# Sir Arthur Pearson Memorial Fund: A Guide to Operations

Revised July 2016

1. History

The Sir Arthur Pearson Memorial Fund is a trust fund operated under the umbrella of the Blind foundation. It was established in 1923 from the proceeds of a public appeal for funds to aid both civilian and war blinded persons.

The Fund was named in memory of the publisher Sir Arthur Pearson, who was the founder of St Dunstans in the United Kingdom, the organization established for the rehabilitation of many British and New Zealand servicemen from the First World War.

1. 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. A copy of the rules is available from the Administrator Pearson Fund.

1. Objects

The main object of the Fund is the aftercare of the blind.

Other objects of the Fund are:

* prevention of blindness;
* cure of blindness; and,
* amelioration of the lot of blind persons.
1. Priorities for 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 the blind; and,
* amelioration of the lot of blind persons.

The Fund does not provide assistance for the general prevention or cure of blindness, but will consider applications from individual members 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 blindness (i.e. those direct financial costs incurred by a blind person, that are not ordinarily incurred by a person who is not blind); and,
* enhance members' 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.

1. 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; and,
* 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 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 Corporation (ACC);
* Workbridge Inc.;
* the Ministry of Education; and
* commercial sources such as banks and other financial institutions.

On the application the applicant will be asked to explain the financial contribution he or she is able to make towards the proposal requiring funding.

1. Who can apply for assistance

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

1. registered members of the Blind Foundation;

2. parents or caregivers on behalf of registered members of the Blind Foundation;

3. legally constituted organisations of or for blind persons.

1. Availability of assistance

The resources of the Fund are limited and consequently not all applications may be approved.

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 the Blind Foundation.

Applicants should apply for assistance before incurring or committing to any expenditure. Approval will not normally be given if an applicant has already paid for any goods and services.

When considering an application, the trustees will examine previous applications to the Fund by the applicant and their outcomes. The credit worthiness with the Fund of the applicant will be taken into account.

1. Programmes

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

1. grant and loan programme;

2. equipment rental programme;

3. subsidised equipment sales programme.

1. The Grant and Loan Programme
	1. Purpose of the programme

The purpose of the Grant and Loan Programme is to provide financial assistance for projects that are within the "priorities for assistance" of the Fund but which are not being met through other sources.

Because everyone's needs are different there is no set list of situations that may be funded. Applicants are required to state their case on the application, and the decision will be made on the merits of the application.

* 1. Specific information required with applications

All applications must be supported by detailed information about the request or proposal for which assistance is being sought.

If an application is for a closed-circuit television system (CCTV / Video Magnifier) or adaptive technology or other blindness products, the application needs to be accompanied by an assessment from a Blind Foundation equipment assessor. To avoid any delays in processing, please ensure this assessment accompanies the application.

Please ensure that copies of quotations or supporting correspondence are attached. If there is not enough room in any section of the application, please attach additional pages.

* 1. Loans

If an applicant wishes to apply for a loan, the applicant is asked to discuss this with the Pearson Fund Administrator prior to completing the application. While the Fund may consider requests for a loan this is generally considered only under special circumstances.

The Pearson Fund may make loans:

* when there is no alternative or affordable loan provider available;
* when there is valuable security;
* when the Fund is prepared to enforce the security on non-payment; and,
* subject to the signing of a legal contract governing the terms and conditions of the loan.
	1. How to apply

Applications for assistance must be made on the application form and are considered by the Pearson Fund Committee which normally meets once a month.

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

Application forms and further information are available from the Administrator Pearson Fund toll free 0800 243 333, or by email to mailto:pf@BlindFoundation.org.nz or from any Blind Foundation locality office.

* 1. If the Grant is Approved

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

If the application is successful, the applicant will be asked to have the supplier of a product or service invoice the Pearson Fund for the amount of the grant. If the application is for adaptive technology software the Blind Foundation will purchase the software on behalf of the applicant.

1. The Equipment Rental Programme
	1. Purpose of the programme

The purpose of the Equipment Rental Programme is to provide new, or used, equipment such as closed circuit television systems (CCTVs / Video Magnifiers) for vocational, educational, recreational or personal needs where this equipment cannot be provided through other agencies.

* 1. How the Rental Programme works

The Pearson Fund purchases and owns the equipment, and supplies 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.

Rental rates are established by the Fund’s Committee and may be varied from time to time.

