



# 2019-21 GOVERNOR'S BUDGET

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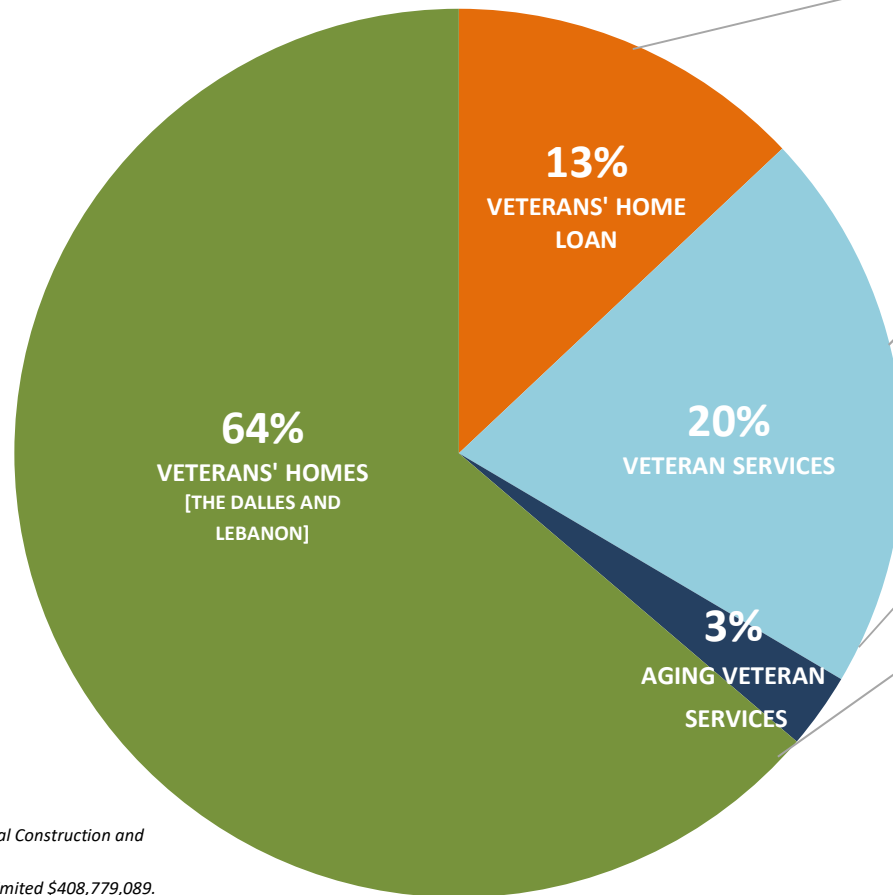
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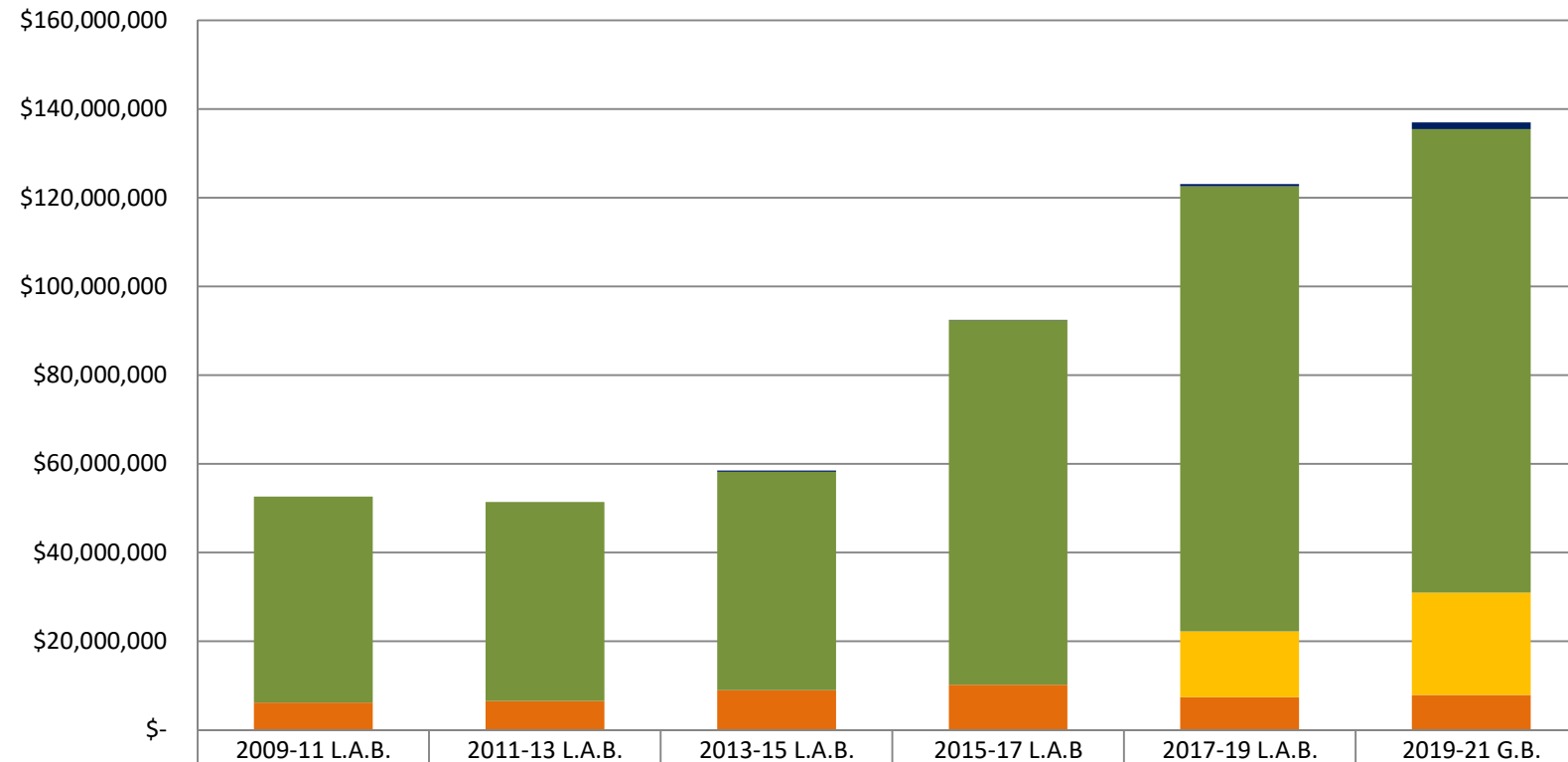
## 2019-21 GOVERNOR'S BUDGET: PROGRAM EXPENDITURES FOR ALL PROGRAMS OR ACTIVITIES



VETERANS' HOME LOAN	
Other Funds	\$ 17,283,914
Lottery Funds	\$ 500,000
<b>TOTAL FUNDS</b>	<b>\$ 17,783,914</b>
VETERAN SERVICES	
Lottery Funds	\$ 19,136,745
General Funds	\$ 7,335,847
Federal Funds	\$ 1,525,000
Other Funds	\$ 109,006
<b>TOTAL FUNDS</b>	<b>\$ 28,106,598</b>
AGING VETERANS SERVICES	
Lottery Funds	\$ 3,209,006
General Funds	\$ 541,861
<b>TOTAL FUNDS</b>	<b>\$ 3,750,867</b>
VETERANS' HOMES	
Other Funds	\$ 87,095,276
Lottery Funds	\$ 250,000
<b>TOTAL FUNDS</b>	<b>\$ 87,345,276</b>
TOTAL PROGRAM EXPENDITURES	
Lottery Funds	\$ 23,095,751
General Funds	\$ 7,877,708
Other Funds	\$ 104,488,196
Federal Funds	\$ 1,525,000
<b>TOTAL FUNDS</b>	<b>\$ 136,986,655</b>

\*Excludes Debt Service, Capital Construction and Nonlimited Expenditures.  
Veterans Loan Program Nonlimited \$408,779,089.  
Veterans' Home Program Debt Service \$2,249,440.

## 2019-21 GOVERNOR'S BUDGET: HISTORICAL OPERATING BUDGET DISTRIBUTION BY FUND TYPE - ALL PROGRAMS



	2009-11 L.A.B.	2011-13 L.A.B.	2013-15 L.A.B.	2015-17 L.A.B	2017-19 L.A.B.	2019-21 G.B.
■ Federal Funds	\$-	\$-	\$300,000	\$1	\$500,000	\$1,525,000
■ Other Funds	\$46,403,160	\$44,891,342	\$49,214,108	\$82,257,619	\$100,316,941	\$104,488,196
■ Lottery Funds	\$-	\$-	\$-	\$-	\$14,856,025	\$23,095,751
■ General Funds	\$6,168,915	\$6,469,659	\$8,945,967	\$10,129,411	\$7,363,276	\$7,877,708

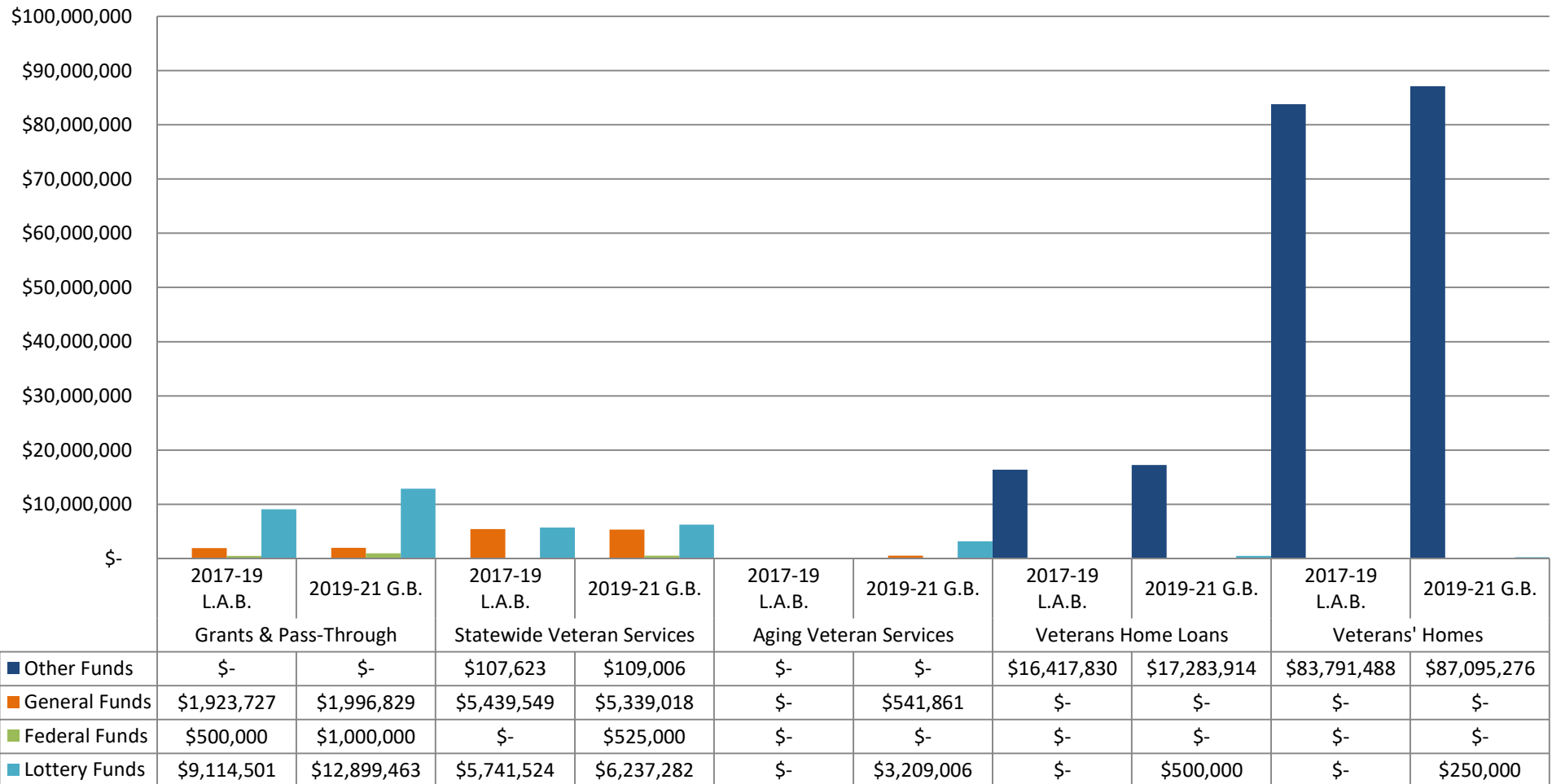
*Note 1: Lottery Funds were a result of voter-passage of Measure 96 in November 2016.*

*Note 2: Significant increase in Other Funds for 2015-17 and 2017-19 based on the new Veterans' Home in Lebanon that opened in Fall 2014.*

L.A.B. = Legislatively Adopted Budget; G.B = Governor's Budget

\*\*Excludes Debt Service, Capital Construction and Nonlimited Expenditures

## 2019-21 GOVERNOR'S BUDGET: COMPARISON TO 2017-19 LEGISLATIVELY ADOPTED BUDGET



Notes: Pass-through includes funds to Counties, National Service Organizations and Partnerships.

Excludes Debt Service, Capital Construction and Nonlimited Expenditures.

## MISSION STATEMENT AND STATUTORY AUTHORITY

In 1945, Oregonians committed to stand up and serve returning veterans. Today, the Oregon Department of Veterans' Affairs (ODVA) continues to carry on this essential support for the veteran community that was envisioned at our founding.

World War I veterans established the voice needed to better coordinate the sea of goodwill for veterans across all levels of government and community partners like national service organizations, colleges and universities, non-profits, faith-based organizations and private sector employers. They recognized that returning veterans gained great strength from their service, but also faced challenges reintegrating home.

These priorities, over seventy years old, could just as easily have been written today to describe the current veteran landscape. This is not to suggest that progress has not been made, rather, the nature of military service across all eras results in challenges for veterans in their civilian life.

ODVA has an incredibly broad mission in serving a diverse veterans' community in key areas of health, education and economic opportunity. Today's veteran services system has been challenged in the last decade to keep up with the unprecedented demand for services from four generations of veterans. The combined breadth of the veterans' population served and their diverse needs has required a cohesive vision and mission supported by a long-term strategic approach to veteran services by the agency.

**OUR VISION** Veterans and their families thrive in Oregon.

**OUR MISSION** ODVA serves and honors veterans through our leadership, advocacy and strong partnerships.

**OUR VALUES** Respect, Integrity, Stewardship and Excellence.

### Statutory Authority

Article XI-A of the Oregon Constitution mandates the over-arching duties of the Department. Oregon Revised Statutes Chapters 406 through 408 and Oregon Administrative Rules contained in Chapter 274 are the primary laws and rules governing the Department.

## AGENCY STRATEGIC PLAN

The Oregon Department of Veterans' Affairs (ODVA) developed a new strategic plan for the agency in early 2014. With fresh eyes, the team developed a five-year strategic plan to make a series of course corrections that would create a more robust agency focused on serving Oregon veterans and their families for future generations.

