±Applied

Braille Institute of America



Case Overview

The Braille Institute of America (BIA) is a 100 year old institution, founded by a blinded cowboy named Atkinson in Southern California who went on to invent new Braille machines, a Braille library, build national awareness about blindness, plus create essentially community centers across SoCal to train the vision impaired to lead normal lives. 100 years later, total blindness now only impacts about 10% of their constituents, with aural and digital technology advances making "Braille" somewhat (but not completely) irrelevant. The key problem is growing visual impairment among aging baby boomers (with diseases like diabetes contributing to the challenge) who will not learn Braille, yet need supportive help & training to lead independent, productive lives.

So the core question to us was, is the name of the institution no longer relevant or worse, a hindrance; what are its perceptions among the general populace and ophthalmologists, do we have to change the name anyway to be more contemporary and how do we maintain relevance as an organization that is being perceived as "past its prime?" How we resolved these issues should be clear from the presentation.

Overview of Key Learnings from Research

Stakeholder Interview Findings

Stakeholder interviews findings recap

The time to act is now

A "caring campus"

The mission is independence

Get the message out

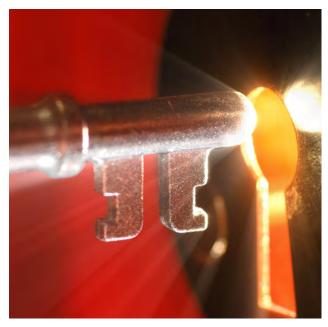
The keys to the kingdom Barriers to entry Boomers are different



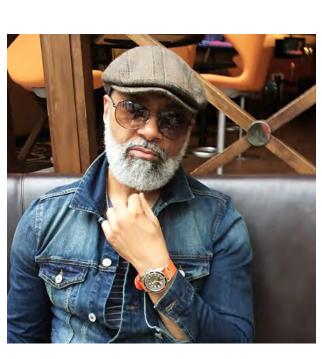




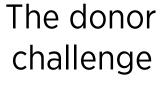








Satellites

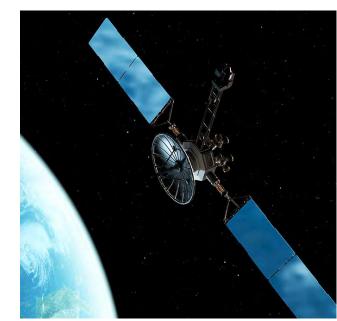


Data divinity

The great name debate Opportunities abound

The path is unclear

There's no time to waste















Stakeholder interview key findings

- On the cusp of its centennial year, Braille Institute must face a confluence of challenging new circumstances by retooling its programs, relaunching its brand, and refreshing its management
- There is alignment around Braille Institute's primary mission, to promote independence, but some concern that the message isn't being communicated clearly
- There is a need to market more aggressively, specifically focusing on physicians and people with low vision
- There are barriers that need to be overcome for both audiences:
 - Physicians: need for professional intake personnel to better assess referrals' needs and, in turn, engender confidence among doctors who do refer patients
 - People with low vision: perception that Braille Institute offers services primarily for the blind
- While some feel the name Braille Institute is problematic there is universal acknowledgment that it has high levels of awareness
- There are a plethora of opportunities investment in technology, collaborations and partnerships, growth of satellite office structure but the path forward is unclear
- There is great urgency around and awareness of the changes that need to be made
 - The structural work has been done on the operations side—evolving the board, exploring the implementation of satellites, investing in technology and data—but many feel that Braille Institute needs to move faster to take on the changing circumstances it's confronting

Comparative Brand Audit Findings

Comparative brand audit











Comparative audit findings recap

No new kids on the block



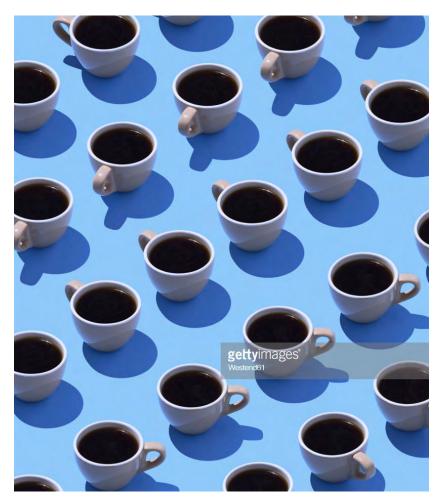
The "Swiss Army Knife" approach dominates



A clear point of view



Consistent communication



Part of the fabric



Comparative audit key findings

- All brands in the comparative set have a long history and progressive legacy.
 The pressure to evolve isn't coming from start-ups
- Experience is a valuable commodity, the key is to remain on the cutting edge and relevant to the community you serve
- All of the organizations in the comparative set offer comprehensive services, including vision rehabilitation and employment training
- Differentiation in the category is driven by the brand positioning and core values, which are marketed consistently across platforms

Braille Institute Audit Findings

Braille Institute brand audit findings recap

Impressive and progressive



A mission without clear purpose



Clarity will enable consistency



A caring community in need of some cool



Braille Institute brand audit key findings

- Braille Institute has both the history and legacy of innovation that are the hallmarks of the brands in the comparative set, but it needs to market those advancements more aggressively
- While the mission of the Braille Institute is clear the organization is unclear about how to manifest it
- A strong brand positioning statement is needed to provide direction and enable consistent messaging and activation of the brand mission
- The current defacto positioning as a "caring campus" doesn't resonate with current clients and inhibits the brand mission

Quantitative Research: Resident Survey

Resident survey method

- 3,000 interviews of adults (18+)
- Representative sample of residents in the following counties: Imperial, Los Angeles, Orange, Riverside, San Bernardino, San Diego, Santa Barbara, Ventura
- Sample balanced to match regional demographics (age, sex, county size, education, income, race/ethnicity)
- Sample provided by Research Now Survey Sampling International
 - World's leading global provider of first-party consumer and professional data based on extensive, proprietary market research panels
 - Provides world-class research data solutions that enable better results for more than 5,800 clients
 - Operates globally with locations in the Americas, Europe, and Asia-Pacific
 - Recognized as the quality, scale, and customer satisfaction leader in the market research industry

Resident survey objectives

- The Braille Institute commissioned this survey to help determine, among potential current and future BIA audiences:
 - The extent to which BIA's name and various services are known
 - How BIA and its services are perceived
 - How BIA can best position its services, marketing materials, advertising, and outreach
 efforts to maximize its reach and utility to vision-impaired residents, caretakers, and those
 who in the future would benefit from its offerings

