanent total disability benefits are comparable to such requirements under social security.

(2) Such applicant shall have been a taxpayer of the Town of Fairfield and have paid taxes for at least one year as of October 1 of the current Grand List year.

[Amended 5-29-2018]

(3) The property for which the benefit is claimed is the legal residence of such applicant and is occupied for than 183 days of each year by such applicant.

[Amended 5-29-2018]

(4) Such applicant(s) shall have applied for property tax relief under any state statutes applicable to persons 65 and over and the permanently and totally disabled for which he or she is eligible. If such applicant has not applied for tax relief under any state statutes because he or she is not eligible, he or she shall so certify by filing on a form acceptable to the Assessor an affidavit attesting to his or her inability.

(5) Such persons shall have individually, if unmarried, or jointly, if married, qualifying income in an amount not to exceed limits described below for each program for the tax year ending immediately preceding the application for tax relief benefits. "Qualifying income" is defined as adjusted gross income, as defined in the Internal Revenue Code of 1986, as may be amended from time to time, plus the nontaxable portion of any social security benefits, railroad retirement benefits, any tax shelter losses, income from other tax-exempt retirements and annuity sources and income from tax-exempt bonds and any other income not includable in adjusted gross income. Unreimbursed gross medical and dental expenses shall be deducted from income in calculating the applicant's Qualifying Income, as long as such unreimbursed gross medical and dental expenses are included on the applicant's federal income tax return of the calendar year immediately preceding the year of application as an itemized deduction and qualify as a medical deduction under Section 213(a) of the Internal Revenue Code of 1986, as may be amended.

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[Amended 5-29-2018]

(7) Benefits granted under this article shall be prorated by the office of the Assessor in the event of the sale or transfer of the affected real estate or the death of the applicant and the surviving spouse, if applicable.

(8) [1]Any application and spouse who qualify for property tax relief under this article shall have a qualifying total asset value (QTAV) not exceeding \$650,000. Qualifying total asset value shall consist of any and all assets of the applicant and spouse as of the date of application but shall specifically exclude the value of the applicant's primary legal residence and all tangible personal property contained therein. Each applicant to whom QTAV applies shall make a sworn statement in a form satisfactory to the Assessor that such applicant's QTAV does not exceed \$650,000.

*[1] Editor's Note: Former Subsection C(8), which stated that taxpayers shall not be delinquent in payment of real property, personal, or motor vehicle taxes, sewer use charges, or sewer assessments for any period extending back more than one year immediately preceding the date of their application, was repealed 5-29-2018. This ordinance also renumbered former Subsection C(9) as Subsection C(8).*

D. A married homeowner whose spouse is a resident of a health-care facility or nursing home in Connecticut that is receiving payment related to such spouse under Title XIX (Medicaid) need not declare the spouse's social security income. Proof that the spouse is in a facility must be provided, including the period of time said spouse was in the facility, the time that Title XIX commenced, and the name and address of the facility. The statement of proof must be on the facility's letterhead and signed by the administrator or other official of the facility.

#### **§ 95-9 Application.**

***[Amended 5-29-2018]***

In order to be entitled to the tax relief provided herein, an application must be filed with the Assessor not earlier than February 1 and not later than May 15 preceding the fiscal year in which the tax is payable.

A. Any eligible taxpayer, or his/her authorized agent, shall file applications for tax relief and tax deferral under this chapter with the Town of Fairfield Assessor, any time from the first of February to the 15th day of May, prior to the commencement of the tax year for which tax relief is claimed, on a form or forms prescribed and furnished by the Town of Fairfield. In making such application, the taxpayer shall present to the Assessor, in substantiation of his/her application, a copy of his/her federal income tax return for the calendar year immediately preceding the year of application, a copy of the Social Security Act Administration Form 1099, or, if not required to file a return, such other evidence of qualifying income which the Assessor may reasonably require to establish compliance with the income qualifications provided in § 95-15 of this article. The applicant, or his/her authorized agent, shall sign a sworn affidavit in the presence of the Assessor affirming the accuracy of the statements in the application.

