

MINUTES
Senior Volunteer Tax Relief Committee
March 19, 2015 11:00 AM
Town Hall, Long Hill Conference Room

Members Present: Paul Niebuhr, Maureen Gordon, Sylvia Askinozi, Victor Pioli and Dee Chiota

Absent: Gail Hanna

Also Present: Lynn Arnow, Mark DeVestern and Ed Lavernoich

The committee researched similar programs offered in four municipalities throughout the state; each has varying requirements, structures, program limits, and levels of participation. As part of their research, the following was considered:

- Were there ample volunteer opportunities for seniors?
- Eligibility criteria for not-for-profit (501-C) agencies to allow volunteers to earn the tax credit
- The differences between an “income qualifying” program vs. a “non-income qualifying” program
- Financial impact to the annual town budget for both of the above
- Local senior profile statistics, including the average income for Trumbull seniors (65+), and how many of them were qualifying real property owners.
- Logistics for administering the program, including the application process and any clerical/administrative cost necessary to manage the program.

Tax Assessor, Mark DeVestern, shared details and qualifying guidelines of a number of local and state tax relief programs currently available to seniors; many are income-qualifying. “Eligibility” is determined by the resident’s W2. In 2014, there were 980 elderly applicants and 57 disabled persons who qualified for the Elderly and Disabled Tax Relief.

Economic Development Director, Ed Lavernoich provided information on the Town’s senior population and helped decipher data from the 2010 U.S. Census Report and two other reporting sources. Though the demographics and statistics vary by definition and income criteria, it was determined that approximately 4000 seniors between the ages of 65-85, could apply for the proposed credit, if it were not an income-qualifying program. There are significantly more resident seniors; however, if they rent or reside with other family members, they would not qualify for the tax credit.

The committee then analyzed the median incomes of the Trumbull Seniors (US Census).

2014:	Age 65 to 74	45% have incomes less than \$74,999
	Age 75+	80% have incomes less than \$74,999

Age 65 to 74 55% have incomes greater than \$75,000
Age 75+ 20% have incomes greater than \$75,000

The committee investigated similar programs within the state and shared the following:

Manchester – Pop. 58,241

- **Income qualifying** at \$34,600 per person, or \$42,200 per couple
- \$500 credit for 50 hours, or \$1000 per household
- Program Cap: 40 people/\$15,000 cap
- Town-managed program
- 18 applicants in 2014

Danbury – Pop. 83,684

- **Income qualifying** at \$56,800 per person, or \$64,300 per couple
- \$600 credit for 100 hours
- No Program cap
- Managed by the Volunteer Center (United Way)
- 30 applicants in 2014

Bristol – Pop. 60,500

- **Income qualifying** at \$34,100 per person, or \$41,600 per couple
- \$300 credit for 50 hours
- Program cap at (\$24,000) 80 people – first come first serve
- Town-managed program
- 8 applicants in 2014

Brookfield – Pop.16,452

- **Income qualifying** at \$52,500 per person, or \$59,200 per couple
- \$600 credit for 100 hours
- Program cap at (\$54,000) 90 people – first come first serve
- Managed by the Volunteer Center (United Way)
- 8 applicants in 2014

The committee agreed the next step would be to determine what kind of program would best suit Trumbull's senior population, and budget: Income qualifying vs. non income-qualifying.

Next meeting: March 24, 2015