Respondent overview

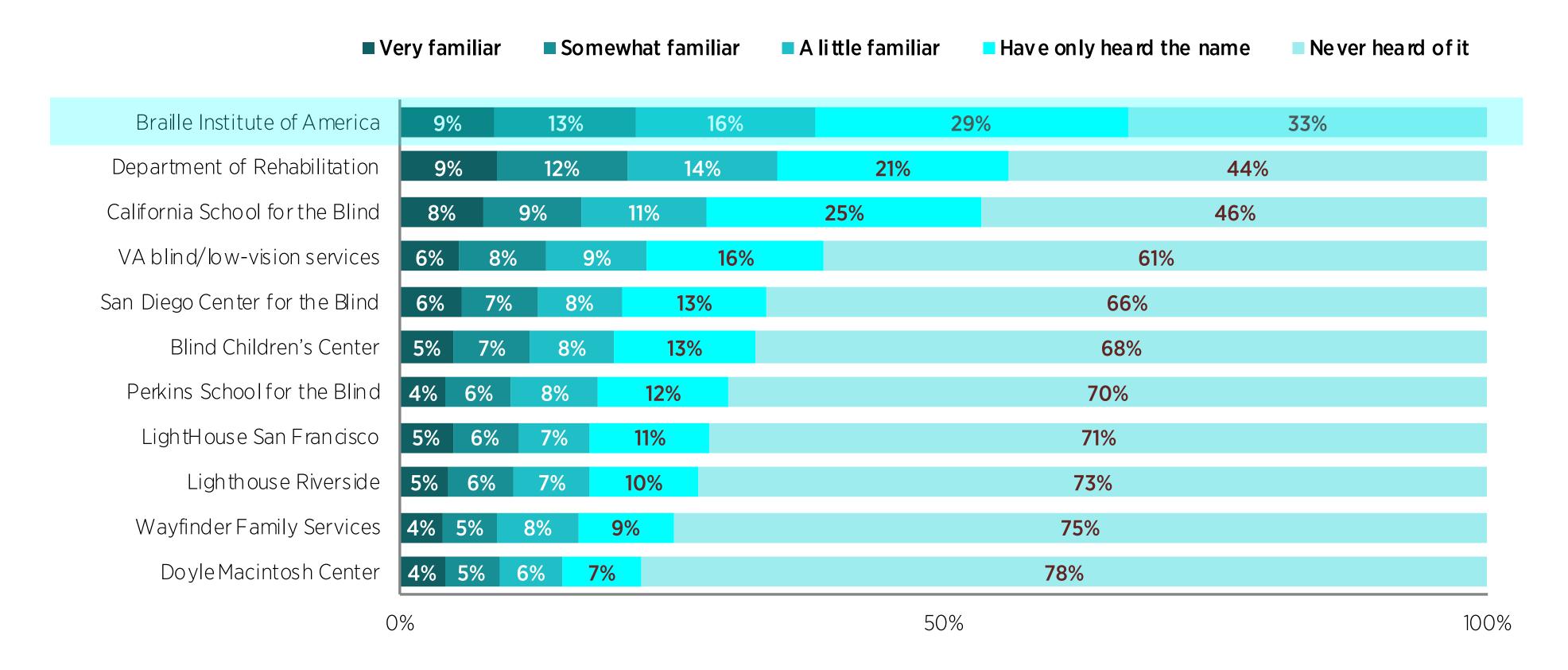
- One in four Southern California residents (25%) say either they or a family member is either:
 - Legally blind (11%)
 - Suffers from low vision (23%)
- Of those who say someone in their family is legally blind, 15% cite themselves (1.5% of the total sample)
- Among those with low-vision family members, 24% say it is themselves (5% of the total sample)
- The median age of referenced blind or low-vision persons is 55 years old and they were diagnosed 8 years ago (median)

Awareness

Braille Institute is well known among SoCal residents

- 67% of Southern California residents have heard of Braille Institute
 - 22% of those say they are "very" or "somewhat familiar" with Braille Institute
 - Name recognition is highest among those with blind/low-vision family members (37%)
- About one in four are similarly familiar with:
 - The Braille Challenge (26%)
 - Cane Quest (23%)
- Only 33% say they have never heard of Braille Institute

In fact, Braille Institute has the highest awareness and name recognition in the category



How familiar, if at all, are you with each of the following organizations? Base: Total respondents.

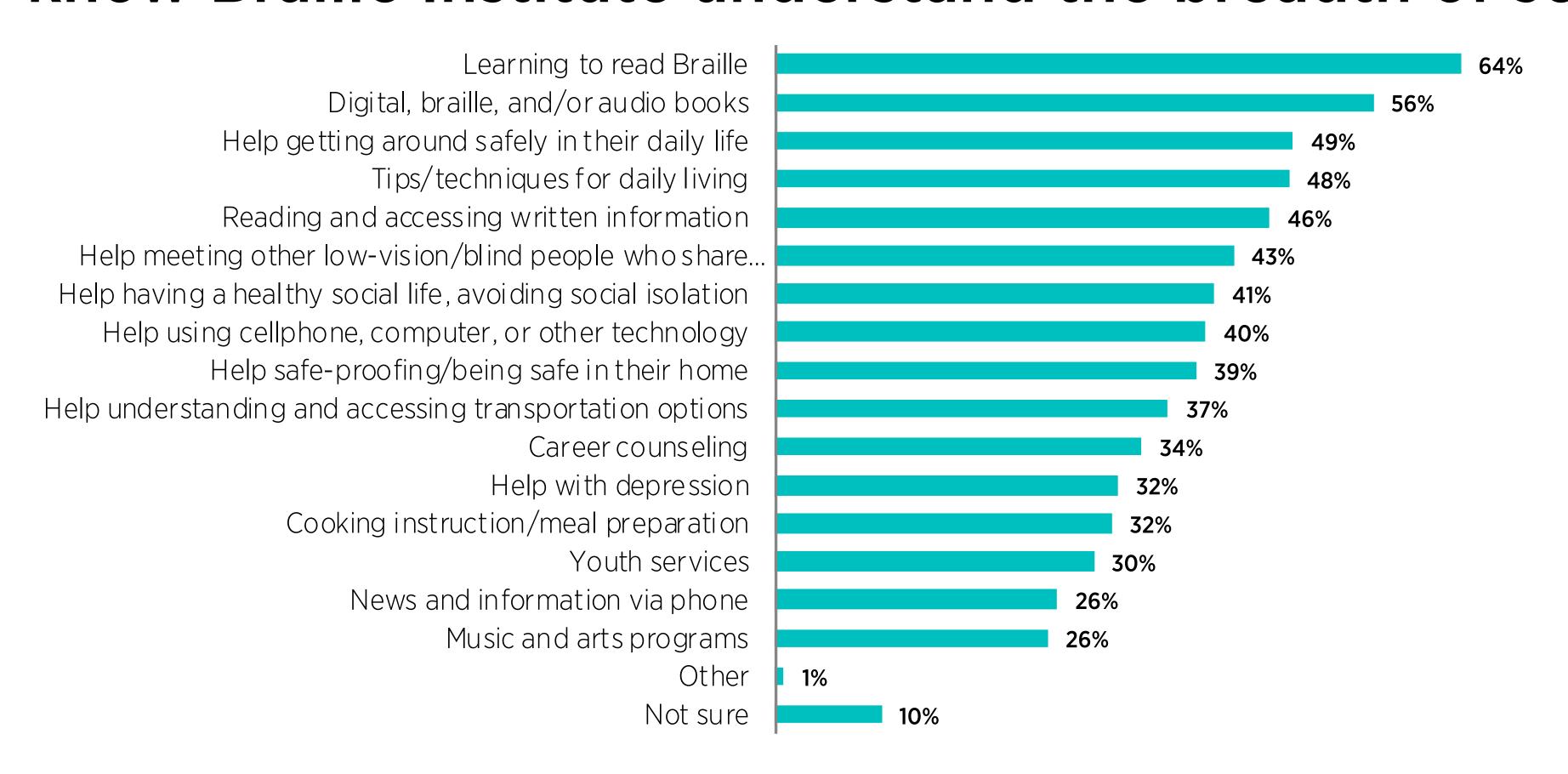
The name itself has significant equity

 Residents were asked what they thought of the name "Braille Institute of America" and were given this description of it:

The Braille Institute is a nonprofit organization whose mission is to eliminate barriers to a fulfilling life caused by blindness and severe sight loss. It offers a wide array of programs and services designed to help people with complete to partial vision loss lead enriched and fulfilling lives. Services include low-vision consultation, braille instruction and library, career counseling, technology education, in-home services, a music program, orientation and mobility aid and training, among many others.