### Overview

ODVA has four major program functions: statewide veteran services, aging veteran services, the veteran home loan program, and core operations that support and enhance other functions. The development of the strategic plan included careful consideration of existing operations and potential strategies to use limited resources to positively impact the greatest number of veterans.

While no single agency or organization can wholly address the needs of veterans, ODVA is well-positioned to reach veterans when they need resources and benefits. As the leader and expert on veteran's issues in Oregon, ODVA recognizes the need to maximize the current veteran benefits that federal, state, local governments and nonprofits provide and has begun to develop and deepen fully-engaged partnerships.

### Strategic Goals and Objectives

ODVA developed four strategic goals: target veteran services, mobilize partnerships, drive veteran engagement and invigorate core operations.

#### Goal: Target Veteran Services

Objective: To serve more veterans and serve them better

Strategies:

- Invest in a 21<sup>st</sup> century veteran services system
- Ensure veteran service officers across Oregon are well-staffed and resourced
- Focus statewide veteran services on training, claims review, advocacy, and support
- Better connect veterans to community resources

#### Goal: Mobilize Partnerships

Objective: To leverage all resources available to veterans

Strategies:

- Maximize up-front, preventative resources to reduce expensive, back-end safety net systems
- Bring the veterans' lens to key outcome areas in health/wellness and education/economic opportunity

- Collaborate to create, connect and support statewide networks for veterans and family resources
- Partner across federal, tribal, state and local governments
- Engage private, non-profit and philanthropic sectors

**Goal: Drive Veteran Engagement**

Objective: To amplify awareness of resources and build the Oregon veteran brand

Strategies:

- Deepen the connection with the veteran community
- Promote a positive image of veterans and their families
- Build the Oregon veterans brand
- Ensure a seamless and positive experience by veterans seeking services

**Goal: Invigorate Core Operations**

Objective: To build a better, stronger and more durable department for future generations through our responsible, resourceful and creative management

Strategies:

- Reenergize the Veterans' Home Loan program
- Provide the best in care at the Oregon Veterans' Homes
- Support 21<sup>st</sup> century veterans' services through integrated information technology
- Maintain fiscal integrity and sustainability of the Department's programs
- Infuse a culture of service that champions our values and vision through leadership, training, communication and accountability



## AGENCY INITIATIVES AND ACCOMPLISHMENTS (2017-19 BIENNIUM)

### Target Veteran Services Highlights and Accomplishments

- Assisted, trained and certified county personnel to stand up new Veteran Services Office in Polk County. Marion County Veteran Services office will be fully trained and certified in the spring of 2019, resulting in access to local benefit assistance for veterans in all 36 Oregon counties.
- The number of county and state veteran service officers serving the veteran community increased by 22% during FY 16-18, from 79 to 97, resulting in more than 25,000 new claims developed and submitted during that time for veterans under ODVA's Power of Attorney.
- Total number of Federal disability and pension claims appeals filed by state and county veteran service officers 2,861.
- Total number of new Powers of Attorney executed by Oregon veterans that allow state and county veteran service officers to advocate on behalf of the veteran: 17,675
- Total disability compensation and pension benefits paid to veterans in Oregon in 2017 totaled more than \$1.36 Billion.
- Total annual Federal VA expenditures in Oregon increased by 8% since 2015 to \$2.84 Billion.
- Provided direct service to LGBTQ veterans that helped more than 100 veterans and their families upgrade dishonorable or general discharge statuses that were the result of their LGBTQ status, to become eligible for Federal benefits; provided basic resource assistance and referrals; helped in the corrections to military records; and helped in the process of filing service-connected claims for these veterans that provided direct payments to veterans.
- Provided direct service to women veterans Oregon's by travelling across the state to provide training and education to hundreds of nonprofit and government organizations, direct service to a multitude of women veterans, and engaged in expansive program development both statewide and nationally.
- The Incarcerated Veterans Program is in its second full year of operation, with the goal being to work with veterans entering the state prison system and transitioning to release. The ODVA Incarcerated Veteran Coordinator, in coordination with the Oregon Department of Corrections, has met with over 1,100 individuals entering the state prison system to verify veteran status, advocate for veterans benefits and assist veteran families with benefits that were transferable to them. To facilitate a successful transition to the community and to reduce recidivism rates for veterans, ODVA also collaborates with US Department of Veteran Affairs' re-entry social worker to meet with veterans when they are transitioning out of the prison system to ensure all possible benefit claims are filed and the veteran is enrolled in Federal VA healthcare. In August 2018, ODVA hired a second Incarcerated Veteran Coordinator, as authorized by HB 4038 (2018).
- Established a Representative Payee position within the Conservatorship program to provide financial assistance to vulnerable veterans.

## Mobilize Partnerships Highlights and Accomplishments

- Partnered with nearly 100 community and government providers, private corporations and veteran owned business for the annual Veteran Benefit Expo, held in Multnomah and Deschutes counties.
- Provided numerous public engagement seminars and briefings to hundreds of participants from various civic groups, state and other governmental agencies, nonprofit agencies and service organizations on veterans' benefits, aging veterans' benefits.
- Cover to Cover Program. In 2016 ODVA began a close partnership with three aging and disability resource connection (ADRC's) agencies in Oregon. The purpose of this program is to train veteran specialists within ADRC staff to understand and connect veterans to federal VA benefits. In 2017, 290 referrals were made to veteran service offices by ADRC staff.
- Formed a partnership with Oregon State Hospital and Psychiatric Safety Review Board to serve Oregon's most vulnerable veterans who are patients at the Oregon State hospital. This partnership also includes the psychiatric safety review board program that works with veterans who are transitioning from the state hospital. Total number of veterans contacted 17.
- In 2016, the federal VA Highly Rural Transportation Grant was awarded to ODVA, marking the third cycle of this \$500,000 grant that provides transportation for veterans to VA-approved medical appointments. All 10 highly rural Oregon counties are participating and receiving the benefits of the grant. Since the inception of this program, hundreds of veterans have received transportation to medical appointments. The program allows veterans to have transportation to federal VA-approved healthcare appointments and to maximize the use of the Veteran's Choice Program for medical appointments outside VA healthcare. This program encompasses all five VA healthcare catchment areas and serves a base of rural veterans that are in need of transportation to their appointments. July 2016 through June 2018: Time Spent: 21,692 hours; number of trips: 11,029; total distance driven: 621,848 miles. Of interest to note: since inception, the program had logged in excess of one million miles transporting veterans to much needed healthcare appointments.
- Continued to work with the federal VA office of Tribal Government to provide the eight Oregon federally recognized tribes better representation for federal claims and appeals. In addition, ODVA is engaged with federal VA healthcare system to ensure transportation for veterans and the use of any health care services on tribal lands. SB 80 (2017) provided ODVA with explicit statutory authority to provide aid and assistance to federally recognized Indian tribes in Oregon with regard to programs of service for Native American veterans and accreditation of federal tribal veterans representatives.
- Partnered with Oregon Housing and Community Services to help support their work with veterans, based on 2013 legislation that dedicated money from county real estate recording fees for veterans at risk of homelessness. This work resulted in two affordable veteran rental housing projects being built in Medford and Klamath Falls. Five other veteran homeless housing projects were funded in 2018, and work is underway.
- Began partnering with Oregon Lottery to increase awareness of lottery funding for veterans and to elevate awareness of large scale events that provide direct benefits to veterans.

- SB 143 (2017) established a \$1M ODVA Campus Veteran Resource Center Grant Program to expand campus veteran resource centers at Oregon community colleges and public universities. In December 2017, ODVA awarded grants to 14 community colleges and public universities to help veterans transition from military service to college life, succeed in college, and complete the transition from college to the workforce and community. The bill also authorized one permanent Program Analyst 2 position, and ODVA hired a Campus Veteran Coordinator in November 2017.
- HB 2891 (2017) established a \$550,000 ODVA Veteran Services Grant Program to provide services to Oregon veterans by expanding outreach and services. ODVA received 59 grant proposals, totaling \$5,354,422 which was nearly ten times the amount of available grant funds. In April 2018, ODVA funded 10 grant proposals across urban and rural Oregon, two of which were only partially funded. Grants were awarded to non-profits, tribal, city and county governments, and transportation districts. Veteran services grants are being used to expand services to veterans in the areas of transportation, legal services, education and training, housing security and homelessness, employment opportunities, and physical and mental health.
- The 2017 Legislature authorized \$1.5M in Lottery Funds to Oregon Housing and Community Services (OHCS) to address veteran homelessness. As a result, ODVA and OHCS worked closely to develop a collaborative plan to reduce and functionally end veteran homelessness. The OHCS Veteran Lottery Fund Investment Plan included: (1) Veteran Homelessness Integrator Position (Integrator hired in June 2018), (2) Increased Community Action Agencies Veterans Service Funding. (Additional funding allocated in 2017), (3) Community Technical Assistance and Consultation (Development of a pilot program is in process), and (4) Permanent Housing for Homeless Veterans (Additional funding applied to 2017 Notice of Funding Availability for Multifamily Housing).
- In partnership with OHCS, ODVA co-hosted two statewide Homeless Veteran Convening two-day workshops, bringing together community partners working on veterans homelessness in their communities to teach, learn, and collaborate on the best ways to serve Oregon homeless veterans. Community partners identified successes, barriers, best practices, and recommendations to help address veteran homelessness.
- In a budget note to HB 5526 (2017) the Legislature allocated \$2.5M in Other Funds from tobacco tax revenues to the Oregon Health Authority (OHA) to improve behavioral health outcomes for veterans. OHA and ODVA, in collaboration with stakeholders, developed four proposals, including (1) develop standards and contract for enhanced peer-to-peer behavioral health programs to increase outreach and support, (2) identify best practice behavioral health treatments and study gaps in access and utilization of identified treatments, (3) fund and hire a veterans behavioral health liaison to identify and improve policies and procedures which improve coordination of services and health outcomes, and (4) develop and improve veteran suicide prevention program through enhanced training for clinical providers.

## Drive Veteran Engagement Highlights and Accomplishments

- More than 600 women veterans participated in the 2016 Oregon Women Veterans Health Study. ODVA gained valuable information that has been used to inform new legislation, including recommendations to increase access to veteran healthcare and improvements that can be made to improve the services at the Federal VA (e.g. Portland Veterans Affairs Medical Center is working on expanding tele-mental health to rural locations as a direct result of both the 2016 Health Study and Women Veteran listening sessions).
- Oregon's Women Veteran Coordinator created the *I Am Not Invisible Campaign (IANI)* to increase awareness about issues that women veterans face and to increase awareness that many veterans are women. The campaign, which is a photo exhibit featuring 22 Oregon women veterans, has traveled across Oregon and has been adopted by other state, veterans agencies across the nation. Near the end of 2017, the exhibit was on display in Washington, D.C. at the nation's capital, and the federal VA produced an *IANI* campaign using the same content and look originally produced by ODVA. Several other states have also replicated this program, highlighting the accomplishments and challenged of women veterans. The impact of this campaign is immeasurable.
- Hosted two Women Veteran Health Summits reaching 225 community providers in eight counties, and the 2018 Women Veteran Conference, which was attended by over 200 women veterans from across Oregon and Washington.
- Oregon's LGBTQ Veterans Coordinator travelled across the state providing training and education to hundreds of nonprofit and government organizations, direct service to a multitude of veterans, and engaged in expansive program development both statewide and nationally.
- Participated in all Pride celebrations in Oregon in both 2016 and 2017, connecting with over three hundred veterans.
- ODVA's new Veteran Benefit Expo has quickly gained notoriety with nearly 1,100 veterans attending the events in Redmond (2017) and Portland (2016).
- ODVA completely overhauled its website, concentrating on designing an intuitive customer experience and easy navigation. In FY 16-18, more than 236,000 unique visitors visited the agency's websites and more than 1.6 million veteran benefit and resource emails have been sent to more than 63,000 subscriptions with an open rate of 25.2%. More than 2.2 million emails have been received by subscribers since the system launch in Sept. 2012.
- A complete editorial and publication redesign of Vets News now delivers content to educate and engage the veteran community about the positive impact veteran benefits has on the individual and community.
- Worked with legislators to create a Veteran Volunteer Program (HB 2098, 2017) and an Aging Veteran Outreach Coordinator (LAB) to engage and help aging veterans across the state access their benefits.

## Invigorate Core Operations Highlights and Accomplishments

- ODVA began planning efforts to modernize and support core program applications.
- A comprehensive ODVA information and security risk assessment took place in the 2017-19 biennium and assisted the agency in identifying security strengths and improvements. Since then, ODVA has established projects and investments that take priority in the next 2 biennium.
- ODVA began construction upgrades at The Dalles including building a location for medical personnel training to ensure the home has adequate nursing to patient ratios.
- ODVA's Home Loan originations grew to more than \$75 million in fiscal year 2018, the highest fiscal year dollar production level since 1998.
- Increased the loan servicing portfolio by over \$35 million as of June 30, 2018, representing approximately a 12% increase over June 30, 2017. As of June 30, 2018, the Department's current servicing portfolio was approximately \$332 million.
- Upgraded the agency's records management system.
- Celebrated the 4-year anniversary of the Oregon Veterans Home in Lebanon. The home reached full census within the first two years of opening.
- The Oregon Veterans Home in Lebanon received the Bronze Award for Quality Achievement from the American Health Care Association (AHCA) and the National Center for Assisted Living (NCAL).
- Received the Department of Administrative Services "Gold Star" award for excellence in financial reporting. This represents the 25<sup>th</sup> consecutive year ODVA has received this award.
- Received "clean" audit opinions on the financial audits of both the Veterans' Loan Program and the Veterans' Home Program.
- Successfully issued over \$175 million in "new money" and refunding bonds to support the Veterans' Loan Program.
- Extended two bank facilities that provide liquidity support to ODVA's variable rate debt.
- Executed quarterly early bond redemptions to help achieve lower overall borrowing costs and facilitate targeted bond refundings.
- Successfully completed all post-issuance bond compliance activities including arbitrage rebate calculations, MSRB EMMA postings, and SEC rule 15c2-12 continuing disclosure responsibilities.
- Successfully processed a variety of federal grant requests/reimbursements (e.g. The Dalles and Lebanon Veteran Homes, federal VA Highly Rural Transportation Grant).
- Received approval from the 2018 Legislature to apply for over \$6 million in new federal grant funding for The Dalles Veterans' Home and the Lebanon Veterans' Home and approval to apply for \$500,000 in federal monies for the Highly Rural Transportation Grant program. Received grant for on-site Certified Nursing Assistant training program at The Dalles Home and completed the interior remodel for The Dalles home, including a new activity room for the memory care residents.
- Completed an interiors remodel of the third floor of the Oregon Department of Veterans' Affairs building comprised of new paint, carpet, vinyl plank floors, two family restrooms and the addition of a breakroom for our new tenant the Early Learning Division (DOE). Currently working on a similar remodel for the first floor of the building involving similar upgrades as the third floor with the addition of new signage and display cases of veteran themes and information from all generations.

