Select Board
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TOWN OF MEDFIELD

Office of the Select Board

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Town Administrator Goals
July 1, 2023 to June 30, 2024
STATUS UPDATE

Goal: Identify and advance opportunities for cooperation between Town departments, Medfield Public Schools, neighboring municipalities, non-profit organizations, and regional governments as ways to improve services and reduce costs.

Task:

A. Solicit Commonwealth Compact Efficiency Grant to aid in recommendations on forming a Grounds Department

- Received Community Compact award, Collins Center was hired to conduct the study. Study began in fall 2023 and we anticipate the final study should be completed in the fall 2024.

B. Investigate regional shared positions for Conservation Agent and Sealer of Weights and Measures

Conservation Agent

- Met with Town of Sherborn TA to discuss the possibility of shared agent
- Hosted meeting with Sherborn TA, Sherborn ConCom Chair, and Medfield ConCom Chair to discuss shared position.
- Neither the Town of Sherborn nor the Town of Medfield Conservation Commissions were interested in a shared Conservation Agent.

Sealer of Weights and Measures

- Medfield joined with Millis and Medway for a shared Sealer of Weights and Measures.
- An Intermunicipal agreement was signed in August 2023

Voted by Select Board: October 2023

Regional Dispatch

- Partnered with Westwood and Dover to study a regional dispatch opportunity
- Westwood determined in July 2024 that it was not economically feasible to include Medfield in their dispatch model

Goal: Continue to manage town finances in a fiscally prudent manner that strikes a proper balance between the funding of important town services and affordability for taxpayers.

Task:

A. Investigate and prepare options for the Select Board to consider for additional senior resident tax relief programs

- Please see the Attached Recommendations

B. Investigate potential for tax mitigation fund for new elementary school project

- Worked with the Warrant Committee to develop a framework for a tax mitigation fund to offset the initial years borrowing for the new elementary school
- Elementary School Tax Mitigation Fund adopted by the 2024 Annual Town Meeting and initial appropriation of $900,000 transferred into the fund from Free Cash

C. Study the feasibility of health insurance changes to allow for savings both for the town and the employees

- Successful negotiation with the PEC (Public Employment Committee) and signed MOU in January 2024.
- Plan design changes resulted in over $700,000 in savings on health insurance premiums for the Town and Employees.
- FY2025 Health Insurance budget savings of $225,000

D. Provide quarterly updates to SB on contracts/projects authorized by the SB

- The project was included as part of the *pilot intern project* and completed in July 2024
- Created a contract database for the Select Board to review on an ongoing basis versus a quarterly report.

Goal: Maintain Environmental quality and the sustainability of our community

Task:

A. Investigate and implement sustainable landscaping alternatives at the Town Hall

- Staffing changes put this project on hold until the Grounds and Maintenance Study is completed

B. Investigate Carbon Sequestration Possibility

1. Conducted research to determine if the Town has enough acreage to accomplish this

- Based on carbon sequestration programs implemented by other Massachusetts municipalities, Medfield may need to approach this on a regional basis. West Springfield, Holyoke, and Westfield collaborated to create the Tri-City Carbon Sequestration Program, leveraging 15,000 acres to collect an estimated $2 million dollars over the next 10 years. Additional funding may also be needed for Medfield to pursue such a project. The Tri-City initiative began with a study funded by a $100,000 earmark included in the state budget.
- Governor Healey announced in June 2024 there will be funding available to implement the "Forests as Climate Solutions" initiative
- The town will investigate grant opportunities as they become available

C. Tree Planting

1. Develop a pilot Tree Planting program with use of ARPA funding.

- Requesting $10,000 in ARPA funding for a pilot project
- Project designed in cooperation with Lovell's Nursery, Charles River and Neponset Watersheds
- Tree Lottery will be conducted in the fall
- Anticipate 50 trees will be available to Medfield residents to be planted in their yard (20 feet from the right of way)
- Sugar maples and red maples were chosen in consultation with the Tree Warden

Goal: Assist Select Board in carrying out a statement against Oppressive Actions and Speech Directed at Individuals and Groups

Task:

Establish a dedicated phone line in Town Administrator's office for residents to report incidents that violate the Select Board's statement. This phone line should be set up to allow callers to leave messages, but is not expected to be staffed for handling live calls. The message traffic will be monitored on a daily basis on all days that the Town Hall is open. Anticipated calls include complaints of legal violations, which will be forwarded to the Police Department if they have not been called in directly, as well as less significant violations that may fall short of being legal violations, but that, nonetheless, violate the Select Board's policy statement. The purpose of this task is to ensure that the Select Board is promptly made aware of all reported violations so the Select Board is in a good position to respond to reports appropriately, and, over time, to give the town better visibility over the significance and extent of undesirable conduct in town.

