**Town Services and Housing Costs Survey - Overview**

**Goals:**

**Study how:**

* **Property taxes and proposed exemptions impact affordability**
* **Property taxes and proposed exemptions impact migration**
* **Town services correlate with current and proposed taxation levels**

**Approach:**

* **Survey of services and housing costs broadly to avoid focusing respondent attention on specific aspects of interest, thereby mitigating advocacy bias**
* **Google Forms to be used for Survey**
* **Anonymity respected**

**Sample Size:**

* **200 is target. 100-300 expected**

**Sampling Goals:**

* **Represent town demographics**
* **Not over-representing vocal/active minority**
* **Ensuring senior participation**
* **Renters and owners**
* **Near zero cost**

**Sampling Expectations:**

* **Out of 200, only 0-5 might mention property taxes and migration**
* **Detailed financial questions will reduce participation**

**Notes:**

* **We have not yet had an opportunity to align financial and demographic responses fully with other survey instruments such as the US census. This work is planned.** <https://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=bkmk>

**Lexington Town Services and Housing Costs Survey**

**Purpose:** The following survey seeks to understand services used by Lexington households and affordability of living in Lexington. Your answers are greatly appreciated as Lexington continues to look for opportunities to be responsive to citizens.

**Privacy:** Survey analysis will not seek to identify individual responses. Answers will be used in aggregate and to produce correlations across questions.

Please answer the questions as best possible for your household. You may use “N/A” for an answer if you do not have information or are uncomfortable with a question.

This survey is intended ***only*** for ***Lexington residents***. Only Lexington residents should respond please.

It will take approximately 10 minutes to complete this survey.

Survey responses will be closed on November 2, 2018.

Thank you for your time.

**Town Services**

In the Last 12 Months Has a household member (checkbox columns: Yes / No / N/A)

* Visited the Lexington Community Center
* Used Lexington swimming facilities
* Used Lexington recreational fields or courts
* Used the Pine Meadows golf course
* Used a school or neighborhood playground
* Used the Minuteman Bikeway
* Used the Lexpress bus
* Visited Lexington conservation areas
* Received fire or police services
* Attended the Lexington public schools
* Participated in any programs or services for seniors
* Served Lexington government in any capacity (employee, committee member, town meeting member, elected representative)?

**Affordability**

* Are you aware that the Recreation & Community Programs Department offers financial aid for programs and services? (Yes/No)
* Has a household member received this type of financial assistance to participate in a program or service? (Yes/No, N/A)
* If your primary residence in Lexington is rental, please indicate your monthly rental cost:

$0-$1499, $1500-$2999, $3000-$4499, $4500+, N/A

* If you own in Lexington, please indicate your approximate mortgage amount:

No mortgage, $1-$299,999, $300-$599,999, $600,000+, N/A

* Do you receive a property tax deferral or property tax credit due to limited income?

Yes / No / N/A

* Do you own a residential property outside of Lexington (vacation home, rental home, condominium, etc.)?

Yes / No / N/A

* What level of stress does your household experience with payment of monthly housing costs in Lexington?

None / Little / Some / Significant / Substantial / N/A

* Thinking about all the costs of living in your owned property or rental (rent/mortgage, home maintenance, condo fees, property taxes, insurance, utilities), what portion of these costs would you estimate is related to property taxes?

None / Little (1-25%) / Some (25-50%) / Significant (50-75%) / Substantial (75-100%) / N/A

Is relocating outside Lexington part of your retirement plan?

Likely / Unlikely / Undecided / Haven’t considered yet / N/A

**Demographic Questions**

1. Respondent Age: under 30 years, 30-39 years, 40-49 years, 50-59 years, 60-69 years,

70-79 years, 80 years and over, N/A

1. Marital status:

never married, now married, separated, widowed, divorced, N/A--ACS categories

Disability status (check all that apply):

