



STATE OF IOWA

GOVERNOR KIM REYNOLDS
LIEUTENANT GOVERNOR ADAM GREGG

IOWA COMMISSION OF VETERANS AFFAIRS
ELIZABETH LEDVINA, CHAIR

IOWA VETERANS TRUST FUND CALENDAR YEAR 2021 REPORT

Per Iowa Code Chapter 35A.13
Annual Report to the Iowa General Assembly
January 15, 2022

OVERVIEW OF THE IOWA VETERANS TRUST FUND

This report fulfills the requirements of Iowa Code 35A.13, section 9:

*The commission shall submit an annual report to the general assembly by January 15 of each year concerning the veterans trust fund created by this section. The annual report shall include financial information concerning the moneys in the trust fund and shall also include information on the number, amount, and type of expenditures, if any, from the fund during the prior **calendar year** for the purposes described in subsection 7.*

Veterans must meet specific income and asset guidelines to qualify for Trust Fund assistance. Initially, the veteran and their family must have a household income below 300% of the Federal Poverty Guidelines (FPG). Some areas of assistance have a lower qualifying asset level. This is to prevent over utilization of the fund and to ensure that the veteran has either contributed some of their assets to their situation, or are truly in need.

Some veterans are only eligible for one category of assistance, such as unemployment assistance, while other applicants apply for and are eligible for multiple areas of assistance based on their needs. For example, a veteran requesting housing repair could also qualify for dental assistance. Applications for assistance may be deferred because the veteran has not provided sufficient evidence to warrant approval or denial, but have indicated they will provide the needed eligibility evidence.

The Iowa General Assembly has determined areas of eligible expenditures for Iowa veterans:

- Travel expenses for service-related medical care
- Unemployment or underemployment assistance due to service-related causes
- Job training or tuition assistance
- Assistance with vision, hearing, dental care, durable medical equipment, and prescription drugs
- Counseling and substance abuse services
- Emergency vehicle and housing repair
- A One –Time vehicle replacement, not exceeding \$5,000 or the value of the vehicle.
- Transitional housing in an emergency
- Emergency room and ambulance transportation assistance
- Funding to determine whether a deceased veteran is the father or mother of a child
- Funding for family support groups
- Grants for providing honor guard services at veteran’s funerals
- Homelessness one-time rental housing assistance

SEE IOWA ADMINISTRATIVE CODE 801, CHAPTER 14 FOR ADDITIONAL DETAILS ON THESE AREAS OF ASSISTANCE.

Trust Fund applications have substantially increased, due in part to the current economic conditions and publicity from the Iowa Lottery. During 2011, the trust Fund interest balance was depleted and a waiting list was implemented. Legislative action in the 2012 session corrected this situation.

During the 2008 Legislative Session, HF 2359 was signed into law. This bill authorized the creation and sale of four new Iowa Lottery tickets to benefit the Iowa Veterans Trust Fund. In early July of 2008 the first scratch-off ticket was introduced and later that month the first pull tab ticket was introduced. First quarter sales met expectations, and in October 2008, \$992,771.80 was deposited into the principle balance of the Trust Fund account. It is anticipated that these tickets will provide between \$2 - \$3 million dollars annually in additional principle revenue.

The following information is provided by the Iowa Lottery:

Lottery Proceeds to Veterans Trust Fund Top \$35 Million

Since the lottery's start in 1985, its players have won more than \$5 billion in prizes while the lottery has raised more than \$2.2 billion for state programs. Today, lottery proceeds help our state in multiple ways. They help Iowa veterans and their families through the Iowa Veterans Trust Fund. They help the families of Iowa peace officers, firefighters and corrections employees who die in the line of duty. In addition, they provide help for a variety of significant projects through the state General Fund.



2. We highlight the Iowa Lottery's support for the Iowa Veterans Trust Fund on the Lottery Gives Back page of the Iowa Lottery's website. Here is a direct link to that page: <https://www.ialottery.com/Pages/Pressroom/IALotteryGivesBack.aspx>

3. We have television ads highlighting the Iowa Veterans Trust Fund as well. Here is a direct link to that ad on YouTube: <https://www.youtube.com/watch?v= 5iyxeh2xbc>

Lottery Annual Transfers to IVTF

<u>Fiscal Year</u>	<u>Lottery Proceeds</u>
<i>FY 2018</i>	<i>\$2,500,000</i>
<i>FY 2019</i>	<i>\$2,500,000</i>
<i>FY2020</i>	<i>\$2,500,000</i>
<i>FY2021</i>	<i>\$2,500,000</i>

(*The Iowa Lottery's annual transfer to the IVTF for FY 2021 was made in October 2021.)

