

Sub-committee B Meeting began at 7:00 p.m., October 27, 2003 at the Senior Center

Attendees: Andy Schwartz, Basil Pallone, Bill Sheehan, Michael DuCros, Claire Schlosser (SubB Chr.), Esther Mann, Ivan Lubash, Dave Levington (Co-Chair PTERC). One guest (unidentified).

Agenda: Tax awareness and personalized education program

IMPLEMENTATION

Per Esther Mann, the Council on Aging (COA) would like to take the lead since such activities are essentially part of their "charter." It was discussed that there are two aspects of an education program, the educating of people; and then the submittal and follow-up of applications for those who choose to apply. COA is the likely body to run the program educating people; the Assessors Office would work with applicants to complete and follow-up with applications.

Education is the key to any successful implementation of any and all programs, and it is also difficult to execute successfully. Past attempts to educate seniors on available programs have not succeeded for varied reasons so careful thinking needs to take place in planning an education effort. There was consensus that marketing an awareness program would be key; and that there should be a "big kickoff effort" followed by a continuing program. Having "one-on-one" confidential sessions for those who wish are also considered key to a successful program.

it following the initial meetings should be part of the minutes as it was specifically discussed.

POSSIBLE APPROACHES

Several ideas were offered:

1. Combine the topic of tax relief program awareness with other topics of keen interest; so to obtain a "captive audience" of sorts. This idea came from the fact that Ruth Griesel, Director of COA, had informed Committee B previously that although attendance at functions were usually high, when the topic for a function included discussing the deferral program for example, attendance would be very low.
2. Trip activities are well attended. Perhaps tie a tax awareness education opportunity to a trip.
3. Have a subject matter expert (SME) available before and after exercise classes.
4. Include information about "how to get tax relief educational assistance" with the tax bill that goes out from the Assessors Office.
5. Offer "one-on-one" confidential sessions for those who wish it following the initial meetings.

FUNDING and VOLUNTEERS

Claire Schlosser suggested the program would require a full-time person to create, oversee, and manage, and that funding would be necessary for this program to succeed. It was generally agreed that funds will be difficult to obtain from the town because of budget constraints and cutbacks from the state, and that we are looking for around \$15-20K or more to fund an education program.

Suggested Funding and Volunteer Sources:

1. Dave Levington suggested the Sudbury Foundation be asked to fund such a program. They also have a matching grant program.
2. Andy Schwartz suggested contacting the high school to determine if support can be obtained from the teaching staff.
3. Dave Levington also noted that a number of the school's retired teachers live in town and may be interested.
4. SERF was also suggested as a resource.

NON-SENIOR EDUCATION and GENERAL MARKETING

Also discussed was the need to educate non-seniors in areas such as understanding the need for tax relief for seniors (similar to the understanding that has evolved within PTERC); and also the

importance of “marketing” the recommendations of PTERC during the months leading up to Town Meeting.

Meeting was adjourned at 7:30 p.m.