- 92% of all respondents feel that the name is "excellent" or "good"
 - 92% of respondents with blind family members
 - 89% of respondents with low-vision family members
- Respondents most likely to say the name is "excellent" include:
 - Those over age 50 (64%)
 - Those familiar with Braille Institute (67%)
- Even those least familiar with Braille Institute, those who have only heard of the organization or have never heard of it, feel the name is "excellent" or "good" (88%)

Though the name suggests services for the blind those who know Braille Institute understand the breadth of services



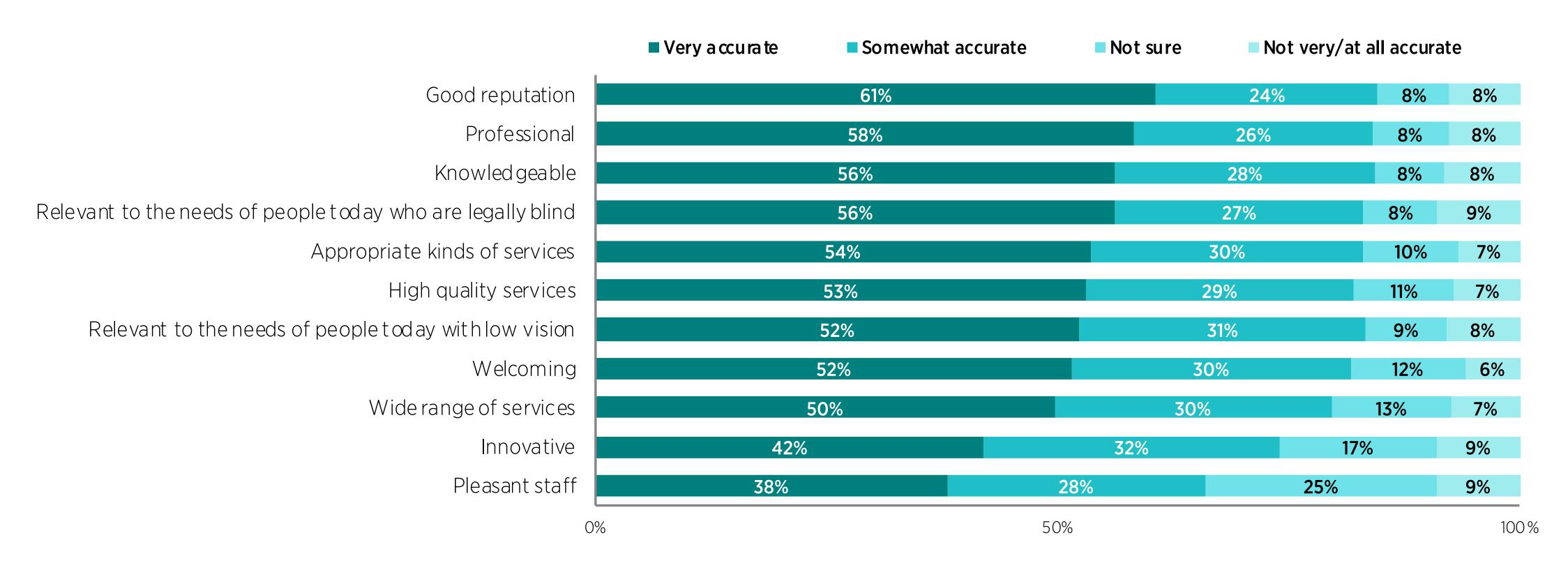
Based on anything you may have heard, seen, or read, or on personal experience, please indicate which of the following services you think the Braille Institute of America provides to low-vision and/or blind people. Please check all that apply. Base: Have heard of or are familiar with BIA.

Awareness is slightly higher with the blind vs. low vision community...but not significantly

- Very/somewhat/a little familiar with Braille Institute:
 - Blind only: 60%
 - Low-vision only: 48%
- Feel the name is "excellent" or "good"
 - Blind only: 92%
 - Low-vision only: 89%
- Would definitely/probably recommend Braille Institute:
 - Blind only: 52%
 - Low-vision only: 46%

Perception

The majority of residents with knowledge of Braille Institute consider you to be a quality provider



Please indicate how accurately you think the words and phrases below describe the Braille Institute of America. Base: Very/somewhat/a little familiar with BIA.

This is especially true of those who have used Braille Institute services

	Total	Age 50+	Blind/low-vision family member	Low-vision family member only	Family member has used BIA
	%	%	%	%	%
Good reputation	85	84	92	84	90
Knowledgeable	84	83	89	80	91
Professional	84	86	88	85	89
Relevant to the needs of people today with low vision	83	83	85	86	89
Appropriate kinds of services	83	85	84	84	90
Relevant to the needs of people today who are legally blind	83	83	86	82	86
High quality services	82	86	86	85	88
Welcoming	82	87	80	85	92
Wide range of services	80	82	81	77	89
Innovative	74	77	76	77	82
Pleasant staff	67	74	62	68	90
Contemporary	66	73	61	69	75
Convenient to get to	57	68	46	67	79
Affordable	56	65	49	62	81
Free	41	49	34	38	61

Please indicate how accurately you think the words and phrases below describe the Braille Institute of America. Base: Very/somewhat/a little familiar with BIA.

Braille Institute is near the top of the list of places people would go to or recommend

- About half of residents say, if they or a family member needed such services, that they would definitely or probably go to or recommend Braille Institute (49%)
 - Which is consistent with those with low vision family members (46%) and blind family members (52%)
 - Especially likely to recommend BIA are those who have experience with it (81%) an excellent resource for getting the word out
- Those who would recommend Braille Institute say they would do so primarily because it has an excellent reputation and is well-known (48%). Other reasons include:
 - Braille Institute has helped them or someone they know (5%)
 - It is close/convenient (2%)
 - The people who work there are nice/kind (2%)
 - One in ten (10%) say it offers braille instruction
- Those who wouldn't recommend Braille Institute most often say it is because:
 - They don't know enough about the organization (20%)
 - They would prefer a different place or resource (13%)
- Only health-care providers (eye doctors, hospitals) receive more recommendations
 - No other area center or other service provider is as likely to be recommended

Has a low-vision

There is a disconnect between awareness / perception and attendance

	vision family member	Has ONLY a blind family member	family member TOTAL
	%	%	%
Low-vision optometrist	26	24	30
Services offered by their eye doctor	23	32	25
Some other organization	21	13	17
Government services/programs for blind/low-vision patients	15	16	19
Hospital services/programs for blind/low-vision patients	15	16	18
Department of Rehabilitation	15	18	16
California School for the Blind	13	14	17
Veterans Administration blind/low-vision services	12	13	14
Braille Institute of America	11	14	15
San Diego Center for the Blind	11	7	12
Outpatient medical center services for blind/low-vision patients	9	21	13
University- or college-affiliated programs for blind/low-vision patients	7	17	11
Doyle Macintosh Center	6	8	10
LightHouse Riverside	6	6	10
Blind Children's Center	6	8	10
Perkins School for the Blind	6	4	10
Wayfinder Family Services	5	5	9
LightHouse San Francisco	4	3	8

Has ONLY a low-

Potentially due, in part, to the gap between perception and reality

 Respondents whose family members have been to Braille Institute give the organization the highest marks on positive attributes, but they also are more critical on negative attributes

			Blind/low-	
			vision family	Family member
	Total	Age 50+	member	has used BIA
	%	%	%	%
Not as good as other service providers	29	40	15	42
Outdated	25	39	11	47

Marketing Braille Institute

Health-care professionals are the first place people go for services

- Asked where, if anywhere, they or their family members have gone for blind/low-vision services, health-care professionals top the list:
 - Low-vision optometrists (29%)
 - Eye doctors (26%)
 - Government services/programs (19%)
 - Hospital services/programs (18%)
 - California School for the Blind (17%)
 - Department of Rehabilitation (16%)
 - Braille Institute (15%)

Have only heard

name/never heard of

Blind/low-vision

And are the preferred source to learn about blind/low-vision services

	Total	family member	BIA
	%	%	%
A family doctor, internist, or primary-care physician	36	28	35
An optometrist	31	21	32
An ophthalmologist	28	22	26
Research I did on the Internet	25	26	23
On TV	21	23	20
Health-care professional such as an occupational therapist, physical therapist, social worker	20	20	17
A pamphlet in a doctor's office or hospital	18	18	17
From a pamphlet I picked up in a doctor's office	13	16	12
From social media on the Internet (e.g., Facebook, Twitter)	13	16	13
Family member, friend or acquaintance with normal vision	12	16	11
A magazine, newspaper, or website article	11	13	9
On the radio	11	14	9
Pamphlet or flyer I received in the mail	11	13	9
A friend or acquaintance with low vision or who is legally blind	11	12	9
A nurse practitioner	10	15	9
A family member with low vision or who is legally blind	8	10	8

And if you should ever need services for low vision or blindness, what would be the best way to reach you to let you know about them and their services? Base: Have blind/low-vision family member in Southern California.