B. When the Assessor is satisfied that the applying taxpayer qualifies under this article, he/she shall compute the amount of such tax relief and tax deferral and cause certificates of tax credit and tax deferral to be issued in such form as to permit the Tax Collector to reduce the amount of tax levied against the taxpayer and make proper record thereof, and a copy thereof shall be delivered to the applicant. Neither the Assessor nor the Tax Collector shall unreasonably withhold the issuance of such a tax credit and tax deferral to a properly qualifying taxpayer. The tax credit shall be applied to the tax payments.

C. Affidavits or applications or other documents presented in support of the application for tax relief or tax deferral shall not be open for public inspection and shall not be disclosed except in connection with claims of fraud.

D. An eligible taxpayer may make his/her application for tax relief or tax deferral to the Assessor up until August 15th of the claim year if approved for extension by the Assessor. The Assessor may grant such extension in the case of extenuating circumstance due to illness or incapacitation as evidenced by a [physician's] certificate signed by a physician or an advanced practice registered nurse, or if the Assessor

determines there is good cause for doing so. Reference Public Act 12-197 amending 12-170w of the Connecticut General Statutes.

**§ 95-10** Amount of tax relief per person limited.

**[Amended 5-29-2018]**

No property tax relief provided for any person shall exceed in the aggregate 75% of the tax which would, except for the benefits provided by state statutes and the program(s), be laid against such person.

**§ 95-11** Amount of relief granted through program limited.

The total of all relief granted under the provisions of these programs shall not exceed an amount equal to 2.5% of the total real property tax levied in Fairfield in the preceding fiscal year. The total amount that can be deferred under § 95-15B is limited to a maximum of \$500,000 in any tax year. In the event that either foregoing limitation on relief is reached, relief shall be prorated among qualified applicants.

**§ 95-12** Relief per parcel of property limited to eligible persons.

**[Amended 5-29-2018]**

Only one tax relief benefit shall be allowed for each parcel of real property eligible for tax relief under the programs. In the event that title to real property is recorded in the name of the taxpayer or his or her spouse who are eligible for tax relief and any other person or persons, the tax relief under the programs shall be prorated to allow a tax relief benefit equivalent to the fractional share in the property of such taxpayer or spouse, and the person or persons not eligible shall not receive any tax relief.

**§ 95-13** Effect on other benefits.

**[Amended 5-29-2018]**

The tax relief provided to any person under the programs shall not disqualify such person with respect to any benefits for which such person is eligible under any state statute, and any tax relief provided under the article shall be in addition to any such benefits.

**§ 95-14** Partial waiver of lien rights.

The Town of Fairfield hereby waives any lien rights given to it by Section 12-129n of the Connecticut General Statutes with respect to the tax freeze and tax credit programs but will exercise such rights as provided below with respect to the tax deferral program.

**§ 95-15** Tax relief programs.

An applicant may not apply, in any assessment year, for more than one of the following Town tax relief programs:

A. Tax freeze. Any taxpayer meeting the eligibility requirements of § 95-8 and having qualifying income not exceeding \$50,600 may elect to apply for a freeze under which such taxpayer shall pay the gross tax levied on applicable property, calculated for the first year the application is granted (the "freeze amount") and shall be entitled to continue to pay no more than the freeze amount for each subsequent year in

which the taxpayer, or his surviving spouse, continues to meet such qualifications, subject to the following:

- (1) In the event that the applicant shall make improvements to his property resulting in an increase in his assessment, an amount calculated by multiplying the increase in the taxpayer's assessment attributable to the improvement by the mill rate in effect in the year such reassessment takes place shall be added to the freeze amount then applicable to obtain a revised freeze amount which will be the freeze amount for subsequent assessment years;
- (2) The applicant or his or her spouse must be at least 65 years of age at the time of such application;
- (3) Relief under this tax freeze is limited to not more than six consecutive years (not including the initial year that is used as the year to determine the freeze amount). Should the applicant choose to apply for the tax deferral program, described below, in the year following the last year of tax freeze eligibility, the freeze amount shall be used as the deferral base under that program;
- (4) An applicant and/or his or her spouse may only receive tax relief under the tax freeze program once during his or her life with an individual also being deemed to have received such tax relief under the tax freeze program if their spouse received such benefits while they were married;
- (5) The qualifying income threshold of \$50,600 for the tax freeze program indicated in § 95-15A above shall be adjusted in the same manner as described in § 95-15C(2) with respect to the tax credit program; and
- (6) If a decrease in the mill rate lowers the normal tax bill below the original frozen tax level, the applicant will pay the normal tax. When the normal tax bill exceeds the original frozen tax bill, the applicant will pay his original frozen tax bill. The counting of the six-year period specified in § 95-15A(3) shall be suspended during the period in which the applicant pays the normal tax.

