

IN BOARD OF SELECTMEN  
WEDNESDAY, NOVEMBER 12, 2003

Present: Chairman Kirsten D. Roopenian, Selectmen John C. Drobinski and Lawrence W. O'Brien.

The statutory requirements as to notice having been complied with, the meeting was convened at 8:10 a.m. in the Sudbury Town Hall.

**Property Tax Equity Review Committee**

Present: Tara Reed and David Levington, Co-chairs, Property Tax Equity Review Committee.

At the request of Tara Reed and David Levington, Co-chairs of the Property Tax Equity Review Committee (PTERC), this meeting was called to provide the Selectmen with a progress report on the work of their Committee.

Co-Chair Tara Reed began by saying the Committee wanted to let the Selectmen know where they will be in their process by December 1. She and Co-Chair David Levington informed the Board as follows:

- 1) The Committee now had a fair consensus on the criteria for a tax relief program and was hoping that evening to finalize that.
- 2) The final proposal was harder to solidify, but that it should be in conceptual form by December 1. They will give an "interim" report on the elements, but not the proposal.
- 3) A survey seeking confidential information regarding income and assessed value for seniors is in progress.
- 4) There is an inability to correlate income and assessed value, and the best they can do is assume that people with lower income have lower assessments. Also they are unable to compute an estimated total cost of any proposed program absent this information. However, PTERC hopes to have a format for a proposal, which it will deliver the first week of December with that formula subject to check after additional data becomes available from the revised assessments and the results of the survey.
- 5) There are three areas that can be pursued: a) general long-term programs to reduce taxes, including alternative housing, and general fiscal restraint, b) education regarding existing tax relief programs, and c) a new tax relief program.
- 6) Responding to Selectman O'Brien, Ms. Reed stated the qualifying income level will be determined by using the CPA template. A person's assets, other than the value of his home, would not be taken into consideration.
- 7) Responding to a question by Town Manager Maureen Valente, Ms. Reed said they may need to use a surcharge. A \$500 cap was discussed by the PTERC but had not been voted or approved. She thought it was impossible to cap the contribution by use of an exemption, but would check with the Assessors at the meeting following the Selectmen's meeting tonight.
- 8) Ms. Reed said the Committee leaned toward pro-rating or curving the benefit.
- 9) Responding to Selectman O'Brien's suggested use of an exemption as being administratively easier, the amount perhaps set annually by the Selectmen, Mr. Levington said he would be favorable to an exemption and Ms. Reed felt it was hard to work with an exemption if the cost is going to be capped at some level.

10) Ms. Reed asked the Selectmen to think about reassessing the makeup of the PTERC after December 1 as to whether it makes sense to continue with a 23-member committee, but noted the Committee, preferably in its full form, will need to meet beyond December 1 to approve a final recommendation and report. Further, either the full PTERC or some sub-set may be helpful in preparing for Town Meeting in the spring, and supporting the Selectmen in any informational meetings they may wish to hold.

Town Manager Maureen Valente advised that the Assessing Department would not have the time during December to analyze a comprehensive tax program, as it is in the middle of performing a revaluation and setting the annual tax rate. She informed Ms. Reed and Mr. Levington that an article in substantial form needs to be submitted by December 31, but approximately four more weeks after that could be used to finalize all details.

Chairman Roopenian stressed the importance of keeping the Assessors informed of potential proposals to receive guidance on implementation requirements. She also urged the Committee to put forward a program that would be easy to administer and easy to understand by those who might benefit by it.

Chairman Roopenian also stated she felt the Committee should be retained as it would be needed to communicate its solutions to the residents before and at Town Meeting.

It was concluded that the PTERC would be looking for feedback from the Selectmen, following their December 1 interim report, on the tax relief program(s) to be pursued and the continuing role of the Committee.

The meeting adjourned at 8:55 a.m.

Attest: \_\_\_\_\_  
Maureen G. Valente  
Town Manager-Clerk