Implications and Opportunities

Braille Institute is a very well known organization with a strong reputation in Southern California

- The name alone carries significant equity
 - Though there is concern internally that the name doesn't represent the full spectrum of services Braille Institute provides, awareness levels demonstrate residents understand that the organization offers a wide range programs
 - Given the history and origin of Braille Institute it isn't a surprise that services related to braille are top of mind, but there are opportunities to expand that definition
- Put the focus on growing UNDERSTANDING
 - Through communications put messages relevant to the low-vision community at the forefront
- Doctors really ARE the key to the kingdom
 - Those who know you best are most likely to recommend Braille Institute to others, but people look first and foremost to their doctors for services and recommendations

Despite high awareness and positive perception only 1 in 7 of those who are blind/have low-vision have used Braille Institute

- There has been an increase in hospitals and providers that offer similar services
- There is a disconnect between expectations and reality, which suggests the need to modernize the experience
 - Those who have experience with Braille Institute say it is outdated
 - "Contemporary" and "innovative" also fall lower on the list of responses
- There is insufficient understanding of what motivates the low-vision community to seek help and the barriers they face

To increase relevance to low-vision residents there are a number of services to focus on

- Like the rest of the respondents the best way to reach family members of low-vision patients is through doctors (primary or eye doctors), the internet, and on television
- Specifically, residents tells us that their low-vision family members most need help with:
 - Help using a cellphone, computer or other technology (41%)
 - Reading and accessing written information (41%)
 - Help getting around safely in their daily life (36%)
 - Help having a healthy social life, avoiding social isolation (34%)
 - Help understanding and accessing transportation options (34%)
- In communications to the low-vision community Braille Institute should emphasize its expertise in services that address these needs in order appeal to this group

Doctor Survey

Doctor survey method

- 14 interviews of ophthalmologists currently practicing in Southern California
- Respondents qualified for the study if they practice in at least one of the following counties: Imperial, Los Angeles, Orange, Riverside, San Bernardino, San Diego, Santa Barbara, Ventura
- Sample provided by Braille Institute of America
- All interviews were self-administered online at the respondents' convenience and were formatted for computer as well as well as Android and iOS portable devices
- All interviews were conducted July 15–August 17
- Questionnaires took 11 minutes, on average, to complete

Doctor survey objectives

- The Braille Institute of America commissioned this study to help determine among ophthalmologists who practice in Southern California:
 - The extent to which Braille Institute's name and various services are known
 - How Braille Institute and its services are perceived
 - How Braille Institute can best position its services, marketing materials, advertising,
 and outreach efforts to maximize its reach and utility to ophthalmologists

Respondent overview

- Most ophthalmologists interviewed specialize in retina/uveitis. A few practice general ophthalmology and one specializes in glaucoma treatment
- All work at a private practice and one also works at a local V.A. hospital. Counties represented include Los Angeles, Orange, Riverside, San Bernardino, and Santa Barbara
- Most are men, age 61 on average, and have been practicing 19 years on average in Southern California
- Most of their patients are age 65 and older
 - About one in four of their patients are between 50 and 64
 - Few treat patients under age 18
- Nearly half say their patients are primarily middle income; the balance say they serve
 patients with a wide range of income levels

Braille Institute is widely known and seen as a quality provider

- Virtually all respondents say they are "very familiar" with Braille Institute
 - More familiar with Braille Institute than with competitors
 - o Of the nine Southern California organizations that service low-vision/blind patients, ophthalmologists are most familiar with Braille Institute
- Asked to name Braille Institute's major strengths in an open-end question, ophthalmologists agree:
 - Braille Institute offers useful instruction and training to patients in technology, everyday living skills, and relevant devices. Moreover BIA offers emotional support when needed
 - Has excellent office locations and staff
 - Gets great feedback from patients
 - The fact that Braille Institute offers free services also garnered several mentions
- Virtually all ophthalmologists surveyed say they have referred their patients to Braille Institute and/or to a low-vision optometrist and all say they would do so in the future

And enjoys a good reputation among SoCal ophthalmologists

- The majority say the following descriptors apply to Braille Institute:
 - Pleasant staff
 - Professional
 - Welcoming
 - Wide range of services
 - Good reputation
 - Appropriate kinds of services
 - Relevant to the needs of people today who are blind or have low vision
- About 50% say the following also applies to Braille Institute:
 - Knowledgeable
 - Convenient to get to
 - Free
 - High quality services

Services that doctors consider to be essential or very important are well covered

- The majority agree Braille Institute does an excellent or good job providing the following:
 - Tips/techniques for daily living
 - Help getting around safely in their daily life
 - Help reading and accessing written information
 - Help safe-proofing/being safe in their home
 - Providing help using cellphone/computer/other technology
 - Help understanding and accessing transportation options

However, most respondents do not see Braille Institute as "innovative" or "contemporary"

Communication with doctors is mission critical

- Asked to evaluate how well Braille Institute interacts with them as doctors about 50% say Braille Institute does an "excellent" or "good job":
 - Interacting in a professional manner, responding to queries in a timely manner, collaborating when appropriate, detailing services they will provide their patients, giving enough information, asking for their input when appropriate
- There are opportunities to improve communication in a few critical areas:
 - Providing clear information in a convenient format
 - Fewer than half say BIA does an "excellent" or "good job" communicating in a way that is convenient for them, giving them information in a clear, easy-to-understand format
 - A majority say Braille Institute does "only fair" to "poor" job keeping them updated on referrals
 - Alerting them when a patient they referred first goes to Braille Institute, reporting referrals' progress, alerting them to any referrals' difficulties or problems
- Personal contact is welcome
 - About half said it would be best to reach them either through their office manager or to go directly to them
 - When contacting the doctors personally, most say they prefer it would be done with a mailed letter or brochure, as part of a continuing education class/seminar, or at a professional meeting
 - About half would also be open to being reached via an email or an in-person meeting with a representative

Implications and Opportunities

Awareness isn't an issue, but there are changes that can help build and strengthen relationships

- Communication is welcomed, but clarity is critical
 - Additional research is recommended to understand the specific messaging and communication touch points that will be most impactful
- Convenience is KING
 - When they want to learn/hear more from Braille Institute
 - When they make a referral
 - For their patients
- Information deprivation
 - There is insufficient follow up on referrals, which in turn means a lack of positive reinforcement
 - Unable to understand how well their patients are doing at Braille Institute
- Competent, but not current
 - Not seen as "innovative" or "contemporary" less relevant and top of mind

Brand Identity

Positioning Statement

The positioning statement is an organization's North star.

