

Taxation Aid Committee, Bedford MA

Minutes for Meeting on August 4, 2023

Approved as amended on Sept. 15, 2023

Present: Rick Rosen (Chair), Rebecca Neale (Board of Assessors, Chair), Alex DiZio (Town Treasurer), Paul Mortenson (Select Board Liaison), Amy Hamilton, Sue Swanson (Clerk)

Invited guest: Matt Lanefski (Director, Assessing Department)

Visitor: Bruce Blake

Meeting called to order at 10.32 a.m.

● Old Business

- **Minutes** of [July 6, 2023](#) tabled until our next meeting
 - **Discussion of draft Application Form.**
 - Questions raised about eligibility of applicants
 - Do we need a rubric that includes both assets and income?
 - Mr. Blake asked how we could put a dollar value on assets and how we define 'low income'. The answer to the second question is that we will use the State's figures for the Senior Circuit Breaker program.
 - Rebecca will research the role of assets in our application, especially real estate holdings.
 - **Discussion of donation process and public outreach.**
 - Matt mentioned that Framingham has been receiving \$3,000-3500/year and awarding about \$300 to each of 12-13 applicants. This is a much lower donation amount than has been reported by other communities, such as Arlington.
 - Decision made not to have minimum recommended donation
 - Online donation option is not recommended initially, but it may be a viable option later.
 - Decision was made to distribute the request for donations form as an insert rather than a separate mailing.
 - Every property owner gets a mailing, even if their banks pay the taxes.
 - An insert could also be included in the Vehicle Excise Tax bills.
 - Easier to distribute at other venues (Town Clerk, COA, Library, churches, etc.) and at town events.
 - Alex will create a first draft.
 - **Discussion about public outreach** included oral presentations, fliers, and articles in The Bedford Citizen.
 - **Discussion of the timeline needed to meet our Jan. 1st goal.**
 - Finalize the guidelines and application form, and the donation request form this fall, before the January tax statements are sent out.
 - Alex thought that the printer would not need more than a month (actually only 2 weeks), especially if we used an insert instead of revising the actual tax bill.
- #### ● Next steps
- Alex will draft the donation form/stuffer and check on costs/timeframe for an insert
 - Rebecca will research an asset rubric (feasibility of requiring a limit and the role of second homes/additional real property)
 - Matt will distribute the slide deck he shared and a soft copy of the handout, "2024 Summary..."
 - Rick will start drafting a presentation for COA Board

- **Next meetings**

- Date: Sept. 1, 2023, at 10:30 am.
- Date: Sept. 15, 2023, at 10:30 am

Meeting was adjourned at 12:09 pm

- **Documents shared for review (3)**

- Taxation Aid Committee Application Form - Draft, August 1, 2023
- Taxation Aid Committee Guidelines - Draft, August 1, 2023
- Bedford donor form - Draft, August 1, 2023

Submitted by Sue Swanson, Clerk