

**Senior Tax Advisory Committee Meeting
in the Heald Room at Town Hall
66 Westford St. Carlisle, MA 01741
December 21, 2022 Minutes (Draft)**

Members Present: Joan Ingersoll, Brian Macdonald, Reuben Klickstein
The meeting was called to order at 1:00 p.m. by Joan Ingersoll

Tax Worker Assignments:

- Joan reviewed the active tax workers and assignments. There are 7 active tax workers, and the maximum abatement obligation is \$9,375.
- Tax workers are currently assigned to the COAHS, the Police Department, Carlisle Public Schools, Gleason Public Library, the Board of Health, and the Assessor's Office.

Program Cycle and Tax Adjustments:

- Brian explained that the MA Department of Revenue (DOR) issued an updated Informational Guideline Release (IGR) requiring that property tax credits be applied to and appear on the actual tax bills.
- While tax bills are mailed in late December, senior tax worker hours must be completed by September 30th to allow time for the Assessor and the Finance Department to complete the required tax calculations and ensure that the net after tax earning appear as a tax credit on the Actual Tax Bill.
- Brian stated the Town has no plans to change the program cycle, which runs from 10/1-9/30.
- The tax abatement will be split equally between the 3rd and 4th quarter tax bills in February and May. Details of abatement calculations will be available to senior tax workers in January.
- Reuben agreed that the new cycle is reasonable in light of the DOR requirements. Reuben also appreciates the details to be provided from the Town Accountant regarding mandatory deductions to the abatements.

Senior Property Tax Exemption

- Although there are several senior tax exemption programs in Carlisle, most have very low income and asset limitations and are infrequently used.
- The COAHS and the Assessor are working to design a senior means-tested property tax exemption program using information from other towns and data collected through the Senior Home Heating Assistance Program.
- A warrant article for the spring town meeting is planned.

The meeting was adjourned at 1:40 pm.
Submitted by Joan Ingersoll