- Defines/reinforces the mission, personality, and tone of the brand
- Is based on business goals and emotional connections
- Provides a foundation for evaluating initiatives and priorities
- Acts as a rallying cry for the organization

For Braille Institute, the brand positioning should set a vision for the organization as the definitive place for services related to low vision rehabilitation.

- Build from Braille Institute's brand equity and awareness
- Use the new branding/new image to drive the low vision rehabilitation focus
- Enroll more clients
- Increase referrals from clinicians

We See No Boundaries

We are an organization inspired by our belief that vision rehabilitation is a beginning, not an end. Founded by a sightless visionary who refused to let blindness define him, we embrace the challenge of sight loss in all its facets and reject its perceived limitations.

It's why our 100 years of pioneering technology, hands-on training, community engagement, and pragmatic determination to expand our possibilities has kept us at the forefront of innovative ideas, services, and programs for the vision impaired.

How do we know? Because we apply sophisticated metrics in our field to ensure our people and our work delivers the positive results we envision. As navigators in a world where information and communication technology advances impact our lives at every level, we never forget the fundamentals: that knowledge and skills effectively learned and applied are empowering and central to living productive, fulfilled, and independent lives.

The Braille Institute of America is a place where challenges are welcomed, obstacles overcome, and lives positively transformed every day. We don't see boundaries, we imagine possibilities

- Brand personality leader, guide, navigator, visionary, captain, pilot
- Brand tone tenacious, informed, confident, resilient

Brandtone

Tenacious, informed, confident, resilient, empowered.

Brand personality

Let's be Frank.

Frank is more than a style. Frank is an <u>approach</u>.

Acknowledge the situation.

Sugarzooatith

Embrace the challenge. And own it.

Avoid the hard talk.

Cut to the chase.



What would Frank do?

Frank would do it her way.

- Be direct and honest—clarity will allow greater understanding of services and programs
- Be succinct—allow the core message to take central stage
- Break the rules that don't work—communications should be user-friendly
- Have a sense of humor—when appropriate

Typography

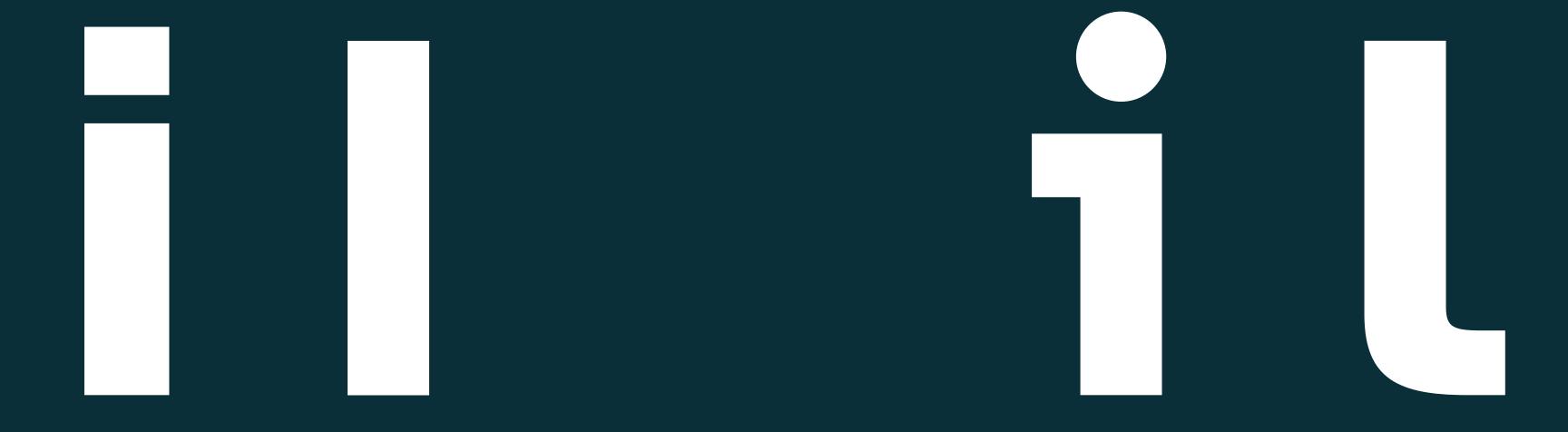
Helvetica Bold

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Atkinson Hyperlegible

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Ambiguous letterforms

Unambiguous letterforms

Ambiguous letterforms

Unambiguous letterforms

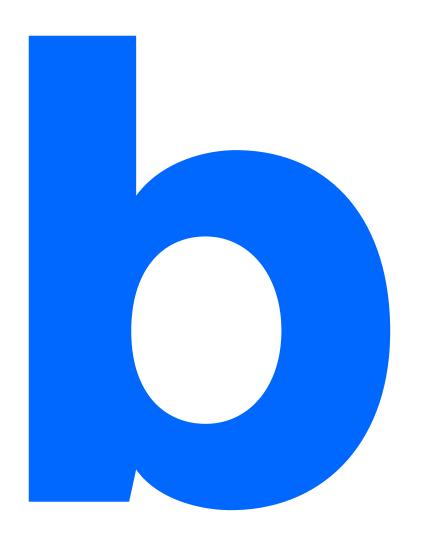
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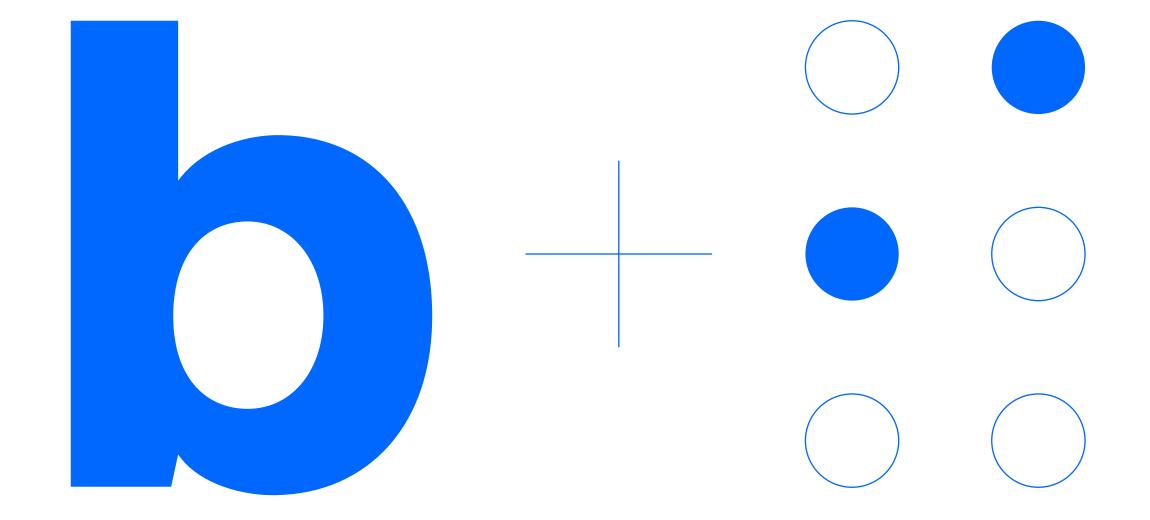
Rule-breaking type style.