With a hearing difficulty, with a vision difficulty, with a cognitive difficulty, with

an ambulatory difficulty, with a self-care difficulty, with an independent living

difficulty, none of the above (ACS categories) N/A

1. Length of time living in Lexington: moved in 2015 or later, 2010-2014, 2000-2009,

1990-1999, 1980-1989, 1979 and earlier (these are the ACS brackets), N/A

1. Type of property occupied:

Single family house, Multi-family, condominium, apartment, other, N/A

1. Property Value - if owned: Less than $500,000, $500,000-$749,999,

$750,000-$999,999, $1,000,000-$1,249,999, $1,500,000-$1,749,999,

$1,750,000-$1,999,999, $2,000,000 or more, not owned, N/A

1. Please indicate your approximate household income in the past 12 months - Less than

$25,000, $25,000-$34,999, $35,000-$49,999, $50,000-$74,999,

$75,000-$99,999, $100,000-$149,999, $150,000-$199,999, $200,000 and over,

N/A (categories from ACS)

1. Race/ethnicity - White alone, Black or African American alone, American Indian and

Native Alaskan alone, Asian alone, Native Hawaiian and Pacific Islander alone, Some other race alone, Two or more races, N/A (ACS categories)

Did you receive this survey from a specific group or list, or was it forwarded from a friend?

Survey source: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please share any comments to the survey team about the survey:

**Mark’s notes for committee:**

1. **I set the property value as “market value” rather than assessed value. Thought this might be more likely to be broadly known. If the committee prefers assessed value, it can be modified--I suggest the term “value” be clear.**
2. **I’m not sure about the brackets for the property value. Maybe they should be $500K increments like 0-499, 500-999, 1million-1.499mill, 1.5million+.**

**(this puts things in big swatchs and gives us some visibility to people with more expensive homes that the brackets above don’t capture)**

**Draft Emigration Factors Survey - Notes from Prior Version**

Goal

Lexington’s current emigration rate is 4-5%. How much of that emigration is driven by property tax hardship, and would that % increase if property taxes and home assessment values continue to increase at the current rates?

**Answering the question: What factors cause emigration from Lexington, particularly among town seniors (60+yrs)?**

As a Committee, we have been asking whether rising property taxes is one of the main factors? Or is it the main factor in some cases? But asking those questions directly could create an affirmative response bias.

One issue that may still need to be addressed is whether we are exclusively trying to understand the effect of tax increase hardship on seniors, or on lower income/wealth brackets more generally. For this current survey draft, the assumption is focus on seniors.

Procedure

Survey will be created in Google Forms and distributed by email. We can test the survey (see whether our questions are worded appropriately, and if answers are yielding the structure of data we anticipate, etc.) before disseminating, recruiting volunteers from Belmont, so we don’t lose Lexington data points. After making any needed revisions to the survey, we will distribute it in Lexington (?date September). We can use email (Lexington At Home, The Sage, PTA/PTOs, Lexington List, Lexington Mavens, LMMA, etc) to reach different audiences.

Survey questions

1. Age (fill in or select from age ranges used in ACS?)
2. Precinct (select 1-9)
3. How long have you been a Lexington resident? (# in years)
4. Where do you anticipate living for the next 2-5years? (Same residence, elsewhere in Lexington, leave Lexington)
5. Please select your top 3 factors influencing your decision whether to remain in your current residence or to move, with 1 being the most important. (Downsizing, Property upkeep, Property taxes, Change in household membership, Isolation/be closer to family, Mobility, Medical care, Transportation, Community Resources/Services, Feeling part of community life/town planning, Other circumstances—please specify)
6. In what type of residence do you live? (SFH, condo, multi-unit, low income housing)
7. Do you own your current residence?
   1. If yes, are you currently paying a mortgage? (Yes/no)
8. Status—check all that apply (married, surviving spouse, single, live with another, caretaker of another)
9. (optional) Annual income (American Community Surveys uses 10 ranges: <$10k, $10k-$14,999, $15k-$24,000, $25k-$34,999, $35k-$49,999, $50k-$74,999, $75k-$99,999, $100k-$149,999, $150k-$199,999, $200k+; **Consolidation could look like: <$25,000, $25k-$49,999, $50k-$74,999, $75lk-149,999, $150k+ or some other grouping of ACS ranges**)
10. What else do you feel we should know with regard to your plans to continue residence in Lexington or to move elsewhere? (fill in)