

Subcommittee C: Potential Proposals

The subcommittee has identified the following areas for further consideration. (9/29/03 meeting) The inclusion of an item does not indicate majority support of the subcommittee for the proposal; these are potential proposals that may be further analyzed to varying degrees. (Numbers are from full PTERC list.)

Maximizing Currently Available Programs (5)

Issues/Tasks include (Mark):

- Consult with Sub B
- Which programs are not at maximum level?
- What is allowed under law?
- Comparison with other towns

Examples:

--*work-off program* has high participation rate. Can it be expanded?

--Concord: \$8.50 per hour?

--Do we have a line item?

--measures to enhance or expand assessors' grants of *clause 18 hardship*

--line item

--voluntary fund (Wayland, Acton)

--legal issues: May not limit assessors' discretion/provide guidelines without home rule petition

Residential Exemption (1)

Issues/Tasks include (Susan):

- Analyze benefits/drawbacks generally
- Review numbers provided by Bill Maloney/budget impact
- What level?
- Combined with other programs?
- Experience of other towns

Expansion of Circuit Breaker (Home Rule) (2, 4, 9b)

Possible two-part approach:

(1) Matching for those eligible (Wayland); **and**

(2) Provide exemption equivalent to CB for those who do not qualify:

Provide for higher income level?

Provide for higher assessed value/or no assessed value requirement?

Provide for all ages?

Longevity?

Any requirement of participation in other programs?

Issues/Tasks include (Karen/Susan):

- Review of eligibility criteria in light of needs identified in baseline data/ Determine target group/income levels
- Legal issues re: level of need
- Structural
- Burden on assessors, other implementation issues
- Difficulty in obtaining legislative approval

Straight Exemption (Home Rule) (10, 14-17)

Issues/Tasks include (Tara has some ideas, may formulate specific proposal?):

- Pros and cons: The development of our own exemption allows more creative options; may be harder to obtain legislative approval. Consider other factors.
- Exemption amount: fixed amount v. percentage?
- Determine possible eligibility criteria: Age, Income, Assets, Longevity, Assessed value, Requirement of participation in other programs

Expansion of Tax Deferral Program (Home Rule) (8)

Possible variations considered:

- All ages
- Combined exemption/deferral approach

Long-term Measures

The subcommittee has discussed various long-term measures that PTERC might recommend for further analysis beyond this Fall:

- Seek legislation to amend current programs state-wide. The primary examples are efforts to amend the Circuit Breaker to allow for local option expansions; to index criteria to local characteristics or to repeal or amend the assessed value. (9a)
- Seek home rule approval for more complex local exemption (may take years) while pursuing short-term options at the same time. (14-17)

Other Issues

The subcommittee has discussed other questions that arose in our discussion that may or may not result in specific proposals. Example:

- Potential changes to override procedures: Could Sudbury alter or amend procedures or requirements of the override process? Mark is checking some legal issues.

Related Tasks

Burden-Shifting Measurement Tool (Paul)

Paul is continuing his efforts to further define the baseline data to help us measure the potential impact of the final proposals.

Budget/Tax Projections (Steve)

Steve is working with Town officials and others to develop budget projections for the next several years.

Legal Issues (Karen, Susan)

Karen and Susan are continuing to pursue legal research or other sources of information relevant to constitutional or other legal limits to proposals.