- Developed by the Braille Institute for enhanced legibility—specifically designed for people with low vision
- In the spirit of the founder and original purpose of the Braille Institute

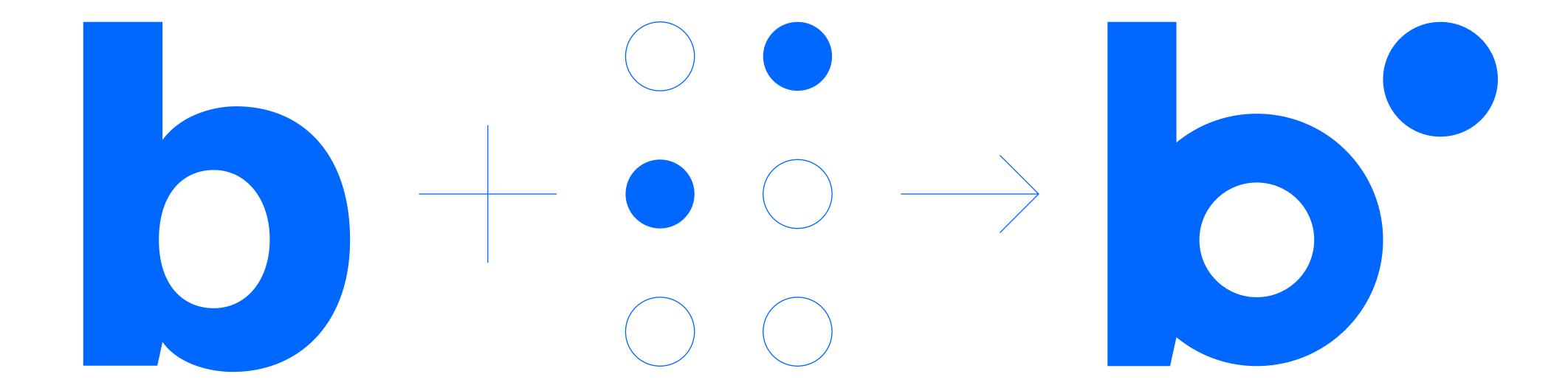
Braille Institute



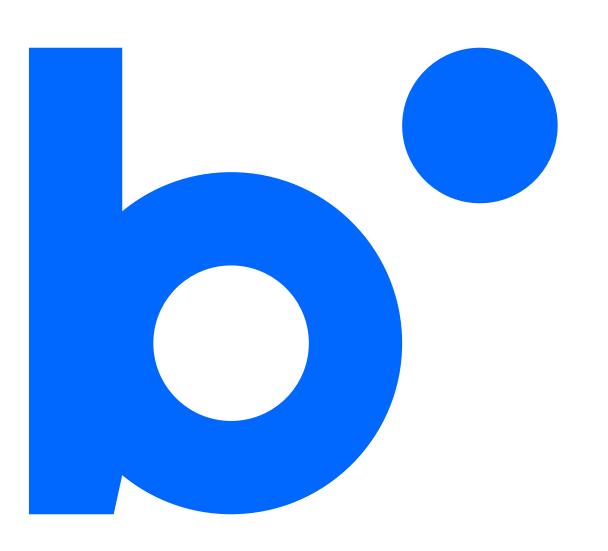
Letter b

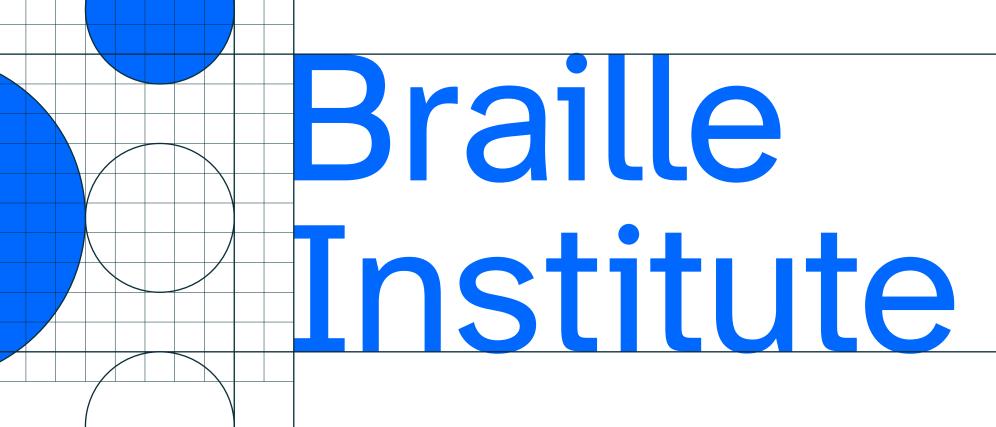


Letter b Braille i



Letter b Braille i Icon





Icon

Lettering



Braille Institute

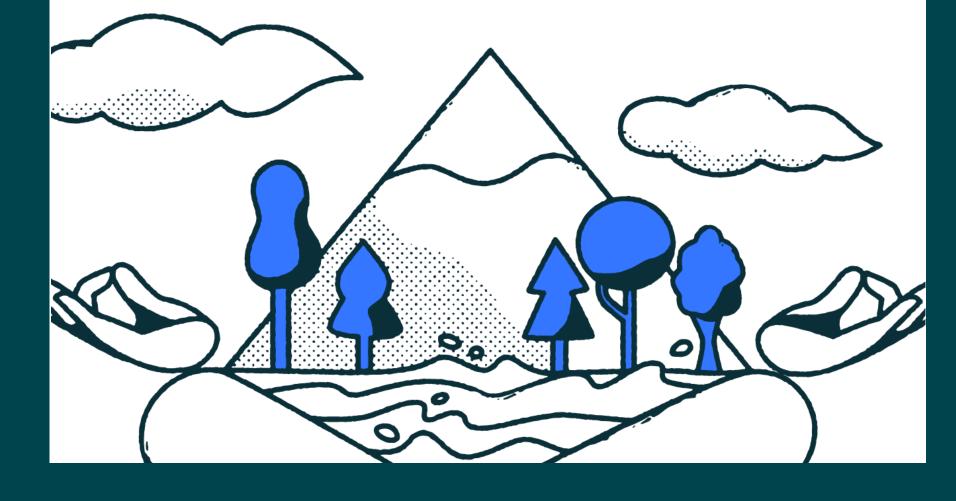


Low Vision Rehabilitation



Low Vision Rehabilitation

Seeing the Future



A bold, approachable, and confident logo.

- References the heritage of the Braille Institute
- Focuses on low vision
- A beacon for the future

