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## Memo

**Date:** August 7, 2025

**To:** Town Council

**From:** Bob Burns, Town Manager

**Re:** Senior Tax Assistance Program Results - 2024-2025 Tax Year Refunds

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

Participation numbers: 2024-2025 Tax Year – 316

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 2024/2025: 316

- Average Income for Qualifying Households: \$40,103
- Average Tax Paid by Qualifying Households: \$4,186
- Qualified for Full Benefit of \$700: 264
- Qualified for Partial Benefit: 40
- (Ranging from \$59 - \$698)
- Not Eligible for Benefit: 12
- 10 applicants had household income that exceeded the limit (50% of the current HUD MFI for the Portland metropolitan area or \$64,900)
- 2 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.

This year, the total program calculated benefit was \$204,503 which is within the fund budget.

I look forward to discussing this with the Council.