



STATE OF IOWA

GOVERNOR KIM REYNOLDS
LIEUTENANT GOVERNOR ADAM GREGG

IOWA COMMISSION OF VETERANS AFFAIRS
DANIEL GANNON, CHAIR

IOWA VETERANS TRUST FUND CALENDAR YEAR 2017 REPORT

Per Iowa Code Chapter 35A.13
Annual Report to the Iowa General Assembly
January 15, 2018

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 \$22 Million

Lottery proceeds to the Iowa Veterans Trust Fund have topped \$22 million, with a set amount in proceeds continuing to be dedicated annually to the Trust Fund each year.

Since 2008, the first year that a portion of Iowa Lottery proceeds began to be dedicated to the Veterans Trust Fund, more than \$22.3 million has been raised to benefit our state's veterans and their families through the sale of lottery tickets.



“Our goal from the beginning of the initiative has been to provide a stable, ongoing source of funding for the Veterans Trust Fund,” said Lottery CEO Terry Rich. “We’re proud to continue to provide support for the men and women who have so nobly served our country.”

During the 2015 legislative session, the lottery worked with state lawmakers to stabilize proceeds to the IVTF. Legislation ultimately was signed into law that took effect in July 2015, specifying that a set amount in lottery proceeds – \$2.5 million – be dedicated annually to the IVTF. Today, a portion of the sale of all lottery games benefits the IVTF.

The lottery continues to spread the word about the proceeds it provides to the IVTF through its advertising and other information. The lottery’s annual \$2.5 million transfer to the IVTF is made in late October each year.

Lottery Transfers To IVTF

<u>Fiscal Year</u>	<u>Lottery Proceeds</u>
<i>FY 2009</i>	<i>\$2,783,377</i>
<i>FY 2010</i>	<i>\$2,661,554</i>
<i>FY 2011</i>	<i>\$3,105,371</i>
<i>FY 2012</i>	<i>\$2,719,493</i>
<i>FY 2013</i>	<i>\$2,126,725</i>
<i>FY 2014</i>	<i>\$1,804,434</i>
<i>FY 2015</i>	<i>\$2,151,167</i>
<i>FY 2016</i>	<i>\$2,500,000</i>
<i>FY 2017</i>	<i>\$2,500,000</i>
<i>FY 2018</i>	<i>\$2,500,000</i>

(*The Iowa Lottery’s annual transfer to the IVTF for FY 2018 was made in October 2017.)

DEPOSITS

<i>Calendar Year</i>	<i>Principle Deposit (not spendable)</i>	<i>Deposits</i>
2010		\$3,617,508.43
2011		\$2,976,456.50
2012		\$2,740,769.14
2013		\$2,740,769.14
2014		\$2,181,729.14
2015		\$3,604,627.96
2016		\$2,500,000.00
2017		\$2,500,000.00
Grand Total		\$20,361,860.31
<i>Balance a/o Dec. 30, 2016</i>		\$25,996,952.16

<i>Income Tax Check-off Deposits</i>		
2008	1/3/2010	\$30,401.50
2009	1/5/2011	\$27,724.50
2010	1/5/2012	\$29,003.50
2011	1/3/2013	\$29,542.50
2012	1/27/2014	\$31,429.00
2013	1/29/2015	\$33,951.50
2014	1/25/2016	\$31,511.50
2015	1/27/2017	\$31,820.50
Total		\$213,873.00

<i>Calendar Year</i>	<i>Spendable Interest</i>	<i>Deposits</i>
2010		\$64,086.32
2011		\$28,470.53
2012		\$50,101.34
2013		\$101,600.04
2014		\$54,061.01
2015		\$97,256.88
2016		\$123,102.58
2017	2/25/2017	\$19,269.16
	3/28/2017	\$17,800.52
	4/26/2017	\$16,468.28
	5/27/2017	\$18,224.03
	6/29/2017	\$20,208.49
	7/25/2017	\$23,752.79
	8/25/2017	\$25,445.75
	9/29/2017	\$28,093.43
	10/27/2017	\$26,854.85
	11/29/2017	\$21,725.14
	12/29/2017	\$21,832.82
Balance a/o Dec. 30, 2017		\$233,649.80

EXPENDITURES

Trust Fund expenditures can be separated into three separate categories: (1) Veteran Service Officer grants, (2) Honor Guard reimbursement, and (3) assistance to veterans in need. In April 2009, the Iowa Veterans Commission temporarily suspended several areas of assistance due to lack of funding. After the 2012 legislative action, the Commission was able to reinstate all categories of assistance. (Assistance categories are established in **Iowa Code 35A.13** and rules are further defined in **Iowa Administrative Code 801, Chapter 14**.)

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

Table 1: 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	\$79,477.27
Vehicle Repair	24	\$28,092.98
Education / Tuition Assistance	0	\$0.00
Emergency Room	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	\$158,338.87

Table 2: 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 Room	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 3: 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 4: 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	\$4,950.07
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
	338	\$335,848.88

Table 5: CY2016 Expenditures

Assistance Category	Approved area of assistance	Total \$ Spent in 2016
Unemployment	15	\$27,500.00
Housing Repair	49	\$113,819.06
Dental Assistance	23	\$48,083.45
Vehicle Repair	41	\$52,580.47
Education/ Tuition Assistance	0	\$0.00
Emergency Medical	5	\$7,996.90
Durable Equipment	10	\$16,511.90
Transitional Housing	2	\$1,750.00
Hearing	2	\$5,682.00
DNA testing	0	\$0.00
Travel Assistance	0	\$0.00
Vision Assistance	4	\$1,523.75
Counseling Services	1	\$1,200.00
Prescription Drugs	0	\$0.00
Honor Guard Reimbursement	237	\$83,525.00
Benefit for the child of a disabled or deceased veteran	0	\$0.00
	389	\$360,172.53

Table 6: CY2017 Expenditures

Assistance Category	Approved area of assistance	Total \$ Spent in 2017
Unemployment	13	\$29,000.00
Housing Repair	67	\$154,932.79
Dental Assistance	64	\$114,564.74
Vehicle Repair	118	\$158,622.82
Education/ Tuition Assistance	3	\$6,232.80
Emergency Medical	4	\$14,686.04
Durable Equipment	10	\$17,430.21
Transitional Housing	0	\$0.00
Hearing	1	\$3,000.00
DNA testing	0	\$0.00
Travel Assistance	0	\$0.00
Vision Assistance	3	\$1,251.00
Counseling Services	0	\$0.00
Prescription Drugs	0	\$0.00
Honor Guard Reimbursement	224	\$96,175.00
Benefit for the child of a disabled or deceased veteran	0	\$0.00
	507	\$595,895.40

FOR QUESTIONS ABOUT THIS REPORT:

Daniel Gannon, Chair, Iowa Commission of Veterans Affairs
gannonobx@aol.com (515)-991-5257

Melissa Miller, Trust Fund Administrator, Iowa Department of Veterans Affairs
melissa.miller2@iowa.gov (515)-727-3443

Steven F. Lukan, Executive Director, Iowa Department of Veterans Affairs
Steven.lukan@iowa.gov (515)-727-3444

**IOWA DEPARTMENT OF VETERANS AFFAIRS
7105 NW 70TH AVENUE, CAMP DODGE BLDG. #3465
JOHNSTON, IA 50131**