

# Scope of Study

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## **Soldiers, Sailors, And Marines Fund**

In 1919, the state of Connecticut established the Soldiers, Sailors, and Marines Fund to provide temporary financial assistance to needy World War I veterans and their families. Since then, eligibility for assistance has been expanded to include veterans who served during other periods of war, including World War II, Korea, Vietnam, and the Persian Gulf.

Under C.G.S. Sec. 27-138, the state treasurer is responsible for investing the principal of the Soldiers, Sailors, and Marines Fund. The interest income from the fund is paid to the American Legion to use for assistance awards and the administrative costs of the program. Since state FY 98, the market value of the fund has ranged between \$56 million and \$59 million, with annual income of approximately \$3 million.

In state FY 04, the fund distributed \$1.8 million in assistance to approximately 2,800 households. Administrative expenses, including fringe benefits, totaled \$1.1 million. An additional \$220,000 was allocated to the Department of Veterans' Affairs to pay for burials and headstones, while \$270,000 was appropriated to the Military Department to cover the costs of burial details.

A staff of 13 handles the fund's day-to-day operations, including the evaluation of applications to determine eligibility for assistance. In addition, 100 volunteers statewide help provide information about the fund, prepare applications, and distribute assistance payments.

### **AREA OF FOCUS**

The study will assess how well the Soldiers, Sailors, and Marines Fund is meeting its goal of providing temporary financial assistance to needy veterans who served in times of war. The study will look at the organizational structure of the fund, the mechanisms used to process requests for assistance, the number and types of assistance awards made, and the proportion of expenditures attributable to program and administrative functions.

### **AREAS OF ANALYSIS**

1. Examine how the Soldiers, Sailors, and Marines Fund operates, including but not limited to:
  - a. measures used to inform veterans and their dependents about the existence of the fund;
  - b. income and asset limits used to determine eligibility for assistance from the fund;
  - c. the types of expenses payable by the fund and any restrictions on the amount or frequency of such payments;
  - d. the application review process, including methods used to verify applicant information;
  - e. the appeal process for applicants denied assistance;
  - f. trends in awards, including the number of recipients by period of war service, the major types of assistance provided (e.g., hospital care, food and shelter, burials, etc.), and the value of the awards made; and
  - g. trends in total expenditures by major categories (e.g., administration, awards, other).

2. Determine whether there are other programs available in Connecticut that provide services similar to those currently provided by the Soldiers, Sailors, and Marines Fund.
3. Identify models used by other states to provide assistance to needy veterans of war.