



Town of Windham
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Memo

To: Town Council
From: Barry Tibbetts, Town Manager
Re: Senior Tax Assistance Program Results - 2023-2024 Tax Year Refunds

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

Participation numbers:	2023-2024 Tax Year – 282
	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 2023/2024: **282**

- Average Income of Qualifying Recipients: \$38,388
- Average Tax Paid by Qualifying Recipients: \$3,467
 - Qualified for Full Benefit of \$700: **181**
 - Qualified for Partial Benefit: **88**
 - (Ranging from \$7 - \$693)
 - Not Eligible for Benefit: **13**
 - 8 applicants had household income that exceeded the limit (50% of the current HUD MFI for the Portland metropolitan area or \$63,750)
 - 5 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 \$160,000 for this fiscal year.

This year, the total program calculated benefit was **\$166,076**, which exceeds the fund amount by **\$6,076**.

I look forward to discussing this with the Council.