

CITY OF SHELTON

SENIOR TAX RELIEF COMMITTEE

Regular Meeting
September 7, 2005

Roll Call

Chairman Ron Pavlucik - present
Vice-Chairman Ann Walsh - present
Gary DeFilippo - present
Steve Morse - present
Carol Savignano - present

Also present: Deborah Onderko, Tax Collector
Gloria Kovac, Tax Assessor

The meeting was called to order at 5:35 pm in the City Hall Auditorium.

Minutes from the August 29, 2005 meeting were unanimously approved.

Goals, Objectives and Plans process document. – this document was reviewed after some recent changes, based on suggestions of Committee members. The updated version of this planning document will help assure that the group's discussion and activities are kept in focus and on schedule.

Tax Relief Committee Tenure. Information was received from Shelton's Consul that the tenure is 60 days after appointment by the Mayor. The Mayor may re-appoint the Committee for another 60 days if necessary.

Shelton's current senior tax relief credit program. Tax Assessor advised that department records show that for current FY2005/06, 563 persons received the local property tax credits, but the data base as it exists is unable to break down the numbers of single vs. married senior property taxpayers.

Tax Collector Deborah Onderko provided information, including:

244 residential homeowners are delinquent with their residential tax payments - 10 of the 244 homeowners are seniors. 7 of the 10 seniors in arrears are on a payment plan.

The senior delinquent payment problem appears to be a budgeting or timing issue, in that the senior citizens may not have funds available when tax payments are due. For example, the last day to make the July 1st tax payment without a penalty is August 1, and social security checks arrive a few days later. Shelton offers a quarterly property tax payment option for those over 65. Currently 116 seniors qualify for this option with 49 actually enrolled.

Sunset provision: Ms. Onderko recommends a 3 year cycle to review senior tax relief programs for possible changes in eligibility and benefits.

Tax Credit Amount: she suggested the current \$150 tax credit is appropriate.

In summary, the Tax Collector advised the committee that in her opinion Shelton seniors generally have the ability to pay property taxes, and taxes are not a big problem for them.

Ron Pavlucik offered a differing opinion: just because most senior citizens pay their taxes on time, as is typical of their generation, does not necessarily mean that it is not a hardship for them. Rising gasoline and heating costs will likely be a big financial hardship for seniors (and other Shelton residents) later this year. An enhanced tax relief program would help seniors with their total household expenses of which the largest is often taxes.

Goals, Objectives and Plans item (3)---Brainstorming on new tax relief programs.

Committee entered into a discussion of tax relief issues both specific and general in nature as they may apply to various attributes of a Shelton Senior Tax Relief Program.

The Tax Assessor will be asked to do the following:

Contact numerous Connecticut cities and town of about the same population as Shelton and obtain the following from each:

- 1) What Senior tax relief program do they have in place(credit/freeze/deferral/other)?
- 2) What are income limits?
- 3) What is credit amount?
- 4) Do they have a freeze program?
- 5) Do they have a tax deferral program?

Goals, Objective and Plans item (4)---Review Tax Relief Programs from other town as discussed during the BOA Finance Committee meetings in early 2005. Steve Morse provided a spreadsheet of local area town Senior Tax Relief Programs which the working group considered to be of further interest and to be reviewed whenever a Shelton Senior Tax Relief Committee was formed. Steve indicated that to avoid re-inventing the “wheel” many of the discussed program elements can easily be adapted for City of Shelton use. The Committee agreed to continue to evaluate the programs in use in other communities.

The meeting was adjourned at 7:20pm

The next meeting is scheduled for Thursday September 15, 2005.

These minutes were prepared by Steve Morse
September 16, 2005 (Modified)
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