

**Administrative
Policy and
Procedure
Policy**

**BOARD OF SELECTMEN
ELLA W. RISTEEN TRUST FUND REQUESTS**

Approved April 18, 2017

PURPOSE

The purpose of this policy is to document the process that the Town will ensue to consider requests by person(s), groups, and organizations requesting financial assistance from the Ella W. Risteen Trust Section 13B (Trust) and to ensure consistent consideration of those identified in need of assistance.

POLICY

The policy of the Town of Upton will be in concordance with the Trust which states “said income for the relief and suffering in the Town of Upton, subject to the discretion of the town committee, (Board of Selectmen), having in charge relief of suffering, and comfort of the needy of said town...especially needy cases who do not ask for help”.

APPLICABILITY

This policy is applicable to all person(s), groups, and organizations and those identified in need of assistance.

IMPLEMENTATION PROCEDURE

1. Any person or organization that is aware of an individual, or persons, in need, is welcome to submit the request for assistance to the Board of Selectmen, (Board). The request must come from a person or organization other than the recipient or a family member of the recipient.
2. All requests for assistance shall be submitted to the Board of Selectmen for review in executive session. Only the Board of Selectmen has the authority to award from the trust. At all times through the process the names of individuals will be treated with discretion.
3. Upon approval by the Board to proceed, the information will be forwarded to the Social Services Coordinator at the Elder Services Center, who will be responsible for validating the need and supplying supporting documentation to the Board. The Social Services Coordinator’s role is limited to only this process and cannot alter or amend the actions of the Board. Persons are not to contact that office for information or updates on progress of the request.
4. Once validated, the Board will, in executive session, review the documentation and determine if there is need and what amount to appropriate from the trust.
5. The Board’s action(s) will be forwarded to the Social Services Coordinator, with direction on how the award is to be handled. The Coordinator will make the necessary payments and notify the Board when that action is completed. No recipient will receive any cash payment; with their debts being managed for payment by the Coordinator.

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6. As follow-up, the Board will monitor the persons(s) receiving the award, and if necessary, take further action; which will close the file or require additional funding. The Board has the authority to award more than one appropriation if necessary.
7. All measures will be taken to evaluate if there is a need which may create delays in making a determination. Requesters should make the Board aware if a timeline needs to be considered and they will act as soon as possible within compliance of the Open Meeting Law.
8. Adherence to this process will insure the integrity of the award, provide validation of the request, and uphold the intent of the trust.

APPROVED BY:

Board of Selectmen, Chair James A. Brochu _____

Board of Selectmen: Robert J. Fleming _____

Board of Selectmen: Gary Daugherty _____

Original date: April 18, 2017

Revised dates: