



MUNICIPAL TAX OVERRIDES

CITY OF MEDFORD, MA

MAYOR BREANNA LUNGO-KOEHN

Brief Overview

The Mayor, City Council leadership, School Committee leadership, and municipal staff, formed a Financial Task Force, released a proposal for voter consideration on the November 2024 general election ballot that included three Proposition 2 1/2 ballot questions to raise revenue for city and school services and construction of a new Fire headquarters:

- two override questions totaling \$7,500,000 in additional funding to be invested in the schools and City (ballot questions 7 and 8)
- one debt exclusion question to fund construction of a new fire headquarters (ballot question 6)

At its June 11 regular meeting, the City Council approved moving these three questions forward to appear as ballot questions in the November election.





Background

Medford had never passed, nor even introduced Proposition 2 1/2 override ballot questions in its history. Yet for decades, the City's needs expanded while its ability to raise its residential and commercial tax base struggled, creating a chasm between significant infrastructure and personnel needs, and the City's ability to maintain its services and output.

Due to this lack of investment, there was already an existing level of support for exploring an override. The dollar amounts however were not universally agreed upon by the public.

The Financial Task Force identified two areas in need of additional revenue support that would benefit from a successful override passage.



Where we began

A previous attempt in 2022 of passing an override stalled before reaching the ballot due to conflicting levels of support.

In order to successfully pass any override questions, it was necessary for the administration and elected leaders work together and remain united in support.

It was also crucial that override questions be weighed against future projections for asks 5-10 years down the road.

Where we began

Continued...

Two years later, inflation had returned to more palatable levels, and the needs at the schools and throughout the City were more apparent to the public due to a concerted communication effort, especially regarding the City's infrastructure, as well as a comprehensive right siding of departments and a dramatic reduction in wasteful spending.

The Taskforce however was still negotiating over dollar amounts for the override, with one side pushing for \$12M and the mayor holding at \$3M. Ultimately, the group compromised and settled at two questions totaling \$7.5M, or an increase of about \$450 per year on the average assessed home.

medfordma.org/override





City/School Needs

Schools

The school department has been operating at a deficit for several years due to costs increasing faster than available revenues. Federal ESSER funding expired at the end of 2024. Significant cuts were being discussed for the school department if a solution could not be found.