- In 2015, ODVA purchased an adjoining property to the Oregon Veteran Home in Lebanon in anticipation of addressing facility parking. Part of the master plan for the adjoining property was to construct a 120-space parking lot which would connect via a walking bridge to the west-side of the Veterans' Home. This additional parking would provide space for staff, volunteers' and overflow for special events. An ITB is currently out for bid and this project should be completed by the end of 2018. The primary benefit of this additional parking is to free up spaces that are proximate to the neighborhoods and provide better access for family and friends and other visitors of our residents.

## Initiatives

### **Policy Option Package 101: 21<sup>st</sup> Century Service Delivery**

One of ODVA's goals and objectives to better serve Oregon veterans is to "invigorate core operations" and "build a better, stronger and more durable department for future generations." To meet these objectives, ODVA needs to replace outdated and inadequate software applications with effective, efficient platforms designed for modern day needs that will improve services to veterans and mitigate risks. In addition, ODVA needs to provide sufficient resources and support to introduce new technologies. Finally, ODVA needs to modernize the workplace by refreshing the second floor interior of the ODVA building that is several years overdue, according to DAS requirements.

### **Policy Option Package 102: Target Veteran Services**

ODVA's vision for veterans, stated in its five-year strategic plan, is that "Veterans and their families thrive in Oregon." One of the goals and its objective that supports that vision is to "Target veteran services: Serve more veterans and serve them better." This package targets services for veterans and supports the objective of serving more veterans and serving them better and includes enhancing training opportunities for veteran service officers that serve veterans, capabilities of the conservatorship and representative payee programs that provide direct support to our most vulnerable veterans, and increase veterans' accessibility to ODVA home loans.

### **Policy Option Package 103: Mobilize Partnerships**

One of ODVA's four strategic plan goals and its objective is to "Mobilize Partnerships" in order to "leverage all resources available to veterans." ODVA forges and mobilizes partnerships with other state, county, local, tribal and federal governmental agencies and non-profits that have subject matter expertise and delivery systems. Working with these partnerships, ODVA provides expertise on the critical needs and special issues facing veterans. Through these partnerships, ODVA is able to achieve another strategic goal and its objective: to "Target Veteran Services" and "serve more veterans and serve them better.

ODVA's purpose is to leverage existing state resources to expand and enhance direct service to veterans including: mental health care; physical health care; housing security; employment opportunities and stability; education and training; and transportation accessibility and availability. The agency's key partners include the National Service Organizations, which provide critical services for veterans. The goals of leveraging these partnerships are to:

- Maximize up-front, preventative resources to reduce expensive, back-end state safety net systems;
- Enhance collaboration to create, connect and support statewide networks for veterans and family resources; and
- Bring the veterans' focus to key state outcome areas.

**Analyst Adjustments Package 090**

In addition to ODVA's policy option packages, the Governor has prioritized the use of Lottery Funds to include grant programs to address veteran homelessness, veteran behavior health needs, funding for tribal veteran offices and administration of veteran service grants. Other priorities include down payment assistance for veteran home loans, enhancing the internal audit function, funding for veteran employment and economic development and efforts to build a third Veterans' Home in Roseburg.

## AGENCY PROGRAMS

The agency's organizational structure has four primary program areas and are supported by the agency's core operations:

- Veteran Services Program
  - Statewide Veteran Services
  - Certification and Training
  - County Veteran Service Offices
  - National Veteran Service Offices
  - Special Advocacy
  - Emergency Financial Assistance
  - Grants to Partners
- Aging Veteran Services Program
  - Volunteer
  - Outreach
  - Conservatorship/Representative Payee Services
  - Oregon Veterans' Homes
    - The Dalles and Lebanon
- Home Loan Program
  - Origination
  - Servicing
- Core Operations
  - Director's Office
  - Policy
  - Financial Services
  - Communications
  - Information Services
  - Records and Information Management
  - Human Resources



- Facility Services

## Veteran Services Program

The Veteran Services Program is responsible for providing advocacy and benefits to veterans, their dependents, and survivors. The program provides benefits counseling, claims and appellate representation, certification and training for counties and national service organizations, emergency financial assistance, and other service delivery partnerships across the state. The division is the front line for all veteran benefits, ensuring that veterans obtain all the benefits to which they are entitled as a result of their military service.

During the 2017-19 biennium, Veteran Services Division had the following sub-program areas:

### **Statewide Veteran Services**

**Purpose:** The United States Department of Veterans Affairs (Federal VA) benefit system is a legal system. In order to qualify for benefits, veterans must file a claim against the United States proving they are eligible for these benefits through the submission of legal, military, and medical evidence.

ODVA employs federally accredited and state certified Veteran Service Officers (VSO's) located in Salem and Portland, who are subject matter experts in Federal VA law (Chapter 38 United States Code and Chapter 38 Code of Federal Regulations) and are allowed to represent veterans who grant the VSO a power of attorney. These VSO's represent veterans, and their dependents and survivors before the Federal VA, in their claims and appeals. With its County Veteran Service Officer and National Service Officer partners, ODVA provides claims advocacy, certification and representation to Oregon's 303,000 veterans, resulting in more than 25,061 new claims filed in FY17-18 and 17,675 new powers of attorney to represent Oregon veterans in the federal VA claims system.

Statewide Veteran Services submits all claims under ODVA's power of attorney for 36 counties and state VSO's to the Federal VA. This division provides claims quality assurance and liaisons with the Federal VA. This office also represents veterans on county and ODVA claims during various stages of appeals, and handles sensitive claims on a statewide basis.

The office also establishes statewide veteran provider partnerships to leverage community and government resources that serve veterans.

### **Training, Accreditation and Outreach**

**Purpose:** ODVA is responsible for the training, certification, and accreditation of all county and state veteran service officers. The agency holds initial onsite training for all new veteran service officers (VSOs), one annual conference and regional trainings across the state. Training is conducted on the latest Federal VA legal, medical and process information.

ODVA trains and accredits VSO's to file defensible claims for disability, benefit and pension compensation on behalf of veterans. Claims are filed through ODVA's Power of Attorney (POA) or a national service organization's POA, as the claims are legal documents reviewed and adjudicated by the Federal VA.

It takes approximately 12 months for a new VSO to achieve accreditation. VSO's must understand the intricacies of veteran status, types of military discharges, privacy laws under HIPAA, Federal VA organization and structure, and state and local information resources available to veterans. The VSO's also need to learn the basics of federal laws and eligibility surrounding service connected compensation, non-service connected pensions, survivor benefits, veteran and dependent educational benefits, Veterans Administration healthcare, fiduciary responsibilities and conservatorship assistance available to veterans, how to interview veterans, and how to develop and file (using the correct forms, documentation, and procedures) each kind of claim.

One of the more challenging hurdles for new VSO's is learning to interpret and manage existing claims with complex case files and long histories. VSOs also need to be trained in laws and procedures specific to the appeals process. ODVA provides 40 hours of intensive one-on-one class room training for new VSO's to go over this information initially, along with mock interviews, full practice claims, and training on the automated case management data system, VetraSpec. After this initial intensive introduction, the VSO returns to their home county, and begins interviewing veterans and compiling claims under remote supervision; for the next 12 months, ODVA provides intensive coaching via phone and email, and will arrange for a site visit to the Portland claims office and the Federal VA, and will also periodically go to a County Veteran Service Office to work with them in their home environment.

Fully-accredited VSO's require continuing education to keep pace with new procedures and directives coming from the federal VA. Training needs for fully-accredited VSO's include developing curricula and hosting an annual conference with specific workshop tracks and general sessions, as well as regional trainings across the state. Advanced training includes a deeper dive into the Code of Federal Regulation Title 38 governing veterans' benefits, analysis of federal claims and appeals decisions, legal research, and outreach best practices.

### **County Veteran Service Officers (CVSO's) Program**

**Purpose:** ODVA's statewide partnership with counties began when the Oregon Legislature appropriated money to aid counties in an effort to promote services to veterans on a local level. It is an effective network of trained County Veteran Service Officers (CVSO) in all 36 counties.

CVSO's are not supervised by ODVA; however, the agency provides training, certification, accreditation, coaching, and outreach to the CVSO's. The vast majority of CVSO appeal cases also are handled by ODVA's Statewide Veteran Service office in Portland.

### **National Service Organizations (NSO)**

**Purpose:** ODVA partners with national veteran service organizations in Oregon. National veteran services officers provide the same veteran benefit and claims

representation as state and county veteran service officers. Currently, the American Legion, Disabled American Veterans, Veterans of Foreign Wars, Military Order of the Purple Heart, and National Association of Black Veterans participate in this funding.

### **Special Advocacy**

#### ***Purpose: Women Veterans***

HB3479 (2016) created funding and authority to improve outcomes for Oregon women veterans in five specific areas: outreach, advocacy, data, research, and policy. Initial efforts in the first year focused on outreach and advocacy, achieved via listening sessions with women veterans around Oregon; community meetings to increase awareness of women veterans and their unique experiences, issues, and needs; and meeting with women veterans to assist in claims filing, especially related to difficult or challenging claims.

#### ***Purpose: LGBTQ Veterans***

The LGBTQ Veteran Program is a first-of-its-kind program nationally. Created by the Legislature in 2016, direct services to veterans in the LGBTQ community are now being provided statewide to assist with military records corrections and service-connected claims work, especially as it relates to discharges that are related to their sexual orientation or identification. The program also assists many from LGBTQ community with homelessness and housing support, advocacy and empowerment, support groups, and much more. Targeted outreach into this community is needed in order to inform these veterans, who do not typically self-identify as veterans, about their eligibility for veteran benefits and services.

#### ***Purpose: Incarcerated Veterans***

The Incarcerated Veterans Program is in its second full year of operation and has been highly successful. The goal of this program is to work with veterans entering the state prison system and transitioning to release. Since the program began in August 2016 the ODVA Incarcerated Veteran Coordinator, in coordination with the Oregon Department of Corrections, met with over 1,100 individuals entering the state prison system to verify veteran status, advocate for veterans benefits and assist veteran families with benefits that were transferable to them. To facilitate a successful transition to the community and to reduce recidivism rates for veterans the ODVA Incarcerated Veterans Coordinator also collaborates with US Department of Veteran Affairs' re-entry social worker to meet with veterans when they are transitioning out of the prison system to ensure all possible benefit claims are filed and the veteran is enrolled in Federal VA healthcare. In August 2018, ODVA hired a second Incarcerated Veteran Coordinator, as authorized by HB 4038 (2018).

### **Emergency Financial Assistance Program**

***Purpose:*** Emergency Assistance offers one-time funds to veterans who have emergency needs. Examples include a veteran whose car needs repair and without this repair cannot work or a homeless veteran who obtains a job, but needs help with rent and deposits for a place to stay. The key is sustainability; the veteran must be able to sustain their finances after receiving the bridge funding. In the 2017-19 biennium, 297 grant applications were received while funding allowed for only 72 of those to be granted.

### **Grants to Partners**

**Purpose: Veterans Services Grant Fund** House Bill 2891 (2017) established the Oregon Department of Veterans' Affairs Veteran Services Grant Fund, and allocated \$550,000 for Grant Funds. Grant Program funds are Lottery Fund dollars established under Ballot Measure 96, that provides lottery funds specifically for services for Oregon veterans.

**Purpose: Campus Veteran Resources Grant Fund** Senate Bill 143 (2017) established a \$1 million Campus Veteran Resource Center Grant Program for campus veteran resource centers and resource coordinators on the campuses of Oregon community colleges and public universities. The purpose of the grant funds is to help veterans successfully transition from military service to college life, succeed in college and complete educational goals, and transition from college to the workforce in the community.

### **Aging Veteran Services Program**

The Aging Veteran Services Division is a new program area within the agency that was established to address the needs and concerns of our rapidly aging veteran demographic and their families. Currently more than 50% of Oregon veterans served during WWII, Korea and Vietnam eras and nationally, more than 12.4 million veterans are age 65 or older.

Long-term care needs for older Americans is a national concern. For the foreseeable future, older veterans and their families will increasingly need access to long-term care, adult foster care, home and community based services, as well as access to prosthetics, mental health services, health care, dental and hearing aids, and prescription medication.

According to the Oregon Office of Economic Analysis, the population of adults 65 years and older will grow at a pace of 4% annually, and will comprise 22% of all Oregonians by 2040. This division strengthens collaboration with all state, federal and community partners to ensure our veterans, their families, and caregivers receive the best advocacy and services available as they age.

The Aging Veteran Services Division is the front line for connecting all aging veteran related benefits and resources. Currently, the division incorporates the operational management of the two Oregon Veterans' Homes and Conservatorship program. For budget purposes only, the Veterans' Home Program is a stand-alone program and not included within Aging Veterans' Services.

### **Oregon Veterans' Homes**

**Purpose:** The purpose of the Oregon Veterans' Homes is to provide veterans and families with access to high-quality nursing home care at affordable rates as a state and federal benefit for veterans. Residents receive 24-hour, long-term nursing, memory-related, and skilled rehabilitative care by a nursing staff whose

skills and understanding meet the unique and special needs of veterans. The nursing staff is complemented by physical, occupational, and speech therapists that provide specific physician-ordered services to help residents meet their maximum rehabilitative potential.

### **Conservatorship and Representative Payee**

**Purpose:** When veterans are deemed to be incompetent by a county circuit court or the Federal VA to manage their own finances, the court or the Federal VA may appoint ODVA to provide financial management services. The court may appoint ODVA to act as conservator, which includes managing all income and assets for the veteran. Federal VA may appoint ODVA to act as a Representative Payee for a veteran, in which the Agency acts in a limited capacity to pay the bills and act as an advocate for these veterans.

### **Volunteer and Outreach Programs**

**Veteran Volunteer Program**— This new program was established during the 2017 Regular Session and aims to create a statewide network of volunteers trained to locate veterans, assist them in recognizing potential earned benefits and services, and connect them to individuals and organizations for additional assistance. This program will provide training and oversight on an ongoing basis to volunteers, ensuring that volunteers are supported in assisting veterans regarding their benefits. Lastly, this program will continue to explore and identify additional opportunities to assist veterans.

**Aging Veteran Outreach Program**— This new program works collaboratively with agency partners statewide on behalf of aging veterans to coordinate benefits and services specific to the aging population. Additionally, this position is responsible for providing outreach presentations to educate other agencies and the general public regarding all benefits and assistance programs available to aging veterans. Lastly, this program is responsible for filing claims on behalf of veterans who are residing in one of ODVA's veterans' homes, or veterans being served through the conservatorship or rep-payee program.

### **Home Loan Program**

**Purpose:** Wanting to provide a benefit to World War II veterans returning home, Oregon citizens voted in 1945 to create a Veterans' Home Loan Program, establishing it in Article XI-A of the Oregon Constitution. Identified as the Home Loan Program (ORVET), this program provides low-interest rate mortgages on single-family, owner-occupied homes to qualified veterans. Through this program, veteran borrowers can generally save between \$15,000 to \$50,000 by obtaining a 30-year ODVA Home Loan compared to similar products available in the conventional market.