B. Tax deferral. Any taxpayer age 75 or older at the end of the preceding calendar year and meeting the eligibility requirements of § 95-8 and having qualifying income not exceeding \$80,000 may elect to apply for a deferral of up to 50% of the gross tax levied on applicable property each year in which the taxpayer, or his surviving spouse, continues to meet such eligibility requirements, subject to the following:

- (1) The recipient shall enter into a written agreement with the Town providing for reimbursement, which shall be recorded in the land records of the Town and shall constitute a lien on the property payable upon death or conveyance.
- (2) All deferral benefits plus interest shall be reimbursed to the Town:
  - a) one year after the recipient's death, unless the recipient's surviving spouse applies for benefits under this program and also qualifies under § 95-8;
  - b) Upon conveyance of the real property subject to taxation; or
  - c) Upon the property no longer being the recipient's principal residence.
- (3) All benefits shall be subject to an interest charge at the greater of the annual percentage rate of 3% or the rate on ten-year United States Treasury Notes. The rate for the purposes of this

subsection shall be set by the Chief Fiscal Officer of the Town of Fairfield on January 31 in each calendar year or, if such day is a day on which the fiscal office of the Town of Fairfield is not open, on the next prior day on which it is open. Such rate shall be effective for the following year. Such interest shall be simple interest, not compounded, and shall accrue from the date of deferral until the date of repayment.

(4) Total deferments, including accrued interest, for all years shall not exceed 70% of the most recent assessed value of the real property.

(5) The qualifying income threshold of \$80,000 for the tax deferral program indicated in § 95-15B above shall be adjusted in the same manner as described in § 95-15C(2) with respect to the tax credit program.

(6) If a decrease in the mill rate lowers the normal tax bill below the original deferral base, the applicant will pay the normal tax. When the normal tax bill exceeds the original deferral base, the applicant will pay the original deferral base.

(7) Taxpayers between the age 65 and 75 who had participated in the tax deferral option as of the 2012 Grand List may reapply for their original deferral base (deferring tax above that base), provided their qualifying income for the preceding year did not exceed \$80,000.

#### C. Tax credit.

(1) Any applicant meeting the eligibility requirements of § 95-8 and having qualifying income shown in the table below, adjusted annually as provided in Subsection C(2) below, shall be entitled to a tax credit of up to a maximum (as limited by § 95-10) provided in the following table, effective for the assessment year beginning October 1, ~~2012~~2019, and for each assessment year thereafter:

Qualifying Income <del>(as of 2012)</del> <u>(as of 2019)</u>			
Over	To	Tax Credit (percentage of tax due)	Cap (not to exceed)
\$0	<del>\$16,700</del> <u>\$18,600</u>	<del>67</del> <u>75</u> %	<del>\$5,000</del> <u>\$7,500</u>
<del>\$16,701</del> <u>\$18,601</u>	<del>\$23,900</del> <u>\$25,500</u>	<del>60</del> <u>65</u> %	<del>\$4,500</del> <u>\$6,500</u>
<del>\$23,901</del> <u>\$26,501</u>	<del>\$29,500</del> <u>\$32,700</u>	<del>50</del> <u>55</u> %	<del>\$3,700</del> <u>\$5,500</u>
<del>\$29,501</del> <u>\$32,701</u>	<del>\$35,300</del> <u>\$39,000</u>	<del>42</del> <u>45</u> %	<del>\$3,500</del> <u>\$4,500</u>
<del>\$35,301</del> <u>\$39,301</u>	<del>\$43,400</del> <u>\$48,000</u>	<del>33</del> <u>35</u> %	<del>\$2,700</del> <u>\$3,500</u>
<del>\$43,401</del> <u>\$48,001</u>	<del>\$50,600</del> <u>\$56,000</u>	25%	<del>\$2,000</del> <u>\$2,500</u>
<del>\$50,601</del> <u>\$56,001</u>	<del>\$70,000</del> <u>\$77,300</u>	15%	<del>\$1,400</del> <u>\$1,500</u>

