

### **Carlisle FY2020 Senior Tax Worker Program:**

If you are a Carlisle property owner, sixty years old or older, you are eligible to apply for the Carlisle Senior Tax Worker Program. In addition, if you live with a Carlisle senior who meets all of the eligibility requirements, you can work in their place without meeting all of the eligibility requirements. Please note: payment will be made in the form of a real estate tax deduction to the owners January Real Estate tax bill. Further note, in order to receive a tax credit, the owner must be the owner of the property effective January of the following year to receive the credit. Example if you work in FY2020 (November 1, 2018 to October 31, 2019), your payment can be applied as a reduction to your (or the property owner(s) that you are working for) tax bill in January 2020 or automatically come off your May 2020 tax bill. Therefore, if you don't expect to be owning the property in January, please realize that your efforts will be considered volunteer work.

Approved applicants provide work assistance to town departments such as the Council on Aging, School, Police, Library, Town Clerk's office and more! Tax workers can generally earn up to \$1,000 working approximately 83+ hours at the current minimum wage of \$12/hr. These funds are intended to offset the tax worker's property taxes by being matched with a Town Department's personnel needs. Tax workers must submit detailed time sheets which must be signed by the tax worker and signed by the department whom you are working for and submitted by the deadline of the program (October 31 no later than 3 p.m. or the last business day before that date).

To comply with IRS and local regulations, all participants in the Senior Tax Worker Program are required to complete the necessary documentation to become an employee of the Town, before commencing any work. If you have done this in the past, and not stopped or interrupted being a tax worker, then you don't need to do this again.

Earnings from the program are considered income for Federal tax purposes, and you will need to report Sr. Tax Worker earnings on your federal income tax form, but they are not considered income for Massachusetts state taxes. Tax Worker positions are not benefits-eligible positions; however, all statutory federal deductions will apply. Currently, a deduction of 1.45% is contributed by all employees for Medicare, and this is matched by the Town. You may also be subject to deductions for a contribution to a retirement plan (these funds minus administrative fees are returned when you are no longer a tax worker).

The individual who performs the work will receive a W2 depicting Sr. Tax Worker Program earnings and payroll deductions. Sr. Tax Workers will not receive a paycheck. Rather their net earnings will be applied to their tax bill that is dated May 1 and due June 1, or once they receive their W2, they can take that document with them to the Treasurer's office and reduce their January tax bill accordingly.

This program has limited slots, therefore, sign up early! Assignments were made in November for FY2020 although applications are accepted throughout the period of the program. If you would like to apply or learn more about this program, please contact the Council on Aging at 978-371-2895.

### **Carlisle Senior Citizen Tax Worker Program Policy and Guidelines**

#### **Goals:**

- **To employ qualified senior citizens who will apply their earnings toward payment of a portion of their property taxes**
- **To increase senior citizen involvement in local government**
- **To enhance municipal service by using the skills of resident senior citizens**

**Eligibility:**

- **Must be 60 years of age or older or fulfilling the tax worker hours for a Carlisle home owner who is 60 years of age or older and be resident of household**
- **Possess employable skills and be able to do the work that has been requested by the town**
- **Must conform to eligibility date stipulation on application**
- **Must own and occupy, as principal residence, the property for which taxes are paid**

**Benefit:**

- **2019 Minimum wage - \$12.00/hr.**
- **Maximum of \$1,000 per fiscal year. The dollars available per household is based on the number of applicants, availability of applicants, and the various department needs.**

**Note:**

- **The number of placements is based upon funding in each fiscal year.**

**Positions:**

**A variety of jobs may be available. Types of duties may include general labor, gardening, skilled project support, record filing, data entry, customer service, book shelving, cafeteria help, crossing guard, office support, and other duties as requested.**

**The Senior Tax Advisory Committee will attempt to match the skills and interests of applicants to the needs of Town departments. Assignments are made at the discretion of the Senior Tax Advisory Committee. Positions may be split among applicants.**

**Applicants will be placed by the Senior Tax Advisory Committee. Applicants will be allowed to request a particular department but will not be guaranteed a position in said department, although best efforts will be made to accommodate these requests.**

**Application Process:**

**Applications are accepted at any time but will only be considered as long as funds are available in any given program period. It is recommended that applications be submitted as early as possible to allow adequate time to complete required hours within the tax program period.**

**All applicants are required to complete the committee's application form (attached), which is available in person, via email, on line at the Town's website or hard copy mail from the:**