- Phone Line has been created in the Town Administrator's Office
- Protocol for phone line has been created in consultation with Medfield Outreach and Medfield Police Department
- Press Releases are drafted and will be submitted for approval/release in Sept 2024
- Project was completed with assistance of summer interns

MANAGE TOWN FINANCES IN A FISCALLY PRUDENT MANNER THAT STRIKES A PROPER BALANCE BETWEEN FUNDING IMPORTANT TOWN SERVICES AND AFFORDABILITY FOR TAXPAYERS

<u>GOAL #1:</u> ***Charting a course for the town calls for an unwavering commitment to prudently impose financial burdens on taxpayers, while also ensuring that essential, or, in some cases, highly desired services are provided to the town's residents and businesses. The natural tension between these two imperatives requires that a thoughtful balance between the two be maintained.***

Town Administrator Goal:

A. Investigate and prepare options for the Select Board to consider for additional senior resident tax relief programs

SENIOR TAX RELIEF PROGRAMS

In order to prepare options for the Select Board to consider as additional options for Senior Tax Relief Programs it is important to understand the options that are currently available to Medfield Residents.

FY2025 Board of Assessors Property Tax Exemptions

What is an exemption?

As used in the context of real estate taxes, an exemption is a release from the obligation to pay all or a portion of the taxes assessed on a parcel of property. Exemptions are conferred by the state legislature (Massachusetts General Laws, Chapter 59, Section 5) on particular categories of persons on whom exemptions are conferred, for their primary domicile and subject to certain qualifications, are listed below, together with an explanation of the eligibility requirements for each. Exemptions are not abatements in that they do not affect the valuation of property, but simply reduce the taxes owed.

It is important to note that with the exception of Clause 41A (Tax Deferral) and Clause 18 (Hardship Deferral), it is not possible to receive the benefit of more than one exemption in the fiscal year.

How do you apply?

Applications are available from the Assessors' office. An application must be filed with the Assessors each year, by April 1. The filing of the exemption application does not stay the collection of the tax, which should be paid as assessed. An exemption even if received in prior years is not automatically conferred but must be specifically acted upon by the Board of Assessors. The Assessors' action is discretionary only insofar as they determine that an applicant, according to the documentation he or she provides, does or does not meet the eligibility requirements. Notice of the Assessors' action will be sent to each applicant.

What documents do I need to have?

As exemptions are granted only for the primary residence, and as some exemptions are age dependent and/or means tested, an applicant must provide whatever information the Assessors deem to be reasonably required to establish eligibility. The information that an applicant may be requested to furnish includes, but is not limited to: (1) birth certificates, (2) evidence of domicile and occupancy, (3) income tax, (4) bank statements.

Property Tax Exemptions

1. **Clause 17 Exemption:** Surviving Spouse/Minor Child/Elderly Person

   Amount: UP to $350.00

   Eligibility: As of July first of the tax year, an individual must be either (1) a surviving spouse or surviving minor child who owns and occupies the property as his or her domicile; or (2) a person at least 70 years old who has owned and occupied the property as his or her domicile for at least five preceding years and must have lived in Massachusetts for at least the ten preceding years.

   Income: There are no income guidelines for Clause 17D.

   Whole Estate: The applicant's whole estate (cash, bank balances, stocks, bonds, some types of personal property, etc.) excluding the value of the domicile (up to three living units) cannot exceed $40,000.

