

Correspondence received by the Concord Select Board
Week Ending – September 3, 2024

1. Scott Gillis 80 Alford Street
2. Brehm Feigh 149 Spencer Brook Road

Subject: Analysis of RTE Year One

Good morning, Mary, Terri, Wendy, Mark and Cameron,

If you haven't already done so, please consider asking the Assessor's office to provide the following analysis when they present to you on September 30th.

- 1) In total and on average per home how much has the RTE affected each 20% group (quintile) of homes based on appraised value? For example how much in total dollars did the bottom 20% of homes save in taxes and how much did the taxes increase in total dollars for the top 20% of homes.
- 2) What would be the impact if every eligible homeowner received the exemption?
- 3) What would happen if the RTE were reduced from 10% to 5%?
- 4) What would happen if the RTE were increased from 10% to 20%?
- 5) What were the Select Board's and the Board of Assessor's goals for the RTE and how well have they been achieved?
- 6) How has the RTE affected the approximately 35 seniors that qualified for the Senior Means Tested Tax Exemption?
- 7) Are there ways more than approximately 35 seniors can be helped?

Attached is information for each town in Massachusetts regarding Senior Means Tested Circuit Breaker income numbers. This report shows that in 2020, 302 state tax filers who live in Concord were under the Circuit Breaker income limits. This represented 3.5% of all Concord state income tax filers.

You probably will have many more questions you would like the presenters to be prepared to answer on September 30th.

Thank you for considering this suggestion.

Scott

P.S. Mary,

Thank you for encouraging me to attend the September 30th meeting. Have you found the report or presentation from the Tax Fairness Committee that suggested the Select Board consider the RTE?

dor-circuit-breaker-usage-report.xlsx

mass.gov

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September 1, 2024

Mary Hartman, Chair
Select Board
Town of Concord

Dear Mary:

When the Select Board members deliberated and voted to adopt the residential tax exemption (“RTE”) in November 2023, you and other Select Board members also suggested a committee be formed to further study the RTE.

At your invitation, I agreed to meet with you in December to discuss the RTE, and you shared that the formation of such a study committee would be up to the Select Board Chair (who at the time was Mr. Dane). I sent several unanswered emails to Mr. Dane (copying you) asking about the status of a potential study committee. I have also not seen an agenda item at subsequent Select Board meetings to discuss a potential study committee.

You are now the Chair of the Select Board, so based on our meeting last year, I understand that you now control the decision. I recently learned that the Select Board intends to hold a public forum in September for citizens to share their views and experiences with the RTE. If this is substitute for a study committee, I believe this is the wrong approach.

I have witnessed such public hearings or forums devolve into citizens speaking at one another and against one another, which creates division in our community. Importantly, citizens express personal stories and opinions, often reflecting what may be best for them and not the entire Town, and certainly do not reflect comprehensive analysis. Additionally, many homeowners with higher-assessed homes will likely be uncomfortable speaking at a public forum for a number of reasons, including being labeled as “rich” or insulated from financial challenges and likely not wanting to be included in local press coverage.

I also think a forum, which puts the onus on citizens, is a shirking of the Select Board's leadership responsibilities. Last November, you and other Select Board members stated the problems that the RTE would address. Rather than leaving it to the citizens to share their anecdotal experience and opinions, the Select Board should share objective facts with the taxpayers of Concord as to whether the Select Board's identified problems have been solved or alleviated by the residential tax exemption.

For FY2024, owners of lowered assessed valued homes received property tax reductions (not just relief from growth in taxes) because of last year's property reassessments and the RTE, many in the middle-assessed values saw nominal impact to their taxes, while the top 20% received significant tax increases. The data was readily available for analysis and understanding. I shared with you in December my detailed analyses which residents should have expected the Select Board and Board of Assessors to have thoroughly analyzed and understood, rather than a resident, before it voted to adopt the RTE in November.

Our town is blessed with a deep talent pool of committed citizens. Rather than a public forum, a study committee would be deliberative and objective, reviewing and assessing data, impacts and trends in Concord as well as from other peer communities, and representative of a broad and diverse range of property owners.

As the elected leader of our town's Select Board, I would urge you to think carefully about the likely outcome of a public hearing as opposed to a study committee which has the charge to thoughtfully analyze the problems the Select Board enunciated last year.

Breht Feigh
Spencer Brook Road