*For prior credit option participants, tax credit will not be less than calculated for 2012/2013, based upon 2012/2013 qualification levels.*

(2) The amounts of qualifying income shown in the above table shall be adjusted annually in a uniform manner to reflect the annual inflation adjustment in social security income, with each adjustment of qualifying income determined to the nearest \$100. Each such adjustment shall be prepared by the Secretary of the Office of Policy and Management, State of Connecticut, in relation to the annual inflation adjustment in social security, if any, becoming effective at any time during the twelve-month period immediately preceding the first of October of each year, and shall

**Commented [DC1]:** Updated date

**Commented [DC2]:** Clarification of date when data is relevant

be the amount of such adjustment which is distributed to the Assessor as of December 31 next following. Adjustments for any bracket of qualifying income not included in the adjustments made by the Secretary of the Office of Policy and Management shall be made by the Assessor by applying the same percentage used by the Secretary of the Office of Policy and Management in making its adjustments and with each adjustment of qualifying income determined to the nearest \$100.

**§ 95-15.1 Report by Assessor.**

The Assessor shall report to the RTM and the Board of Finance every June on the tax relief program established under Article III of Chapter 95.

**Commented [DC3]:** Added BOF review

**§ 95-15.2 Severability.**

In the event that any provision of §§ 95-7 through 95-15 of the Fairfield Town Code is found to be unlawful, only such unlawful provision shall be ineffective, and all other provisions shall remain in full force and effect.

**§ 95-15.3 When effective.**

The amendments to §§ 95-7 through 95-15.2 shall become effective immediately after the period for subjecting them to a referendum has expired.

**§ 95-15.4 S&DTR Review Committee Initiation**

**§ 95-15.4 RTM Review Committee.**

[Amended 2-23-2015; 5-29-2018]

When the Town Tax Assessor believes revisions should be made to Senior and Disabled Tax Relief Program, he/she shall make a request for the Board of Finance (BOF) to review the same. The BOF shall create a three-person Chapter 95, Tax Relief for Elderly and Disabled Homeowners Review Committee and make a recommendation to the entire BOF of whether any revisions should be made, and if so, what recommendations should be made. If the BOF determines that a change(s) are necessary to Chapter 95, Tax Relief for Elderly and Disabled Homeowners, a joint Senior & Disabled Tax Relief Committee (S&DTRC) shall be formed and tasked with recommending changes to the BOF. The joint S&DTRC will consist of the three members from the BOF review committee and two members of the Representative Town Meeting (RTM). The two RTM members shall be appointed by the Special Legislative Management Committee ("Committee on Committees") and may not be from the same political party. The BOF will review the recommended changes proposed by the S&DTRC and vote on a recommendation of changes to Chapter 95, Tax Relief for Elderly and Disabled Homeowners, to the RTM for approval pursuant to its approval process.

At its first regularly scheduled meeting in January 2020, the Representative Town Meeting shall convene a special committee to review Article III of Chapter 95, Tax Relief for Elderly and Disabled Homeowners.

