**Sir Arthur Person Memorial Fund: A Guide to Operations**

**Revised September 2021**

History

The Sir Arthur Pearson Memorial Fund is a trust fund operated under the umbrella of Blind Low Vision NZ. It was established in 1923 from the proceeds of a public appeal for funds to aid both civilian and war blinded persons. It was named in memory of the publisher Sir Arthur Pearson, who was the founder of St Dunstans in the United Kingdom, the organisation established for the rehabilitation of many British and New Zealand servicemen from the First World War.

Rules

The original conditions of the Fund were published in 1923 and have been amended on several occasions since then. The current rules of the Fund were adopted on 27 January 1994. In accordance with the terms and conditions of the rules, the objects of the Fund have never been altered.

Objects

The main object of the Fund is aftercare of those who are blind, deafblind or low vision.

Other objects of the Fund are:

* prevention of vision loss
* cure of vision loss
* amelioration of those who are blind, deafblind or low vision

Priorities of Assistance

As the objects of the Fund are wide, the Trustees have set priorities for providing assistance.

The Fund gives priority to the objects relating to the:

* aftercare of those who are blind, deafblind or low vision
* amelioration of the lot of those who are blind, deafblind or low vision

The Fund does not provide assistance for the general prevention or cure of vision or hearing loss, but will consider applications from individual clients for assistance on a case by case basis.

Within the two objects it supports, the Trustees have agreed to focus on providing assistance to:

* meet the additional financial costs of vision loss - this encompasses those direct financial costs incurred by a blind, deafblind or low vision person, that are not ordinarily incurred by a person who is not blind, deafblind or low vision
* enhance client’s rehabilitation, habilitation and personal development needs

The fund does not provide assistance to meet the ordinary costs of daily living or welfare needs of applicants.

Fund of Last Resort

The Pearson Fund operates as a Fund of Last Resort. This means that:

* applicants are required to make reasonable use of personal, family and community resources, before seeking assistance from the Fund
* the Fund will not usually provide assistance where this is seen as the normal responsibility of another agency

Before an application is submitted to the Pearson Fund, applicants are required to investigate funding from other agencies, such as:

* the department of Work and Income (WINZ)
* AccessAble or Enable Funding
* Accident Rehabilitation and Compensation Insurance Cooperation (ACC)
* the Ministry of Education
* Workbridge
* commercial sources such as banks and other financial institutions
* internal University funding streams (if studying)
* other local funds/trusts

Applications must include written declines from other available funding sources that the applicant has applied to prior to approaching the Pearson Fund.

On the application, the client will be asked to explain the financial contribution they are able to make toward the item for which they are applying for funding. Applicants are expected to cover the first 25% of the item they are applying for, up to $250. If the client is unable to contribute this much, they should indicate what they can contribute in their application. If they are in a position to contribute more, that is of course encouraged.

For those in paid employment, defined as 30 or more hours a week, they will be asked to attach an IRD Summary of Income. Requests for this can be made directly with the IRD, at <https://www.ird.govt.nz/tasks/request-a-summary-of-income> or over the phone via 0800 257 777.

Who Can Apply for Assistance

Three categories of people can apply for assistance from the Pearson Fund:

* individuals who are recorded as fully eligible clients of Blind Low Vision NZ, as defined by the Blind Low Vision NZ Constitution, can access all aspects of the Pearson Fund. Those recorded as partially eligible clients may only access equipment subsidies and the equipment rental programme.
* parents or caregivers on behalf of registered fully eligible clients of Blind Low Vision NZ
* legally constituted organisations of or for those who are blind, deafblind or low vision

All clients applying to the Pearson Fund for funding of technology, glasses and hearing aids must also be in possession of a Community Services Card. Confirmation of the community services must be included at the time of application.

Availability of Assistance

The resources of the Fund are limited and consequently not all applications may be approved. All applications for items to be funded that are not sold through the Equipment Solutions department at Blind Low Vision NZ are reviewed in full by the Pearson Fund Committee.

Applications are approved at the discretion of the Pearson Fund committee, which operates within policy set by the Trustees of the Fund, who are the Board of Directors of Blind Low Vision NZ.