2. **Clause 22 Exemption: Veterans**

   Amount: UP to $800 to a full exemption depending on nature and extent of disability

   Eligibility: As of July first of the tax year, an individual must have lived in Massachusetts for at least one year prior to application or must have been domiciled in Massachusetts for at least six months prior to entering the service and must either be either (1) a veteran or a spouse of a veteran who has a service connected disability of at least 10% (as verified by the veterans administration); or (2) a veteran or spouse of a veteran who was awarded a purple heart; or (3) the parent of a serviceman who lost his or her life during wartime.

   Income: There are no income guidelines for Clause 22.

   Whole Estate: There are no whole estate guidelines for Clause 22.

3. **Clause 37A Exemption: Blind Persons**

   Amount: UP to $1,000

Eligibility: As of July 1 of the tax year, an individual who is blind must own and occupy the property as his or her primary domicile. A certificate of blindness from the Commissioner for the Blind must be provided annually with the application for exemption.

Income: There are no income guidelines for Clause 37A.

Whole Estate: There are no whole estate guidelines for Clause 37A.

4. **Clause 41 C: Elderly**

Amount: UP to $2,000

Eligibility: As of July 1 of the tax year, an individual must be at least 65 years old, must have owned and occupied the property for at least the five preceding years and must have lived in Massachusetts for at least the ten preceding years.

Income: The applicant's gross receipts from all sources in the year preceding the application cannot have exceeded $20,000, if single, $30,000, if married.

Whole Estate: : The applicant's whole estate, excluding the value of the domicile (up to three living units) cannot exceed $40,000, if single, $55,000, if married.

5. **Clause 41A: Tax Deferral**

Eligibility: Any or all of the taxes assessed may be deferred (not exempted), with interest, until the property is sold or transferred, or until the demise of the owner, at which point the taxes and interest must be paid. The cumulative total of the taxes and interest deferred cannot exceed 50% of the applicant's share of the assessed value of the property. Entry into tax deferral creates a lien on the property, which is recorded by the Town at the Registry of Deeds.

Income: The applicant's gross receipts from all sources in the year preceding the application could not have exceeded the Circuit Breaker Credit income limit determined by the state, which is currently $69,000.

Whole Estate: There are no whole estate guidelines for Clause 41A.

6. **Clause 18A: Hardship Deferral**

   Persons, who because of their age, financial condition and physical infirmity feel they cannot contribute fully to the payment of their property taxes, may request consideration by the Board of Assessors in the form of a Clause 18A Hardship Deferral. The decision to grant a Clause 18 exemption is made solely at the discretion of the Board of Assessors. The deferral is for three years only and must be paid back over five years following the last year deferred.

Massachusetts Senior Circuit Breaker (CB) Tax Credit

https://www.mass.gov/info-details/massachusetts-senior-circuit-breaker-tax-credit#overview-

As a senior citizen (65 or older by December 31 of the tax year), you may be eligible to claim a refundable credit on your Massachusetts personal income tax return. The Circuit Breaker tax credit is based on the actual real estate taxes or rent paid on the Massachusetts residential property you own or rent and occupy as your principal residence.

The maximum credit amount for tax year 2023 is $2,590. If the credit you're owed exceeds the amount of the total tax payable for the year, you'll be refunded the additional amount of the credit without interest.

Medfield Tax Filers:	**5,964**
Senior CB Filers:	**182**
Amount of Credit Claimed:	**$196,735**
Average CB Credit:	**$1,081**

Who is Eligible?

- *You must be a Massachusetts resident or a part-year resident.*
- *You must be 65 or older by December 31 of the tax year.*
- *You must file a Schedule CB with your Massachusetts personal income tax return.*
- *You must own or rent residential property in Massachusetts and occupy it as your primary residence.*
- *For tax year 2023, your total Massachusetts income doesn't exceed:*
  - *$69,000 for a single individual who is not the head of a household.*
  - *$86,000 for a head of household.*
  - *$103,000 for married couples filing a joint return.*

- *If you are a homeowner, your Massachusetts property tax payments, together with half of your water and sewer expenses, must exceed 10% of your total Massachusetts income for the tax year.*
- *If you are a renter, 25% of your annual Massachusetts rent must exceed 10% of your total Massachusetts income for the tax year.*
- *The assessed valuation of the homeowner's personal residence as of January 1, 2023, before residential exemptions but after abatements, cannot exceed $1,025,000.*
- *The Schedule CB must be completed within 3 years from the last day for filing the return, without regard to any extension of time to file.*

Who is not Eligible?