Oregon is one of only five states in the nation that has been grandfathered under federal tax law to offer a state veteran home loan program; the other four grandfathered states include Alaska, California, Texas, and Wisconsin. The concept behind the veteran home loan program is that these states want to provide an enhanced housing benefit to their veterans for their past service and sacrifice.

Historically, this enhanced housing benefit has generally resulted in significantly lower home loan rates than are normally available in the marketplace through the issuance of tax-free, state general obligation bonds called Qualified Veteran Mortgage Bonds (QVMB). QVMB's have limitations on how they can be used; most notably, borrowers must apply for a loan within 25 years of discharge from military service, and funds cannot be used for refinancing. ORVET also has access to limited amounts of less restrictive bond monies from which it can also make loans to veterans who apply for a loan after 25 years from date of discharge. It is this money that is being used to finance loans made to Oregon's veterans that were made eligible as a result of the passage of Measure 70 in 2010. The ORVET program offers financing up to the Federal Housing Finance Authority (FHFA) limit, currently \$484,350 as of January 1, 2019.

## ENVIRONMENTAL FACTORS

A number of factors that will affect ODVA's work in the 2019-21 biennium and future sustainability include:

### Sustainable Long-term Funding

In the 1980's, the ODVA Home Loan Program was one of the largest lenders in Oregon, producing more than \$7.9 billion in home loans for more than 335,000 veterans in Oregon over the lifetime of the program. While the program was robust, a majority of the agency's operational costs were solely dependent on the subsidies from this program for funding. In 2010, the agency began incurring losses due to the decline of portfolio home loans combined with veteran support services funding. In the 2017-19 biennium, the subsidy the Loan Program provided to other agency operations was largely discontinued. Continuing to subsidize other Agency operations from Loan Program resources was not sustainable as the agency had recently experienced a \$12 million reduction to its Net Position over a 6 year period. In order to help ensure the long term viability of the Loan Program, its resources should only be used to fund Loan Program operations.

### Increase in the number of veterans filing claims and continuously changing veteran demographics

From WWII to the most current conflict in Afghanistan, veterans are seeking benefits, services and resources at unprecedented rates. Since the beginning of the Iraq and Afghanistan wars, the total dollars being received by Oregon veterans has nearly tripled from \$924 million (2003) to more than \$2.8 billion (2017). According to the Federal VA's FY17 Geographic Distribution of VA Expenditures Report, Oregon veterans received nearly \$1.4 billion in Compensation and Pension Payments (approximately \$113 million per month), nearly \$153 million in Education and Readjustment benefit, and more than \$1.2 billion in Health Care.

Federal VA spending in Oregon has continued to increase even as veteran population numbers have steadily declined. Within the last five years, the Oregon veteran population has declined by more than 6% and nearly 22% since the beginning of the wars in Iraq and Afghanistan. Total VA expenditures in Oregon has increased more than 300% since 2003 with nearly 34% of Oregon veterans receiving at least one federal benefit.

Spending for VA Healthcare for veterans in Oregon equate to more than \$13,000 per veteran receiving this benefit and makes up almost half of the expenditures in Oregon by the federal VA.

ODVA has recently prioritized resources to address the needs and concerns of our rapidly aging veteran demographic and their families. Currently more than 50% of Oregon veterans served during WWII, Korea and Vietnam eras and nationally, more than 12.4 million veterans are age 65 or older. Long-term care needs for older Americans is a national concern. For the foreseeable future, older veterans and their families will increasingly need access to long-term care, adult foster care, home and community based services, as well as access to prosthetics, mental health care, health care, dental and hearing aids, and prescription medication. According to the Oregon Office of Economic Analysis, the population of adults 65 years and older will grow at a pace of 4% annually, and will comprise 22% of all Oregonians by 2040.

Today, there are an estimated 303,689 veterans in Oregon whose service ranges from World War II (3.7%), Korea (7.2%), Vietnam (37.5%), the Gulf War/Post 9/11 (28.8%) and the intervening peacetime operations (22.8%). Nearly three quarters of this population served during a war or major conflict. Women veterans make up approximately 8.4% of Oregon veterans, while 10.5% are minorities and 1% is Native American.

Dedicated funding to support programs and resources across the diverse needs of the Oregon veteran population will continue to have great influence on the agencies initiatives and work.

## Home Loan Market

Interest rates, home prices and general economic conditions can help or hinder ODVA's home loan program. With interest rates near historic lows, other issues facing the market play into production levels. Both the Oregon and national housing markets have rebounded from the housing crisis that lingered from the 2007 and 2008 economic conditions. Many property values have reached pre-crash levels. With the improvement in housing prices come other factors affecting the ODVA home loan program. Two main concerns are prevalent in our local markets: the shortage of available inventory and prices rising faster than incomes.

In many Oregon communities, available inventory for prospective purchasers is extremely low. Often, there are less than 2 months available inventory to meet the needs of home purchasers. What this means is that if no additional homes were listed for sale, the current inventory would sell out in less than 2 months. This creates a bidding war for homes, escalating values rapidly, often with multiple offers on the same house. Sellers no longer accept offers that are not accompanied by lender pre-approval letters.

Additionally, with the rapid increase in housing prices, many homebuyers have been priced out of the market, their incomes no longer meeting required levels to afford these houses, and having a negative effect on loan qualifications.

The success of this program is especially critical due to the agency's dependency on it for core operational funding.

**Inability to Refinance Loans or Lend to Veterans Discharged More Than 25 Years** – In the face of near historic mortgage interest rate lows, ODVA is left out of the market due to program limitations of offering a refinance loan opportunity for existing homeowners, including our own portfolio. With these low rates, a significant amount of our customer interaction involves requests for a refinance product. Qualified Veterans Mortgage Bonds (QVMB) are tax-free, state general obligation bonds and may not be used to refinance homes. This is the type of money generally used to fund the majority of veteran Home Loans in Oregon. Currently, federal law limits the use of this money to purchase only loans and does not allow loans to be made to veterans who are 25 years past discharge from military service.

## Home Values

As mentioned above, home values have rebounded significantly and have reached pre-crisis levels. This has resulted in a new set of challenges for our program.



ODVA continues to reach out to new third-party originator sources to continue to serve the home financing needs of Oregon veterans in areas that we previously had not reached.

## Sources

With changes in the lending industry brought about by the housing crisis, ODVA is seeking new and additional sources of third-party originators. Because ODVA does not have retail loan officers in the marketplace, we rely on mortgage bankers and mortgage brokers in our communities to provide a supply of loans for our servicing portfolio. Some changes mandated in the 2010 Dodd-Frank Financial Regulatory Reform Bill have shifted loan originations away from the traditional mortgage broker over to mortgage bankers. The ODVA program historically has received 80% of our loan submissions from mortgage brokers, with 20% coming from mortgage bankers. We are now undergoing a transition to attract more submissions from mortgage bankers, with recent volume splits at 70% brokers/30% bankers. Our emphasis in the biennium is to increase originations with mortgage bankers, while maintaining a vibrant business relationship with our mortgage brokers.

## CRITERIA FOR 2019-21 BUDGET DEVELOPMENT

The criteria the Oregon Department of Veterans' Affairs used for the development of the 2019-21 Governor's Budget was based on the department's five-year strategic plan that was developed in 2014. Each budgeting decision was based on whether the proposal met the department's vision, mission, goals and objectives. Only proposals that strongly aligned, supported and advanced the strategic plan were considered.

Within the context of the required budget development guidelines, each proposal was judged by the following criteria:

### Programmatic Criteria

- Will the proposal support one or more of the agencies four goals, objectives and strategies?
- Will the initiative lead to better outcomes for veterans?
- Will the proposal address critical barriers to accessing benefits and resources?

### Operational Cost Criteria

- Will the proposal increase the capacity or quality of current operations?
- Is the proposal responsible management and stewardship of state dollars?
- Does the proposal maintain fiscal integrity and sustainability of the department's programs?
- Does the initiative provide proper resources to produce desired outcomes?

### Overall Criteria

- Will the program leverage other public and private resources?
- Can the outcomes of the program be sustained if state funding is reduced or eliminated?
- Is this a necessary ask to mitigate risk or advance an initiative?
- Does the program develop long-term capacity as well as short-term outcomes?

## STATE-OWNED BUILDINGS AND INFRASTRUCTURE

ODVA owns and is responsible for the maintenance of buildings at three separate locations. A brief description of the buildings, the services provided and recent/planned facility renovations are discussed in the paragraphs below.

### ODVA Building – Salem

This three-story building is the location of ODVA's central hub of operations and administration. It is located in the Capital Mall area of Salem and was built in 1982. The Department's four primary program areas (e.g., Statewide Veteran Services, Aging Veteran Services, Veterans' Loan Program and the Veterans' Home Program) operate out of this location, including the Department's executive leadership team.

In 2017, the third floor of this building underwent a major interior renovation consisting of new flooring, paint and fixtures to satisfy the needs of a new Agency tenant. The Department is also working on the interior renovation of the first floor which is expected to be completed by the end of the current biennium.

For the 2019-2021 biennium, the Department has requested funding (see Policy Option Package 101) to renovate the second floor of this building. The second floor renovation will consist of painting all wall surfaces, new flooring and signage. When feasible and not cost-prohibitive, work that may significantly impact Agency operations will be performed after hours and on weekends.

### Oregon Veterans' Home – Lebanon

The Oregon Veterans' Home located in Lebanon opened in 2014 and provides 24 hour skilled nursing services and memory care to approximately 150 veterans and residents. This site consists of eleven, 14-bed resident Homes interconnected to four neighborhood areas. These buildings are ODVA's newest facility.

In 2018, the Department significantly expanded the off-street parking available to the residents, their family members and care-givers. The Department also requested and received approval from the 2018 Legislature (see Senate Bill 5701) to apply for a USDVA grant to build a storage building to accommodate facility equipment, furniture and personal property of residents. This storage building will be similar in size to the one built in 2017 at The Dalles Veterans Home. In addition, the USDVA grant would allow construction of a single-story multipurpose building (which would include staff offices, training rooms and medical office space for healthcare providers), an activity room for the memory care residents (for enhanced recreational events, special occasions and family gatherings), and allow for upgrading of the Home's HVAC control system (for improved efficiency and reliability).

For the 2019-2021 biennium, no policy option package expenditure requests are being submitted for the Oregon Veterans' Home – Lebanon.

## Oregon Veterans' Home – The Dalles

The Oregon Veterans' Home – The Dalles is a single story building that opened in 1997 and provides 24 hour skilled nursing services and memory care for up to 150 veterans and residents. This facility is the site of Oregon's first Veterans' Home and has been providing skilled nursing and memory care services for over 20 years.

In 2017, the Department completed extensive interior renovations to the entire facility which included all the resident rooms, ancillary areas, office areas and public spaces. An assessment was also performed on the exterior of the facility which identified areas that needed replacement or renovation. As a result, the Department requested and received approval from the 2018 Legislature (see Senate Bill 5701) to apply for a USDVA grant to perform the necessary renovations which will include a new roof, adding two storefront components to create air locks (eliminating a wind tunnel effect down the main corridor), upgrading/replacing two garden areas, replacement of an industrial water heater nearing the end of its service life; and replacing the window sills in resident rooms due to wear and water and UV damage.

For the 2019-2021 biennium, no policy option package expenditure requests are being submitted for the Oregon Veterans' Home – The Dalles.

Additional facility and maintenance related information for all of the Department's buildings is provided in the pages that follow. Building information was submitted to the Capital Projects Advisory Board (CPAB), which accepted the Department's information without any comments. For budget purposes, adjustments were made to the budget documents from the original CPAB submission.

## MAJOR INFORMATION TECHNOLOGY PROJECTS AND INITIATIVES

Since the passage of legislation in 1965, ODVA has been serving Oregon veterans as court-appointed conservators and more recently, as representative payees. When veterans are deemed incompetent by an Oregon county circuit court or the United States Department of Veterans' Affairs (USDVA) to manage their personal finances, the court or USDVA may appoint ODVA to act as Conservator, which includes managing all income and assets on behalf of the veteran. The USDVA may alternatively appoint ODVA to act as a Representative Payee for a veteran, through which ODVA acts as an advocate in a limited capacity and pays bills for these veterans.

Presently, ODVA provides Conservatorship services to 130 clients and Representative Payee services to 140 clients. The systems and processes used to manage these financial affairs are custom designed, labor intensive, and increasingly unsupported

The agency proposes to replace its current conservatorship system to assist the program in meeting statutory deadlines for conservator clients, increase workflow efficiencies and accuracy, meet new conservatorship industry requirements, standards and best practices, increase the number of veterans the program can serve, and reduce the paper-based case records for easy retrieval and record retention. By replacing the current application, the conservatorship program will also be able to sustain operations without the dependency of only one contracted developer.

### Current State

To manage each of the approximate 130 Conservatorship and 140 Representative Payee clients, staff currently utilizes six separate software applications, in addition to the main accounting software. Staff performs all statutorily required tasks such as filing accountings with the courts, paying bills, tracking and managing all assets of the veteran, and ensuring all taxes (both personal and property related) are filed and paid. Staff utilizes the agency's main accounting program, the iSeries AS400, to complete budget work ups, track income and expenses, pay bills, and create accounting transaction statements.

All workflows and deadlines are performed with manual process, enabling missed deadlines, lengthy processing times and an inability to serve additional clients even as the agency has hired additional expert staff to handle caseloads.

### Project Goals

- *Assist the program in meeting statutory deadlines for conservator clients*
- *Increase workflow efficiencies and accuracy*
- *Meet new conservatorship industry requirements, standards and best practices*
- *Increase the number of veterans the program can serve*

- *Reduce the paper-based case records for easy retrieval and record retention.*

The ODVA conservatorship project aligns with strategic direction at many levels of state government:

### **Agency Strategic Framework**

One of the critical areas of focus in ODVA's strategic plan is to:

- Target veteran services by investing in a 21st century veterans' services system and
- Invigorate core operations through integrated information technology, maintaining fiscal integrity and sustainability of the department's program.

## **Governor's Goals, Priorities, and Initiatives**

### **A Healthy and Safe Community**

- The conservatorship system enables the ODVA Conservatorship Program to provide just and accountable management services to protected veterans who would otherwise be at the mercy of unscrupulous, and often, predatory forces within society. This service allows the protected veteran the opportunity to thrive with dignity in a healthy and safe environment.
- Oregon Governor's Executive Order 18-05 Public Records

## **Enterprise Information Resource Management Strategy 2015-2020**

The conservatorship project reflects the EIRMS by implementing guiding principles as part of the project: Business-driven, oversight, iterative progress, innovation, risk tolerance, optimization, adaptability, security, simplify, and measured outcomes.

- *Active participation in IT Strategic Direction*

The conservatorship project is the first ODVA initiative to fully embrace the concept of IT governance at both the enterprise and agency level, consisting of focus of service, value proposition, 10-year plan, and key initiatives.

