

TO: BOS

FROM: STEVE BARRETT CPA – TOWN TREASURER

RE: BETSEY M. BALL TRUST FUND

DATE: MARCH 15, 2013

3/18 (5)

In January 2013 I received a written request from ABRSD High School principal Dr. Callen concerning the availability of scholarships for the pursuit of higher education for the 2013 high school graduating class that could be funded by the Betsey M. Ball Trust Fund, as had been done in the past.

In reviewing an abstract of the Will of Betsey M. Ball, (attached), please note that there is an order of priority that should be followed when considering an award:

- a. The Selectmen should first determine whether they can identify a person or persons in the first category (deserving poor ... in need of medical or surgical services). If so, income can be used for said person or persons.
  - b. If the Selectmen do not identify a person or persons in the first category, they can allocate funds to the second category (promotion of the industrial education of such child or children resident in said town ... most deserving).
  - c. If the Selectmen do not identify a person or persons in the second category, they can allocate funds to the third category (other educational purpose or purposes in and for the benefit of said Town or its children).
3. The first category does not cover scholarships.
4. The second category does cover scholarships (for industrial education). The Selectmen have discretion to reasonably interpret the meaning of the phrase "industrial education," which in today's world can probably mean

everything from traditional business and vocational subjects to math, physics, engineering, computer sciences, genetics, etc.

5. The third category may or may not cover scholarships depending on how the Selectmen interpret it. It could also be used for example to fund academic prizes for Acton students in the High School, middle school, etc.

The Selectmen should consider the first category before moving to the second category during each award cycle. The Selectmen may make the determination that there is an adequate safety net in place for medical or surgical services for the deserving poor at any given time. But it is the Selectmen who should make that determination; it should not happen by default.

Last year (8) scholarships were awarded @ \$1,500 each for a total of \$12,000.

Understanding the Board and the Town's commitment to Education I have provisionally pledged (2) \$500 scholarships to the ABRHS Local Scholarship Committee, pending BOS ratification.

Considering that in all cases, the judgment of the Selectmen control utilization of Trust Fund income and given that the expendable balance is currently \$25,617 my recommendation is two-fold.

First, I recommend that a Betsy Ball Trust Fund Committee be formed consisting of the Health Director, Nursing Administrator, Community Services Coordinator and Council On Aging Director or the Council On Aging Outreach Coordinator. Each year this Committee will make recommendations to the Board of Selectmen based on identified needs and the restrictions of the Betsy Ball Fund.

I also recommend that given we are working on evaluating the first priority, and a report back to the BOS would be expected in 60 – 90 days, the BOS fund (2) \$500 scholarships for the A-B Class of 2013. If approved, the ABRHS Local Scholarship Committee will communicate their final decisions on this year's recipients at a later date.

Abstract of Will of Betsey M. Ball--  
In the Town Hall

Pay the principal of said trust fund to the inhabitants of the town of Acton, the income thereof to be used for the assistance of such deserving poor of said town as in the judgment of the selectmen thereof may be in need of medical or surgical services and if at any time in the judgment of said selectmen there be no such person in such need, the said income to be used for the promotion of the industrial education of such child or children resident in said town as in the judgment of said selectmen shall be most deserving, and in such proportions as they deem fit and if at any time there shall be in the judgment of the selectmen no person properly entitled to such assistance, then such income to be used for such other educational purpose or purposes in and for the benefit of said Town or its children as the Selectmen may seem proper.

I hereby Authorize and empower the trustees who may at any time hold the trust under this will to sell at public auction or private sale any portion or portions or the whole of the estate, real or personal, so held, and to execute and deliver good and sufficient deeds and other instruments to convey and transfer the same and to reinvest the proceeds thereof as may seem to them best, and to change such investments at any time.

- 1, Brother Nixon Ball
- 2, Cousin Mary H. M. Richardson
- 3, Rest to Addison G. Fay of New York and Ralph A. Stewart of Brookline in trust for Nixon Ball or his children and then the income of said trust fund to Mary H. M. Richardson and on her death,

3/18 (5)

**Christine Joyce**

---

**From:** Steve Ledoux  
**Sent:** Monday, March 04, 2013 10:00 AM  
**To:** Christine Joyce  
**Subject:** FW: The Betsy Ball Charity Fund

Steven L Ledoux  
Town Manager  
472 Main Street  
Acton, MA 01720  
Telephone (978) 929-6611

When writing or corresponding, please be aware that the Secretary of State has determined that most email is a public record and, therefore, may not be kept confidential.

---

**From:** Stephen Barrett  
**Sent:** Monday, March 04, 2013 9:57 AM  
**To:** Steve Ledoux  
**Cc:** Brian McMullen; Lisa Krause; Doug Halley  
**Subject:** FW: The Betsy Ball Charity Fund

Can we get this on the BOS agenda for March 25<sup>th</sup>...???

Thanks,

Steve B.

---

**From:** Susan Sousa [<mailto:ssousa@abschools.org>]  
**Sent:** Friday, March 01, 2013 12:45 PM  
**To:** Stephen Barrett  
**Subject:** Re: The Betsy Ball Charity Fund

Hi Stephen,

Our committee begins their series of meetings next month. The committee appreciates knowing what they are working with with regard to number of scholarships and dollar amounts as they move through their decision making process. Would you be able to confirm this number and dollar amount by the end of March? For now I will let them know the current status. Thank you.

On Fri, Mar 1, 2013 at 11:40 AM, Stephen Barrett <[sbarrett@acton-ma.gov](mailto:sbarrett@acton-ma.gov)> wrote:

Susan:

We can pledge (2) scholarships @ \$500 per for this year, pending BOS approval.

We will be bringing this in front of the BOS at a later meeting.

When is your deadline for final determination?

Best regards,

Steve Barrett

--

Susan E. Sousa - Office Manager/Secretary to the Principal  
Acton-Boxborough Regional High School  
36 Charter Road  
Acton, MA 01720  
978-264-4700 ext. 3405  
[ssousa@ABschools.org](mailto:ssousa@ABschools.org)