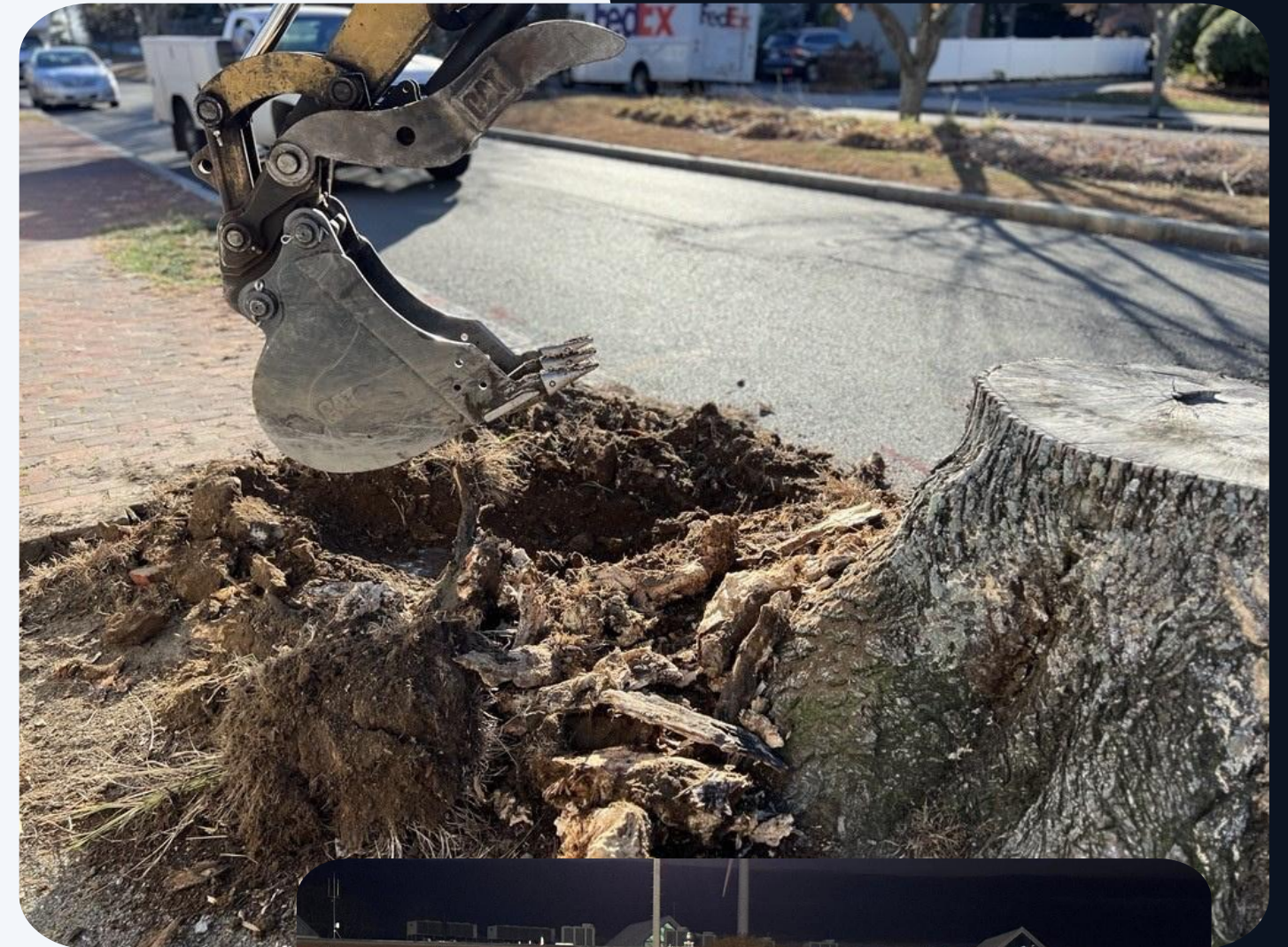
Infrastructure

The most consistent complaints from the community have been regarding potholes, road repaving and sidewalk repairs. With a professional leadership staff in place at the DPW, it was agreed that a dedicated repair crew was the most effective use of additional DPW funds.

The taskforce linked the DPW override question with additional revenue for teachers and staff salaries in the school department.

Goals

- Make all override communications as accurate and transparent as possible
- Set expectations for what a “Yes” vote would mean and what a “No” vote would mean
- Provide fact-based answers when engaging with public and do not offer opinions
- Provide enough context and information to the public to allow them to make an informed decision regarding their vote.
- Do no overstep on the City side and allow elected leaders to lead the narrative on support.



Approach

- Establish central information hub on City website to direct public to that clearly outlines each ballot question, establishes existing needs in the City and describes property tax impacts.
- Ensure trust, utilize existing official state or local resources regarding tax information, override procedures and voting information.
- Disseminate routine press releases outlining strategy of the task force, keeping the process transparent and the community engaged.



Challenges

Education

Educating the public on what an override is, why the City is moving forward with the ballot questions and how a successful override would impact property taxes.

Misinformation

Preventing misinformation regarding tax implications, scope of work the overrides would allow for and decision-making process was a key area of concern.

Public Outreach Strategy & Resources

Since there was already such a demand and substantial public support for an override, the public outreach campaign was able to focus on educating those in the public that were not as engaged.

We found that many people, who did not usually vote in municipal elections, were unaware about additional questions appearing on a ballot as the override vote aligned with the Presidential Election.

Our website was an important tool and we regularly pushed out content related to the override, specifically the property tax calculator, the current needs of the City and voting information, always pushing users back to the medfordma.org/override page.

Stakeholders were also very active both online and in person, often engaging directly with the


Takeaways

- Transparency, engagement and frequent updates on the process were all key to a successful vote on the two override questions
- Despite best efforts, a vocal minority was able to gain some traction and organize a counter effort, which may continue.





Thank you!

 (781) 393-2408

 mayor@medford-ma.gov

 www.medfordma.org/mayor

 85 George P. Hassett Dr.,
Medford