- *You are a nonresident.*
- *You are married and your status is married filing separately.*
- *You are a dependent of another taxpayer.*
- *You receive a federal and/or state rent subsidy or you rent from a tax-exempt entity.*
- *For tax year 2023, the assessed value of principal residence exceeds $1,025,000.*
- *If you did not complete a Schedule CB within 3 years from the last day for filing the return, without regard to any extension of time to file.*

Council on Aging Senior Tax Work-Off Program

Senior Tax Work-Off Program
[Adopted ATM 4-24-2000]

§ 250-1. Program established.

The Board of Selectmen shall designate the Council on Aging to administer a Senior Tax Work-Off Program in accordance with the provisions MGL c. 59, § 5K, in accordance with the following local rules and procedures.

§ 250-2. Hourly rate for volunteer services.

The hourly rate at which the volunteer services are to be credited shall be the minimum wage of the Commonwealth in effect at the time the services are provided.

§ 250-3. Maximum amount of tax reduction. [Amended 4-28-2014ATM by Art. 32]

The maximum amount by which the real property tax obligation of any one volunteer may be reduced in any given tax year shall not exceed $1,000, or such other maximum amount as may from time to time be established by the Commonwealth of Massachusetts.

§ 250-4. Age qualification.

A volunteer must have reached 60 years of age by the July 1 of the fiscal tax year for which the tax credit is given.

§ 250-5. Income eligibility.

There shall be no income eligibility for participation in the program.

§ 250-6. Application of credits.

Tax credits may be applied only towards real property which the volunteer occupies as a principal residence and has property tax liability.

§ 250-7. Town officials or employees ineligible.

Elected officials serving on any Town board, committee or commission or individuals who are or were compensated, full-time employees of the Town during the fiscal year for which the tax credit is sought shall be ineligible to participate in the program.

§ 250-8. Number of participants.

The Board of Selectmen, in consultation with the Council on Aging, shall determine annually the maximum number of residents who may participate in the program and shall advise the Board of Assessors of this number prior to the start of the fiscal year for which tax credits are to be given.

§ 250-9. Eligible services.

The Council on Aging shall have the sole discretion to review and approve volunteer services to be included in the program and to place and/or assign eligible residents to perform such services. To assist them in making these decisions, the Council on Aging may solicit requests for volunteer services from the various Town departments.

§ 250-10. Certification of hours served; application of credit. [Amended 4-28-2014ATM by Art. 32]

The Council on Aging will certify the amount of volunteer services performed by each participating taxpayer to the Medfield Board of Assessors on or before December 1 of the year for which tax credits are to be given. Upon timely receipt of this certification, the Board of Assessors shall credit the real property tax obligations of the participating taxpayers in an amount not to exceed $1,000 per taxpayer, or such other maximum amount as may from time to time be established by the Commonwealth of Massachusetts. A copy of each taxpayer's certification will be given to that taxpayer. This credit shall be in addition to any exemption or abatement for which the volunteer may otherwise be eligible.

§ 250-11. Statutory authority.

All of these procedures shall be carried out in accordance with the provisions of MGL c. 59, § 5K, as they may from time to time be amended.

Recommendations for the Select Board

Adopt the following to existing Property Tax Exemptions

1. **Request the 2025 Annual Town Meeting to adopt MGL c.59, section5, Clause 17E**

   This adoption will increase the whole estate limit automatically each year by COLA determined by the Department of Revenue (DOR).

2. **Request the 2025 Annual Town Meeting to adopt MGL c.59, section5, Clause 17F**

   This adoption will increase the exemption amount annually by any % up to COLA determined by DOR.

