



# TOWN OF TRURO

P.O. Box 2030, Truro, MA 02666

Tel: 508-349-7004

Fax: 508-349-5505

## POLICY MEMORANDUM #68

Subject: Budget Requests from Multi-Member Bodies

Date: Adopted February 14, 2023

### Purpose:

The Truro Select Board and Town Manager aim to support the work of volunteer boards, committees and commissions. This policy establishes the process for reviewing budgetary requests from those multi-member bodies. The Town Manager and staff must take into consideration the entire town budget for programs and services, staff availability required to meet the requests, competing demands for financing and whether the purpose meets the goals and objectives of the Select Board.

This policy is intended to encourage board and committee members to project any costs for their work so those costs may be considered in the annual budget review. It is also intended to provide guidance to multi-member bodies that are interested in grant financing for their work.

### Procedures:

- The Town Manager will assign at least one staff “fiscal agent” to each multi-member body. That agent is solely a contact person for financial requests unless the Town Manager has directed otherwise.
- The multi-member body will vote on any requests for financing. The request must be reviewed first with the board’s Select Board liaison.
- A written request will be submitted to the fiscal agent. The request will detail the reason for the expense, how it contributes to town initiatives, and any staff support or outside expertise that may be required.
- Requests must be submitted to fiscal agent by the first Monday in November, when budget preparation begins for the July 1 start of the next fiscal year.
- The fiscal agent may request further detail or analysis from the multi-member body. The agent will consider whether the request adequately reflects the true costs, short-term and ongoing, and any procurement law and/or policies related to the request. The agent will

consider the Select Board's goals and objectives, priorities for town services, impacts to town property, and any related town policy or charter requirements.

- The fiscal agent will approve, deny, or modify the request and notify the Town Manager and the multi-member body.
- The Town Manager will review all requests approved by the fiscal agent and will approve, deny, or modify the request. If approved, the Town Manager will determine the appropriate funding source. The item may be included as a budget line item, for consideration during the review process, or a separate warrant article. (Approval by the fiscal agent and Town Manager shall not be considered an endorsement of the program or that the budget item will be accommodated.)
- The Town Manager's recommendation for the budget item will be presented to the Budget Task Force. A representative of the multi-member body must attend the designated Budget Task Force meeting to answer questions or provide justification of the expense. The request shall continue through the budget review process as required by Town Charter.
- If approved by Town Meeting, the multi-member body shall work with the staff fiscal agent to determine appropriate specifications of the item or the scope of services required.
- Fiscal agents will facilitate the purchasing process, in as timely a manner as their departmental duties allow. The fiscal agent will be responsible for paying invoices in accordance with town accounting procedures.
- Fiscal agents must be consulted in advance if a board, committee or commission seeks to apply for grant funding. This consultation will cover a range of areas, among them: whether the grant is applicable for the specific purpose; who is responsible for filing the application; how the grant fits into the goals and strategic plans of the town; whether matching town funds are required or if the grant is reimbursable or direct payment; and whether staff time will be required for the project or any grant administration or reporting function.



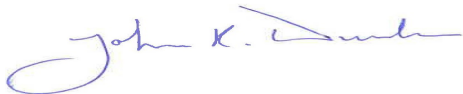
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Kristen Reed, Chair



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Robert Weinstein, Vice-Chair



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John Dundas, Clerk



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Susan Areson



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Stephanie Rein  
Truro Select Board