DEPOSITS

<i>Calendar Year</i>	<i>Principle Deposit (not spendable)</i>	<i>Deposits</i>
2018		\$2,500,000.00
2019		\$2,500,000.00
2020		\$2,500,000.00
2021		\$2,500,000.00
Grand Total		\$10,000,000.00
<i>Balance a/o Dec. 30, 2021</i>		\$36,223,214.66

<i>Calendar Year</i>		<i>Income Tax Check-off Deposits</i>
2016	2/26/18	\$31,429.00
2017	2/25/19	\$33,951.50
2018	1/15/20	\$31,511.50
2019	1/12/21	\$31,820.50
Grand Total		\$128,712.50

<i>Calendar Year</i>	<i>Spendable Interest</i>	<i>Deposits</i>
2018		\$417,478.82
2019		\$539,897.18
2020		\$319,401.68
2021		\$97,256.88
	1/27/21	\$2,721.89
	2/24/21	\$1,710.25
	3/24/21	\$12,938.06
	4/23/21	\$6,424.10
	5/21/21	\$5,305.05
	6/23/21	\$2,379.21
	7/21/21	\$2,889.80
	8/20/21	\$1,878.38
	9/24/21	\$4,882.02
	10/22/21	\$4,291.25
	11/23/21	\$8,799.41
	12/17/22	\$2,071.08
Balance a/o Dec. 30, 2020		\$651,146.20

EXPENDITURES

Trust Fund expenditures can be separated into three separate categories: (1) Survivor Outreach Program, (2) Honor Guard reimbursement, and (3) Iowa Veterans Trust Fund.

In January 2020, the Veterans Affairs Commission made needed changes to the Trust Fund language. These changes made the program more flexible and not as restricted to veterans and military families. In which, made for families eligible for the program.

A breakdown of assistance per category is illustrated in the tables below.

Table 1: CY2018 Expenditures

Assistance Category	Approved area of assistance	Total \$ Spent in 2018
Unemployment	15	\$29,000.00
Housing Repair	49	\$154,932.79
Dental Assistance	71	\$114,564.74
Vehicle Repair	112	\$158,622.82
Education Assistance	7	\$6,232.80
Emergency Medical	4	\$14,686.04
Durable Equipment	9	\$17,430.21
Transitional Housing	0	\$0.00
Audiology	1	\$3,000.00
DNA testing	0	\$0.00
Travel Assistance	0	\$0.00
Vision Assistance	1	\$1,251.00
Counseling Services	0	\$0.00
Prescription Drugs	0	\$0.00
Honor Guard Reimbursement	67	\$96,175.00
Benefit for the child of a disabled / deceased veteran	0	\$0.00
	336	\$496,153.37

Table 2: CY2019 Expenditures

Assistance Category	Approved area of assistance	Total \$ Spent in 2019
Unemployment	6	\$10,000.00
Housing Repair	83	\$193,666.98
Dental Assistance	57	\$107,873.56
Vehicle Repair	134	\$191,924.95
Education Assistance	4	\$12,000.00
Emergency Medical	9	\$8,431.27
Durable Equipment	8	\$11,205.82
Transitional Housing	0	\$0.00
Audiology	0	\$0.00
DNA testing	0	\$0.00
Travel Assistance	0	\$0.00
Vision Assistance	1	\$220.00
Counseling Services	0	\$0.00
Prescription Drugs	0	\$0.00
Honor Guard Reimbursement	219	\$97,025.00
Benefit for the child of a disabled / deceased veteran	0	\$0.00
	523	\$632,397.58

Table 3: CY2020 Expenditures

Assistance Category	Approved area of assistance	Total \$ Spent in 2020
Unemployment	7	\$10,000.00
Housing Repair	57	\$127,540.66
Dental Assistance	62	\$217,255.01
Vehicle Repair	88	\$110,886.47
Education Assistance	6	\$5,243.45
Emergency Medical	6	\$7,154.29
Durable Equipment	9	\$14,120.91
Transitional Housing	0	\$0.00
Audiology	2	\$1,885.00
DNA testing	0	\$0.00
Travel Assistance	0	\$0.00
Vision Assistance	2	\$1,523.75
Counseling Services	1	\$2,500.00
Prescription Drugs	0	\$0.00
Honor Guard Reimbursement	193	\$75,300.00
Benefit for the child of a disabled / deceased veteran	0	\$0.00
	432	\$572,885.79

Table 4: CY2021 Expenditures

Assistance Category	Approved area of assistance	Total \$ Spent in 2021
Unemployment	1	\$1,000.00
Housing Repair	134	\$663,554.69
Dental Assistance	171	\$689,228.39
Vehicle Repair	115	\$166,834.06
Vehicle Replacement	20	\$87,894.50
Education Assistance	6	\$17,276.00
Emergency Medical	3	\$4,405.94
Durable Equipment	13	\$44,570.90
Transitional Housing	0	\$0.00
Audiology	0	\$0.00
DNA testing	0	\$0.00
Travel Assistance	1	\$1,000.00
Vision Assistance	4	\$1552.90
Counseling Services	2	\$1,500.00
Prescription Drugs	0	\$0.00
Honor Guard Reimbursement	214	\$95,295.00
Survivor Outreach Program	1	\$26,200.00
Benefit for the child of a disabled / deceased veteran	0	\$0.00
	472	\$1,704,717.38

FOR QUESTIONS ABOUT THIS REPORT:

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