



Town of Wareham

Senior Citizen Tax Work-off Program Policy

What Is The Senior Citizen Tax Work-Off Program?

The Town of Wareham has adopted the provisions of MGL c.59, §5(K), as amended, which allows for a Senior Citizen Tax Work-off Program. For the calendar year 2024, the program offers seniors the opportunity to contribute up to 80 hours of service worked to the Town and receive up to a \$1,200.00 abatement on their real estate taxes on their primary residence. The pay rate is \$15.00/hour, the Massachusetts minimum wage. Participants will not receive paychecks. Instead, they will receive a voucher that can be submitted to the Tax Collector as evidence of the amount earned, which will then be deducted from the property tax bill. (Only good for the year of service.) The program runs annually from January 1st through October 31st.

Under the law the reduction in property taxes is exempt for State income tax purposes. However, **it is** considered income for Federal income tax purposes. The Town of Wareham will issue a 1099 to all residents that participate in this program. Each individual property owner should discuss this program with a financial advisor or an accountant to determine how this may affect any retirement benefit they currently receive. The Town has available information from Social Security that may help.

What Are The Eligibility Requirements?

Participants must be 60 years of age or older as of July 1, 2024. They must be year-round Wareham taxpayers who claim Wareham as their primary residence and who have demonstrated financial hardship or need. ***Annual income must NOT exceed \$33,320 for an individual and \$38,080 for two persons.*** Priority will be given to those applicants who demonstrate the greatest financial need. Applicants that have some special skill of particular use to the Town will receive second priority in assignments.

What Are The Days And Hours?

The participant's schedule and the needs of the department will be coordinated by the department head. The actual number of hours will depend on the tasks at hand, but participants may not work more than 80 hours in the calendar year. Participants may begin work after assignments have been assigned and must finish the program by October 31,

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2024. Work performed after October 31, 2024 will be credited to the following year's actual tax bill.

How Do I Apply?

Applications are available at the Select Board's Office, the Council on Aging, and on the Town website (www.wareham.ma.us/council-aging). The Council on Aging staff will log in all applications and verify information provided. If accepted, you must also complete an employment contract with the Town. Please note that only the Board of Assessors can approve the actual tax abatement and will do so upon certification that the work was actually performed.

The policy for the implementation of the Wareham Senior Citizen Tax Work-off Program is issued by the Select Board as follows:

1. Any full-time, year-round resident homeowner and taxpayer in the Town of Wareham who is at least sixty (60) years old may receive, on a primary residence that he/she owns and occupies, a Senior Citizen Property Tax Work-off Credit, not to exceed One Thousand Two Hundred Dollars (\$1,200.00) in any fiscal year.
2. The program shall be coordinated through the Council on Aging, which shall oversee the program. The program will be administered through the coordinated efforts of the Council on Aging, the Board of Assessors, the Tax Collector, and the Town Administrator.
3. The applicant must provide the following information to the Council on Aging:
 - a. A completed application (See page 5.)
 - b. Proof of real estate ownership and year-round residency.
 - c. A signed participation agreement under which the applicant agrees to adhere to the policies of the program. (See page 9)
 - d. Proof of income. Applicants must provide front page of Form 1040. Annual income limits are: \$33,320 for individuals and \$38,080 for two persons.
4. Applicants must submit to a CORI/SORI check. (See page 11.)
5. Applicants must fill out a Liability Waiver to Town. (See page 13.)
6. All applicants must complete an on-line Ethics Training Program and submit proof that they have done so prior to starting their assignments. (See page 15.)
7. All applicants must sign a Confidentiality Agreement prior to starting their assignments. (See page 17.)
8. All applicants must sign the Town's Discriminatory Harassment Policy. (See page 19.)

How are applicants chosen?

When the Council on Aging office considers your application to be complete, assignments will be made depending upon your qualifications and available positions.

1. Current Town of Wareham Employees or spouses are not be eligible for this program.
2. Depending on the interest or experience of the participants, the work may be clerical, and you may be assigned to any participating Town department. Preference is not guaranteed.
3. If the number of applicants exceeds the approved number of slots available, preference will be given to those applicants who demonstrate the greatest financial need.