**Carlisle Council on Aging  
66 Westford Street  
Carlisle, MA 01741**

**Completed applications must be returned to the Senior Tax Advisory Committee, c/o Council on Aging, 66 Westford Street, Carlisle, MA 01741**

**A copy of the applicant's most recent property tax bill must be attached to the application.**

**All applications will be reviewed by the Senior Tax Advisory Committee to determine whether the applicant's skills and interests match the needs of any Town departments.**

**Applicants may be invited to one or more interviews to confirm their qualifications.**

**All applicants will be notified of their standing in the program as soon as a decision has been made regarding their individual application.**

**To receive the position, required employment paperwork must be filled out as soon as possible after your assignment is known.**

**The applications of senior citizens who are not hired will be maintained and may be reviewed again later in the eligible year to determine whether a job opportunity has developed.**

**Individuals who need accommodation in order to participate in this process should contact the Council on Aging.**

**Appointment:**

**All appointments will be made by the Senior Tax Advisory Committee.**

**Jobs will be offered based upon eligibility, qualifications in meeting departments' needs, availability on the times and days needed (including providing for one's own transportation) and availability of funded slots.**

**Questions regarding this program should be addressed to:**

**Senior Tax Advisory Committee  
c/o Council on Aging  
66 Westford Street  
Carlisle, MA 01741  
978-371-2895**

**Volunteers make a difference!**

**This program represents a modest effort to provide some financial relief to retired taxpayers of the Town of Carlisle. Yet the program cannot assist every eligible citizen. It will prove counter-productive if its effect is to discourage volunteerism with respect either to committees and other civic activities. For those who are not eligible or not selected for work within this program, please continue to volunteer.**

**FY2020 SENIOR TAX WORK PROGRAM  
APPLICATION**

PLEASE NOTE: Your assignment(s) should be considered a work commitment; communication with your supervisor is critical. Once an assignment is made, if you are not currently a town employee (not having been a tax worker in the previous year), please contact the COA office to pick up your employment packet. Once that has been submitted, please contact your supervisor to establish a work schedule that can fulfill the hours required and meet the needs of the Department and your schedule. Please note that it is the person performing the work who will receive a W2 form and if that individual is working for someone they live with who meets the requirements of the program, it is that individual who will have their tax bill reduced. **Further note, that in order to receive any credit, the home owner must own Carlisle property in January when the tax credit would be considered.**

Name: \_\_\_\_\_

Address \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

If you are applying for someone in your household, please list who you are applying for and have them answer the next five questions: \_\_\_\_\_

Homeowner:	Yes	No
Over 60:	Yes	No
Carlisle Resident:	Yes	No
Pay Property Taxes:	Yes	No
Parcel I.D.:	Map_____	Block: _____ Lot: _____

The % of slot that you would prefer/can work. Note: Please request slots in the following manner: ¼ slot or \$250, 1/2 slot or \$500, 3/4 slot or \$750, or full slot or \$1000. Dollar amounts are based on current minimum wage for the period that is worked. Please note the Senior Tax Advisory Committee does their best to match Department needs and applicant capabilities.

¼ slot/\$250\_\_\_\_\_; ½ slot/\$500\_\_\_\_\_; ¾ slot/\$750\_\_\_\_\_; full slot/\$1,000\_\_\_\_\_.

For FY2020 ¼ slot would be approximately 21 hours

½ slot would be approximately 42 hours

¾ slot would be approximately 63 hours

Full slot would be 84 hours

2019 minimum wage is \$12/hr

2020 minimum wage is \$12.75

2021 minimum wage is \$13.50

2022 minimum wage is \$14.25

2023 minimum wage is \$15.00

Do you have a department preference? Yes No  
If yes, which department(s): \_\_\_\_\_

Please state your past experience (feel free to add more information on a separate page or include a copy of a resume):

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Please indicate present health: Excellent: \_\_\_\_ Good \_\_\_\_ Fair \_\_\_\_

Are there any medical restrictions that would keep you from performing certain tasks?

Yes No

If yes, please explain:

If I become involved in the Senior Tax Work Program, I understand that I will become an employee of the Town, and I may earn **up to a maximum** of \$1000 to be applied to my real estate taxes. Wages will be subject to a 1.45% Medicare withholding as well as any other statutory deductions which are required.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

**A COPY OF YOUR TAX BILL MUST BE ATTACHED TO THIS APPLICATION**