3. **Request the 2025 Annual Town Meeting to adopt MGL c.59, section5, Clause 41D**

   This adoption will increase Clause 41, 41B or 41C gross receipts and whole estate limits automatically each year by COLA determined by DOR

Adopt the following changes to the Senior Tax Work-Off Program

1. Request the 2025 Annual Town Meeting to amend the following

    A. Amend **§250-3** Maximum amount of tax reduction from $1,000 to $1,500

    B. Amend **§250-7** Town officials or employees ineligible

        a. Amend to allow individuals who are or were compensated **for less than 15 hours per week to be eligible**

DRAFT PRESS RELEASE

FOR IMMEDIATE RELEASE

Medfield Introduces Dedicated Hotline to Report Discrimination and Bias-Motivated Incidents

Medfield, MA - The Town of Medfield Administrators Office is pleased to announce the creation of a dedicated hotline for residents to report incidents of hate speech and actions that violate the Select Board's "Statement Against Oppressive Actions and Speech Directed at Individuals and Groups." This new initiative is part of Medfield's ongoing commitment to ensure everyone in our community has the opportunity to be heard, respected, and acknowledged.

Hotline Details:

The hotline is set up as a messaging system and will not be staffed for receiving live calls. Residents who have witnessed or experienced bias-motivated speech or actions are encouraged to call and leave a detailed message. Calls that include the reporting of theft, threats, vandalism, or violence will be communicated to the Police Department.

Purpose of the Hotline:

The primary goal of this hotline is to ensure the incidents that violate the Select Boards Statement are addressed by the necessary parties. By implementing this hotline, Medfield aims to enhance its visibility and understanding of the prevalence and severity of undesirable conduct within the community.

Important Information for Residents:

- **Reporting Only:** This hotline is solely for reporting incidents of discrimination and bias. *Residents who are in life-threatening emergency situations should contact 911 immediately.*
- **Confidentiality:** You may report incidents anonymously, however, if you wish to receive follow-up communication, please be advised that your confidentiality may be compromised. Leave your contact information if follow-up is desired.

Statement from the Administrator's Office:

"The Town of Medfield is dedicated to creating a safe and inclusive environment for all residents. This new hotline is an important step in ensuring that instances of discrimination and bias are reported and addressed promptly. We are committed to listening to our community and taking action to improve the quality of life for everyone in Medfield."

For more information, and to access the hotline, please visit the Town Administrator or Select Board's website.

DRAFT WEBSITE PAGE - Will be posted under Select Board

Welcome to the Town of Medfield's Discrimination and Bias Reporting Hotline

The Town of Medfield is committed to ensuring everyone in our community has the opportunity to be heard, respected, and acknowledged.. To help achieve this, we have established a dedicated hotline for reporting incidents of discrimination and actions that contravene the Select Board's "Statement Against Oppressive Actions and Speech Directed at Individuals and Groups."

****If you are in a life-threatening emergency situation, please contact 911 immediately.****

How to Use the Hotline:

- **Hotline Number:** 508-906-3050
- **Purpose:** This hotline is for reporting bias-motivated actions or speech that violate the Select Board's statement.
- **Operating Mode:** The hotline is a messaging system and will not be staffed for live calls. Again, if you are someone you know is in a life threatening emergency, please contact 911 immediately.
- **Reporting:** Please leave a detailed message describing the incident, you may do so anonymously.

What Happens Next:

- **Review:** The messages will be reviewed, and any calls that include the reporting of theft, threats, vandalism, or violence will be communicated with the Police Department.
- **Department Coordination:** The Town Administrator's Office will coordinate with the appropriate internal departments, for example, Medfield Outreach and the School Department, to determine the next steps to be taken. The Select Board will be promptly informed of all reported incidents.
- **Confidentiality:** If you wish to receive follow-up communication, please be aware that your confidentiality may be compromised. Leave your contact information if follow-up is desired.

Our Commitment:

The Select board commits to:

- Ensuring that everyone in our community has the opportunity to be heard
- Promote civility in the face of disagreements on important issues
- Encourage a culture of civic responsibility across our community that promotes the common good in order to provide a safe, secure environment for all to live in, and
- Ensure that individuals are free to make decisions about how they live their lives to the greatest degree possible, within the limits of the law and decisions made by the community as a whole, – to include decisions about how they raise their children.

Democracy thrives when everyone has the opportunity to be heard, respected, and acknowledged. Town government, along with all citizens of Medfield have both the obligation and the responsibility to do all in our combined power to ensure that everyone can count on reliably having that opportunity.