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APPLICATION

Application # _____

Name: _____

Residential Address: _____

Mailing Address: _____

Phone: home _____ cell _____

Social Security Number: _____ Date of Birth: ___/___/___

Email address: _____

Part A: Eligibility Requirements *(These documents are required to be shown when you submit your application but they will not be retained by the Town of Wareham.)*

- Proof that you are at least 60 years old. (Copy of Driver’s License or Birth Certificate)
- Proof that Wareham is your primary residence. (Copy of most recent Real Estate tax bill)
- A copy of the Vision card showing your property. (Available from Assessors Office)
- Proof of annual income.
 - A copy of your most recent individual (for one) or joint (for two) tax return
 - OR Massachusetts Schedule CB-Circuit Breaker Tax Credit Form
 - OR if you qualify for Clause 41C-Elderly Persons

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Part B: Your Needs Assessment, Skills and Work Experience

Explain why you are applying: _____

Please explain the issue of need, include extenuating circumstances: _____

Do you have special skills or work experience? Yes ___ No ___

Please describe your special skill/experience: _____

Part C: Work Environment

Please check three areas where you would like to work for the Town of Wareham using #1 as your first choice and #3 as your last. While we will try to accommodate your choices please note that we may not be able to honor your request if all the slots are already filled when your number is drawn in the lottery.

Assessors ___ Clerk ___ Board of Health ___ Library _____
Municipal Maintenance _____ Harbormaster ___ Planning Dept. _____
Inspectional Services ___ Police ___ COA _____

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Can you perform the essential functions of the job that you have requested to be assigned?

Yes _____ No _____

If I qualify for the Senior Citizen Tax Work-off program, I understand that I will earn a maximum \$1,200.00 tax credit (which may be subject to back-up federal withholdings) for working 80 hours at \$15.00/hour and that this tax credit can only be applied toward my Town of Wareham real estate tax bill.

I certify that I meet the eligibility requirements to qualify for the 2024 Senior Citizen Tax Work-Off Program.

Signature

Date

For office use only

Verified by: _____ Date: _____

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PARTICIPATION AGREEMENT

The Town of Wareham, a municipal corporation with offices at 54 Marion Road, Wareham MA, hereinafter “the Town” and _____ of _____, Wareham MA, hereinafter “the participant” on this ___ day of _____, 2024 agree as follows:

The Participant will provide service to the Town for a maximum of eighty (80) hours between the date of execution of this Agreement and October 31, 2024.

It is agreed and understood by both parties that the actual work assignments may be made on a week-to-week basis and may vary according to the needs of the department to which the Participant is assigned. No assignments will be made to a department not listed unless arrangements have been made and approved in advance.

The nature of the work assignment shall be dictated by the needs of the Town and the head of the department to which the Participant is assigned.

The Participant is a volunteer in this program and is not entitled to benefits under any classification, compensation, or benefit schedule.

This Agreement will terminate on October 31, 2024, but may be terminated sooner at the discretion of the Wareham Select Board upon no less than seven (7) days written notice of termination, which shall be given or mailed to the Participant’s residential address listed above.

Volunteer Participant: _____

Council on Aging: _____

Department Head: _____

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CORI POLICY

Where Criminal Offender Record Information (CORI) and Sexual Offender Registry Information (SORI) checks are part of a general background check for employment, volunteer work or licensing purposes, the following practices and procedures will generally be followed.