Look and Feel

Braille Institute

Color Coding

Low Vision Rehabilitation

Subject Category

High Contrast

Headline

Bold lettering with underlines

Subheading

Low Vision Rehabilitation

Seeing the Future

Image Area

Low Vision Rehabilitation



Low Vision Rehabilitation

Seeing the Future



Illustration made from dots and lines

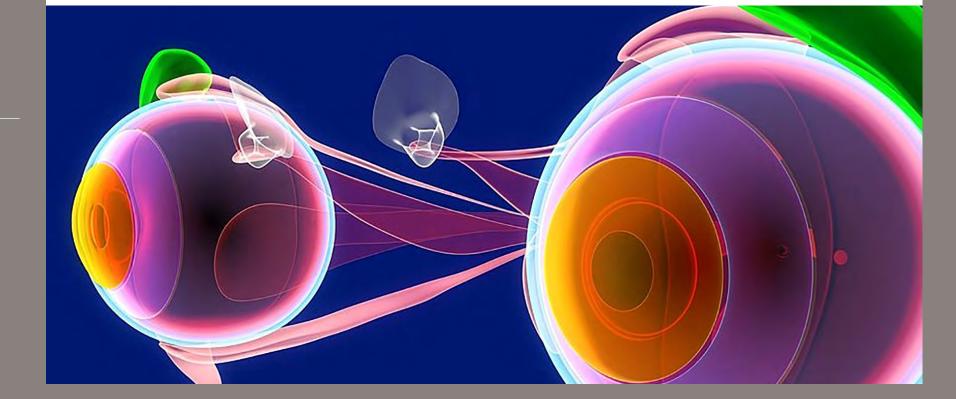
Low Vision Rehabilitation



Low Vision Rehabilitation

Seeing the Future

Telegraphic photography



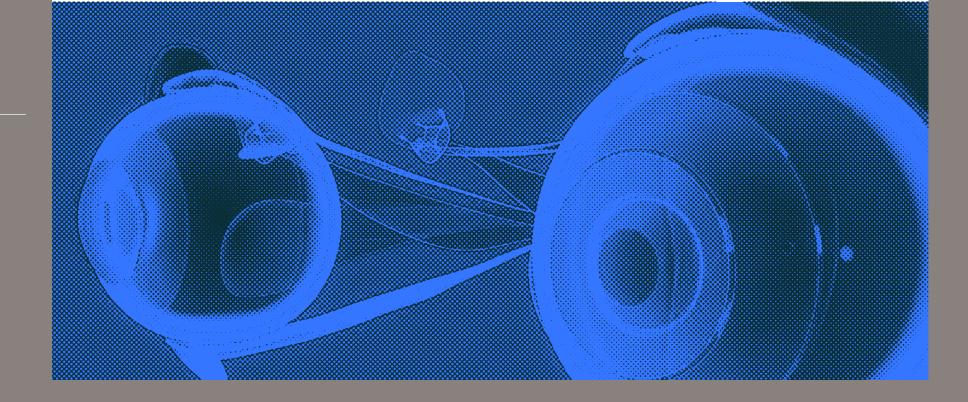
Low Vision Rehabilitation



Low Vision Rehabilitation

Seeing the Future

Halftone photography



Low Vision

Low Vision

Braille Institute

<u>t</u> a class.

ool ig Puck



We need to talk.

Using Audio Devices With Low-Vision



Low Vision

A man walks into a bar.
And a table.

Navigating With Low-Vision

Braille Institute



Our library, and congress's.

Library Services

Braille Institute

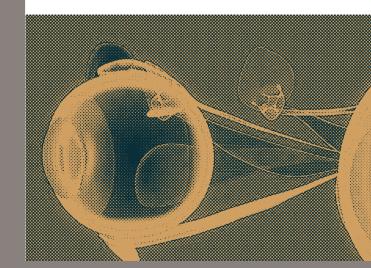


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Low Vision

Low Vision Rehabilitation

Seeing the Future



High Visibility Ink

Accent Blue	Accent Green	Base Putty
Accent Pink	Accent Gold	Base
Accent Cyan	Accent Yellow	Sand

Braille Institute of America 11/14/2018

High Visibility Ink and White

14.2:1

Straight to the point house style.

- The layouts are designed specifically for those with low vision
- Bold headlines—enhance readability
- High contrast—allows for greater visibility
- Color coding—aids in usability

Brochures

Quisque imperdiet rutrum volutpat. Quisque Importa, urna vel suscipit varius,
Nullam congue, urna est, vitae vehiculo Nullari curigue, arrigue est, vitae vehicula nisi justo uapibus Donec justo Jacus Jorem et metus. Donec justo lacus luisii, sit amet purus vel, ipsum, mollis sit amet purus vel, ipsum, monis sit annot punus vel, vestibulum hendrerit est. Cras rhoncus

Ut sit amet diam a urna scelerisque Ut sit amer ularing aring scelerisque

Ut sit amer ularing aring scelerisque

Molestie in eget ex. Vestibulum lacinia

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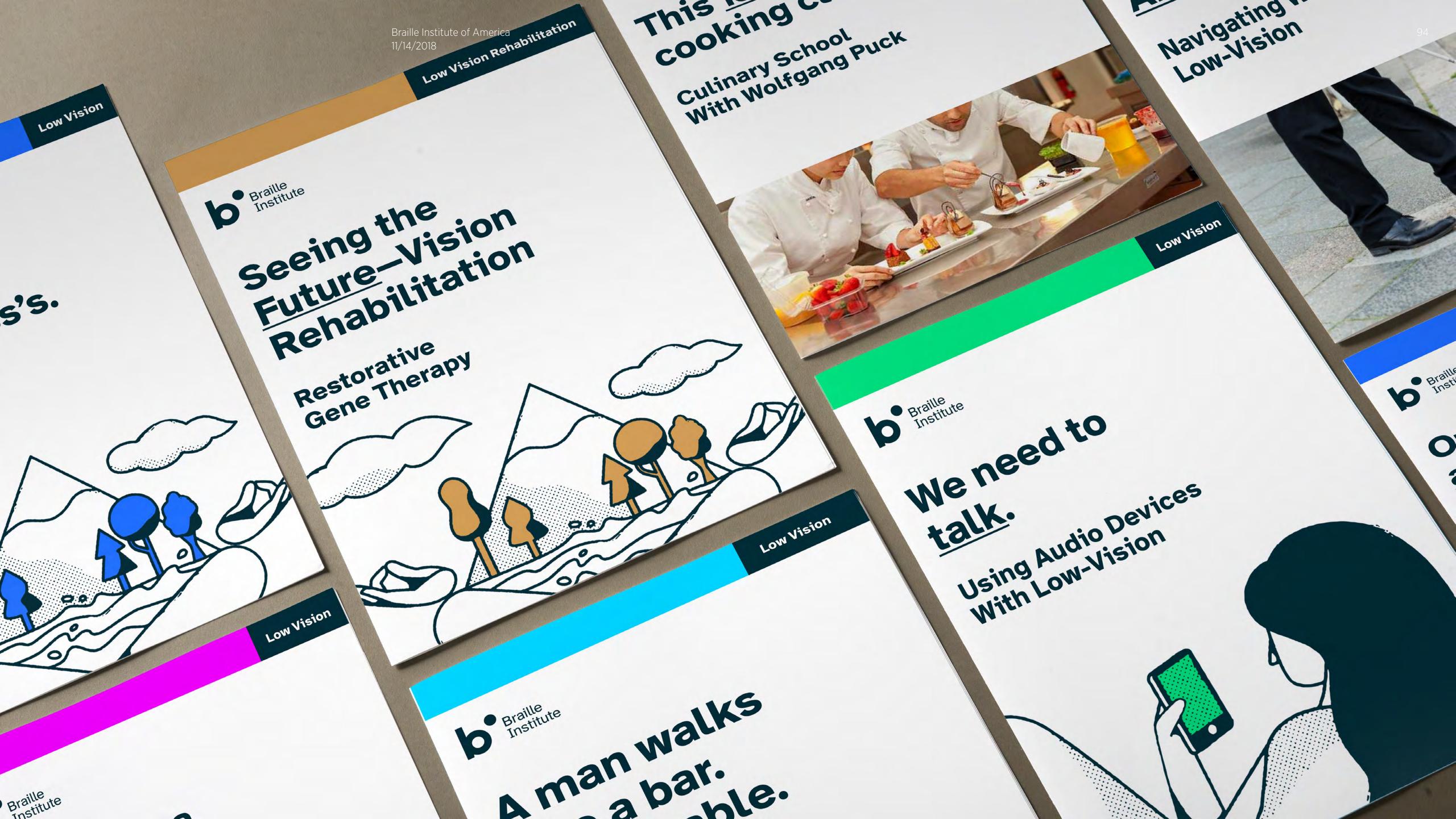
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Braille Institute

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Services Locations Classes/Events Resources About Donate

Low Vision Rehabilitation.

I'm a <u>client</u>. Get started.

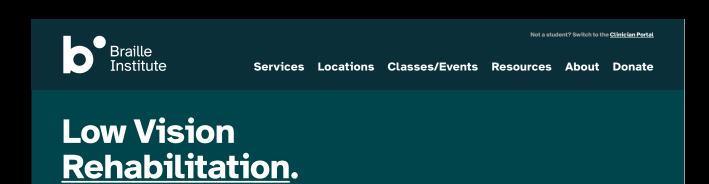
Client Portal

I'm a clinician. Learn More.