- *Transportation and Economic Development Information Resource Management Strategic Plan Strategic Goal 2: Modernize Critical Systems*

Technology solutions must be current, supportable, and sustainable to fully support the agency, enterprise, and state strategy and vision. Modernization efforts ensure effective alignment between technology and vision. The ODVA conservatorship project seeks to modernize its 18-year old legacy core business system.

## Veterans' Affairs, Department of

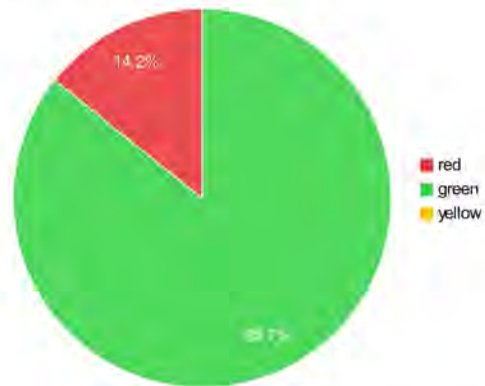
Annual Performance Progress Report

Reporting Year 2018

Published: 9/21/2018 8:29:10 AM

**KPM # Approved Key Performance Measures (KPMs)**

- 1 a. Loan Program- Delinquent Accounts - Percentage of Oregon Department of Veterans' Affairs home loan accounts that are delinquent.
- 1 b. Loan Program- Loan Origination. Increase the loan origination volume to \$35 million or more in new loans per year.
- 2 a. Oregon Veterans Homes - Maintain an occupancy rate of at least 80% for licensed beds in both Veteran Homes.
- 2 b. Oregon Veterans Homes - Maintain below-market veteran private pay rates.
- 3 Veteran Services - Disability Compensation and Pension Benefits - Amount of average U.S. Department of Veterans Affairs (federal VA) disability and pension compensation received per Oregon Veteran who receives those benefits.
- 4 Veteran Services - Power of Attorney (POA) - Number of powers of attorney granted by veterans to veteran service officers and the Department.
- 5 Customer Satisfaction - Percentage of customers rating their satisfaction with the Oregon Department of Veterans' Affairs customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, and availability of information.
- 6 Best Practices - Percent of total applicable best practices met by the Board.



**Performance Summary**

Summary Stats:

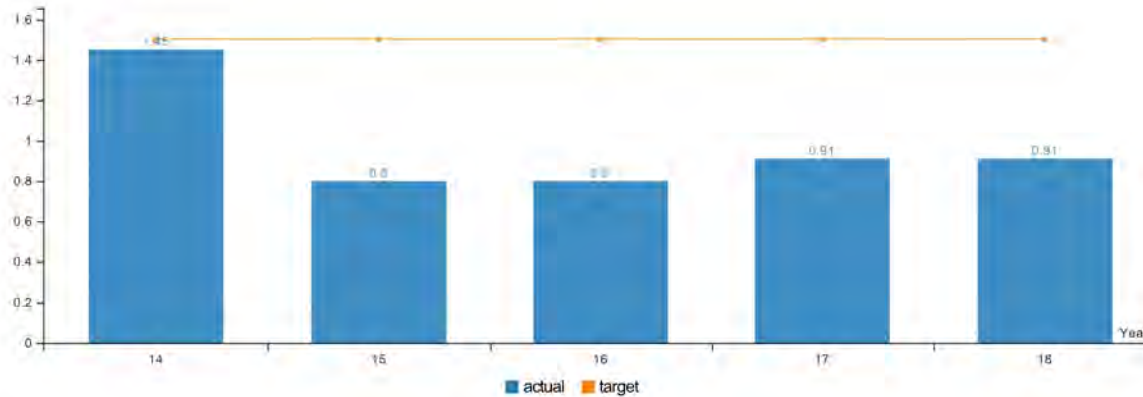
Green	Yellow	Red
= Target to -5%	= Target -5% to -15%	= Target > -15%
85.71%	0%	14.29%



KPM #1 a. Loan Program - Delinquent Accounts - Percentage of Oregon Department of Veterans' Affairs home loan accounts that are delinquent.

Data Collection Period: Jul 01 - Jun 30

\* Upward Trend = negative result



Report Year	2014	2015	2016	2017	2018
<b>Percentage of Oregon Department of Veterans' Affairs home loan accounts that are delinquent</b>					
Actual	1.45%	0.80%	0.80%	0.91%	0.91%
Target	1.50%	1.50%	1.50%	1.50%	1.50%

**How Are We Doing**

This metric measures the percentage of the Department's loan (in units) that are 90 or more days delinquent or in foreclosure. For fiscal year 2018, the Department successfully achieved better results than the Key Performance Measure target.

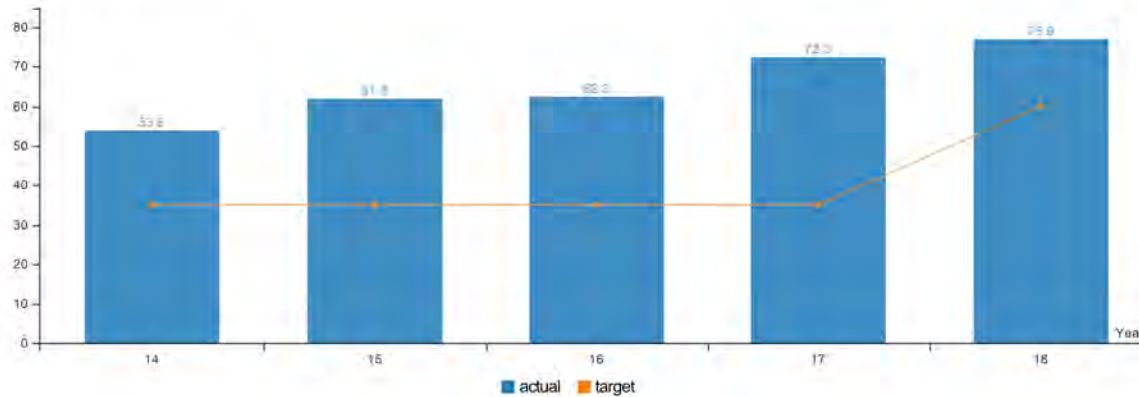
**Factors Affecting Results**

Oregon's strong economy, low unemployment levels and real estate price appreciation helped keep the Department's delinquency levels low. These factors along with prudent loan underwriting and timely contact with borrowers experiencing payment difficulties helped prevent most loan accounts from becoming seriously delinquent during the fiscal year.

KPM #1 b. Loan Program - Loan Origination. Increase the loan origination volume to \$35 million or more in new loans per year.

Data Collection Period: Jul 01 - Jun 30

\* Upward Trend = positive result



Report Year	2014	2015	2016	2017	2018
<b>Loan Origination shown in Millions</b>					
Actual	\$53.80	\$61.80	\$62.30	\$72.30	\$76.90
Target	\$35.00	\$35.00	\$35.00	\$35.00	\$60.00

**How Are We Doing**

The Department has achieved increased loan origination levels for the fifth consecutive year. Fiscal year 2018 results exceeded the Key Performance Measure target and represent the highest level of loan originations since 1997.

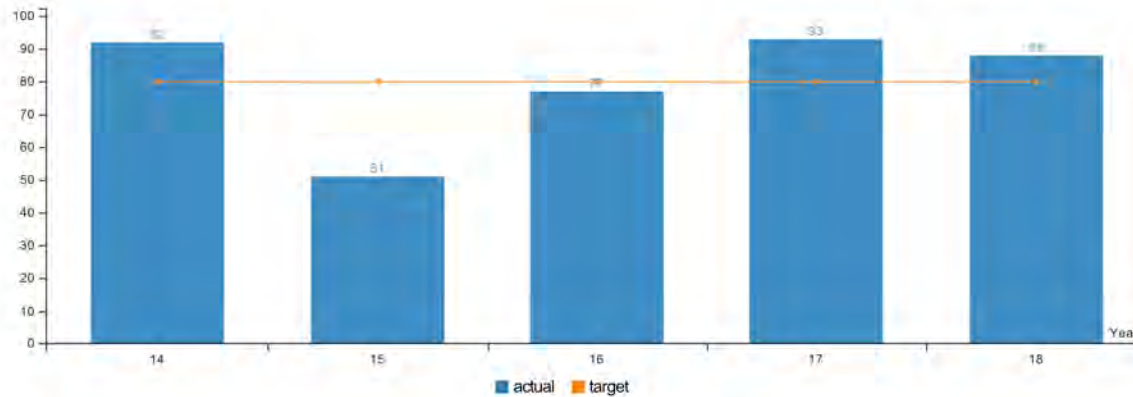
**Factors Affecting Results**

Low interest rate levels, a strong Oregon economy and frequent contact with our lending partners had a positive impact on Department loan originations. Despite achieving increased loan origination levels, home price appreciation and the limited inventory of homes for sale helped prevent even higher levels of loan originations. The Department continues to build new and stronger relationships with third-party originators and the real estate community, enhancing our overall visibility in the marketplace.

KPM #2 a. Oregon Veterans Homes - Maintain an occupancy rate of at least 80% for licensed beds in both Veteran Homes.

Data Collection Period: Jul 01 - Jun 30

\* Upward Trend = positive result



Report Year	2014	2015	2016	2017	2018
<b>Oregon Veterans Homes: Occupancy</b>					
Actual	92%	51%	77%	93%	88%
Target	80%	80%	80%	80%	80%

**How Are We Doing**

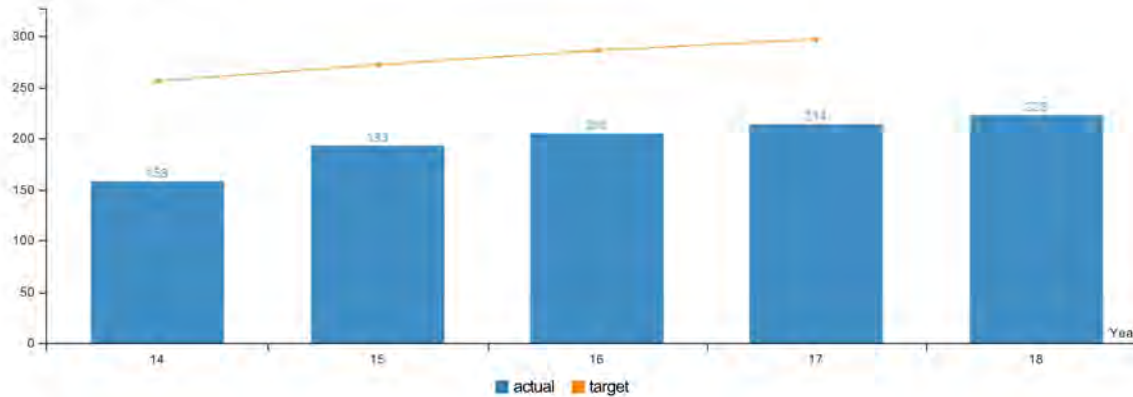
The Oregon Veteran Home in The Dalles has been exceeding the targeted 80% occupancy rate for the past several years and continues to do so. The new Veterans Home in Lebanon has exceeded its fill-up projections and is expected to maintain a census well-above 80% target going forward. However, this past year census was reduced at The Dalles Veteran Home in order to complete an interior building remodel.

**Factors Affecting Results**

While other Skilled Nursing Homes (SNFs) in Oregon are showing occupancy rates in the 60%-65% range, the two Oregon Veteran Homes have been well-above the target of 80% occupancy. Because these homes only admit veterans, their spouses and Gold Star Parents (parents who have lost a child in service to our country), ODVA works with a specific veteran population that is different than civilian long-term care facilities. Both facilities provide high quality care that honors veteran service and is sensitive to military culture and aging issues. Both homes also provide memory care, which is an increasing need in the aging veteran population. Below market private pay rates at the two Veteran Homes also positively impact occupancy levels. We anticipate that occupancy rates will continue to exceed the targets going forward.

KPM #2 b. Oregon Veterans Homes - Maintain below-market veteran private pay rates.  
Data Collection Period: Oct 01 - Sep 30

\* Upward Trend = negative result



Report Year	2014	2015	2016	2017	2018
<b>Oregon Veterans' Homes Private Pay Rates</b>					
Actual	\$158.00	\$193.00	\$205.00	\$214.00	\$223.00
Target	\$256.00	\$272.00	\$286.00	\$297.00	TBD

**How Are We Doing**

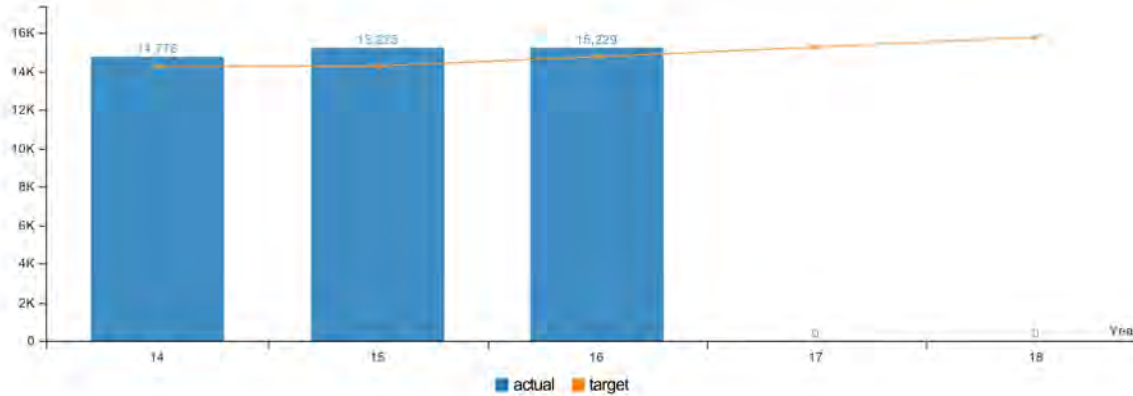
The two Oregon Veteran Homes have historically, and will continue to, offer private pay rates for veterans that are below the median charged by Oregon Skilled Nursing Facilities. By offering this reduced rate veterans who require skilled nursing care (and are not eligible for VA coverage) can have the same access to veteran-specific care in our two homes at a rate lower than the private market in civilian nursing facilities across Oregon.

**Factors Affecting Results**

The factors influencing the veteran private pay rates generally include traditional cost drivers in the long-term care industry, the needs of the veteran requiring care and reimbursement from the Federal VA/Medicare/Medicaid sources. Inherent in these factors are the critical costs of recruiting, training and maintaining a qualified nursing workforce who tend to the medical and social needs of veterans on a 24/7 basis.

KPM #3 Veteran Services - Disability Compensation and Pension Benefits - Amount of average U.S. Department of Veterans Affairs (federal VA) disability and pension compensation received per Oregon Veteran who receives these benefits.  
Data Collection Period: Jul 01 - Jun 30

\* Upward Trend = positive result



Report Year	2014	2015	2016	2017	2018
<b>Disability Compensation and Pension Benefits per Veteran</b>					
Actual	\$14,776.00	\$15,225.00	\$15,229.00	No Data	No Data
Target	\$14,264.00	\$14,281.00	\$14,766.00	\$15,268.00	\$15,787.00

**How Are We Doing**

Federal Fiscal Year 2017 has not been made available yet by the U.S. Department of Veterans Affairs. Federal Fiscal Year 2018 does not end until September 30, 2018 and therefore data is not yet available.

