

Iowa Department for the Blind
Draft Gifts & Bequests Fund Policy
Updated 2/19

Section 1: Grant Eligibility and Application Requirements

1.01 Except where otherwise indicated, grants will only be considered when an applicant has a household income below the [federal poverty guidelines](#).

1.02 No more than one grant will be approved per household within a 12-month period.

1.03 All applicants for grants must meet the following minimum qualifications to be considered:

- a. Applicant must be blind as defined by Iowa Code.
- b. Applicant must be a resident of Iowa.
- c. Applicant must not have any loans from IDB that are not in good standing. Loans are considered in good standing when recipient has not missed more than three payments in a calendar year without obtaining a deferment
- d. Application must be signed and contain a valid social security number.

1.04 At least two quotes for the requested item should be attached to the application. If quotes are not attached or do not match the requested amount, the grant may be delayed until these quotes are obtained.

1.05 A description of other resources that the applicant attempted to utilize before making the request should accompany the application.

1.06 Grants will not be made for an item or event for which a grant has previously been issued. Such requests may be submitted as loans.

Section 2: Loan Eligibility and Application Requirements

2.01 All applicants for loans must meet the following minimum qualifications to be considered:

- a. Applicant must be blind as defined by Iowa Code.
- b. Applicant must be a resident of Iowa.
- c. Applicant must not have any loans from IDB that are not in good standing. Loans are considered in good standing when recipient has not missed three payments in a calendar year without obtaining a deferment.
- d. Application must be signed and contain a valid social security number.

2.02 Loans will be made at an interest rate of 0%.

2.03 The minimum monthly loan payment is \$25.00.

2.04 If a loan recipient is unable to make scheduled payments, the Director may approve a loan deferment.

2.05 If a loan recipient fails to make more than 3 payments within a calendar year without requesting deferment, IDB may choose to seek repayment through Income Offset.

2.06 Loans will not be granted to individuals with a current loan balance.

Section 3: Requests Not Requiring Commission Approval

3.01 A \$1,000 grant to Braille Challenge national finalists will be awarded to assist in attending the national competition. This grant is not subject to any of the restrictions listed in section 1.

3.02 First-time national consumer group convention attendees may receive a grant not to exceed \$1,200 to attend national consumer group conventions regardless of whether or not they are below the grant income limit or have outstanding loans. This grant can be received once for each of the national consumer group conventions only if that applicant has never attended that particular convention before. These requests will be tracked and anonymized by accounting staff and approved by the Director. Applicants will be asked to provide cost estimates.

3.03 First-time state consumer group convention attendees may receive a grant not to exceed \$400 to attend state consumer group conventions regardless of whether or not they are below the grant income limit or have outstanding loans. This grant may be received once for each of the state consumer group conventions only if the applicant has never attended that particular convention before. These requests will be tracked and anonymized by accounting staff and approved by the Director. Applicants will be asked to provide cost estimates.

3.04 Requests for equipment and support services for active Independent Living (IL) clients (as outlined in Appendix A) will be authorized by the case manager and reviewed and approved by the IL Program Administrator through the case management system. Accounting staff will ensure that items authorized in this manner follow all established procedures for client authorizations.

3.05 Adaptive equipment needed to live independently with a disability and not available through existing programs costing no more than \$1,500.

3.06 Funding to attend professional conferences or trainings, not covered by VR case services, and costing no more than \$1,500.

3.07 Loan requests from attendees who have previously attended the state or national convention for which they are seeking support. No grants will be considered from applicants who are not first-time attendees at that particular convention. Loans for attendance at state or national consumer group conventions must meet the standards of approval listed in section 2. No loan of this type shall exceed 2,000 *for a national convention* or \$500 for a state convention.

3.08 Provision of support services for Youth, family, and educator programs such as supplies, communications services, information distribution platforms, food, housing, per diems or transportation that are not attributable to pre-ETS services and not able to be authorized as part of a VR plan as outlined in Appendix B.

3.09 Tools and supplies for the provision of training to teachers, para educators, and other professionals serving blind youth as outlined in Appendix B.

3.10 Assistance to defer the cost of transportation, food, or lodging for persons serving as volunteer mentors for Senior Integration, transition retreats, or other IDB programs as outlined in Appendix C.

3.11 Property remodeling or equipment to aid independent living with a disability where costs cannot be covered by the applicant or any other community program costing no more than \$1,500.

