

approved

senior tax credit task force

Minutes of the October 16, 2007, meeting

The Senior Tax Credit Task Force met on October 16, 2007, in the Tyson Room, Howard Building, 3430 Courthouse Dr., Ellicott City, MD, at 2 pm.

The following members of the task force were in attendance: Ted Meyerson, Frank Chase, Sue Buswell, Colin Burke, Sara Hamer, Don Dunn, Peter Rogers, Joel Yesly, Larry Lewis, Sue Brown, and Sherman Howell..

Others from staff in attendance were Linda Watts, Leo Oken, Don Stitely, Jeff Meyers, Terry Hansen, and Diana Coll.

The meeting was open to the public and press.

The chairman called the meeting to order at 2:00 p.m.

The task force approved the minutes from October 11, 2007.

The chairman indicated that the meeting was to discuss the task force's findings and consider recommendations. Ms. Buswell clarified that no final decisions would be made at the meeting and that open discussions would continue with the hope that a consensus would be reached.

Mr. Dunn distributed a document that he created that said the purpose of the credit was to aid "aging in place". Mr. Dunn recommended decoupling the County credit from State credits, eliminating means tests, and simplifying the application form and process. Mr. Dunn also indicated that, for fairness, the Columbia Association should pay property taxes on its facilities.

Mr. Chase reminded the task force that some property owners who need help are not seniors. He wants to help those people too. Ms. Hamer and Mr. Meyerson indicated that the task force was charged with focusing on the senior property tax credit. Ms. Buswell added that that the accepted interpretation of "aging in place" is not limited to remaining in one's current home.

Several members discussed the application form, noting that many applicants found the form to be difficult.

Several members expressed a strong desire in not changing the current law so as to give the Committee and Howard County Government time to assess its effect. Mr. Burke, Ms. Buswell, Mr. Rogers, Mr. Lewis, and Mr. Meyerson recommended that the task force seek to have its term extended. The data for the current tax year are incomplete and, to discern trends, more than one year's data are needed. Ms. Watts indicated that final data for this tax year will not be available until February or March. Furthermore, the County is expected to be affected by changes in State finances, but the impact cannot be predicted at this time. It seems clear that the credit will cost the County less than was anticipated. The task force is concerned that there is no good data to indicated how many more people would have qualified for the credit had they applied for it. Ms. Buswell reminded that task force that legislative changes this fall could require the Department of Finance to redesign the application, which would add confusion and delay to the process.

Mr. Chase, Ms. Buswell, Mr. Yesly, and Mr. Burke discussed the asset test. Some people have carefully and painstakingly accumulated assets over their lives. Should they be penalized for

having done so? Information from the Department of Finance seems to suggest that few applicants were disqualified by the asset test; however, the number of people who were discouraged from applying by this test is unknown.

The task force discussed the outreach efforts that the Department of Finance undertook. While the task force was impressed by the Department's efforts, the task force is skeptical that all those who might qualify had actually applied.

The chairman indicated that he hoped to email draft language for a final report before the next meeting (October 25).

The meeting adjourned at 2:55 p.m.

Respectfully submitted,

Jeff Meyers