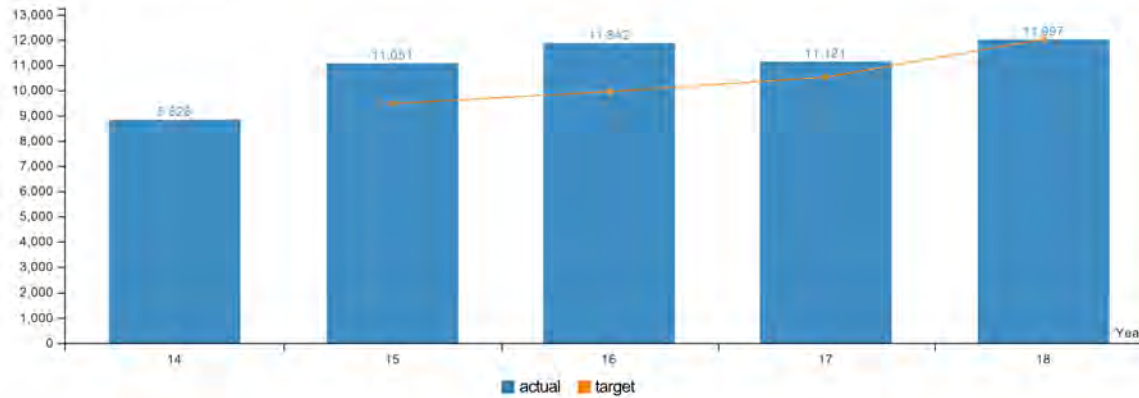
**Factors Affecting Results**

The quality and effectiveness of the Department's claims representation result in the receipt of higher disability compensation and pension dollars by Oregon veterans and their families. The U.S. Department of Veterans Affairs claims rating policies, backlog, and procedural changes may affect compensation received.

KPM #4 Veteran Services - Power of Attorney (POA) - Number of powers of attorney granted by veterans to veteran service officers and the Department.

Data Collection Period: Jul 01 - Jun 30

\* Upward Trend = positive result



Report Year	2014	2015	2016	2017	2018
<b>Number of power of attorneys granted by veterans to veteran service officers and the Department.</b>					
Actual	8,828	11,051	11,842	11,121	11,997
Target	TBD	9,455	9,928	10,500	12,000

**How Are We Doing**

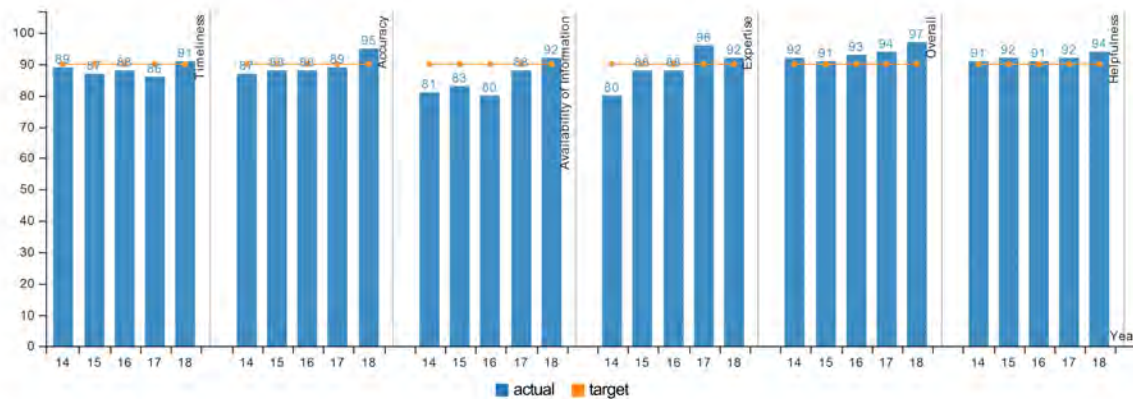
Despite a decline in the total number of Oregon veterans from 331,632 in 2014 to 303,689 in 2017 the number of powers of attorney increased to just under 12,000 in 2018.

**Factors Affecting Results**

Some veterans may not want to be identified as veterans for receiving assistance; some veterans may not meet the criteria for benefits; and others may be entitled to benefits but may not wish to apply.

**KPM #5** Customer Satisfaction - Percentage of customers rating their satisfaction with the Oregon Department of Veterans' Affairs customer service as "good" or "excellent": overall, timeliness, accuracy, helpfulness, expertise, and availability of information.

Data Collection Period: Jul 01 - Jun 30



Report Year	2014	2015	2016	2017	2018
<b>Timeliness</b>					
Actual	89%	87%	88%	86%	91%
Target	90%	90%	90%	90%	90%
<b>Accuracy</b>					
Actual	87%	88%	88%	89%	95%
Target	90%	90%	90%	90%	90%
<b>Availability of Information</b>					
Actual	81%	83%	80%	88%	92%
Target	90%	90%	90%	90%	90%
<b>Expertise</b>					
Actual	80%	88%	88%	96%	92%
Target	90%	90%	90%	90%	90%
<b>Overall</b>					
Actual	92%	91%	93%	94%	97%
Target	90%	90%	90%	90%	90%
<b>Helpfulness</b>					
Actual	91%	92%	91%	92%	94%
Target	90%	90%	90%	90%	90%

How Are We Doing

97% of those surveyed indicated their overall satisfaction with the Department to be excellent or good.

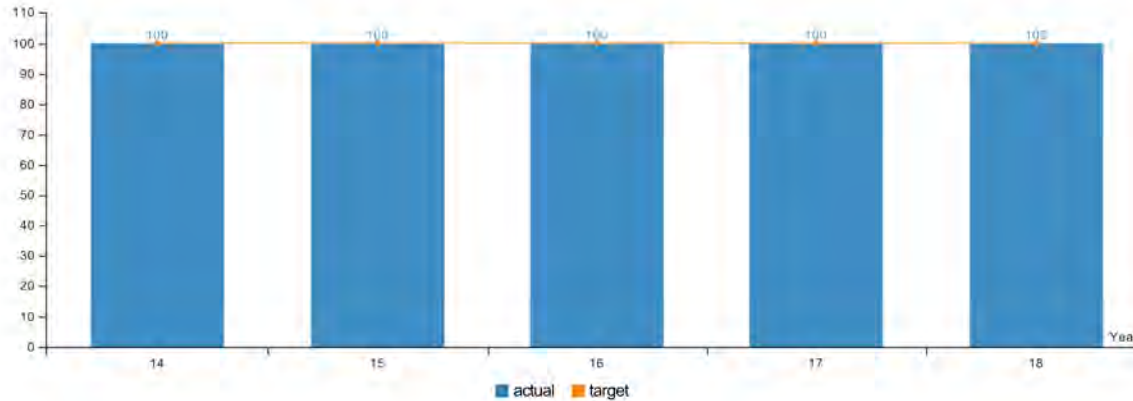
**Factors Affecting Results**

Some customers mistake the Oregon Department of Veterans' Affairs for the U.S. Department of Veterans' Affairs (Federal VA). The Department advocates for veterans to help them obtain their benefits. The Federal VA adjudicates veterans claims for benefits. There is a potential that confusing the Department with the Federal VA could result in lower ratings in cases where the veteran is not pleased with how the federal agency rated their claim for benefits or the length of time it may have taken to receive a decision.



KPM #6 Best Practices - Percent of total applicable best practices met by the Board.  
Data Collection Period: Jul 01 - Jun 30

\* Upward Trend = positive result



Report Year	2014	2015	2016	2017	2018
<b>Percent of total of best practices met by the Committee</b>					
Actual	100%	100%	100%	100%	100%
Target	100%	100%	100%	100%	100%

**How Are We Doing**

The Governor's Advisory Committee meets every one of the best practice assessments that can be applied to the committee and its duties.

**Factors Affecting Results**

Not all the Board and Commissions Best Practices Key Performance Measures apply to the Veterans' Affairs Advisory Committee because it is not a board or a commission with authority over the Department. The Advisory Committee acts in an advisory role and therefore five Best Practice Criteria are not applicable and will not be used to calculate the Department's outcome on this performance measure. The Advisory Committee does meet 100 percent of the 10 Best Practice Criteria that are applicable.

### Summary of 2019-21 Biennium Budget

**Veterans' Affairs, Oregon Dept of  
Veterans' Affairs, Oregon Dept of  
2019-21 Biennium**
**Governor's Budget  
Cross Reference Number: 27400-000-00-00-00000**

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
2017-19 Leg Adopted Budget	96	95.84	524,549,724	8,380,599	14,856,025	113,266,941	500,000	387,546,159	-
2017-19 Emergency Boards	1	0.54	11,004,093	187,515	342,774	3,626,666	6,847,138	-	-
<b>2017-19 Leg Approved Budget</b>	<b>97</b>	<b>96.38</b>	<b>535,553,817</b>	<b>8,568,114</b>	<b>15,198,799</b>	<b>116,893,607</b>	<b>7,347,138</b>	<b>387,546,159</b>	<b>-</b>
<b>2019-21 Base Budget Adjustments</b>									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	-	0.25	915,565	249,315	358,442	307,808	-	-	-
Estimated Cost of Merit Increase	-	-	-	-	-	-	-	-	-
Base Debt Service Adjustment	-	-	(2,534,953)	1,232,117	-	-	-	(3,767,070)	-
Base Nonlimited Adjustment	-	-	25,000,000	-	-	-	-	25,000,000	-
Capital Construction	-	-	-	-	-	-	-	-	-
<b>Subtotal 2019-21 Base Budget</b>	<b>97</b>	<b>96.63</b>	<b>558,934,429</b>	<b>10,049,546</b>	<b>15,557,241</b>	<b>117,201,415</b>	<b>7,347,138</b>	<b>408,779,089</b>	<b>-</b>
<b>Essential Packages</b>									
010 - Non-PICS Pers Svc/Vacancy Factor									
Vacancy Factor (Increase)/Decrease	-	-	309,241	65,461	(78,458)	322,238	-	-	-
Non-PICS Personal Service Increase/(Decrease)	-	-	60,140	14,848	19,396	25,896	-	-	-
<b>Subtotal</b>	<b>-</b>	<b>-</b>	<b>369,381</b>	<b>80,309</b>	<b>(59,062)</b>	<b>348,134</b>	<b>-</b>	<b>-</b>	<b>-</b>
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase - In	-	-	-	-	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	(25,686,705)	-	(1,400,000)	(17,939,567)	(6,347,138)	-	-
<b>Subtotal</b>	<b>-</b>	<b>-</b>	<b>(25,686,705)</b>	<b>-</b>	<b>(1,400,000)</b>	<b>(17,939,567)</b>	<b>(6,347,138)</b>	<b>-</b>	<b>-</b>
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	4,212,386	102,550	389,578	3,720,258	-	-	-
State Gov't & Services Charges Increase/(Decrease)	-	-	416,153	49,544	291,016	75,593	-	-	-

**Summary of 2019-21 Biennium Budget**

**Veterans' Affairs, Oregon Dept of  
Veterans' Affairs, Oregon Dept of  
2019-21 Biennium**

**Governor's Budget  
Cross Reference Number: 27400-000-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
Subtotal	-	-	4,628,539	152,094	680,594	3,795,851	-	-	-
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	0.08	(5,974)	(6,543)	569	-	-	-	-
<b>Subtotal: 2019-21 Current Service Level</b>	<b>97</b>	<b>96.71</b>	<b>538,239,670</b>	<b>10,275,406</b>	<b>14,779,342</b>	<b>103,405,833</b>	<b>1,000,000</b>	<b>408,779,089</b>	<b>-</b>

### Summary of 2019-21 Biennium Budget

**Veterans' Affairs, Oregon Dept of  
Veterans' Affairs, Oregon Dept of  
2019-21 Biennium**
**Governor's Budget  
Cross Reference Number: 27400-000-00-00-00000**

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
<b>Subtotal: 2019-21 Current Service Level</b>	<b>97</b>	<b>96.71</b>	<b>538,239,670</b>	<b>10,275,406</b>	<b>14,779,342</b>	<b>103,405,833</b>	<b>1,000,000</b>	<b>408,779,089</b>	-
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
<b>Modified 2019-21 Current Service Level</b>	<b>97</b>	<b>96.71</b>	<b>538,239,670</b>	<b>10,275,406</b>	<b>14,779,342</b>	<b>103,405,833</b>	<b>1,000,000</b>	<b>408,779,089</b>	-
080 - E-Boards									
080 - May 2018 E-Board	-	-	-	-	-	-	-	-	-
<b>Subtotal Emergency Board Packages</b>	-	-	-	-	-	-	-	-	-
Policy Packages									
081 - September 2018 Emergency Board	-	-	-	-	-	-	-	-	-
090 - Analyst Adjustments	7	6.88	4,998,524	(96,122)	4,460,640	109,006	525,000	-	-
091 - Statewide Adjustment DAS Chgs	-	-	(162,055)	(50,632)	(26,692)	(84,731)	-	-	-
092 - Statewide AG Adjustment	-	-	(40,933)	(1,504)	-	(39,429)	-	-	-
101 - 21st Century Service Delivery	-	-	1,865,000	-	995,000	870,000	-	-	-
102 - Target Veteran Services	2	2.00	460,270	-	232,753	227,517	-	-	-
103 - Mobilize Partnerships	-	-	2,654,708	-	2,654,708	-	-	-	-
<b>Subtotal Policy Packages</b>	<b>9</b>	<b>8.88</b>	<b>9,775,514</b>	<b>(148,258)</b>	<b>8,316,409</b>	<b>1,082,363</b>	<b>525,000</b>	-	-
<b>Total 2019-21 Governor's Budget</b>	<b>106</b>	<b>105.59</b>	<b>548,015,184</b>	<b>10,127,148</b>	<b>23,095,751</b>	<b>104,488,196</b>	<b>1,525,000</b>	<b>408,779,089</b>	-
Percentage Change From 2017-19 Leg Approved Budget	9.28%	9.56%	2.33%	18.20%	51.96%	-10.61%	-79.24%	5.48%	-
Percentage Change From 2019-21 Current Service Level	9.28%	9.18%	1.82%	-1.44%	56.27%	1.05%	52.50%	-	-

### Summary of 2019-21 Biennium Budget

**Veterans' Affairs, Oregon Dept of  
Loan Program  
2019-21 Biennium**
**Governor's Budget  
Cross Reference Number: 27400-001-00-00-00000**