The term of the agreement for closed circuit televisions varies between three years to seven and a half years depending on the unit type and at the discretion of the Pearson Fund.

Repairs and maintenance must be arranged through Equipment Solutions of the Blind Foundation.

Blind Foundation clients experiencing financial hardship may apply to have the rental charge reduced or waived for a pre-agreed period.

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

The rented equipment always remains the property of the Pearson Fund and should be returned to the Blind Foundation 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; when these signed documents are returned to the Pearson Fund Administrator, the equipment will be released to the applicant.

Applicants are expected to advise the Blind Foundation of any change of address or other change in their circumstances.

* 1. Assessment for Closed-Circuit Television System (CCTV / Video Magnifier)

The Pearson Fund issues CCTVs / Video Magnifiers to assist the independence of applicants by improving their ability to access printed matter. An applicant seeking a CCTV / Video Magnifier will require a functional assessment from an appropriately qualified Blind Foundation staff member who is an equipment assessor.

Names of equipment assessors are available from any Blind Foundation locality office or the Pearson Fund Administrator on 0800-243333.

* 1. Assessment for Computers or Adaptive Technology Software

If the application is for a grant towards the cost of computer equipment or adaptive technology software, the applicant will require an assessment of the suitability of the equipment from an appropriately qualified Blind Foundation staff member who is an equipment assessor. A detailed quotation should be attached for the equipment being sought.

Names of equipment assessors are available from any Blind Foundation locality office or the Pearson Fund Administrator on 0800-243333.

* 1. How to apply

Applications for assistance must be made on the application form and are considered by the Pearson Fund Committee which normally meets once a month.

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

Application forms and further information are available from the Administrator Pearson Fund toll free 0800 243 333, or by email to PF@BlindFoundation.org.nz or from any Blind Foundation locality office.

1. The Subsidised Equipment Sales Programme
	1. Purpose of the programme

The Subsidised Equipment Sales Programme attempts to equalise the higher price of some equipment items used by members with the cost of similar items available to the public.

Subsidies are applied to approved equipment items sold through Equipment Solutions of the Blind Foundation and to magazines in audio, Braille, large print or electronic formats published overseas which are ordered through the Blind Foundation Library.

The amount of subsidy varies from 10% to 90% depending on the type of equipment being purchased.

The subsidies are not available to Workbridge, ACC, The Ministry of Health or The Ministry of Education.

* 1. How to apply

The appropriate subsidy is automatically applied when equipment or a magazine, which carries a subsidy, is purchased. Separate application is not required. Details of the subsidy applied will be shown on the invoice provided with the goods.

Further information about these subsidies is available from Blind Foundation Equipment Solutions or library staff.

1. The Sir Arthur Pearson Memorial Fund Committee and Its Decisions

A committee made up of Blind Foundation CEO appointed staff and two Blind Foundation Board Directors considers each application for assistance from the Fund. The committee normally meets once a month. The Administrator of the Fund is in attendance at each meeting and has no voting rights.

The Committee, at its discretion, may consider applications via email or any other communication method which the Committee deems appropriate.

The Committee, at its sole discretion, may bestow delegation to the Fund’s Administrator to consider applications and/or to 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 noted within the formal minutes.

Applicants are advised of decisions not more than five working days following the meeting in which the decisions were taken.

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 the Blind Foundation.

1. Role of the Administrator

The Administrator of the Sir Arthur Pearson Memorial Fund:

* supports Blind Foundation members applying to the Fund to clarify details of their applications.
* reminds applicants that the Pearson Fund is a "Fund of last resort" and advises applicants on possible alternative sources of funding where these have not already been tried.
* Ensures that all the paperwork is complete and correct.
* Determines that each application fits within the rules or seeks a decision from the committee if an application is ambiguous.
* Carries out responsibilities delegated by the Fund’s Committee.
* Seeks legal advice where appropriate.
* Implements administrative follow ups including debt management, annual review of suspended leases, suspensory loans etc.
1. Further information

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

Administrator Sir Arthur Pearson Memorial Fund

Blind Foundation

Private Bag 99941

Newmarket

Auckland 1031

Phone 09 355 6861 (Auckland callers)

Phone tollfree 0800 243 333

Fax 09 355 6936

Email: pf@BlindFoundation.org.nz

Web Site: http//www.blindFoundation.org.nz

**Sir Arthur Pearson Memorial Fund Appendix A**

From time to time the Sir Arthur Pearson Memorial Fund makes policy decisions 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 it should be read along with the Pearson Fund Guide to Operations. For specific information about how to make applications please contact the Fund’s Administrator on either 0800 24 33 33 or 09 355 6861 or via email to PF@BlindFoundation.org.nz

**Computers, Laptops, Tablets and Smart Devices**

For computers, Laptops, Tablets and Smart Devices the Pearson Fund may consider requests for up to $1,150.00 including GST. It is expected that, where possible, applicants will make a personal contribution of $250.00 towards this cost effectively meaning the Pearson Fund can contribute up to $900.00 towards the cost of an assessed item.

