

Senior and Disabled Tax Relief Committee Meeting Minutes
March 6, 2018
Location: 2nd floor Conference Room, Sullivan Independence Hall
7:30 pm

Present: Mark McDermott, Michael Herley, Cindy Perham, Peter Tallman, and Jill Vergara.

I. Call to Order:

J. Vergara called the meeting to order at 7:35 p.m. and took roll call.

II. Approval of the Minutes, both revised Minutes from 2/12/2018 and 3/01/2018

1. M. Herley asked if we divide the voting of the two sets of Minutes, as he was not in attendance at the 3/0/12018 Senior and Disabled Tax Relief Committee meeting.
2. M. Herley moved to accept the revised Minutes from the 2/12/2018 meeting. P. Tallman seconded it. Passed unanimously.
3. M. McDermott moved to accept the Minutes from the 3/01.2018 meeting. J. Vergara seconded it. 4 in favor. M. Herley abstained.

III. Review Proposed Revisions to the Tax Relief Ordinance and Voting on the changes.

1. Before discussion of agenda items, M. Herley asked that we consider and vote on additional changes to the ordinance that had not been discussed at prior meetings and were not on the agenda. J. Vergara said that M. Herley could introduce these changes under New Business but that only items which had been vetted at prior meetings and were on the agenda would be voted on in this discussion.
2. First revision would be Section 95-8 C2. It would now read; "Such applicant shall have been a taxpayer of the Town of Fairfield and have paid taxes for at least one year as of October 1st of the current Grand List year." Moved by M. McDermott. Seconded by P. Tallman. Passed unanimously.
3. Second revision would be Section 95-8 C3. It would now read, "The property for which the benefit is claimed is the legal residence of such applicant and is occupied more than 183 days of each year by such applicant." Moved by C. Perham. Seconded by J. Vergara. Passed unanimously.
4. Third revision was to removed Section 95-8 C8 Tax Delinquency would be removed to simplify the administration of the application process and to be more consistent with the goals of the program. Moved by C. Perham. Seconded by M. McDermott. Passed unanimously.
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IV. Discussion of Mailing info regarding the updates to Senior Tax Relief to all 65+

1. In order to cover all of our residents 65+ in the mailing, we would have to mail to approximately 9375 residents.
2. Coordinate with Ross Murray who has spoken with the Registrar of Voters about a mailer; it would include info on all town programs assisting the seniors, including the renters rebate program and the state circuit breaker program.
3. Ask Terry Giegengack, the Senior Center's Director, if the center would like to include/gather info from the mailer
4. M. Herley though that the info should be expanded to 62+ and J. Vergara agreed.

V. V. Set date for Public Forum at the Senior Center

1. Saturday, April 21 during the hours of 10 am till noon was chosen as a date that would work.

VI. Public Comment

Gordon McKenzie, 11 Palmer Bridge, commented about Bonding, and the Department of Revenue Services Fed Tax Changes. 10K being deductible and the overage having to be deposited in a Charitable Foundation. He said this is happening in some NJ towns currently.

Carol Way, 324 Villa Avenue, added that NY State has proposed this as well.

John Wynne of 144 Harbor Road mentioned that he thought we should all wait for the dust to settle and see how this shakes out.

Urb Leimkuhler of 83 Spruce Street, Southport wanted to hear more about how the mailer to those 65+ would look like. Chair J. Vergara added that the mailer would include info on qualifying for the credit, the freeze, and the deferral. It would include the deadlines for applying, and it would have contact info, links to websites and emails to ask further questions. Urb also added that the Forum at the Senior Center on April 21 would be helpful and should allow the public to share experiences. J. Vergara agreed with this and added that those in attendance can also ask for changes they are looking for. We would also, of course, do a brief introduction about the program before opening up for questions.

Steve Elsworthy, 1135 Hulls Farm Road, added that choosing a Saturday for this forum is a good idea.

Gerry Stuhlman, 71 Somerset Avenue mentioned three issues he sees that the committee needs to address;

1. Information, including the Annual Report of the Town Tax Assessor needs to be on the Town website.
2. In the past the town budget used to have a line item showing the lost revenue.
3. It is necessary to gather support for the program. How have Seniors improved this town? What is the Return on Investment in keeping a Senior in place in Fairfield.
4. More income brackets needed to be added to the Senior Tax relief qualifying chart. J. Vergara responded that Ross Murray told us at the meeting on March 1, 2018 that the computer system that the capability to add 10 more brackets.

VII. New Business

M. Herley wanted the committee to consider making changes to both income levels and asset levels at this time and to lower the eligibility age for the programs to 62 years of age. J. Vergara countered that the committee had discussed and agreed to approach changes to the tax relief program in a bifurcated way: first, make procedural changes quickly so that Ross Murray can implement the changes during this application season, and next, tackle more substantive changes right after we get these procedural changes passed. Having these procedural changes voted on and approved within the span of a month will be difficult enough. Adding changes that require much research and analysis risks slowing down the process and/or getting caught in L & A. Members of the committee seem to unanimously want to make more substantive changes to the ordinance that would increase and expand the participation, but these kinds of changes require a lot more analysis and discussion. J. Vergara also questioned whether the state's enabling statute allowed the municipalities to even consider lowering the eligibility age. As M. Herley had no knowledge, J. Vergara tried to find the statute in her materials but couldn't locate it. M. McDermott also added that the changes being made aren't small – they are changes that seniors had advocated for the past 2 years he's been on the committee, and he's excited to finally get something done.

P. Tallman made a motion to increase the tax credit by 10% for each income bracket in the town's credit program. M. Herley seconded. J. Vergara questioned whether it was advisable to make such changes in the middle of the budget season, without knowing the impact this would have on the budget and considering the unpredictability of the fiscal climate right now. She also questioned whether making this change now would disable the committee from making better and more significant changes later.

The public was asked its opinion.

Carol Way agreed that the committee's additional changes to be made in the future should be well thought out. She supports looking into the Homestead Credit that is available in a handful of towns in CT. Urb Leimkuhler agrees, too, that the committee should spend some time reviewing the Homestead Credit opportunity, and that the budget facts and the impacts of elasticity on the impact of the whole Tax Relief Program requires a lot more study. Gerry Stuhlman ended public comment with the suggestion that we ask a local college student to do some data engineering and analysis. For example, they could study, "How do we save 10 seniors from leaving? And If we lose one senior, what does it cost the town?" After considering the public's input, P. Tallman withdrew his motion.

VIII. Adjournment

Motion made by C. Perham to adjourn meeting. J. Vergara seconded. Unanimously passed.
The meeting was adjourned at 9:10 p.m.

Respectfully submitted,

Cindy Perham, Secretary