Description	Positions	Full-Time Equivalent (FTE)	ALL FUNDS	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds
2017-19 Leg Adopted Budget	46	46.00	16,417,830	-	-	16,417,830	-	-	-
2017-19 Emergency Boards	-	-	208,976	-	-	208,976	-	-	-
<b>2017-19 Leg Approved Budget</b>	<b>46</b>	<b>46.00</b>	<b>16,626,806</b>	<b>-</b>	<b>-</b>	<b>16,626,806</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>2019-21 Base Budget Adjustments</b>									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	-	(0.21)	163,816	-	-	163,816	-	-	-
Estimated Cost of Merit Increase	-	-	-	-	-	-	-	-	-
Base Debt Service Adjustment	-	-	-	-	-	-	-	-	-
Base Nonlimited Adjustment	-	-	-	-	-	-	-	-	-
Capital Construction	-	-	-	-	-	-	-	-	-
<b>Subtotal 2019-21 Base Budget</b>	<b>46</b>	<b>45.79</b>	<b>16,790,622</b>	<b>-</b>	<b>-</b>	<b>16,790,622</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Essential Packages</b>									
010 - Non-PICS Pers Svc/Vacancy Factor									
Vacancy Factor (Increase)/Decrease	-	-	316,702	-	-	316,702	-	-	-
Non-PICS Personal Service Increase/(Decrease)	-	-	59,910	-	-	59,910	-	-	-
<b>Subtotal</b>	<b>-</b>	<b>-</b>	<b>376,612</b>	<b>-</b>	<b>-</b>	<b>376,612</b>	<b>-</b>	<b>-</b>	<b>-</b>
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase - In	-	-	-	-	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	(1,183,333)	-	-	(1,183,333)	-	-	-
<b>Subtotal</b>	<b>-</b>	<b>-</b>	<b>(1,183,333)</b>	<b>-</b>	<b>-</b>	<b>(1,183,333)</b>	<b>-</b>	<b>-</b>	<b>-</b>
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	261,588	-	-	261,588	-	-	-
State Gov't & Services Charges Increase/(Decrease)	-	-	51,748	-	-	51,748	-	-	-

**Summary of 2019-21 Biennium Budget**

**Veterans' Affairs, Oregon Dept of  
Loan Program  
2019-21 Biennium**

**Governor's Budget  
Cross Reference Number: 27400-001-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
Subtotal	-	-	313,336	-	-	313,336	-	-	-
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	-	-	-	-	-	-	-	-
<b>Subtotal: 2019-21 Current Service Level</b>	<b>46</b>	<b>45.79</b>	<b>16,297,237</b>	<b>-</b>	<b>-</b>	<b>16,297,237</b>	<b>-</b>	<b>-</b>	<b>-</b>

**Summary of 2019-21 Biennium Budget**

**Veterans' Affairs, Oregon Dept of  
Loan Program  
2019-21 Biennium**

**Governor's Budget  
Cross Reference Number: 27400-001-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
<b>Subtotal: 2019-21 Current Service Level</b>	<b>46</b>	<b>45.79</b>	<b>16,297,237</b>	<b>-</b>	<b>-</b>	<b>16,297,237</b>	<b>-</b>	<b>-</b>	<b>-</b>
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
<b>Modified 2019-21 Current Service Level</b>	<b>46</b>	<b>45.79</b>	<b>16,297,237</b>	<b>-</b>	<b>-</b>	<b>16,297,237</b>	<b>-</b>	<b>-</b>	<b>-</b>
080 - E-Boards									
080 - May 2018 E-Board	-	-	-	-	-	-	-	-	-
<b>Subtotal Emergency Board Packages</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Policy Packages									
081 - September 2018 Emergency Board	-	-	-	-	-	-	-	-	-
090 - Analyst Adjustments	-	-	500,000	-	500,000	-	-	-	-
091 - Statewide Adjustment DAS Chgs	-	-	(76,390)	-	-	(76,390)	-	-	-
092 - Statewide AG Adjustment	-	-	(34,450)	-	-	(34,450)	-	-	-
101 - 21st Century Service Delivery	-	-	870,000	-	-	870,000	-	-	-
102 - Target Veteran Services	1	1.00	227,517	-	-	227,517	-	-	-
103 - Mobilize Partnerships	-	-	-	-	-	-	-	-	-
<b>Subtotal Policy Packages</b>	<b>1</b>	<b>1.00</b>	<b>1,486,677</b>	<b>-</b>	<b>500,000</b>	<b>986,677</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total 2019-21 Governor's Budget</b>	<b>47</b>	<b>46.79</b>	<b>17,783,914</b>	<b>-</b>	<b>500,000</b>	<b>17,283,914</b>	<b>-</b>	<b>-</b>	<b>-</b>
Percentage Change From 2017-19 Leg Approved Budget	2.17%	1.72%	6.96%	-	-	3.95%	-	-	-
Percentage Change From 2019-21 Current Service Level	2.17%	2.18%	9.12%	-	-	6.05%	-	-	-

**Summary of 2019-21 Biennium Budget**

**Veterans' Affairs, Oregon Dept of  
Veterans' Services Program  
2019-21 Biennium**

**Governor's Budget  
Cross Reference Number: 27400-002-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
2017-19 Leg Adopted Budget	45	44.84	22,826,924	7,363,276	14,856,025	107,623	500,000	-	-
2017-19 Emergency Boards	1	0.54	1,030,289	187,515	342,774	-	500,000	-	-
<b>2017-19 Leg Approved Budget</b>	<b>46</b>	<b>45.38</b>	<b>23,857,213</b>	<b>7,550,791</b>	<b>15,198,799</b>	<b>107,623</b>	<b>1,000,000</b>	<b>-</b>	<b>-</b>
<b>2019-21 Base Budget Adjustments</b>									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	-	0.46	607,757	249,315	358,442	-	-	-	-
Estimated Cost of Merit Increase			-	-	-	-	-	-	-
Base Debt Service Adjustment			-	-	-	-	-	-	-
Base Nonlimited Adjustment			-	-	-	-	-	-	-
Capital Construction			-	-	-	-	-	-	-
<b>Subtotal 2019-21 Base Budget</b>	<b>46</b>	<b>45.84</b>	<b>24,464,970</b>	<b>7,800,106</b>	<b>15,557,241</b>	<b>107,623</b>	<b>1,000,000</b>	<b>-</b>	<b>-</b>
<b>Essential Packages</b>									
010 - Non-PICS Pers Svc/Vacancy Factor									
Vacancy Factor (Increase)/Decrease	-	-	(7,461)	65,461	(78,458)	5,536	-	-	-
Non-PICS Personal Service Increase/(Decrease)	-	-	(371)	14,848	19,396	(34,615)	-	-	-
<b>Subtotal</b>	<b>-</b>	<b>-</b>	<b>(7,832)</b>	<b>80,309</b>	<b>(59,062)</b>	<b>(29,079)</b>	<b>-</b>	<b>-</b>	<b>-</b>
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase - In	-	-	-	-	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	(1,478,544)	-	(1,400,000)	(78,544)	-	-	-
<b>Subtotal</b>	<b>-</b>	<b>-</b>	<b>(1,478,544)</b>	<b>-</b>	<b>(1,400,000)</b>	<b>(78,544)</b>	<b>-</b>	<b>-</b>	<b>-</b>
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	492,128	102,550	389,578	-	-	-	-
State Gov't & Services Charges Increase/(Decrease)			340,560	49,544	291,016	-	-	-	-



**Summary of 2019-21 Biennium Budget**

**Veterans' Affairs, Oregon Dept of  
Veterans' Services Program  
2019-21 Biennium**

**Governor's Budget  
Cross Reference Number: 27400-002-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
Subtotal	-	-	832,688	152,094	680,594	-	-	-	-
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	(11)	(10.92)	(2,852,999)	(563,137)	(2,289,862)	-	-	-	-
<b>Subtotal: 2019-21 Current Service Level</b>	<b>35</b>	<b>34.92</b>	<b>20,958,283</b>	<b>7,469,372</b>	<b>12,488,911</b>	<b>-</b>	<b>1,000,000</b>	<b>-</b>	<b>-</b>

**Summary of 2019-21 Biennium Budget**

**Veterans' Affairs, Oregon Dept of  
Veterans' Services Program  
2019-21 Biennium**

**Governor's Budget  
Cross Reference Number: 27400-002-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
<b>Subtotal: 2019-21 Current Service Level</b>	<b>35</b>	<b>34.92</b>	<b>20,958,283</b>	<b>7,469,372</b>	<b>12,488,911</b>	<b>-</b>	<b>1,000,000</b>	<b>-</b>	<b>-</b>
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
<b>Modified 2019-21 Current Service Level</b>	<b>35</b>	<b>34.92</b>	<b>20,958,283</b>	<b>7,469,372</b>	<b>12,488,911</b>	<b>-</b>	<b>1,000,000</b>	<b>-</b>	<b>-</b>
080 - E-Boards									
080 - May 2018 E-Board	-	-	-	-	-	-	-	-	-
<b>Subtotal Emergency Board Packages</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Policy Packages									
081 - September 2018 Emergency Board	-	-	-	-	-	-	-	-	-
090 - Analyst Adjustments	7	6.88	4,256,331	(88,315)	3,710,640	109,006	525,000	-	-
091 - Statewide Adjustment DAS Chgs	-	-	(60,224)	(45,210)	(15,014)	-	-	-	-
092 - Statewide AG Adjustment	-	-	-	-	-	-	-	-	-
101 - 21st Century Service Delivery	-	-	237,500	-	237,500	-	-	-	-
102 - Target Veteran Services	-	-	60,000	-	60,000	-	-	-	-
103 - Mobilize Partnerships	-	-	2,654,708	-	2,654,708	-	-	-	-
<b>Subtotal Policy Packages</b>	<b>7</b>	<b>6.88</b>	<b>7,148,315</b>	<b>(133,525)</b>	<b>6,647,834</b>	<b>109,006</b>	<b>525,000</b>	<b>-</b>	<b>-</b>
<b>Total 2019-21 Governor's Budget</b>	<b>42</b>	<b>41.80</b>	<b>28,106,598</b>	<b>7,335,847</b>	<b>19,136,745</b>	<b>109,006</b>	<b>1,525,000</b>	<b>-</b>	<b>-</b>
Percentage Change From 2017-19 Leg Approved Budget	-8.70%	-7.89%	17.81%	-2.85%	25.91%	1.29%	52.50%	-	-
Percentage Change From 2019-21 Current Service Level	20.00%	19.70%	34.11%	-1.79%	53.23%	-	52.50%	-	-

**Summary of 2019-21 Biennium Budget**

**Veterans' Affairs, Oregon Dept of  
Oregon Veterans Home Program  
2019-21 Biennium**

**Governor's Budget  
Cross Reference Number: 27400-003-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
2017-19 Leg Adopted Budget	5	5.00	84,808,811	1,017,323	-	83,791,488	-	-	-
2017-19 Emergency Boards	-	-	-	-	-	-	-	-	-
<b>2017-19 Leg Approved Budget</b>	<b>5</b>	<b>5.00</b>	<b>84,808,811</b>	<b>1,017,323</b>	<b>-</b>	<b>83,791,488</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>2019-21 Base Budget Adjustments</b>									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	-	-	143,992	-	-	143,992	-	-	-
Estimated Cost of Merit Increase	-	-	-	-	-	-	-	-	-
Base Debt Service Adjustment	-	-	1,232,117	1,232,117	-	-	-	-	-
Base Nonlimited Adjustment	-	-	-	-	-	-	-	-	-
Capital Construction	-	-	-	-	-	-	-	-	-
<b>Subtotal 2019-21 Base Budget</b>	<b>5</b>	<b>5.00</b>	<b>86,184,920</b>	<b>2,249,440</b>	<b>-</b>	<b>83,935,480</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Essential Packages</b>									
010 - Non-PICS Pers Svc/Vacancy Factor									
Non-PICS Personal Service Increase/(Decrease)	-	-	601	-	-	601	-	-	-
<b>Subtotal</b>	<b>-</b>	<b>-</b>	<b>601</b>	<b>-</b>	<b>-</b>	<b>601</b>	<b>-</b>	<b>-</b>	<b>-</b>
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase - In	-	-	-	-	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	(310,000)	-	-	(310,000)	-	-	-
<b>Subtotal</b>	<b>-</b>	<b>-</b>	<b>(310,000)</b>	<b>-</b>	<b>-</b>	<b>(310,000)</b>	<b>-</b>	<b>-</b>	<b>-</b>
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	3,458,670	-	-	3,458,670	-	-	-
State Gov't & Services Charges Increase/(Decrease)	-	-	23,845	-	-	23,845	-	-	-
<b>Subtotal</b>	<b>-</b>	<b>-</b>	<b>3,482,515</b>	<b>-</b>	<b>-</b>	<b>3,482,515</b>	<b>-</b>	<b>-</b>	<b>-</b>

**Summary of 2019-21 Biennium Budget**

Veterans' Affairs, Oregon Dept of  
Oregon Veterans Home Program  
2019-21 Biennium

Governor's Budget  
Cross Reference Number: 27400-003-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	-	-	-	-	-	-	-	-
<b>Subtotal: 2019-21 Current Service Level</b>	<b>5</b>	<b>5.00</b>	<b>89,358,036</b>	<b>2,249,440</b>	<b>-</b>	<b>87,108,596</b>	<b>-</b>	<b>-</b>	<b>-</b>

**Summary of 2019-21 Biennium Budget**

**Veterans' Affairs, Oregon Dept of  
Oregon Veterans Home Program  
2019-21 Biennium**

**Governor's Budget  
Cross Reference Number: 27400-003-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
<b>Subtotal: 2019-21 Current Service Level</b>	<b>5</b>	<b>5.00</b>	<b>89,358,036</b>	<b>2,249,440</b>	<b>-</b>	<b>87,108,596</b>	<b>-</b>	<b>-</b>	<b>-</b>
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
<b>Modified 2019-21 Current Service Level</b>	<b>5</b>	<b>5.00</b>	<b>89,358,036</b>	<b>2,249,440</b>	<b>-</b>	<b>87,108,596</b>	<b>-</b>	<b>-</b>	<b>-</b>
080 - E-Boards									
080 - May 2018 E-Board	-	-	-	-	-	-	-	-	-
<b>Subtotal Emergency Board Packages</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Policy Packages									
081 - September 2018 Emergency Board	-	-	-	-	-	-	-	-	-
090 - Analyst Adjustments	-	-	250,000	-	250,000	-	-	-	-
091 - Statewide Adjustment DAS Chgs	-	-	(8,341)	-	-	(8,341)	-	-	-
092 - Statewide AG Adjustment	-	-	(4,979)	-	-	(4,979)	-	-	-
101 - 21st Century Service Delivery	-	-	-	-	-	-	-	-	-
102 - Target Veteran Services	-	-	-	-	-	-	-	-	-
103 - Mobilize Partnerships	-	-	-	-	-	-	-	-	-
<b>Subtotal Policy Packages</b>	<b>-</b>	<b>-</b>	<b>236,680</b>	<b>-</b>	<b>250,000</b>	<b>(13,320)</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total 2019-21 Governor's Budget</b>	<b>5</b>	<b>5.00</b>	<b>89,594,716</b>	<b>2,249,440</b>	<b>250,000</b>	<b>87,095,276</b>	<b>-</b>	<b>-</b>	<b>-</b>
Percentage Change From 2017-19 Leg Approved Budget	-	-	5.64%	121.11%	-	3.94%	-	-	-
Percentage Change From 2019-21 Current Service Level	-	-	0.26%	-	-	-0.02%	-	-	-

