

## Taxation Aid Committee, Bedford MA

### Minutes of Meeting on Sept 1, 2023

### Approved as amended on Sept. 15, 2023

**Present:** Rick Rosen (Chair), Rebecca Neale (Board of Assessors, Chair), Alex DiZio (Town Treasurer), Amy Hamilton, Sue Swanson (Clerk).

Meeting called to order at 10.35 a.m.

- **Old Business**
  - **Minutes**
    - July 6, 2023 – minutes approved and subsequently submitted to Town Clerk
    - Minutes of Aug. 4th – tabled for next meeting
  - Discussion of criteria for selecting recipients of aid – deferred until Sept. 15
  - Discussion of draft guidelines and application form postponed.
  - Continued discussion of donation process and public outreach
    - Draft was reviewed – Form title selected was “Bedford Tax Aid Donation Form” – Other suggestions were adopted that clarified and/or shortened the draft. Alex will prepare a new draft with recommended changes for our next meeting.
    - Name of the fund was discussed but any decision was postponed. Both the state statute and the town warrant article were reviewed, but final decision postponed
    - Discussion of distribution of donation form
      - Decision was made to limit mailings to the quarterly real estate tax notices and not to the motor vehicle excise tax bills.
      - Cost per mailing of a ½ sheet would be about \$350
    - Possibility of underwriting the mailings was discussed. Alex will research legal ramifications
    - Public outreach options discussed, including town website, committee webpage, articles in the Citizen, flyers at town and other locations and events
- **Next steps**
  - Alex will confirm room for our next two meetings
  - Rebecca will review and compile information for evaluating assets
  - Alex will revise the donation form and research feasibility of underwriting the cost
- **Next meetings:** Sept. 15, 2023, at 10:30 am and Sept. 29, 2023, at 10:30 am

Meeting was adjourned at 11:50 am

### Documents shared for review (3)

- Taxation Aid Committee - Unapproved minutes for July 6, 2023
- Taxation Aid Committee - Unapproved minutes for Aug 4, 2023
- Taxation Aid Committee Application Form - Draft, August 1, 2023
- Taxation Aid Committee Guidelines - Draft, August 1, 2023
- Bedford tax relief donor form - Draft, August 28, 2023
- Information sheet for voluntary tax donation - Draft, August 28, 2023
- Powerpoint slide deck for Bedford’s voluntary tax donation program - Draft, August 28, 2023

**Submitted by Sue Swanson, Clerk**