**Commented [CD4]:** Approved by BOF, rejected by RTM L&A



*Changes Initiated by RTM L&A*

*§ 95-15.4 S&DTR Review Committee Initiation*

When either the Assessor, the Board of Finance or the Representative Town Meeting (in each case by majority vote) believes revisions should be made to Article III of Chapter 95 of the Town Code, Tax Relief for Elderly and Disabled Homeowners ("Chapter 95, Article III"), he/she or it shall make a request for the Board of Finance (BOF) to review the same. The BOF shall create a three-person BOF Chapter 95, Article III Review Committee, no more than two members of which shall be from the same political party, and make a recommendation to the entire BOF of whether any revisions should be made, and if so, what recommendations should be made. If the BOF determines that changes are necessary to Chapter 95, Article III, a joint Senior & Disabled Tax Relief Committee (S&DTRC) shall be formed and tasked with recommending changes to the BOF. The joint S&DTRC will consist of the three members of the BOF Chapter 95, Article III review committee and two members of the Representative Town Meeting (RTM). The two RTM members shall be appointed by the Special Legislative Management Committee ("Committee on Committees") of the RTM and may not be from the same political party. The BOF will review the recommended changes proposed by the S&DTRC and vote on a recommendation of changes to Chapter 95, Tax Relief for Elderly and Disabled Homeowners. The recommendation approved by the BOF will then be sent to the RTM for approval pursuant to its approval process.

~~§ 95-15.4 RTM Review Committee.~~

~~At its first regularly scheduled meeting of each calendar year, the Representative Town Meeting shall convene a special committee to review Article III of Chapter 95, Tax Relief for Elderly and Disabled Homeowners.~~

Heavy Equipment  
Vehicle Listing

Town of Fairfield

Over 100,000 cost (\$2)

