



MEMORANDUM

TO: Mayor and Council Members

THRU: Nuria Rivera-Vandermyde, Deputy City Manager *YPR*

FROM: Jessica Kingpetcharat-Bittner, Interim Director
Communications & Public Information Office *JB*

DATE: December 14, 2020

SUBJECT: **Update on Resolution No. 20190822-070 Senior Property Tax Exempt Education & Outreach**

The purpose of this memorandum is to provide an update on [Resolution 20190822-070](#) regarding recommendations for the most efficient and effective means of educating senior Austinites about existing opportunities to reduce their property tax burden; and recommendations for a senior volunteer program to allow seniors to volunteer as a means of offsetting a portion of their property tax bundle.

The Communications and Public Information Office (CPIO) worked with staff in the Budget Office, the Innovation Office, the Housing and Planning Department, the Parks & Recreation Department (PARC), Austin Public Health (APH), the Law Department, and the Travis County Appraisal District (TCAD) in response to Council's resolution.

RESEARCH FINDINGS

- **Volunteering in exchange for tax reduction.** Staff research found that the State of Massachusetts is currently the only state to adopt a tax work-off abatement law allowing property owners over the age of 60 the opportunity to volunteer in exchange for a reduction of property tax. At this time, such an option is not statutorily authorized in Texas and requires State legislative action.
- **Existing Education and Outreach.** TCAD offers reaches out to property owners to inform them about options to lower their property tax burden. In January 2020, TCAD issued a press release encouraging property owners to review and file for homestead exemptions before the April 30th deadline. Additionally, TCAD held a townhall meeting on Saturday, February 8, 2020 at the Conley-Guerrero Senior Activity Center to provide additional information to eligible homeowners, including seniors, regarding the exemption process. This information was communicated to the City's Commission on Seniors and to the City's senior centers via CPIO and PARC.
- **Data Analytics to Identify Eligible Homeowners.** To identify our target audiences and where they are located, staff wanted to understand the available data and leaned on TCAD data as well as the City's Neighborhood Stabilization Data Tool.

In partnership with TCAD, staff utilized Travis County's annual reporting metrics to help identify opportunities for seniors to meet property tax obligations. Unfortunately, TCAD data is unable to identify which property owners are 65 or older because TCAD does not require property owners to provide their birth dates or ages, therefore, the information is not available. However, Travis County's metrics do track the number of properties in the county that are utilizing homestead exemptions. TCAD's 2020 data indicates that of the 457,281 residences in Travis County (residential, multifamily, commercial, etc), 227,459 residences (49%) have a general residence homestead exemption. Of those with a homestead exemption, 63,003 residences (27%) have an "over 65" or "over 65 surviving spouse" exemption.

To further develop a target audience, staff wanted to focus on neighborhoods experiencing gentrification. The City's Innovation Office referenced the Neighborhood Stabilization Strategy Tool to identify the concentration of homeowners 65 and older in neighborhoods that are gentrifying or susceptible to gentrification per the University of Texas' Uprooted Study. Staff filtered TCAD FY19 data and created a zip code-based map of all records in which TCAD approved a senior homestead exemption. The zip code-based map connects to a larger dashboard, which displays the Census data of homeowners above 65 years by zip code. The dashboard includes a detailed neighborhood level view into the data. By subtracting already approved senior homestead exemptions from the Census data, we can approximate our target audience for our education and outreach efforts. However, there may be many other properties and homeowners we are unable to reach due to incomplete data.

FUTURE PLANS

Continued Data Analysis and Monitoring. Current challenges with the data analysis include the inability to further delve into zip codes to identify current exempted homesteads, which would provide insight to eligible homes currently not utilizing the exemption. Because the addresses in TCAD data are not standardized and much of the address data is blank, and because Travis County does not require certain data such as age, comparing the data against census data will still leave unanswered fields. Innovation Office staff will update the homestead exemption dashboard to include FY20 TCAD data, and a map at the census tract level.

Given the limitations of the data, staff hopes to reach as many vulnerable seniors as possible by focusing direct outreach to gentrifying neighborhoods, with long term-term residents (homeowners of 18+ years), that also have the lowest number of people 65 and older with no Senior Homestead Exemption. Staff will establish a baseline with the 2021 tax season and will continually measure the efficacy of the outreach based on the number of new applications for Senior Homestead Exemption in the applicable areas.

Outreach and Education. City staff spent a significant amount of time coordinating with TCAD in the development of current and future outreach plans to ensure the most effective approach. Outreach and education plans anticipated to begin in 2021 include the following:

Travis County

- Host an online webinar series to educate the public on Homestead Exemptions beginning in early 2021.
 - Each month host a new topic offered at least once.
 - Depending on public demand, may add more.
- Press Release in January to kick-off the outreach.
- Social Media campaign targeting new homeowners and realtors encouraging them to apply.
- Create list of digital assets for partners to share promoting exemptions and the webinars.

- Reach out to the Travis County Delegation asking them to promote and see if anyone is interested in partnering with TCAD for a mailer.
- Mailer will be sent out in late February/early March to those who may be eligible for homestead exemption based on TCAD data.
- E-mail reminder sent out in early April to contacts TCAD has on file.
- All marketing directing public questions to TCAD customer service line to get one on one help with filling out applications.

City of Austin

- City press release sharing information from TCAD.
- Work with City departments, including Austin Public Health, Equity Office, and CPIO's Community Engagement team to share TCAD's messaging, flyers, and graphics via City of Austin social media accounts, newsletters, and other channels.
- Work with Mayor and Council as well as Commission on Seniors to share messaging.
- Coordinate with the Housing and Planning Department to include via their active campaigns.

In addition to the planned activities listed above, the Housing and Planning Department kicked off the [Austin Is My Home](#) campaign in July 2020 and plans to coordinate with community partners like Austin Area Urban League, CAN, Meals on Wheels, and UT Housing Hub on implementation. The effort is an ongoing public awareness campaign to help Austinites understand predatory real estate behavior and learn about available tax relief tools, home repair programs, and other resources. The campaign also highlights homestead exemptions that are available to homeowners.

NEXT STEPS

The City's Communications and Public Information Office and the Housing and Planning Department will continue the above listed education and outreach plans through 2021. Staff will also share information with City Council offices for distribution to the public as it becomes available. Additionally, Travis County informed City staff that they do not currently have plans to translate their outreach/education messaging regarding homestead exemptions. City staff will work with the County to collaborate and identify options to fund and prioritize content for translation.

If you have any questions regarding the City's Senior Homestead Exemption outreach efforts, please do not hesitate to contact me at 512-974-2406 or via email at jessica.king@austintexas.gov

cc: Spencer Cronk, City Manager
 Nuria Rivera-Vandermyde, Deputy City Manager
 Rodney Gonzales, Assistant City Manager
 Chris Shorter, Assistant City Manager
 Anne Morgan, Law Department
 Stephanie Hayden, Director, Austin Public Health
 Kimberly McNeeley, Director, Parks & Recreation Department
 Kerry O'Connor, Officer, Innovation Office
 Rosie Truelove, Director, Housing and Planning Department