

Fiscal Policy #11

Choices Wish List

Original Date: 03/27/2024

Updated: July 31, 2026

Objective

Choices' employees and other donors have contributed dollars to a fund called the Wish List to support clients' needs, including furnishings, appliances, vacations, entertainment, or other items that enhance their health, safety, independence, dignity, or quality of life.

The Choices Wish List is intended to supplement, not replace, items or services that are available through Medicaid, Medicare, private insurance, county board funding, vocational rehabilitation, other governmental programs, or other available funding sources. Assistance is provided only after a formal review process and is intended to support clients who lack sufficient personal financial resources to obtain the requested item or service.

A separate Wishlist Committee reviews all requests to ensure a fair, consistent, and objective approval process.

Wishlist Committee

The Wishlist Committee, composed of employees and volunteers, meets periodically to review requests. Approval of any request requires a majority vote from the Committee members. The Committee has final decision-making authority over all requests.

Eligibility Criteria

- Whether the requested item or service is available through Medicaid, Medicare, private insurance, county board funding, vocational rehabilitation, another governmental program, or another available funding source.
- Whether the client has sufficient personal funds available to purchase the requested item or service.
- Whether the request is consistent with the charitable purpose of the Choices Wish List.
- Whether the requested item or service will reasonably enhance the client's health, safety, independence, dignity, or quality of life.
- Whether the purchase complies with all applicable CICL fiscal policies, including Fiscal Policy #7 – Purchasing Policy.
- Whether the client has previously received assistance from the Choices Wish List, taking into consideration the equitable distribution of available charitable funds while recognizing that repeat assistance may be appropriate based on individual circumstances.

The Committee may request additional information when necessary before making a determination.

Determination of Need

An employee will identify a client's need and verify with the Fiscal Office that no client funds are available.

When appropriate, the employee should also determine whether the requested item or service may be available through Medicaid, another payer, or another funding source before submitting the request to the Wishlist Committee.

Request Process

The employee will email the Wishlist Committee once the need is verified.

Committee members will review the request using the established eligibility criteria and provide input.

If the request is approved, the Committee Chair will notify the employee, the Fiscal Office, and the Chief Executive Officer. All purchases must comply with Fiscal Policy #7 – Purchasing Policy.

Quarterly Financial Reporting

The Fiscal Office will provide the Wishlist Committee Chair a financial report within 10 business days after each quarter's close, detailing deposits, withdrawals, and beginning and ending fund balances.