- I. CORI checks will only be conducted as authorized by CHSB. All applicants will be notified that a CORI check will be conducted. If requested, the applicant will be provided with a copy of the CORI policy.
- II. An informed review of a criminal record requires adequate training. Accordingly, all personnel authorized to review CORI in the decision-making process will be thoroughly familiar with the educational materials made available by CHSB.
- III. Unless otherwise provided by law, a criminal record will not automatically disqualify an applicant. Rather, determinations of suitability based on CORI checks will be made consistent with this policy and any applicable law or regulations.
- IV. If a criminal record is received from CHSB, the authorized individual will closely compare the record provided by CHSB with the information on the CORI request form and any other identifying information provided by the applicant, to ensure the record relates to the applicant.
- V. If the Select Board is inclined to make an adverse decision based on the results of the CORI check, the applicant will be notified immediately. The applicant shall be provided with a copy of the criminal record and the organization's CORI policy, advised of the part(s) of the record that make the individual unsuitable for the position or license, and given an opportunity to dispute the accuracy and relevance of the CORI record.
- VI. Applicants challenging the accuracy of the CORI record shall be provided a copy of CHSB ***Information Concerning the Process in Correcting a Criminal Record***. If the CORI record provided does not exactly match the identification information provided by the applicant, Select Board will make a determination based on a comparison of the CORI record and documents provided by the applicant. The Select Board may contact CHSB and request a detailed search consistent with CHSB policy.
- VII. If the Select Board reasonably believes the record belongs to the applicant and is accurate, based on the information as provided in section IV on this policy, then the determination of suitability for the position or license will be made. Unless otherwise provided by law, factors considered in determining suitability may include, but not be limited to the following:
 - (a) Relevance of the crime to the position sought;
 - (b) The nature of the work to be performed;
 - (c) Time since the conviction;
 - (d) Age of the candidate at the time of the offense;
 - (e) Seriousness and specific circumstances of the offense;
 - (f) The number of offenses;
 - (g) Whether the applicant has pending charges;
 - (h) Any relevant evidence of rehabilitation or lack thereof;
 - (i) Any other relevant information, including information submitted by the candidate or requested by the hiring authority
- VIII. The Select Board will notify the applicant of the decision and the basis of the decision in a timely manner.

**STANDARD HOLD HARMLESS AND INDEMNITY CLAUSE FOR USE IN
LEASES, USE AGREEMENTS, ETC.**

I, _____, through the signing of this document, indemnify, hold harmless and defend the Town of Wareham and its agents and employees from all suits and actions, including attorney's fees and all costs of litigations and judgment of every name and description brought against the Town as a result of loss, damage or injury to person or property by reason of any act by:

Print Name

Signature

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ETHICS TRAINING

All applicants for the program must complete an on-line Ethics Training Course prior to starting their work assignments.

If you have a computer at home with access to the Internet and a printer, you may complete the training at home. If you do not have a computer, Internet access or a printer, you may use one at the Council on Aging office or the Library.

Whether doing this from home, the Council on Aging office or the Library, once on the Internet go to the Mass.gov website (www.mass.gov) and search "Ethics Training." You are looking for Mandatory Training Requirements and you will be brought to a page that lists "Online Training Program." You will be guided through some questions with multiple choice answers. If you make a mistake you will need to try again as you must get all questions correct. Once that has been done you will receive the following:

STATE ETHICS COMMISSION RECEIPT



Conflict of Interest Law Online Training Program

was completed by: (YOUR NAME HERE)

on

DAY AND DATE

Thank you for completing the State Ethics Commission's online training program.

You must then print this receipt and bring it to the Council on Aging office to be included with your application for the Senior Tax Work-off Program. Remember, **this must be done before you can start your work assignment.**

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CONFIDENTIALITY AGREEMENT

Whereas, in consideration of being able to participate in the Wareham Senior Tax Program, the below signed participant may have access to information derived from files, conversations or other materials that contains personal, confidential and/or proprietary information that would otherwise be exempt from public disclosure by applicable public records laws;

Now therefore, the below signed participant promises and covenants not to disclose and to hold confidential information, data, and documents to which he/she has access or may encounter in the course of his/her service with the Town of Wareham through the Wareham Senior Tax Program.

Signed under seal this ____ day of _____, 2024

(Signature of Participant)

(Printed Name of Participant)

(Address)

COMMONWEALTH OF MASSACHUSETTS
Plymouth County, ss. _____, 2024

On this ____ day of _____, 2024, before me (the undersigned notary public), personally appeared _____, proved to me through satisfactory evidence of identification, which was _____ (personal knowledge, credible witness, or identification document) to be the person whose name is signed on the preceding document, and acknowledged to me that he/she signed it voluntarily for its stated purpose.