No.	Year	Age	Make	Model	VIN	Value	Replacement Year	Mileage	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036																
42	2001	20	JOHN DEERE	back hoe, medium	T0310SG901120	170	2021		Request	Approved	Request	Approved	Request	Approved	Request	Approved	Request	Approved	Request	Approved	Request	Approved	Request	Approved																
47	2019	2	JOHN DEERE	back hoe, medium	1T0410LXCKF363450	170	2031																																	
49	2013	8	JOHN DEERE	back hoe, medium	1T0310SKJCE232503	170	2024					170							170																					
44	2015	6	JOHN DEERE	back hoe, medium	1T0410KXAE265640	170	2024							170																										
12yr																								112																
108	2008	13	JOHN DEERE	loader	DW624JZ619421	240	2022	11,000hrs.		240																														
109	2006	15	JOHN DEERE	loader	DW544JZ601004	220	2023	8000hrs.			220																													
110	2019	2	JOHN DEERE	loader	1DW544LZJKF701836	230	2034																																	
250	2011	10	JOHN DEERE	loader	1DW544KZKB0634397	220	2026															230																		
251	2015	6	JOHN DEERE	loader	1DW544KZJFF671860	220	2030							220																										
15 Yr																	220																							
97	2002	19	ELGIN	sweeper	P3645-S	210	2023				230																													
72	2018	3	ELGIN	sweeper	P41491	210	2033																																	
64	2005	16	ELGIN	sweeper	P4353S	210	2024				230											230																		
74	2017	4	ELGIN	sweeper	NP41335	210	2032					230																												
																			230																					
164	2007	14	INTL	6 wh all season	1HTWLAZR7J474568	210	2026								225																									
165	2005	16	INTL	6 wh all season	1HTWLAZR26J289140	210	2023				220																													
166	2007	14	INTL	6 wh all season	1HTWLAZR77J556726	210	2025						220																											
167	2008	13	INTL	6 wh all season	1HTWLAZR59J133324	210	2026																																	
171	2000	21	STERLING	6 wh all season	2FZHLRBB8YAA75602	210	2022			220						225																								
290	2000	21	INTL	6 wh all season	1HTSDDADR61H301518	210	2022			220																														
169	2015	6	FRT LINER	6 wh all season	1FVAG3DV3FHGL3326	210	2030																																	
170	2015	6	FRT LINER	6 wh all season	1FVAG3DV3FHGL3327	210	2030											225																						
174	1997	24	FORD	6 wh all season	1FDYF80CIVVA39387	220	2022			220								225																						
172	2015	6	FRT LINER	6 wh all season	1FVAG3DV5FHGM9107	210	2030																																	
179	2015	6	FRT LINER	6 wheel dump truck	1FVAG3CY8GHHF9772	210	2030																																	
191	2020	2	FRT LINER	6 wheel dump truck	1FVAG3FE8LHLZ2741	210	2035																																	
198	2016	5	FRT LINER	6 wh all season	1FVAG3CYXGHH9773	210	2031																																	
195	2018	3	FRT LINER	6 wh all season	1FVAG3FE7JHJW4471	210	2033																225																	
177	2019	2	FRT LINER	6 wheel dump truck	1FVAG3FE1KHKM1613	210	2034												225																					
316	2004	17	INTL	6 wh all season	1HTWDAOR64J033004	210	2023			220																														
172	2015	6	FRT LINER	6 wh all season	1FVAG3DV5FHGM9107	210	2030																225																	
161	2005	16	INTL	6 wh hook lift truck	1HTWLAZR06J298726	210	2024				220								225																					
162	2007	14	INTL	6 wh hook lift truck	1HTWLAZR67J474566	210	2026																																	
															225																									
178	1991	31	FORD	6 wheel dump truck	1FDYK90L6MVA14968	220	2021		220																															
180	1990	31	INTL	6 wheel dump truck	1HTGEGBR2MH313288	220	2021																																	
181	1990	31	INTL	6 wheel dump truck	1HTGEGBROMH313287	220	2021																																	
200	1996	25	FORD	6 wheel dump truck	1FDYK90L5TVA17195	220	2021		220																															
198	2016	5	FRT LINER	6 wheel asphalt	1FVAG3CYGHH9773	210	2031																																	
192	2017	4	FRT LINER	6 wheel all season	1FVAG3CYOHHJE5166	210	2032																																	
193	2017	4	FRT LINER	6 wheel dump truck	1FVAG3CY7HHJF4429	210	2032																																	
197	2020	2	FRT LINER	6 wheel dump truck		210	2035																																	
39	2005	6	INTL	10 wheel truck	1HTWPAZT86J239651	228	2024					240																												
55	2008	13	INTL	10 wheel truck	1HTWPAZT99J133326	228	2026																																	
57	2015	6	MACK	10 wheel truck	1M2AX04CXFM024548	228	2033																																	
114	1995	28	FORD	10 wheel truck	1FDZW82E0SVA81774	228	2022				240																													
63	2016	5	FRT LINER	10 wheel truck	1FVHG3DV8GHHHP2464	228	2034																																	
53	1999	22	INTL	Aerial tree truck	1HTSDAAN5XH638076	220	2021			215																														
54	2015	6	INTL	Aerial tree truck	3HAMMMMN5FL698146	220	2027																																	
299	2002	19	VERMEER	Wood Chipper	1VRN1312921002928	100	2023				100																													
300	2002	19	VERMEER	Wood Chipper	1VRN1312921002927	100	2025						100																											
298	2015	6	VERMEER	Wood Chipper	1BRY1312121F1004690	100	2035																																	
301	2019	2	VERMEER	Wood Chipper	1VRY15124K1007220	100	2039																																	
208	2019	2	VERMEER	Stump Grinder	1VR2151J4L1003170	100	2029																																	
260	2015	6	IZUZU NRR	trash compacting	JAL5W164F7300846	160	2025																																	
4	1990	31	ACKERMAN	Excavator	6172	300	no schedule																																	
303	1999	52	MACK	tractor trailer cab	R773ST1355	160	no schedule																																	
201	2004	17	INTL	flat bed truck/gate	1HTMPAFM25H118401	130	2021																																	
236	2020	1	JOHN DEERE	Roadside Mower	LV5510S450160	115	2035																																	
211	2007	14	INTL	flat bed truck/gate	1HTMMAAM08H569394	125	2027																																	
234	2007	14	JOHN DEERE	5525 Tractor & Rake	LV5525R454269	180	2022				180																													
combine above				Barber	600HD Surf Rake	61131	combine	above																																
BT-1	1984	34	FLUSH DECK	Utility Work Barge	WUB4745A189	180	?																																	
	1990	31	Rotary	HD Portable Lifts		120	2024					120																												
264	2011	10	INTL	Chip Box Tree Truck	1HTJT8KL2BH3345564	215	2023																																	
									12125																															
									1395	0	1320	0	1305	0	980	0	320	0	1305	0	535	0	0	0	100	0	1345	0	620	0	680	0	705	0	680	0	605	0	112	0