

> PROPERTY TAX EQUITY REVIEW COMMITTEE

>

> Minutes, August 12, 2003 --- Page 1 of 2

>

> Members Present: Beth Farrell, David Levington, Steven Wishner, Karen  
> Darmer, Joe Meeks, Arletta Cioffari, Bill Maloney, Basil Pallone, Ralph  
> Tyler, Andy Schwarz, David Berry, Paul Pakos, Claire Schlosser, Ivan  
> Lubash,> Susan Iuliano, Mark Collins

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> Meeting was called to order at 8:35 p.m. by co-chair David Levington  
> with a quorum present.

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> 1. The floor was opened for public comments or questions. Citizen  
> Richard > Payne inquired if the analysis quoted in the Town Crier on  
> August 1, 2003 > would be retracted by PTERC. Mr. Levington replied that  
> PTERC would not respond to that article specifically. After discussion  
> among PTERC members regarding how the Open Meeting Law requires dialogue on  
> issues, and their pros and cons, in the public domain, it was suggested  
> that this be the issue in a column for The Town Crier, to be written by PTERC  
> and published in September. PTERC members noted that this requirement is not  
> necessarily understood by many who write Letters to the Editor.

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> 2. Mr. Levington's opening remark highlighted the issues regarding the  
> migration of seniors in Sudbury and there would be disagreements on the  
> analysis. He indicated that the Steering Committee had opined not to  
> respond to the Letter to the Editor printed in the Town Crier on August 7,  
> 2003, as no votes were taken on that analysis and it did not represent the  
> opinion of the committee at that time.

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> 3. Andy Schwarz made the following motion to change PTERC's Ground Rule on  
> a Quorum:

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> MOTION:

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> A quorum necessary for a meeting of business and discussion will be 12  
> of the 23 Committee members.

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> Except for the final report of the Committee, a 2/3 majority of those  
> committee members present will be required for Committee approval.

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> The Committee will consider at a later time the necessary vote for the  
> final report.

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> The motion was seconded and approved by majority vote.

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> 4. Subcommittee A made a report of its findings:

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> The population of Sudbury is aging.

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> Looking at absolute numbers from decade to decade, one might interpret the  
> data to point that there could be an exodus. If senior representation as a  
> percentage of the total population is examined, there is no change,  
> however.

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> Patterns are not different in the last 20 years, but tax run up is a  
> recent event.

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> Some members suggested talking to real estate agents as to why people leave  
> and that more data was needed to quantify the reasons why people are  
> leaving.

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> A survey of seniors is too difficult to construct in an unbiased manner.

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> Why seniors leave anywhere needs to be examined more broadly.

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> The need to examine equity issues with relying on property taxes for  
> services and education is a moot point as these are set by the state.

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> Charted out tax bill over next 10 years using extrapolated data.

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> Some members disagreed with a simplistic extrapolated approach to  
> potential future tax burdens, as the Town has been going through an  
> infrastructure revamping and tax burden being augmented by the CPA, in  
recent years. A suggestion was made to look at new extrapolations with no  
override included, and then one with a baseline, layering on top a 2.5%  
increase, as allowed by the state, and then various override levels on top in  
order to determine the impact of each to the average tax payer in town.  
These levels would also assist in understanding the impact of those increases  
on the different populations within Sudbury.

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> 5. Subcommittee B made its report::

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> Ruth Griesel from the Council on Aging attended B's last meeting and  
> provided the following information:

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> There was a low response to the 1997 survey, but the result  
> was the BOA would look at more individual hardship cases.

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> Only 27 families currently use the tax deferral program. This may be  
> because of seniors' sense of need for privacy, pride, concern about  
> embarrassment. But it's not a "dead" program -- needs training and  
> education.

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> Other potential approaches were discussed, such as exemptions from tax  
> increases resulting from overrides, or perhaps the Town could match  
> Circuit Breaker abatements.

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> The outlook is that the current 55-65 year olds may not be able to  
> afford to pay taxes in 5-10 years.

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> 6. PTERC and BOA member Dave Berry said there were 16 applicants for  
> hardship and a majority were approved. These deferrals are not in  
> perpetuity, as the nature of the program requires citizens to reapply  
> annually.

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> 7. Discussion turned to the "Homestead Program". Mr. Tyler offered to  
> get that information to everyone.

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> 8. Mr. Levington closed by saying PTERC may need to restructure itself  
> after its fact-finding is completed. And the Committee may need to talk  
> about taxes as well as senior tax relief.

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> Meeting was adjourned at 10:07 p.m. by Mr. Levington.  
> Minutes recorded and submitted by Beth Farrell, Recording Secretary