Notary Public
My Commission Expires: _____

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**DISCRIMINATORY HARASSMENT POLICY OF THE
TOWN OF WAREHAM**

I. Introduction

It is the goal of the Town of Wareham to promote a workplace that is free of discriminatory harassment ("Harassment") of any type, including sexual harassment. Harassment consists of unwelcome conduct, whether verbal or physical, that is based on a characteristic protected by law, such as gender, race, color, national origin, ancestry, ethnicity, religion, age, disability, genetic information, gender identity, sexual orientation, military or veteran status, pregnancy and pregnancy related conditions, natural or protective hairstyle or participation in discrimination-complaint-related activities. The Town of Wareham will not tolerate harassing conduct that affects employment conditions, that interferes unreasonably with an individual's performance, or that creates an intimidating, hostile, or offensive work environment.

The Town of Wareham prohibits any conduct towards its employees that could be Harassment, to the extent that conduct occurs in the workplace, in connection with work-related travel, and/or at work-sponsored events. Further, the Town of Wareham prohibits retaliation against any individual who reported or complained about Harassment or assisted or cooperated with an investigation of potential Harassment.

Because the Town of Wareham takes allegations of Harassment and retaliation seriously, we will respond promptly to reports and complaints of workplace Harassment or retaliation. Where it is determined that inappropriate conduct has occurred, we will act promptly in a manner that is designed to eliminate the conduct, including corrective and/or disciplinary action as the Town of Wareham determines is appropriate.

Please note that while this policy sets forth our goals of promoting a workplace that is free of Harassment, the policy is not designed or intended to limit our authority to discipline or take remedial action for workplace conduct which we deem unacceptable, regardless of whether that conduct satisfies the definition of harassment. This means that the Town of Wareham will take responsive action, including corrective or disciplinary action, where there is conduct that could contribute to Harassment in the workplace, without regard to whether the conduct rises to the level of "unlawful harassment."

II. Definitions

Sexual Harassment

In Massachusetts, the legal definition for sexual harassment is this: "sexual harassment" means sexual advances, requests for sexual favors, and verbal or physical conduct of a sexual nature when:

- a. submission to or rejection of such advances, requests or conduct is made either explicitly or implicitly a term or condition of employment or as a basis for employment decisions; or
- b. such advances, requests or conduct have the purpose or effect of unreasonably interfering with an individual's work performance by creating an intimidating, hostile, humiliating or sexually offensive work environment.

Direct or implied requests by a supervisor for sexual favors in exchange for actual or promised job benefits such as favorable reviews, salary increases, promotions, increased benefits, or continued employment is prohibited.

The definition of sexual harassment is broad. In addition to the above examples, other sexually oriented conduct, whether intended or not, that has the effect of creating a work environment that is hostile, offensive, intimidating or humiliating to either male or female workers could rise to the level of unlawful harassment and is therefore prohibited.

Hostile Work Environment

The legal definition of harassment other than sexual harassment is conduct based on a legally-protected category that has the purpose or effect of unreasonably interfering with an individual's work performance by creating an intimidating, hostile, humiliating or offensive work environment.

For purposes of this policy, "Harassing Conduct" means any conduct, whether verbal or physical, that is sexual in nature or based on a characteristic protected by law, without regard to the welcomeness, severity or pervasiveness of the conduct. In order to maintain an environment free of Harassment, the Town of Wareham prohibits Harassing Conduct in any work-related context. While it is not possible to list all those circumstances that may constitute Harassment, the following are some examples of prohibited conduct; in particular contexts, this conduct could rise to the level of unlawful harassment:

- Display or circulation of written materials or pictures that are sexual or degrading based on a legally-protected category.
- Verbal abuse, slurs, derogatory comments, or insults about a legally-protected category
- Unwelcome sexual advances-whether they involve physical touching or not;
- Sexual epithets, jokes, written or oral references to sexual conduct, gossip regarding one's sex life; comment on an individual's body, comment about an individual's sexual activity, deficiencies, or prowess;
- Displaying sexually suggestive objects, pictures, cartoons;

- Unwelcoming leering, whistling, brushing against the body, sexual gestures, suggestive or insulting comments;
- Inquiries into one's sexual experiences; and,
- Discussion of one's sexual activities.