Applications should be made prior to clients incurring or committing to any expenditure. The Pearson Fund is unable to provide reimbursements for goods that have already been paid for. When considering an application the Committee examines previous applications and grants awarded by the Pearson Fund.

Programmes

The Trustees have decided to provide assistance to applicants through three programmes:

1. Pearson Fund grant programme
2. Pearson Fund equipment rental programme
3. Pearson Fund subsidised equipment sales programme for clients

The Grant Programme

**Purpose of the programme**

The purpose of the Grant Programme is to provide financial assistance for items that are within the priorities of assistance of the Fund but which are unable to be supported by other entities.

As everyone’s needs are different, there is no set list of items that may be funded. Applicants are required to state their case on the application form. The Committee will come to a decision based upon the merits of each individual application.

The most cost effective solution must be identified by the assessor during the client assessment, or by the client if applying for a non-assessed item e.g. glasses. Clear rationale must be included to explain why a particular item has been identified as appropriate, and the committee may require more information to review before any decision is made.

**Specific information required with applications**

All applications must be supported by detailed information to support the funding being sought. The client is required to look elsewhere for funding prior to approaching the Pearson Fund, as the Pearson Fund is a fund of last resort.

Any technology application (for example, a hand held magnifier, adaptive software or hardware) must be accompanied by an assessment from a Blind Low Vision NZ assessor. The most cost effective solution to meet the client’s needs must be identified by the assessor, and the assessor must arrange for one, preferably two quotes where practicable to be supplied as part of the application. If a request is being made that requires access to wifi or data, the applicant will need to confirm what access they have, or how they intend to set up access.

For prescription glasses applications, a quote, confirmation of prescription, lens information and details of acuity before and after corrective lenses have been prescribed should accompany the client application.

Paperwork supplied is compiled into one document by the Administrator for the Committee to review, so please ensure that all supporting correspondence is attached with the application form(s).

Applicants are asked to make a minimum contribution of 25% of the full cost of the item up to $250. If the client is unable to make the minimum contribution, they should indicate in their application what they can reasonably afford to contribute toward the item they are requesting funding for.

**How to Apply**

The appropriate application form must filled out and all supporting documents supplied in full for an application to be considered by the Pearson Fund Committee. The Committee normally meet once per month, and may request more information when required.

Applicants are advised of decisions not more than five working days following the meeting of the Pearson Fund Committee, in which the decisions are made.

The Pearson Fund will only provide funding towards the approved item(s) and will not consider requests to subsidise the cost of a higher spec solution. If the Committee believes that there is a more cost effective solution available than that which has been requested, they may choose to seek additional information from the assessor or applicant. This may also require additional quotes being supplied from another source.

Application forms can be found on the Blind Low Vision NZ website. For further information please email pf@blindlowvision.org.nz or call 0800 24 33 33.

The Sir Arthur Pearson Memorial Fund Committee and its Decisions

**The Committee**

A committee made of Blind Low Vision NZ Chief Executive appointed staff, and two Blind Low Vision Board Directors considers each application for assistance from the Fund. The committee normally meets once a month. The Administrator of the Fund attends each meeting, and has no voting rights.

The Committee, at its sole discretion, may bestow delegation to the Fund’s Administrator to consider applications and/or carry out day to day functions of the Fund. Any decisions taken by the Fund’s Administrator must be reported to the Fund’s Committee and notes within the formal meeting minutes. Applicants will be notified of the outcome of an application reviewed by the Committee, normally not more than five working days following the meeting in which decisions were taken.

**If the grant is approved**

The Pearson Fund will supply the client with confirmation that their grant was approved at the committee meeting. This letter will include further relevant information and lay out any terms and conditions that must be acknowledged by the client.

Successful applicants are advised to take out insurance on the item that they received the funding for, and that the item is now their responsibility. The Pearson Fund has no obligation to replace any item if it is lost, stolen or damaged. Applicants are also reminded that an approval should not be seen as a sign that future requests may be approved.

Once the signed paperwork is returned, and the client contribution has been received by the Fund, the administrator will arrange for the payment of the goods, and delivery to the referring assessor, where appropriate, or to the client directly.

**If the grant is declined**

If an application is declined the applicant will be offered the opportunity to present new information and seek a review from the Committee.

