



Bill and Joyce Mitchell Memorial Fund

Purpose Statement:

The Bill and Joyce Mitchell Memorial Fund was established to assist adults with disabilities by providing funding for specific needs thus enhancing the individuals' personal experiences and quality of life.

The Chamberlin House Inc., a non-profit corporation, has the fiduciary responsibility of reviewing and approving requests, monitoring and maintaining the investment and reporting the activity to the Board of Directors.

The request for need will be made to the Chamberlin House Inc. Executive Director and be approved by the Board of Directors. In all requests **Chamberlin Residents will be given preference to the funds.**

The parameters of the need will be:

- The individual does not have the funds available for the need.
- The need is viewed to enhance the quality of life for the individual.
- The funds are not revolving and require no repayment.
- Chamberlin client requests can come direct from the individual or on their behalf from any outside source.
- External requests for individuals will be viewed on a case by case basis and must be submitted by a County Service Coordinator.
- The request must be in writing and submitted to the Executive Director. A request form is available but is not mandatory.
- All requests will require a quorum vote of the board members set out in the bylaws.
- Notification of use will be made to the Mitchell family.

The funds are viewed as restricted and not available for Chamberlin House Inc. operations

The request will be submitted to the Board of Directors for review. If the request is accepted the funds will be made available as soon as possible or with adequate arrangements made. If the request is denied a written notification will be sent to the requestor stating the reason as to the denial.

A monthly report will be provided to the Board with the financial report for review to account for the funds. The funds will be maintained in an interest bearing account in a reputable financial institution. Proper signature cards and authorization will be reviewed on an annual basis or as needed. The fund can be separated and monitored if individual certificates of deposit (CD's) are deemed appropriate and at a higher interest level.

Funds received as gifts or contributions to Chamberlin House Inc. will be deposited in the Bill and Joyce Mitchell Memorial Fund unless otherwise specified.

Fundraising and solicitation for this account can be authorized by the Board of Directors and will be conducted in a professional manner.

Chamberlin House Inc. is thankful to the Mitchell family for making this fund possible and will take great care in maintaining the integrity of the fund.



Chamberlin House Inc.

Request form for the Bill and Joyce Mitchell Memorial Fund

Individual's to receive the funds: _____

Date: _____ Amount: _____

Reason / purpose for need: _____

Individual requesting the fund: _____

Relationship to Individual: _____

Date Received: _____ Executive Director: _____

Date presented: _____ Board Approved: _____

Approved Amount: _____ Check Number: _____

Date Denied: _____ Date Denial Letter Sent: _____

Notification to Mitchell Family: _____