



STATE OF IOWA

GOVERNOR TERRY E. BRANSTAD
LIEUTENANT GOVERNOR KIM REYNOLDS

IOWA COMMISSION OF VETERANS AFFAIRS
MONICA M. BLAKLEY, CHAIR

IOWA VETERANS TRUST FUND CALENDAR YEAR 2015 REPORT

Per Iowa Code Chapter 35A.13
Annual Report to the Iowa General Assembly
January 15, 2016

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 less than \$15,000 in liquid assets and have a household income below 200% 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
- 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
- Matching funds to veterans service organizations to provide for accredited veteran service officers

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 \$17 Million

In the seven years that a portion of Iowa Lottery proceeds has been dedicated to the Iowa Veterans Trust Fund, more than \$17.3 million has been raised to benefit our state's veterans and their families through the sale of lottery tickets. And, recent changes in the initiative will stabilize lottery proceeds to the Trust Fund in the years ahead.

"The Lottery is proud to provide support for the brave men and women who have served our country and our goal is to ensure that we continue to provide a stable, ongoing source of funding for the IVTF," Lottery CEO Terry Rich said.

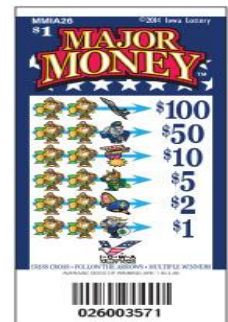
Lottery games dedicated to veterans' causes debuted in July 2008 and continued to be released each year through fiscal year 2015. Annual lottery proceeds from specific games for the IVTF varied during that time, with a high of \$3.1 million in fiscal year 2011 and a low of \$1.8 million in FY 2014.

During the 2015 legislative session, the lottery worked with state lawmakers to change the way it raises proceeds for the IVTF with the goal of stabilizing proceeds to the cause. Legislation ultimately was signed into law in March that took effect July 1. It specifies that rather than have money raised for the cause through specific games, a set amount in lottery proceeds – \$2.5 million – will be dedicated annually to the IVTF. That amount is the midpoint of the lottery's publicly stated goal for the ongoing initiative and also was the annual average through the program's first six years. Moving ahead, a portion of the proceeds from the sale of all Iowa Lottery games will benefit the IVTF.

In late 2014 and early 2015, the lottery introduced its final set of games that dedicated all of their proceeds to the IVTF. Those two games, the \$1 "Major Money" pull-tab game that debuted Dec. 8 and the \$1 "High 5s" instant-scratch game that debuted Jan. 5, helped the lottery achieve its goal of raising at least \$2 million for the Trust Fund in FY 2015. The total in lottery proceeds to the IVTF in FY 2015 was \$2.15 million.

The lottery will continue to spread the word about the proceeds it provides to the IVTF through its advertising, and also plans to occasionally offer patriotic- or veterans-themed games, as those have always been popular.

Beginning in fiscal year 2016, the lottery will make an annual \$2.5 million transfer to the Iowa Veterans Trust Fund, with the deposit being made in late October each year.



Here are the lottery proceeds raised for the Trust Fund up to and including the most recent annual deposit in October 2015:

- **FY 2009** **\$2,783,377**
- **FY 2010** **\$2,661,554**
- **FY 2011** **\$3,105,371**
- **FY 2012** **\$2,719,494**
- **FY 2013** **\$2,126,724**
- **FY 2014** **\$1,804,434**
- **FY 2015** **\$2,151,167**
- **FY 2016** **\$2,500,000**
- **TOTAL:** **\$17,352,121**

| <u>Game Name:</u> | <u>Release Date:</u> | <u>Game Type:</u> |
|--------------------------|-----------------------------|--------------------------|
| All American | July 2008 | Pull-tab |
| Stars & Stripes | July 2008 | Instant-scratch |
| Freedom Rings | January 2009 | Instant-scratch |
| Land Of Liberty | January 2009 | Pull-tab |
| Red White & Blue | July 2009 | Pull-tab |
| The Freedom Rock | July 2009 | Instant-scratch |
| Star Spangled Bucks | January 2010 | Pull-tab |
| Veterans Cash | January 2010 | Instant-scratch |
| Blaze Of Glory | July 2010 | Pull-tab |
| Veterans Hot 7's | July 2010 | Instant-scratch |
| American Pride | December 2010 | Pull-tab |
| Give Me \$20 | January 2011 | Instant-scratch |
| Veterans Pride | July 2011 | Pull-tab |
| Veterans Hot \$50 | July 2011 | Instant-scratch |
| Veterans Double Doubler | January 2012 | Instant-scratch |
| Bold & Brave | January 2012 | Pull-tab |
| Veterans Silver 6s | June 2012 | Instant-scratch |
| Forever Free | July 2012 | Pull-tab |
| A 10 Hut | January 2013 | Instant-scratch |
| Red White & Moo | July 2013 | Instant-scratch |
| Say Uncle | June 2014 | Pull-tab |
| 15X | July 2014 | Instant-scratch |

Table 1: CY2010 Expenditures

| Assistance Category | Approved area of assistance | Total \$ Spent in 2010 |
|---|-----------------------------|------------------------|
| Unemployment | 11 | \$15,000.00 |
| Housing Repair | 11 | \$16,281.84 |
| Dental Assistance | 40 | \$57,439.00 |
| Vehicle Repair | 8 | \$13,016.56 |
| Education/ Tuition Assistance | 0 | \$0.00 |
| Emergency Room * | 0 | \$0.00 |
| Durable Equipment | 0 | \$0.00 |
| Transitional Housing | 1 | \$400.00 |
| Hearing | 0 | \$0.00 |
| DNA testing * | 0 | \$0.00 |
| Travel Assistance * | 0 | \$0.00 |
| Vision Assistance | 2 | \$413.42 |
| Counseling Services * | 0 | \$0.00 |
| Prescription Drugs * | 0 | \$0.00 |
| Benefit for the child of a disabled or deceased veteran * | 0 | \$0.00 |
| | 73 | \$102,650.82 |

