

## Taxation Aid Committee, Bedford MA

### Minutes of Meeting on June 5, 2023

**Present:** Rick Rosen (Chair), Sue Swanson (Clerk), Rebecca Neale (Board of Assessors, Chair), Alex Dizio (Town Treasurer). **Invited Guest:** Matt Lanefski (Director, Assessing Department)

Meeting called to order at 2:03pm

- **Old Business**
  - **Minutes** of May 15th approved as amended (to include list of shared documents)
  - **Revised Committee Guidelines** discussed, amended, and approved,
    - including the following change under “Income”: “Income thresholds will be reviewed annually and updated as necessary. For fiscal year 2025, these thresholds are established beginning January 1, 2024, and are broken out as follows....”
    - Committee discussed when we could expect to begin soliciting donations on real estate tax bills, and it agreed the target date should be January 1, 2024
  - **Discussion of committee vacancies** (current and pending)
    - No new applications have been received
    - Rebecca will ask the Volunteer Coordinating Committee to learn if previous applicants might still be interested
    - Alex will check with Charlie Ticotsky about status of Sue’s reapplication
- **New Business**
  - **Discussion of draft Application Form**
    - General preference expressed for the town of Seekonk’s format, with some alterations
    - Alex agreed to revise our application (guidelines and form) using Seekonk’s format
    - Rebecca agreed to create charts for financial info (assets, liabilities, income, expenses)
    - Question raised about criteria for selecting applicants, and how these might affect what is asked on the application form
  - **Discussion of donation process** – tabled for future discussion
  - **Discussion of public participation at meetings** – Unless specifically included in the published agenda, Bedford’s committee guidelines allow a chair to determine if, when, and how to incorporate public comment into a meeting. Minimal attendance is expected, and the Committee decided to deal with the issue if and when it arises.
- **Next meeting**
  - July 6, 2023 at 2pm in the Town Hall, second floor conference room
  - Tentative agenda: Continued discussion of forms and process, committee membership

Meeting was adjourned at 3:49pm

- **Documents shared for review (1)**
  - Town of Bedford, Tax Aid Committee Guidelines - revised draft

Submitted by Sue Swanson, Clerk