All employees should take special note that, as stated above, retaliation against an individual who has complained about Harassment, and retaliation against individuals for cooperating with an investigation of a report of possible Harassment is prohibited and will be investigated and addressed.

III. Reporting Procedures

All employees, managers, and supervisors of the Town of Wareham share responsibility for avoiding, discouraging and reporting any form of Harassing Conduct and/or Harassment. The primary responsibility for ensuring proper investigation and resolution of harassment complaints rests with the Town of Wareham's EEO or Civil Rights officer or his/her designee, who will administer the policy and procedures described herein.

If any of our employees have observed or been subject to conduct that could be Harassing Conduct, the employee has the right to file a report with our organization. This may be done in writing or orally. In addition, residents, visitors, applicants, vendors, contractors, their agents and employees, or other third parties who believe they have been subjected to Harassing Conduct or Harassment by a Town employee may file a report with our organization using the procedures described herein. Furthermore, employees may also file a complaint if they have been observed or been subject to Harassing Conduct or Harassment by residents, visitors, applicants, vendors, contractors, their agents and employees, or any other third parties in the workplace, while performing work-related duties, or during other work-related activities.

Prompt reporting of Harassing Conduct is in the best interest of our organization and is essential to a fair, timely, and thorough investigation. Accordingly, reports should be filed as soon as possible following the incident(s) at issue. If you would like to file a report you may do so by contacting Derek D. Sullivan, Town Administrator, Memorial Town Hall, 54 Marion Road, Wareham, MA 02571, telephone number (508) 291-3100 x 3110 or Dorene M. Allen-England, Esq., Assistant Town Administrator/HR Director, Memorial Town Hall, 54 Marion Road, Wareham, MA 02571, telephone number (508)291-3100 x 3119. These individuals also are available to discuss any questions or concerns you may have and to provide information to you about our policy on harassment and our complaint process.

IV. Investigation

When we receive a report, we promptly investigate the issues in a fair and expeditious manner to determine whether there has been a violation of our policy. The investigation will be conducted in such a way as to maintain confidentiality to the extent practicable under the circumstances. Our investigation will usually include private interviews with the person filing the report and with witnesses whose information would be helpful to a determination of what happened. We will usually interview the person alleged to have violated the policy. Everyone is required to cooperate with all aspects of an investigation. When we have completed our investigation, we will, to the extent appropriate, inform the reporter and the person alleged to have violated the policy of the outcome and, if appropriate, the responsive action, while maintaining privacy as appropriate on the details of specific employee information.

Notwithstanding any provision of this policy, we reserve the right to investigate and take action on our own initiative in response to behavior or conduct which may violate this policy, regardless of whether an actual report or complaint is made.

V. Disciplinary Action

If after an investigation, the Town determines that one of our employees has violated this policy, we will take responsive action as we deem appropriate under the circumstances. Such action may range from counseling or training to corrective or disciplinary action, which may include termination from employment.

VI. State and Federal Remedies

In addition to the above, if you believe you have been subjected to sexual or other discriminatory harassment or retaliation, you may file a formal complaint with either or both of the government agencies set forth below. Using our complaint process does not prohibit you from filing a complaint with these agencies. Each of the agencies requires that claims be filed within 300 days from the alleged incident or when the complainant became aware of the incident.

The United States Equal Employment Opportunity Commission ("EEOC")
One Congress Street, 10th Floor
Boston, MA 02114
(617) 565-3200

The Massachusetts Commission Against Discrimination ("MCAD")

Boston Office:
One Ashburton Place, Room 601
Boston, MA 02108
(617) 727-3900

Springfield Office:
424 Dwight Street, Room 220
Springfield, MA 01103
(413) 739-2145

Worcester Office:
22 Front Street, 5th Floor
P.O. Box 8038
Worcester, MA 01641
(508) 799-6379

Revised Policy September 12, 2022

**DISCRIMINATORY HARASSMENT POLICY OF THE TOWN OF
WAREHAM**

I acknowledge receipt of the

“DISCRIMINATORY HARASSMENT POLICY OF THE
TOWN OF WAREHAM”

Signature

Print Name

Date: _____

**NOTE: BE SURE TO KEEP THE POLICY AND RETURN
THE RECEIPT.**

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