Clinician Portal

MacBook Pro

Website



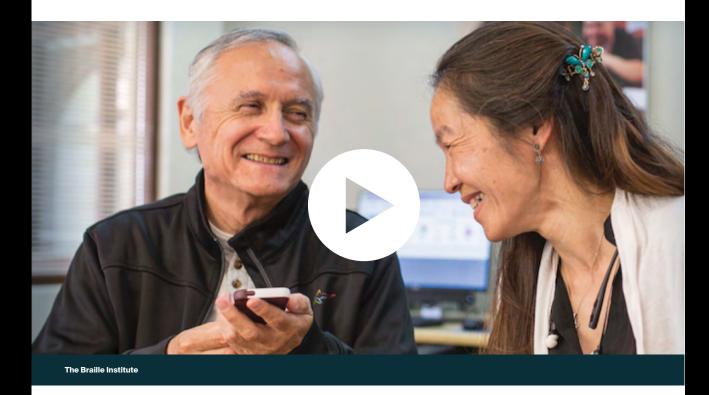
I'm a <u>client</u>. Get started.

Learn More.

I'm a clinician.

Client Portal

Clinician Portal

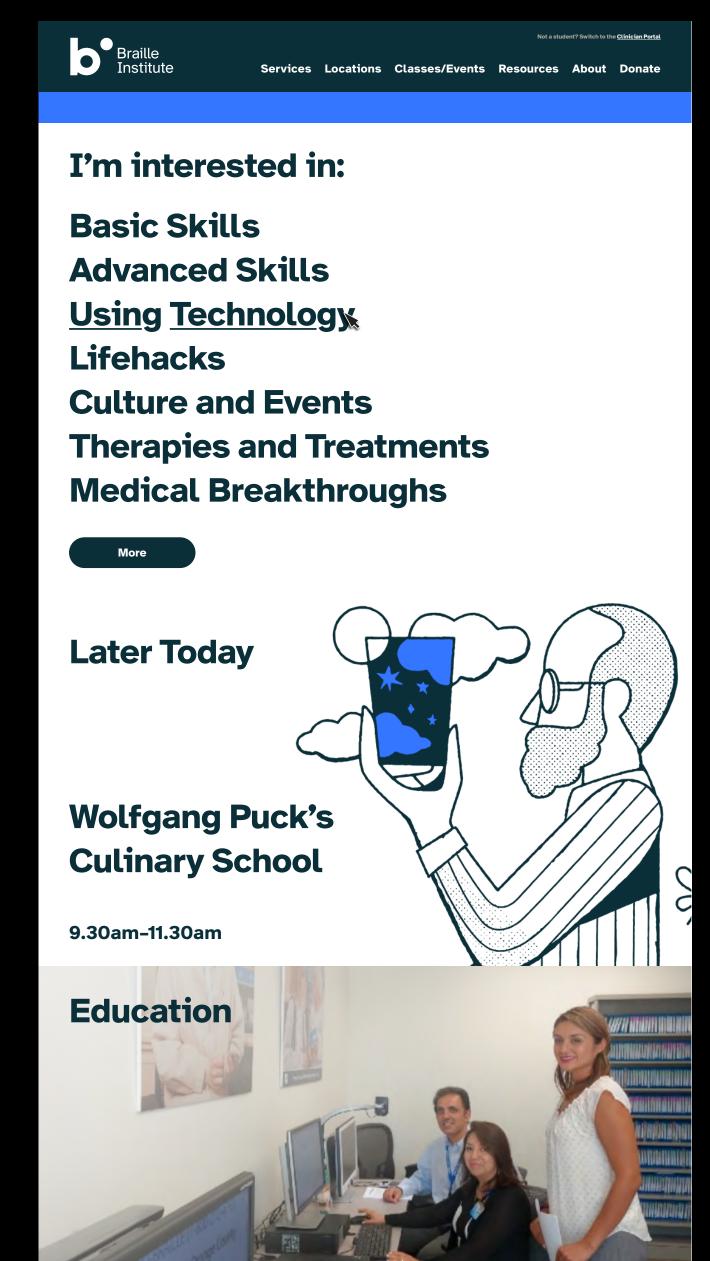


Braille Institute is a non-profit organization offering a broad range of free programs, classes and services serving thousands of students of all ages to empower themselves to live more enriching lives with blindness and vision loss.

We serve the community from six centers and 220 community outreach locations throughout Southern California, and lead popular national programs like **Braille Challenge and Cane Quest.**

Our staff and volunteers understand losing your vision can be scary, and we believe it is not the end of independence, but a new way of living.







Services Locations Classes/Events Resources About Donate

Not a clinician? **Switch to the Client Portal**



What we offer



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Student Report Card

John H. Sample

Progress Snapshot

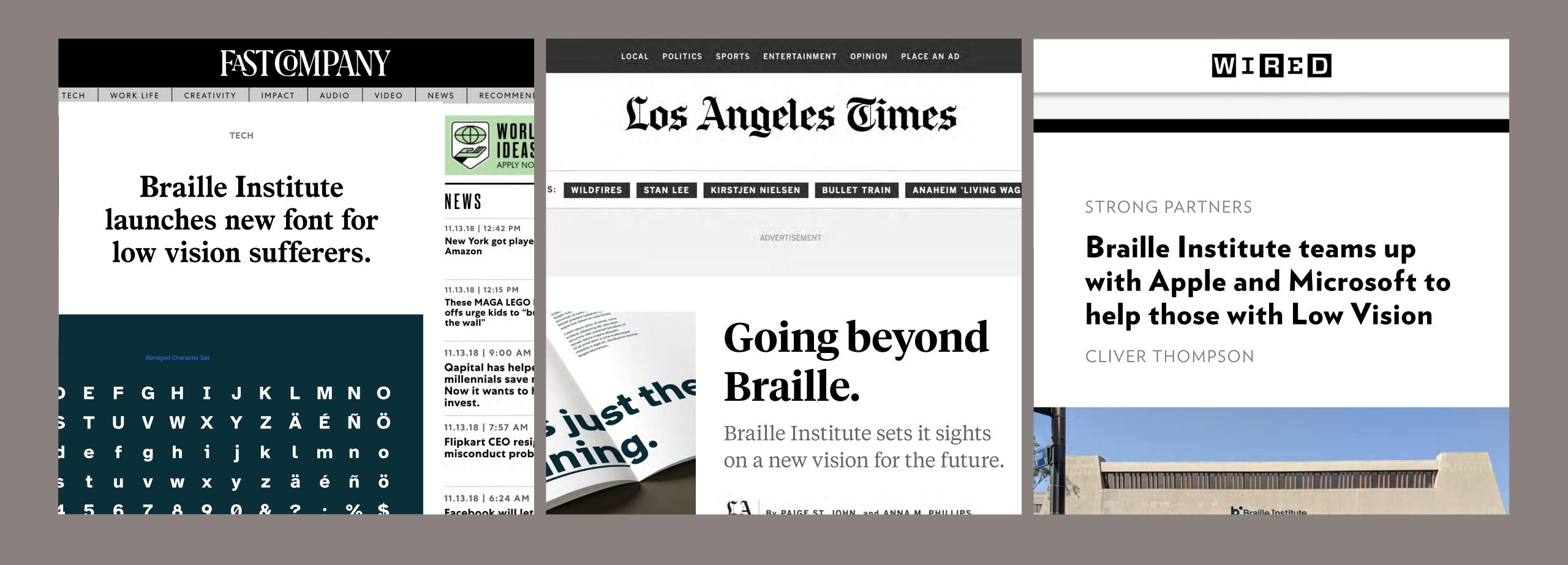






The Brand in Action

Announcing a shift in focus







Braille Institute



Braille Institute

±Applied

Thank You