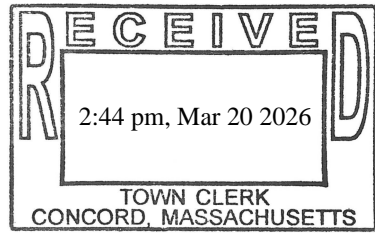


Tax Relief Evaluation Task Force

March 12, 2026

Approved March 19, 2026



Pursuant to a notice duly filed with the Town Clerk, the Tax Relief Evaluation Task Force convened in person and via Zoom at 8:30 AM.

CALL TO ORDER

Ms. Salinger (Co-chair) called the meeting to order at 8:30 AM. Task Force members present in person: Mr. Feeley, Ms. O’Neil, Ms. Quackenbush (Co-chair) was present on Zoom. Ms. Rovelli (Select Board liaison) was present in person and Ms. Reed (Finance Committee liaison) was present on Zoom.

The minutes of the February 26 meeting were approved unanimously by members present with the correction that there are approximately 1,500 parcels below breakeven that did not receive the RTE. The minutes of the March 5 meeting were approved unanimously as submitted.

Report Edits

Ms. Salinger distributed possible additional points to be added to the Findings section, particularly one on the political aspects of the dispute over the RTE. Members were comfortable with adding this item, as revised, to the Findings.

Members generally approved of the revisions to the quantitative analysis section (Ch. 5). Further revisions were suggested to make even clearer the methodology used to extrapolate the survey data to the town. We have noted that the survey skews older and lower income (for homeowners), but any errors introduced by the extrapolation do not affect the general conclusions about efficiency and effectiveness.

In general, the term “non-qualifying” should be used to refer to the parcels that did not receive the RTE, since we do not know for sure the proportion of these that did not apply, but might have been eligible.

Members were generally pleased with the section describing possible alternatives that the Select Board might adopt. Mr. Feeley asked that we be clear that an option that involves removing the RTE should NOT be implemented until replacement programs (such as 41C ½) are in place.

Mr. Feeley confirmed that the Concord Housing Authority pays a negotiated PILOT, not regular real estate taxes. Also, the \$750,000 estimate of the average assessed value of CHA properties is quite a bit too high. This will be removed, since assessed value is not relevant when a PILOT is paid.

The material in the Findings section (p. 82) no longer tracks the discussion of reasons for not qualifying. Once that section is revised, Mr. Feeley will redraft this item in the Findings.

Report Enhancements

Members were pleased that the sensitivity analysis shows that our conclusions are quite robust, but thought the sensitivity analysis discussion (p.43) would confuse readers and might be removed.

In discussing the impact on renters, Ms. Salinger notes that, while Concord has a higher percentage of renters than other surrounding towns, the percentage is much lower than the “non seasonal communities” that have

adopted the RTE---including Boston, Cambridge, Somerville, Watertown, Waltham, Chelsea. She will note this in the discussion of other towns.

Mr. Piper is working on a further analysis of the impact on renters, which he hopes to have for the March 29 meeting.

Whatever the Select Board does, the Town needs to improve communication about the options for tax relief. Ms. Rovelli noted that the Assessor's Office has limited ability to provide such counseling, since they are handling abatement requests, deferrals, etc. More detailed counseling on available tax relief options, such as that provided by the COA for elders, would be desirable.

Next Steps

Ms. Gurall White will be adding a quantitative analysis comparing sales trends for mid and high-priced homes in Concord and adding this to the real estate section.

Ms. Salinger will create an Executive Summary, which will basically reflect the "Findings" section, and the possible alternatives for Select Board consideration. She will also attempt to outline the key points that the Task Force wants to make in the Select Board presentation at the time it submits the report.

Ms. Stone will be asked to comment on the revised draft after the March 19 meeting.

Public Comment

Ms. Reed indicated that she thought the Task Force is providing the appropriate level of analysis.

Mr. Gillis asked if the Hugh Cargill Trust can do more for tax relief. He is under the impression that there are limits, perhaps not necessary and imposed by the Select Board. Ms. Rovelli noted that the Property Tax Relief Fund administered by the Hugh Cargill Trust is distinct from the main body of the Trust, which can be used for a broader range of relief for Concord residents experiencing hardship. Ms. Salinger said that, as part of improved communication about tax reduction opportunities, it might be appropriate to update materials for the Hugh Cargill Trust, and also the materials provided by the Assessor on tax deferrals.

Next Meetings

March 19 8:30 AM

March 26 8:30 AM

April 2 8:30 AM (If needed)

The Task Force meeting adjourned at 9:40 AM.