Section 4: Requests Considered by the Commission Board

4.01 Adaptive equipment needed to live independently with a disability and not available through existing programs costing more than \$1,500.

4.02 Funds that will be utilized to support programs that benefit blind lowans that are not sponsored by IDB.

4.03 Funding to attend professional conferences or trainings, not covered by VR case services, and costing more than \$1,500.

4.04 Property remodeling or equipment to aid independent living with a disability where costs cannot be covered by the applicant or any other community program costing more than \$1,500.

4.05 Medical expenses when all other sources of comparable benefit have been exhausted. A letter of support from a licensed medical practitioner may be required to support such requests.

4.06 Funding to improve or expand a Business Enterprise Program (BEP) business.

4.07 Any requests for support of IDB programs or services not outlined in Appendices A, B, or C.

Section 5: Examples of Requests that will not receive Funding:

5.01 Taxes or Lawyer's fees for any purpose will not be funded.

5.02 Rent, utility, phone, internet, insurance, or other regularly recurring bills will not be funded.

5.03 Property remodeling or upkeep not related to making a dwelling accessible.

5.04 Services eligible for funding through an active vocational rehabilitation plan.

5.05 Adaptive equipment available through a partner agency or other program.

5.06 While exceptions can be made, requests of more than \$10,000 are generally not funded.

Section 6: Determination Process

6.01 The process for determining whether or not a grant or loan will be issued as follows:

Step 1: Applicant will complete and sign an [application](#). This application should be printed, signed, and submitted to IDB at 524 4th St., Des Moines, IA 50309.

Step 2: Accounting staff receiving the application will complete a form that is submitted to the Director and Commissioners. This allows the Director or Commissioners to make a decision without knowing the identity of the applicant. The following information is recorded on this form:

- Request number
- Amount requested
- Whether the request is a loan or a grant
- Status of grant eligibility based on income
- Purpose of loan or grant
- Verification that the form is signed and contains a social security number
- Verification that the applicant is blind
- Verification that the applicant lives in Iowa
- Status of current loans
- Verification that two quotes are attached and in line with amount requested
- Whether or not the applicant has requested that the information remain confidential in accordance with Iowa Code 22.7 (18)

Step 3: If the request is of the type listed in Section 3, the Director decides the request as soon as possible. If the request requires Commission approval, The Commissioners discuss and vote on the request at the next scheduled board meeting.

If the applicant has not requested that the application be considered confidential under Iowa Code 22.7 (18) or the application may be voted on without discussion, it will be handled entirely in open session. Any application where the applicant has requested that the application be considered confidential and a Commissioner requests discussion prior to a vote, the application will be discussed in closed session and voted on in open session.

In cases where the Director or Commission cannot offer a grant due to failure to meet one or more of the grant eligibility requirements listed in Section 1, they may approve the request as a loan.

Step 4: Director or Board Secretary sends approval or denial to accounting staff for applicant notification. If a grant request is approved as a loan, the applicant may choose whether or not to accept the loan.

Appendix A: IL Purchasing Guidelines

Items on this list are basic staples of independent living for blind persons and can continue to be used regardless of any change in visual acuity. No item on this list costs more than \$200.

Any of the following items will be authorized with G&B funds as the funding source as part of an Independent Living case when they are directly related to and necessary for the completion of a client SMART objective:

- Iowa cane
- Sleep shades
- Slate and stylus
- Braille paper
- Talking or tactile clock
- Talking or tactile timer
- Braille watch, talking watch, or keychain clock
- Digital recorder
- Check, signature, and envelope writing guides
- Bump or locator dots
- Dymo or magnetic labeling tape* Hi-marks, puff paint, or Velcro tape
- Talking cooking thermometer
- Talking home thermostat or talking indoor/outdoor thermostat
- Talking calculator
- Talking medical thermometer
- Talking bathroom scale
- Bilingual talking blood pressure reader (arm or wrist)
- Count-A-Dose-Insulin Tool
- Needle threaders or self-threading needles
- Sock sorters
- Rotomatic, tactile measuring devices, or talking tape measure
- Transportation costs for an IL client to participate in IL training activities if a volunteer can't be arranged or the IL teacher is unable to transport the client
- Maintenance identified as a need related to training activities during Senior Orientation, Senior Integration or a CBT
- Any food or supplies needed for training during Senior Orientation, Senior Integration, or CBT
- Pen Friend device
- Laundry labels for Pen Friend device

All eligible items that can be purchased using grant funding should be purchased using that funding source. Items on the list above that require batteries that are not included may add batteries billed to G&B.

