



Town of Windham
Office of the Town Manager
8 School Road
Windham, ME 04062

Barry A. Tibbetts, Town Manager
batibbetts@windhammaine.us

207.892.1907 voice
207.892.1910 fax

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Memo

To: Town Council
From: Barry Tibbetts, Town Manager
Re: Senior Tax Assistance Program Results - 2021-2022 Tax Year Refunds

The Town experienced a successful response to the Senior Tax Assistance Program again this year.

Participation numbers:

2021/2022 Tax Year	– 244
2020/2021 Tax Year	– 200
2019/2020 Tax Year	– 185
2018/2019 Tax Year	– 141
2017/2018 Tax Year	– 79

Applicants for Tax Year 2021/2022: **244**

- Average Income of Qualifying Recipients: \$35,193
- Average Tax Paid by Qualifying Recipients: \$3,004
 - Qualified for Full Benefit of \$700: **128**
 - Qualified for Partial Benefit: **99**
 - (Ranging from \$39 - \$695)
 - Not Eligible for Benefit: **17**
 - 9 applicants had household income that exceeded the limit (50% of the current HUD MFI for the Portland metropolitan area or \$56,350)
 - 8 applicants did not pay property taxes that met the program requirements (Property Taxes Paid - 4% of household income / 2 = refund)

Per our ordinance, Chapter 209, Article I - Property Tax Assistance, payments to all qualifying applicants are limited to the amount available in the fund and any surplus monies available after all payments shall be carried forward within the fund to the next fiscal year. We carried forward \$49,541 and budgeted \$100,000 for this fiscal year. The Council increased the maximum benefit or refund amount was increased to \$700.

This year, the total program calculated benefit was **\$133,823**, which is within the fund amount of \$149,541.

I look forward to discussing this with the Council.