Table 2: CY2011 Expenditures

| Assistance Category | Approved area of assistance | Total \$ Spent in 2011 |
|---|-----------------------------|------------------------|
| Unemployment | 3 | \$6,500.00 |
| Housing Repair | 5 | \$13,150.00 |
| Dental Assistance | 10 | \$16,628.00 |
| Vehicle Repair | 4 | \$5,569.63 |
| Education/ Tuition Assistance * | 0 | \$0.00 |
| Emergency Room * | 0 | \$0.00 |
| Durable Equipment * | 0 | \$0.00 |
| Transitional Housing | 0 | \$0.00 |
| Hearing | 0 | \$0.00 |
| DNA testing * | 0 | \$0.00 |
| Travel Assistance * | 0 | \$0.00 |
| Vision Assistance | 0 | \$0.00 |
| Counseling Services * | 0 | \$0.00 |
| Prescription Drugs * | 0 | \$0.00 |
| Benefit for the child of a disabled or deceased veteran * | 0 | \$0.00 |
| | 22 | \$41,847.63 |

Table 3: CY2012 Expenditures

| Assistance Category | Approved area of assistance | Total \$ Spent in 2012 |
|---|-----------------------------|------------------------|
| Unemployment | 1 | \$3,000.00 |
| Housing Repair | 20 | \$40,396.63 |
| Dental Assistance | 46 | \$79,447.27 |
| Vehicle Repair | 24 | \$28,092.98 |
| Education/ Tuition Assistance | 0 | \$0.00 |
| Emergency Medical | 2 | \$6,601.99 |
| Durable Equipment | 0 | \$0.00 |
| Transitional Housing | 0 | \$0.00 |
| Hearing | 0 | \$0.00 |
| DNA testing | 0 | \$0.00 |
| Travel Assistance | 0 | \$0.00 |
| Vision Assistance | 2 | \$770.00 |
| Counseling Services | 0 | \$0.00 |
| Prescription Drugs | 0 | \$0.00 |
| Benefit for the child of a disabled or deceased veteran | 0 | \$0.00 |
| | 95 | \$158,308.87 |

Table 4: CY2013 Expenditures

| Assistance Category | Approved area of assistance | Total \$ Spent in 2013 |
|---|-----------------------------|------------------------|
| Unemployment | 3 | \$5,000.00 |
| Housing Repair | 17 | \$40,086.19 |
| Dental Assistance | 71 | \$124,949.72 |
| Vehicle Repair | 22 | \$26,316.98 |
| Education/ Tuition Assistance | 2 | \$5,780.92 |
| Emergency Medical | 0 | \$0.00 |
| Durable Equipment | 0 | \$0.00 |
| Transitional Housing | 1 | \$1,000.00 |
| Hearing | 0 | \$0.00 |
| DNA testing | 0 | \$0.00 |
| Travel Assistance | 0 | \$0.00 |
| Vision Assistance | 1 | \$500.00 |
| Counseling Services | 0 | \$0.00 |
| Prescription Drugs | 0 | \$0.00 |
| Honor Guard Reimbursement | 313 | \$170,095.00 |
| Benefit for the child of a disabled or deceased veteran | 0 | \$0.00 |
| | 430 | \$373,728.81 |

Table 5: CY2014 Expenditures

| Assistance Category | Approved area of assistance | Total \$ Spent in 2014 |
|---|-----------------------------|------------------------|
| Unemployment | 8 | \$15,000.00 |
| Housing Repair | 37 | \$89,386.82 |
| Dental Assistance | 52 | \$100,364.68 |
| Vehicle Repair | 51 | \$75,831.51 |
| Education/ Tuition Assistance | 6 | \$13,440.44 |
| Emergency Medical | 4 | \$8,392.97 |
| Durable Equipment | 0 | \$0.00 |
| Transitional Housing | 1 | \$1,000.00 |
| Hearing | 1 | \$2,990.00 |
| DNA testing | 0 | \$0.00 |
| Travel Assistance | 0 | \$0.00 |
| Vision Assistance | 2 | \$908.00 |
| Counseling Services | 0 | \$0.00 |
| Prescription Drugs | 0 | \$0.00 |
| Honor Guard Reimbursement | 178 | \$59,350.00 |
| Benefit for the child of a disabled or deceased veteran | 0 | \$0.00 |
| | 340 | \$366,664.42 |

Table 6: CY2015 Expenditures

| Assistance Category | Approved area of assistance | Total \$ Spent in 2015 |
|---|-----------------------------|------------------------|
| Unemployment | 14 | \$24,500.00 |
| Housing Repair | 43 | \$94,209.41 |
| Dental Assistance | 31 | \$53,984.75 |
| Vehicle Repair | 65 | \$91,263.92 |
| Education/ Tuition Assistance | 2 | \$4,950.07 |
| Emergency Medical | 2 | \$3,188.73 |
| Durable Equipment | 0 | \$0.00 |
| Transitional Housing | 0 | \$0.00 |
| Hearing | 1 | \$3,000.00 |
| DNA testing | 0 | \$0.00 |
| Travel Assistance | 0 | \$0.00 |
| Vision Assistance | 2 | \$1,052.00 |
| Counseling Services | 0 | \$0.00 |
| Prescription Drugs | 0 | \$0.00 |
| Honor Guard Reimbursement | 178 | \$59,700.00 |
| Benefit for the child of a disabled or deceased veteran | 0 | \$0.00 |
| | 324 | \$335,848.88 |

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