Clients may request grants or loans from G&B for larger items using the standard Gifts & Bequests application process.

Appendix B: Expenditures in Support of Youth and IL Programming

Background

Providing services to blind youth, their families, and education professionals who work with them is key to creating a foundation of high expectations. This leads to blind youth who are more confident, skilled, and prepared for college and career success. Recognizing this, Congress passed the Workforce Innovation and Opportunity Act (WIOA) which mandated that vocational rehabilitation agencies such as IDB spend 15% of its VR basic support grant on Pre-Employment Transition Services (Pre-ETS).

While the provision or purchase of many of the direct services to youth count toward this 15%, certain support and ancillary costs are not allowable. Most of these costs can be paid using non-Pre-ETS VR basic support funds for youth at least 14-years old who have opened a VR case. However, no VR funds can be used to cover these costs when providing training to families, educators, volunteers, or youth under the age of 14. In addition, IDB cannot use VR dollars to provide per diems or stipends to educators to offset the costs incurred in program attendance.

Significant challenges also exist in the Library's efforts to improve the timeliness and quality of braille production. School districts and Transcribers often lack the necessary equipment to handle the final pieces of braille and tactile production. The Library would like to be able to provide training in equipment use and provide loaner equipment to transcribers and school districts. This would greatly improve the availability of high quality braille and tactiles for library students and patrons of all ages. In addition, as the use of tablets and laptops in school and employment continues to increase rapidly, the ability to set up and use refreshable braille displays with these devices becomes more vital. Relying on speech alone puts students at a disadvantage when learning spelling, grammar, and other key literacy skills. The library would like to provide training and loaner displays to patrons, educators, and families to remove any barriers that might be stopping blind lowans from becoming fully literate.

Limitations and restrictions around the uses of various funding streams delay and sometimes halt the creation and execution of new innovative programming designed to raise expectations among parents and educators. The Friends of the Library graciously provide some of the support needed, however, this funding is not unlimited.

In addition, the Independent Living program is unable to use its funding streams to purchase food and food related supplies to conduct group programs. Using Gifts and Bequests Funds to provide these supplies is also occasionally necessary.

Costs to be Covered Using Gifts & Bequests Funds

In the above situations and when no other funding source is available, IDB may use Gifts & Bequests Funds to provide:

- Transportation to and from events.
- Food and beverages provided at events.
- Housing costs.
- The cost of communications services and platforms that would allow for the delivery of online trainings.
- Canes, slates, learning shades, and other blindness tools for training educators, children under the age of 14, or family members.
- Providing stipends to educators to defer the cost of obtaining braille literacy training or other training that will

- raise their expectations and help them to better educate blind students.
- The purchase of loaner braille production equipment and refreshable braille displays.
- Food and supplies for IL group trainings

Documentation

These expenditures will be detailed in a written report in each quarter's board packet. These purchases will be made either by purchase order or P Card whenever possible. When these expenditures are made by program staff, the staff member will make the purchase and submit a travel voucher for reimbursement and this reimbursement will be paid using Gifts & Bequests Funds.

The reimbursement request will follow IDB's established reimbursement procedures.

Appendix C Procedures for Grants to Program Volunteers

Pre-payment Requests

In order to facilitate transportation arrangements, applicants wishing to receive funds before the event rather than being reimbursed after the event should do the following:

1. Apply for the grant at least three weeks prior to the event.
2. Complete and sign the application.
3. Director will obtain confirmation of volunteer participation from the program coordinator and when received, approve request.
4. Accounting will issue payment for the amount requested.
5. Applicant will submit receipts for expenses and return any excess funds to IDB accounting no later than 30 days after the event.
6. Failure to submit receipts and or return excess funds will disqualify applicant for receipt of any future grants.

Reimbursement Requests

Applicants wishing to receive reimbursement for actual costs incurred while volunteering should do the following:

1. Apply for the grant at least one week before the event by completing the application.
2. Director will obtain confirmation of volunteer participation from the program coordinator and when received, approve request.
3. Applicant will submit receipts to IDB accounting department.
4. Accounting will issue payment.