

Senior and Disabled Tax Relief Committee Meeting Minutes
Location: 2nd floor Conference Room, Sullivan Independence Hall
April 17, 2018 6:30 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 6:32 p.m. and took roll call.

II. Pledge of Allegiance

III. Approval of the Minutes, March 6, 2018

1. M. McDermott moved to accept the Minutes from the 3/6/2018 meeting. J. Vergara seconded. During discussion M. Herley thought that in the New Business Section of the Minutes, the following should be added. "P. Tallman indicated that the RTM recently approved a 8.2% increase in teacher's salaries over 3 years so we should consider increases in Senior tax relief as well." This amendment was moved by M. Herley, seconded by P. Tallman. M. McDermott, M. Herley, C. Perham, and P. Tallman in favor. J. Vergara voted against. Passed.
2. M. Herley made a motion to approve the Minutes as amended. J. Vergara seconded. Passed unanimously.

IV. New Business

- a) Discussion of Section 95-15C (1) as per Ross Murray's email dated April 5, 2018--Participant's qualifying income levels have changed; current participant has received tax relief dating before the 2012 revisions to ordinance which changed income levels and amount of credits but guaranteed that tax credits for any current participants would not be less than the 2012/2013 qualification levels. Participant was limited in relief by the requirement to pay 25% of tax bill: she qualified for a \$3500 credit but due to that 25% requirement, received \$2500. The committee unanimously agreed with Ross Murray that participant should be entitled to the full amount of \$3500 that she had qualified for in 2012 were it not for the 25% limitation
- b) M. Herley made a Point of Order--he argued that discussing any further revisions to the tax relief ordinance while other revisions were pending before the RTM was inappropriate and asked that we not discuss any of this New Business. Chairman Vergara ruled against the Point of Order, stating that the discussion and division of research of other sections of the ordinance, which were separate and distinct from those submitted to the RTM, is permissible.
 1. Assessor Ross Murray said that the medical and dental are difficult to determine. Not sure his department is equipped to figure that in.
 2. a) Members discussed changes they'd like to focus on. C. Perham brought up Ross Murray's August 2017 email and wanting to make the revisions that he suggested, including changing QTAV, eliminating Freeze; M. McDermott spoke about Homestead Freeze and increasing limits; P. Tallman spoke about raising qualifying limits and increasing caps. J. Vergara discussed replacing QTAV with assessment limits.
 - b) Ross said that his department is $\frac{3}{4}$ the way done with applications, and at this point only 5-6 people have exceeded the QTAV limit. He went on to say that it is cumbersome for applicants as well as the department. Many of the assets are not on the tax return. Ross also indicated that no one was using the Freeze option currently

- c) J. Vergara wanted the components of the current program to be split between committee members to do research on how other towns treat the current criteria.
- P. Tallman will research the Income limit and tax cap brackets M. Herley will assist in this.
- C. Perham will research QTAV
- M. McDermott will research the Homestead Freeze
- Ross Murray added that he would like to see a minimum credit given to the smallest homes that qualify for Senior Tax Relief.
- M. Herley said CCM is a great resource for our committee.

V. Public Comment

Gordon McKenzie, 11 Palmer Bridge, commented about those living in million-dollar homes with low income and the fairness aspect of the Senior Tax Relief Program. He referenced the Newtown program.

Nancy Legare, 241 Unquowa Road asked how people dropped out of program because of income limits. M. McDermott referenced a report that indicated that a net 38 Seniors less qualified for the program last year. Reasons included passing away, not applying or moving. The report also showed that in 2013 1600 received assistance from the program with last year the number being 1438.

Terri Giegengack, Director of the Senior Center said that her 4 PT social worker would be helpful and on 5/7 her Lead Social Worker would be starting and more of a personal touch would be important, including more outreach and other local partnerships.

M. Herley added that we could partner with other commissions in town to assist in getting the word out on the current parameters. Possibly liaison opportunities.

Jim Walsh, 85 Pratt Street, wanted to know if our committee could get to the bottom of why the number of those applying is trickling down. He suggested us working with Probate or Senior community center to conduct exit interviews with those still living in town that didn't apply. He also added that seniors add history, many contributions, and guidance as veterans.

Urb Leimkuhler of 83 Spruce Street, Southport of Fairfield Senior Advocates feels that our committee is a great resource that should be documenting our philosophy, purpose, and objectives. We need to market, and sell the program., including discussing the legislative history.

Ross Murray let the committee know that the three changes that are currently sitting on the RTM floor would not be able to be enacted on until the next application year.

VI. Old Business

- a) J. Vergara summarized status of revisions before the RTM and again asked that Ross Murray confirm that these revisions would be implemented this current application season. Ross Murray said that he didn't realize the process for approval would take so long and that he would not be able to utilize the new language this application season.
- b) Motion by C. Perham to adjourn the meeting so that J. Vergara could consult with the Moderator, seconded by J. Vergara. Unanimously passed.

The meeting was adjourned at 8:20 p.m.

Respectfully submitted,

Cindy Perham, Secretary