Where the assessed item cost is over and above $1,150.00 including GST an applicant can either choose to pay the additional cost on top of their personal contribution or they can make a case for increased funding to the Pearson Fund

In cases where an applicant is not able to make the personal contribution of $250.00 they may request an exemption from the Pearson Fund.

Computer and Adaptive Software related requests specifically not funded by the Pearson Fund.

* Transport and accommodation costs related to the Adaptive Technology courses run by the Foundation of the Blind.
* Dragon Dictate Software. Pearson Fund will fund half the cost of the Jaws for Windows bridging programme, J-Say.
* One on One computer training.
* Adaptive Technology for school students to use at home as this should be considered by Group Special Education (GSE) of the Ministry of Education.
* The Pearson Fund does not consider Funding Adaptive Technology items that should be funded by ACC or Workbridge unless a client has reached the limit of their entitlement.

Applicants should note that in granting a computer or item of adaptive technology the Pearson Fund takes no responsibility for providing ongoing funding for service or maintenance issues. Applicants are encouraged to retain all discs, documents and packaging. Applicants are also encouraged to consider taking out insurance cover as the Pearson Fund is not obliged to provide replacement goods if the item is lost, stolen or otherwise damaged.

**Portable Digital talking book players**

The Pearson Fund may consider applications for a grant towards the cost of a portable digital (DAISY) talking book player. The Fund will not consider applications for players that don't support DAISY books. The fund does not consider requests for funding towards the desktop Daisy players that are supplied by the Blind Foundation Library Service. The maximum grant payable is 25 percent of the total cost up to a maximum grant of $300.00 (excluding GST).

**Trekker Breeze GPS devices**

The Pearson Fund, on request, can consider a grant of up to $500.00 towards the cost of this equipment.

**Outdoor play equipment**

The Pearson Fund can consider applications for grants and the maximum that will be paid is the lesser of either twenty five percent of the cost of the equipment or $250.00.

**Corrective lenses and frames**

The Pearson Fund can consider a grant towards the cost of corrective lenses. While there is no set maximum grant for the lenses themselves the fund may only consider grants for up to $325.00 including GST for spectacle frames.

**Hearing aids**

The Pearson Fund can consider grants towards the cost of hearing aids and the maximum that can be considered is the lesser of either twenty five percent of the total cost or $500 including GST.

**Subsidies on Braille books and magazines**

Braille books and magazines purchased through the Blind Foundation Library shall be eligible for a subsidy through the Pearson Fund. Books and magazines that cost less than NZ$100.00 (including GST) shall be fully subsidised by the Pearson Fund. Books and magazines that cost NZ$100.00 (including GST) or over shall attract a ninety percent subsidy through the Pearson Fund.

**Personal development programmes**

The Pearson Fund can consider requests for personal development programmes. These usually take the form of short term specifically targeted programmes. The assistance from the Fund is designed to be short term in nature and not ongoing. The Pearson Fund may set a time period for example three months.

 Typical requests may include:

* Swimming lessons or riding for the disabled to improve muscular development for young person.
* Confidence programme or course.
* Singing or music lessons
* Other short term non tertiary courses.

Personal Development requests not normally considered by the Fund include:

* 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.
* Developmental equipment for pre six year olds as this is normally funded by the Ministry of Health.

**School uniform funding**

While noting that a school uniform is not in itself a direct cost of blindness the Pearson Fund may consider a grant of up to a maximum of $150.00 as a contribution towards the total cost.

Items specifically not funded by the Pearson Fund

* Financial support for members who wish to attend the Foundation of the Blind’s National Deafblind Residential Program.
* 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 there request with either Blind Foundation Employment Services, 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 Foundation 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 the Blind Foundation. 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.
* 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 approach either the Blind Foundation Employment Service or talk to their local Work and Income office.