

PROPERTY TAX EQUITY REVIEW COMMITTEE

Minutes for September 9, 2003

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Members Present: Beth Farrell, William Maloney, Arletta Cioffari, David Berry, Dave Costello, Ivan Lubash, John Nikula, Marilyn Goodrich, Bill Sheehan, Michael DuCros, Susan Iuliano, Steven Wishner, Tara Reed, David Levington, Paul Pakos, Karen Darmer, Ralph Tyler, Andrew Schwarz, Basil Pallone, Claire Schlosser

Meeting was called to order at 7:04 p.m.

1. No public comments made.
2. Minutes for the August 26, 2003 Full PTERC meeting were approved unanimously.
3. **Presentation:** Dr. Alan Gordon, a Sudbury resident for 19 years, and who holds a PhD in Statistics, specializing in demographics presented his finding regarding population trends in Sudbury for the last 10 years. His research used numbers from the Center for Disease Control and their “life tables” and “survival rates.” Highlights included a big drop off in the age 20-24 population in 2000, according to Dr. Gordon probably because that group lives elsewhere in college and new jobs. There was an in-migration of ages 35-39 of 137%. He suggested looking at the net-migration numbers for comparable towns and compare them to Sudbury’s. His conclusion was there was a net out-migration of seniors, but it is comparable to other towns.
4. **Subcommittee B:** Ms. Schlosser, representing Subcm. B, made a report of preliminary findings to the full PTERC committee. Please see attached document. Mr. Levington suggested looking at the Federal guidelines of no more than 25% of an individual’s income allocated for housing as something to consider for Sudbury residents.
5. **Subcommittee A:** Ms. Cioffari, representing Subcm. A, reported to the committee that in comparing Sudbury to other towns, they were hoping to find data with a correlation to taxes and a senior out-migration. Please see attached document for specific information.
6. **Subcommittee C:** Ms. Iuliano, representing Subcm. C, reported that considering the commercial tax base and its trends could be useful.
7. The co-chairs of PTERC took preliminary votes on the committee members’ opinions of various building blocks for the final proposal. These included:

Including a Cost-Benefit Analysis: Some committee members felt it should try to provide one, but it would not be precise. Others felt if it could not be quantified, that maybe it should not include one. Overall, the majority of the committee was willing to consider and develop programs that do not offer offsetting economic benefits.

A means test: It was pointed out that some currently adopted programs, such as the residential exemption in Boston, have no means test. Therefore, one for Sudbury may not be necessary. Overall, the committee was split on deciding to implement a means test.

Which segments of population should get assistance: The majority of the committee felt that it should be open to consider helping anyone who meets a needs test.

Longevity requirement: Some propositions have come before the State using a longevity requirement, but have not passed. The committee vote on this was split.

8. **The Report to the Selectmen:** The co-chairs are reporting to the BOS on Tuesday, Sept. 16, 2003. They will give them copies of the Subcommittees' reports, the "building block" suggestions and an executive summary of what has been completed thus far.

9. **The Future:** The Steering Committee will discuss how to organize within PTERC for the completion of any uncompleted tasks and report writing. Some members thought the current groupings with new tasks would be fine, but no decisions were made.

10. **HB 3909:** This will be taken up by the Joint Committee on Taxation on September 23, 2003 in SH rm. 437 from 10-12 a.m. PTERC will have no official representation there.

Meeting was adjourned at 9:32 p.m.

The next PTERC meeting will be September 23, 2003 at 7:30 p.m. at the Fairbank Senior Center.

Minutes recorded by Beth Farrell, Recording Secretary.