

The Hugh Cargill Trust Committee

Minutes of the public meeting held April 13, 2021.

Judy Terry, Chair and Treasurer, called the meeting to order at 9:31 AM.

Present from the Committee were: Robert Abraham, Tax Relief; Elisabeth Elden, Silent Fund Lucy Rosborough, Intake; and Deena Whitfield, Clerk.

Also present: Jeremy Romanul, Senior Administrative Assistant, Town of Concord

APPROVAL

Minutes: The public and executive minutes of March 9, 2021 were unanimously approved for release as read.

Treasurer's Report: Unanimously approved. Anne Stevens notified us that the grace period for CMLP was coming to an end and that they were advising clients that disconnections would start July 1. They are being careful and cautious, even calling clients to advise of their options.

NEW BUSINESS

Timing to send new annual application Tax Relief Letters: Bob and Lucy have already been receiving inquiries from anxious clients regarding tax relief. Bob suggested that we move up the date for sending the application letters from July to early May. He will work with Jeremy to work out the details.

CONTINUING BUSINESS:

Town Social Services Resource List: The list was accepted as written with one correction. It was suggested that the list go to Bonny Wilbur with the request that she distribute it to appropriate places in town and that it be posted on the Concord town website. Elisabeth will write a letter to the Editor for the Concord Journal advising of the availability of this resource.

Job descriptions

Tax Relief – accepted as written (attached at the end of the minutes)

Intake – accepted as written (attached at the end of the minutes)

OTHER BUSINESS: None

Adjournment: At 9:54 AM on a motion made and seconded, the committee voted to adjourn from open session for the purpose of discussing individuals or families seeking assistance, the disclosure of which would be a violation of privacy.

NEXT MEETING: scheduled for May 11 at 9:30.

Respectfully submitted,

Deena Whitfield, Clerk, Hugh Cargill Trust Committee

Role of Tax Relief Person

Tax Relief Program

Town residents who own their home and qualify for reduced tax rates are eligible for a \$325 quarterly rebate. Residents will now qualify on an annual basis. Eligibility is based on ownership, income and assessed value of the property. Every year eligible residents receive from the Town Select Board Administrative Assistant (SBAA)(Jeremy Romanul) (1) a letter of application mailed by May 1 approx. 2 months before the July tax bill is due and (2) a letter of confirmation sent by June 15 .

Qualification Requirements for Tax Relief Applicants are as follows:

- Own and live in the property at the address
- Own no other property unless it is used solely to produce additional income
- The property is assessed at no more than \$838,900
- Total income falls within one of the following categories:
 - ✧ Single owner, income no more than \$57,000
 - ✧ Head of household (1 or more dependents living at home) no more than \$72,000
 - ✧ Married filing jointly, no more than \$86,000

Residents who qualify will either receive an individual check for \$325 if their taxes are paid by an escrow account or the resident will subtract \$325 from the tax amount due if the resident pays their tax bill directly. The SBAA will submit one check to the Town Treasurer for all residents who pay their tax bills directly.

Basic Responsibilities of the Tax Relief Person

The HCTC Tax Relief Person assists the Select Board Administrative Assistant making sure residents who are eligible for tax relief take advantage of the program and have followed up with their paperwork.

- New Recipients: Occasionally HCTC Intake or Community Services Coordinator (Bonny Wilbur) will contact you with a new name, Call the applicant and ask what

the household income is, who owns the property and the assessed value of the property. The call-in number to maintain our privacy is 978 318-3298 at dial tone14789,9,1 + applicant's phone number.

- Verify: Double check the assessed value and legal ownership by accessing the town website: **Online Property Data**. Go to www.concordma.gov; scroll down to the bottom of the page and select icon "GIS&Maps". On the GIS page under Who Uses GIS click on the link **Online Property Data**. This will direct you to the property database. You may search by address (default) or owner. ***If the owner qualifies contact SBAA (Jeremy) so he can add the name to the Tax Relief list.***
- Follow up: Approximately 3 weeks before the July tax bill due date the SBAA will give you names of recipients who have not returned their applications. You will need to call and remind them to submit the paperwork. In case of senior citizens, you may contact the COA if you feel it is warranted.
- Keep a copy of the current Tax Relief List in your files.
- Assist in updating the Tax Relief Annual Appeal letter.
- Coordinate with the Town Tax Relief Committee and attend meetings as necessary prior to submittal of the annual appeal letters.

References

Tax Relief Application Letter

Tax Relief Approval letter for Tax Escrow Accounts

Tax Relief Approval letter for Direct Tax Payment Accounts

Tax Relief Annual Appeal letter

Intake Responsibilities

- Check the HCTC line frequently (every day or so) for messages left by clients requesting financial assistance. 978-318-3100 ext *2030, passcode 2031. Press "P" to play message, "K" to save, "D" to delete.
- It is helpful to keep a month-to-month log of calls with date, name, address, phone number for your reference.
- If caller is a former client, retrieve their information packet from the files and review their profile before returning the call. Complete a **Confidential Intake Form** for each request even if from a former client. It is helpful to capture their email address. Provide those who may be eligible for property tax relief with HCTC contact, currently Bob Abraham, robertwa@comcast.net.

- Client call back number 978-318-3298, at dial tone 14789,9,1 + client number. This protects you from client having access to your home/office telephone number.
- Respectfully retrieve as much pertinent information as possible during the conversation. If an eligible homeowner, suggest connection with HCTC Tax Relief member.

Make client aware of options available through Town of Concord Social Services Resources and meal programs (Open Table, Food for Families, etc.)

- Prior to each HCTC meeting, prepare a master list of clients requesting financial assistance on the **HCTC Executive Session Form** (Excel) and forward to committee members a day before meeting with a copy to Administrator in Town House handling payments. (currently Jeremy Romanul, jromanul@concordma.gov)
- Present client requests at the Executive Session preserving privacy, if requested.
- Notify clients of HCT decision as soon as possible after the Executive Session and complete the **Payment Authorization Form** for each request.
- Prepare **Executive Session Summary Checklist – Approvals/Denials** and forward to HCT Chair, Clerk and Administrator at Town House. A courtesy copy should also be emailed to Bonny Wilbur, Community Services bwilbur@concordma.gov. It is helpful to CMLP if you email a list of utility approvals after each meeting to Anne Stevens astevens@concordma.gov
- Photocopied invoices provided by clients should be submitted by email (if available to them) to hctc@concordma.gov (that is YOU!) and the Administrative Assistant handling payment, currently Jeremy Romanul jromanul@concordma.gov. Copies of invoices can be delivered to the Town House after approvals if email not available to them. CMLP will provide email copies of their invoices when requested by you.
- Expect follow up calls from clients anxious about date of payment of their grant.

Attached:

Confidential Intake Form
 Payment Authorization Form
 Executive Session Master Form
 Executive Session Summary Checklist – Approvals/ Denials

Draft prepared by Lucy Rosborough

12 April 2021