

LEVERETT TAX RELIEF COMMITTEE
MINUTES OF MAY 13, 2017
9:00 a.m.

Present: Don Robinson, Shirley Thomas, Jason Noschese, Jim Hicks, Judy Weinthaler
Meeting called to order at 9:00 a.m.

Approval of minutes of April 15, 2017: Unanimous vote

Discussion of revisions to the application form for the Leverett Tax Relief funds:

- The committee reviewed the current application and made the following changes:
- Clarification of where the form is to be returned, including tax returns
- Rewording of eligibility requirements as Yes/No questions
- Add definition of disabled individual as a foot note; definition below
- Clarification that the applicant must own and legally reside in the residence (that the individual is a resident of Leverett for the majority of the year)
- Clarification that the applicant has lived in the property for the past 5 years

- Adding lines for additional owners
- Specifying that they are to report the gross annual income from all sources for each household member age 18 and older. The total of this income should be reported on page 1 as the Gross annual income.
- Assets: same as above; assets of all property owners and household members
- Separate lines specifying the return of State/Federal Tax returns for all household members

Page 2:

- Retitle column as "co-owner or household member"; add another column
- Add line for "Total Income from all household members to be entered on page 1"
- Retitle Medical expense section: "Household non-reimbursable medical expenses for the preceding calendar year (co-pays, deductibles, etc.)".

Definition of Disabled: "Disabled is defined as a person, of any age, who is not able to work or to do very limited work. The applicant could be receiving SSI, transitional assistance, retirement income, VA benefits, or other pensions related to the disability, or may have suffered a loss of income due to major illness or accident. Determination of disability eligibility is at the sole discretion of the Committee."

Discussion of Income and Asset eligibility amounts:

The Committee questioned how these amounts are determined. The members did not know of any guidelines that were established when the Committee was first appointed. In reviewing past years' application there was no pattern for increases and in fact the 2017 amounts are less than 2016 in some cases.

Shirley T. will contact Margie McGinnis with the following questions:

When was the Committee formed under the MGL facilitating legislation Chapter 60 section 3D?
Were any guidelines for eligibility set at that time?

How have increases been determined over the year? Is there a standard that has been used such a percentage of Median regional income, Leverett assessments, etc.?

The Committee agreed this information is needed in order to set such a guideline to possibly change the current levels and then use to make increases in the future.

Jim H. will write the Committee with levels of eligibility currently used for the State tax abatement program.

Next Steps:

Shirley will draft a revised application form and circulate to members for editing purposes only.

The Committee will have to meet to discuss and vote on setting new eligibility levels and a formula for increases after we receive more information from Shirley.

Note: The next distribution of funds will not be until May 2018 tax bill so any changes would take effect at that point.

After the form is complete with all of the above changes, including eligibility limits, the form will be posted on the Town website.

Future Tasks:

Develop a Guide to all the different sources of support for tax relief. (The handout from Lexington could be included.)

Also, a handout outlining the work of the Committee and how to apply as well as information about when funds are available, etc. This would be posted as well on the website.

Announcement: Judy will be resigning from the Committee as of the middle of June, 2017. (Moving out of the area) Members will contact possible new members and forward their names to the Selectboard.

Next Meeting: To be determined. Shirley will contact members to set a date to vote on eligibility amounts.

Meeting adjourned 10:30

Minutes submitted by Judy Weinthalder