If the review is declined, the applicant will be offered the opportunity to present the application to the Appeals Committee of the Board of Directors of Blind Low Vision NZ. Information will be provided to the applicant regarding this process if the applicant indicates that they would like to contest the Committee’s decision.

The Equipment Rental Programme

The purpose of the Equipment Rental Programme is to provide new, or used, equipment such as Desktop Video Magnifiers for vocational, educational, recreational or personal needs where this equipment cannot be provided through other agencies.

**Assessment for Desktop Video Magnifiers**

The Pearson Fund issues Desktop Video Magnifiers to assist the independence of applicants by improving their ability to access printed matter. An applicant seeking a Desktop Video Magnifier will require a functional assessment from an appropriately qualified Blind Low Vision NZ staff member. If an applicant wishes to go ahead with a rental the assessor will complete a referral document and forward this to the Pearson Fund Administrator. There is no application form for the client to complete.

**How the Rental Programme works**

The Pearson Fund purchases and owns the equipment, supplying it at a monthly rental charge including GST and a charge for maintenance. The monthly payment does not include any charge for interest or insurance.

The term of the agreement for Desktop Video Magnifiers is normally 60 months (5 years). Clients who wish a shorter or longer term may request this, and the charge can be pro-rated. This is at the discretion of the Pearson Fund. The units that the Pearson Fund supplies are also at the Pearson Fund’s discretion.

Rental rates are established by the Fund’s Committee and may be reviewed from time to time and updated where deemed necessary. Applicants experiencing financial hardship may apply to have the rental charge reduced or waived for a pre-agreed period of time, at the discretion of the Pearson Fund Administrator.

Repairs and maintenance must be arranged by calling 0800 24 33 33 or emailing pf@blindlowvision.org.nz – if no solution can be provided with an over the phone consultation with the client, normally a replacement is sent whilst the faulty unit is brought in for repair to ensure continuity of service for the client.

Rental agreements may be cancelled by either party at any time without penalty. If an individual discontinues the automatic payment authority, the client must return promptly the equipment being rented.

The rented equipment always remains the property of the Pearson Fund and should be returned to Blind Low Vision NZ when it is no longer needed by the applicant.

Full details of the terms and conditions of the rental agreement will be forwarded to the applicant when the rental is approved. Successful applicants will be asked to sign a rental agreement and an automatic payment authority. Once the signed documents are returned to the Pearson Fund, the equipment will be released to the client.

Applicants are expected to advise Blind Low Vision NZ of any change of address or other changes in their circumstances.

The Subsidised Equipment Sales Programme

**Purpose of the Programme**

The Subsidised Equipment Sales Programme attempts to equalise the higher price of some equipment items used by Blind Low Vision NZ clients. Subsidies are applied and approved to equipment items sold through Equipment Solutions at Blind Low Vision NZ. The amount of subsidy varies from 10% to 50% depending on the type and cost of the equipment being purchased. All subsidies are approved by the Committee, and any changes must be confirmed by the Committee at one of the monthly meetings. The subsidies are also agreed upon in the June meeting annually, regardless of any additional approvals to changes made during the previous twelve months.

The subsidies are not available to any member of the public, Workbridge, ACC, Ministry of Health or the Ministry of Education, including BLENNZ.

**How to apply**

The appropriate subsidy is automatically applied when equipment that carries a subsidy is purchased. A separate application is not required.

Role of the Pearson Fund Administrator

The Administrator of the Sir Arthur Pearson Memorial Fund:

* supports Blind Low Vision NZ clients applying to the fund to clarify details of their application
* liaises with Blind Low Vision NZ staff members that support or provide applications as part of their assessments and/or work with clients to gather additional information and clarify any queries the Committee may have
* reminds the applicants that the Pearson Fund is a fund of last resort, advising applicants on possible alternative sources of funding that have not already been tried
* ensures paperwork is complete, and correct
* determines that each application fits within rules and compiles applications for the committee to review on a monthly basis
* carries out responsibilities that are delegated by the Fund’s Committee
* implements administrative follow ups, issues approval and decline letters, collates reporting and writes the Annual Report and attends the Pearson Fund AGM

Further Information

For further information on any aspect of the Sir Arthur Pearson Memorial Fund, please contact:

Administrator

Funds & Trusts

Blind Low Vision NZ

Private Bag 99941

Newmarket

Auckland 1052

0800 243 333

pf@blindlowvision.org.nz

[www.blindlowvision.org.nz](http://www.blindlowvision.org.nz)

Sir Arthur Pearson Memorial Appendix A

From time to time the Pearson Fund makes policy decision about services and products that it may consider granting funding for. The following information is provided as a reference for those wishing to apply to the Fund and should be read along with the Pearson Fund Guide to Operations.

