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Memo

Date: August 6, 2025

To: Town Council

From: Bob Burns, Town Manager

Re: Senior Tax Assistance Program Results - 2025-2026 Tax Year Refunds

As anticipated, the Town experienced another successful response to the Tax Assistance Program this year. Applicants expressed their appreciation to staff and the Council often.

Participation numbers:

2025-2026 Tax Year – **371** (includes 28 applicants who didn't complete applications due to ineligibility)

2024-2025 Tax Year – 315

2023-2024 Tax Year – 396 (application period extended due to State program expiration)

2022/2023 Tax Year – 243

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 2025/2026: **343**

- Average Income of Qualifying Households: \$45,388
- Average Tax Paid by Qualifying Households: \$4,365
- Qualified for Full Benefit of \$700: 283
- Qualified for Partial Benefit: 40
- (Ranging from \$41 - \$699)
- Not Eligible for Benefit: 20
 - 17 applicants had household income that exceeded the limit (50% of the current HUD MFI for the Portland metropolitan area or \$69,550)
 - 3 applicants did not pay property taxes or rent 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 budgeted \$280,000 for this fiscal year and expect to carry remaining FY26 funds of \$71,496 forward.

This year, the total program calculated benefit was \$217,765 which is within the fund budget. I look forward to discussing this with the Council.