Corrective Lenses

The Pearson Fund can consider a grant towards the cost of corrective lenses. Applications can be made no more than once every two years, unless there has been a significant change in a client’s vision that requires new lenses. Whilst there is no set maximum grant for the lenses, the fund may only consider grants for up to $200 including GST for frames. It is encouraged that frames are reused where possible.

As standard all clients applying for funding support with their glasses must provide their prescription, lens information and a confirmation of visual acuities before and after lens correction.

The Pearson Fund also requires a minimum contribution of 25% of the cost of the glasses, up to $250. However if the client unable to contribute at least the minimum required amount, they must indicate how much they can reasonably contribute.

Normally only one pair of glasses will be considered for funding, unless there is an exceptional circumstance for funding two pairs, which should be explained clearly in the application when submitted. Safety goggles, swimming goggles and contact lenses are not normally funded by the Pearson Fund. Specialist eye appointments and any extra tests performed by the Specialist are also unable to be funded. A standard eye examination by an Optometrist may be funded by the Pearson Fund.

Technology and Adaptive Software

The Pearson Fund does not normally fund laptops, as they are not considered to be an additional cost of disability. However, there may be exceptional circumstances, and these applications are welcome to be submitted with thorough explanation from both the client and the relevant BLVNZ staff member involved in the assessment.

The Pearson Fund does not assist with the cost of protective screens, covers, bags or phone wallets in regard to smart phones, tablets or laptops.

Apps are considered on a case by case basis, where there is a clearly identified need, and the requested app is over the value of $50 NZ.

Hearing Aids

The Pearson Fund can consider grants towards the cost of hearing aids. The maximum that can be considered is the lesser of either 25% of the total cost or a maximum of $500 including GST. Applicants that have been granted funding support in the last three years will not normally be considered for additional funding, except in exceptional circumstances.

Personal Development and Education

The Pearson Fund does not normally fund personal development programmes nor pay for educational courses. Please contact the Pearson Fund Administrator for more information on funding around music lessons, tertiary education funding and personal development courses such as swimming and riding lessons for youth.

Items Not Funded by the Pearson Fund

* Financial support for members who wish to attend the Blind Low Vision NZ’s National Deafblind Residential Programme.
* Requests from clients who owe a debt to the Fund or who wish to use Fund resources to repay a debt to another party.
* Business set up costs. Clients are encouraged to discuss their request with Workbridge or Work and Income.
* Car repairs. Work and Income may be able to provide a repayable loan for this type of assistance.
* Guide Dog fencing. All such requests should be referred to Blind Low Vision NZ Guide Dogs.
* Generally the Pearson Fund does not support applications for members who wish to attend overseas conferences. If an applicant is seeking to attend a conference for personal development and this relates to their role within a Consumer Organisation then this Organisation should be encouraged to fund this expense through their own resources. It is noted that such Organisations generally receive funding already through Blind Low Vision NZ. There is also possible funding available through the Cyril White Memorial Fund for those seeking to develop their leadership skills.
* Safety equipment for work purposes as this should be funded by either the employer or if the client is self-employed a tax rebate may be applied for via the IRD.
* School Uniforms are not viewed as a direct cost of blindness.
* The Pearson Fund does not provide assistance with the cost of eye surgery or sight restoring operations.
* The Pearson Fund does not provide wage subsidies. Clients seeking this assistance should talk to their local Work and Income office.
* While noting that residential rehabilitation programmes such as the Kick Start Programme are a cost of blindness, the Pearson Fund, as a matter of policy, does not assist with the costs relating to persons attending residential rehabilitation programmes.