**Summary of 2019-21 Biennium Budget**

**Veterans' Affairs, Oregon Dept of  
Aging Veteran Services  
2019-21 Biennium**

**Governor's Budget  
Cross Reference Number: 27400-004-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
2017-19 Leg Adopted Budget	-	-	-	-	-	-	-	-	-
2017-19 Emergency Boards	-	-	-	-	-	-	-	-	-
<b>2017-19 Leg Approved Budget</b>	-	-	-	-	-	-	-	-	-
<b>2019-21 Base Budget Adjustments</b>									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	-	-	-	-	-	-	-	-	-
Estimated Cost of Merit Increase	-	-	-	-	-	-	-	-	-
Base Debt Service Adjustment	-	-	-	-	-	-	-	-	-
Base Nonlimited Adjustment	-	-	-	-	-	-	-	-	-
Capital Construction	-	-	-	-	-	-	-	-	-
<b>Subtotal 2019-21 Base Budget</b>	-	-	-	-	-	-	-	-	-
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase - In	-	-	-	-	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	-	-	-	-	-	-	-
<b>Subtotal</b>	-	-	-	-	-	-	-	-	-
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	11	11.00	2,847,025	556,594	2,290,431	-	-	-	-
<b>Subtotal: 2019-21 Current Service Level</b>	<b>11</b>	<b>11.00</b>	<b>2,847,025</b>	<b>556,594</b>	<b>2,290,431</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

**Summary of 2019-21 Biennium Budget**

**Veterans' Affairs, Oregon Dept of  
Aging Veteran Services  
2019-21 Biennium**

**Governor's Budget  
Cross Reference Number: 27400-004-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
<b>Subtotal: 2019-21 Current Service Level</b>	<b>11</b>	<b>11.00</b>	<b>2,847,025</b>	<b>556,594</b>	<b>2,290,431</b>	-	-	-	-
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
<b>Modified 2019-21 Current Service Level</b>	<b>11</b>	<b>11.00</b>	<b>2,847,025</b>	<b>556,594</b>	<b>2,290,431</b>	-	-	-	-
080 - E-Boards									
080 - May 2018 E-Board	-	-	-	-	-	-	-	-	-
<b>Subtotal Emergency Board Packages</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Policy Packages									
081 - September 2018 Emergency Board	-	-	-	-	-	-	-	-	-
090 - Analyst Adjustments	-	-	(7,807)	(7,807)	-	-	-	-	-
091 - Statewide Adjustment DAS Chgs	-	-	(17,100)	(5,422)	(11,678)	-	-	-	-
092 - Statewide AG Adjustment	-	-	(1,504)	(1,504)	-	-	-	-	-
101 - 21st Century Service Delivery	-	-	757,500	-	757,500	-	-	-	-
102 - Target Veteran Services	1	1.00	172,753	-	172,753	-	-	-	-
103 - Mobilize Partnerships	-	-	-	-	-	-	-	-	-
<b>Subtotal Policy Packages</b>	<b>1</b>	<b>1.00</b>	<b>903,842</b>	<b>(14,733)</b>	<b>918,575</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total 2019-21 Governor's Budget</b>	<b>12</b>	<b>12.00</b>	<b>3,750,867</b>	<b>541,861</b>	<b>3,209,006</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Percentage Change From 2017-19 Leg Approved Budget	-	-	-	-	-	-	-	-	-
Percentage Change From 2019-21 Current Service Level	9.09%	9.09%	31.75%	-2.65%	40.10%	-	-	-	-

**Summary of 2019-21 Biennium Budget**

**Veterans' Affairs, Oregon Dept of  
Nonlimited  
2019-21 Biennium**

**Governor's Budget  
Cross Reference Number: 27400-087-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
2017-19 Leg Adopted Budget	-	-	387,546,159	-	-	-	-	387,546,159	-
2017-19 Emergency Boards	-	-	-	-	-	-	-	-	-
<b>2017-19 Leg Approved Budget</b>	-	-	<b>387,546,159</b>	-	-	-	-	<b>387,546,159</b>	-
<b>2019-21 Base Budget Adjustments</b>									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	-	-	-	-	-	-	-	-	-
Estimated Cost of Merit Increase	-	-	-	-	-	-	-	-	-
Base Debt Service Adjustment	-	-	(3,767,070)	-	-	-	-	(3,767,070)	-
Base Nonlimited Adjustment	-	-	25,000,000	-	-	-	-	25,000,000	-
Capital Construction	-	-	-	-	-	-	-	-	-
<b>Subtotal 2019-21 Base Budget</b>	-	-	<b>408,779,089</b>	-	-	-	-	<b>408,779,089</b>	-
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase - In	-	-	-	-	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	-	-	-	-	-	-	-
<b>Subtotal</b>	-	-	-	-	-	-	-	-	-
030 - Inflation & Price List Adjustments									
Cost of Goods & Services Increase/(Decrease)	-	-	-	-	-	-	-	-	-
<b>Subtotal</b>	-	-	-	-	-	-	-	-	-
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									



**Summary of 2019-21 Biennium Budget**

Veterans' Affairs, Oregon Dept of  
Nonlimited  
2019-21 Biennium

Governor's Budget  
Cross Reference Number: 27400-087-00-00-00000

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
060 - Technical Adjustments	-	-	-	-	-	-	-	-	-
<b>Subtotal: 2019-21 Current Service Level</b>	-	-	408,779,089	-	-	-	-	408,779,089	-

**Summary of 2019-21 Biennium Budget**

**Veterans' Affairs, Oregon Dept of  
Nonlimited  
2019-21 Biennium**

**Governor's Budget  
Cross Reference Number: 27400-087-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
<b>Subtotal: 2019-21 Current Service Level</b>	-	-	408,779,089	-	-	-	-	408,779,089	-
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
<b>Modified 2019-21 Current Service Level</b>	-	-	408,779,089	-	-	-	-	408,779,089	-
080 - E-Boards									
080 - May 2018 E-Board	-	-	-	-	-	-	-	-	-
<b>Subtotal Emergency Board Packages</b>	-	-	-	-	-	-	-	-	-
Policy Packages									
081 - September 2018 Emergency Board	-	-	-	-	-	-	-	-	-
090 - Analyst Adjustments	-	-	-	-	-	-	-	-	-
091 - Statewide Adjustment DAS Chgs	-	-	-	-	-	-	-	-	-
092 - Statewide AG Adjustment	-	-	-	-	-	-	-	-	-
101 - 21st Century Service Delivery	-	-	-	-	-	-	-	-	-
102 - Target Veteran Services	-	-	-	-	-	-	-	-	-
103 - Mobilize Partnerships	-	-	-	-	-	-	-	-	-
<b>Subtotal Policy Packages</b>	-	-	-	-	-	-	-	-	-
<b>Total 2019-21 Governor's Budget</b>	-	-	408,779,089	-	-	-	-	408,779,089	-
Percentage Change From 2017-19 Leg Approved Budget	-	-	5.48%	-	-	-	-	5.48%	-
Percentage Change From 2019-21 Current Service Level	-	-	-	-	-	-	-	-	-

**Summary of 2019-21 Biennium Budget**

**Veterans' Affairs, Oregon Dept of  
Capital Construction  
2019-21 Biennium**

**Governor's Budget  
Cross Reference Number: 27400-089-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
2017-19 Leg Adopted Budget	-	-	12,950,000	-	-	12,950,000	-	-	-
2017-19 Emergency Boards	-	-	9,764,828	-	-	3,417,690	6,347,138	-	-
<b>2017-19 Leg Approved Budget</b>	-	-	<b>22,714,828</b>	-	-	<b>16,367,690</b>	<b>6,347,138</b>	-	-
<b>2019-21 Base Budget Adjustments</b>									
Net Cost of Position Actions									
Administrative Biennialized E-Board, Phase-Out	-	-	-	-	-	-	-	-	-
Estimated Cost of Merit Increase	-	-	-	-	-	-	-	-	-
Base Debt Service Adjustment	-	-	-	-	-	-	-	-	-
Base Nonlimited Adjustment	-	-	-	-	-	-	-	-	-
Capital Construction	-	-	-	-	-	-	-	-	-
<b>Subtotal 2019-21 Base Budget</b>	-	-	<b>22,714,828</b>	-	-	<b>16,367,690</b>	<b>6,347,138</b>	-	-
020 - Phase In / Out Pgm & One-time Cost									
021 - Phase - In	-	-	-	-	-	-	-	-	-
022 - Phase-out Pgm & One-time Costs	-	-	(22,714,828)	-	-	(16,367,690)	(6,347,138)	-	-
<b>Subtotal</b>	-	-	<b>(22,714,828)</b>	-	-	<b>(16,367,690)</b>	<b>(6,347,138)</b>	-	-
040 - Mandated Caseload									
040 - Mandated Caseload	-	-	-	-	-	-	-	-	-
050 - Fundshifts and Revenue Reductions									
050 - Fundshifts	-	-	-	-	-	-	-	-	-
060 - Technical Adjustments									
060 - Technical Adjustments	-	-	-	-	-	-	-	-	-
<b>Subtotal: 2019-21 Current Service Level</b>	-	-	-	-	-	-	-	-	-

**Summary of 2019-21 Biennium Budget**

**Veterans' Affairs, Oregon Dept of  
Capital Construction  
2019-21 Biennium**

**Governor's Budget  
Cross Reference Number: 27400-089-00-00-00000**

<i>Description</i>	<i>Positions</i>	<i>Full-Time Equivalent (FTE)</i>	<i>ALL FUNDS</i>	<i>General Fund</i>	<i>Lottery Funds</i>	<i>Other Funds</i>	<i>Federal Funds</i>	<i>Nonlimited Other Funds</i>	<i>Nonlimited Federal Funds</i>
<b>Subtotal: 2019-21 Current Service Level</b>	-	-	-	-	-	-	-	-	-
070 - Revenue Reductions/Shortfall									
070 - Revenue Shortfalls	-	-	-	-	-	-	-	-	-
<b>Modified 2019-21 Current Service Level</b>	-	-	-	-	-	-	-	-	-
080 - E-Boards									
080 - May 2018 E-Board	-	-	-	-	-	-	-	-	-
<b>Subtotal Emergency Board Packages</b>	-	-	-	-	-	-	-	-	-
Policy Packages									
081 - September 2018 Emergency Board	-	-	-	-	-	-	-	-	-
090 - Analyst Adjustments	-	-	-	-	-	-	-	-	-
091 - Statewide Adjustment DAS Chgs	-	-	-	-	-	-	-	-	-
092 - Statewide AG Adjustment	-	-	-	-	-	-	-	-	-
101 - 21st Century Service Delivery	-	-	-	-	-	-	-	-	-
102 - Target Veteran Services	-	-	-	-	-	-	-	-	-
103 - Mobilize Partnerships	-	-	-	-	-	-	-	-	-
<b>Subtotal Policy Packages</b>	-	-	-	-	-	-	-	-	-
<b>Total 2019-21 Governor's Budget</b>	-	-	-	-	-	-	-	-	-
Percentage Change From 2017-19 Leg Approved Budget	-	-	-100.00%	-	-	-100.00%	-100.00%	-	-
Percentage Change From 2019-21 Current Service Level	-	-	-	-	-	-	-	-	-

**Veterans' Affairs, Oregon Dept of**
**Agency Number: 27400**
**Agencywide Program Unit Summary  
2019-21 Biennium**
**Version: Y - 01 - Governor's Budget**

<b>Summary Cross Reference Number</b>	<b>Cross Reference Description</b>	<b>2015-17 Actuals</b>	<b>2017-19 Leg Adopted Budget</b>	<b>2017-19 Leg Approved Budget</b>	<b>2019-21 Agency Request Budget</b>	<b>2019-21 Governor's Budget</b>	<b>2019-21 Leg. Adopted Audit</b>
001-00-00-00000	<b>Loan Program</b>						
	Lottery Funds	-	-	-	-	500,000	-
	Other Funds	12,160,347	16,417,830	16,626,806	17,419,754	17,283,914	-
	All Funds	12,160,347	16,417,830	16,626,806	17,419,754	17,783,914	-
002-00-00-00000	<b>Veterans' Services Program</b>						
	General Fund	10,335,744	7,363,276	7,550,791	7,706,872	7,335,847	-
	Lottery Funds	-	14,856,025	15,198,799	15,228,619	19,136,745	-
	Other Funds	969,206	107,623	107,623	-	109,006	-
	Federal Funds	100,485	500,000	1,000,000	1,000,000	1,525,000	-
	All Funds	11,405,435	22,826,924	23,857,213	23,935,491	28,106,598	-
003-00-00-00000	<b>Oregon Veterans Home Program</b>						
	General Fund	2,618,937	1,017,323	1,017,323	2,249,440	2,249,440	-
	Lottery Funds	-	-	-	-	250,000	-
	Other Funds	64,195,794	83,791,488	83,791,488	87,133,596	87,095,276	-
	All Funds	66,814,731	84,808,811	84,808,811	89,383,036	89,594,716	-
004-00-00-00000	<b>Aging Veteran Services</b>						
	General Fund	-	-	-	556,594	541,861	-
	Lottery Funds	-	-	-	3,245,684	3,209,006	-
	All Funds	-	-	-	3,802,278	3,750,867	-

 \_\_\_\_\_ Agency Request  
2019-21 Biennium

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 \_\_\_\_\_ Legislatively Adopted  
Agencywide Program Unit Summary - BPR010

**Veterans' Affairs, Oregon Dept of**
**Agency Number: 27400**
**Agencywide Program Unit Summary  
2019-21 Biennium**
**Version: Y - 01 - Governor's Budget**

<b>Summary Cross Reference Number</b>	<b>Cross Reference Description</b>	<b>2015-17 Actuals</b>	<b>2017-19 Leg Adopted Budget</b>	<b>2017-19 Leg Approved Budget</b>	<b>2019-21 Agency Request Budget</b>	<b>2019-21 Governor's Budget</b>	<b>2019-21 Leg. Adopted Audit</b>
087-00-00-00000	Nonlimited						
	Other Funds	235,863,557	387,546,159	387,546,159	408,779,089	408,779,089	-
089-00-00-00000	Capital Construction						
	Other Funds	2,475,976	12,950,000	16,367,690	-	-	-
	Federal Funds	3,302,891	-	6,347,138	-	-	-
	All Funds	5,778,867	12,950,000	22,714,828	-	-	-
<b>TOTAL AGENCY</b>							
	General Fund	12,954,681	8,380,599	8,568,114	10,512,906	10,127,148	-
	Lottery Funds	-	14,856,025	15,198,799	18,474,303	23,095,751	-
	Other Funds	315,664,880	500,813,100	504,439,766	513,332,439	513,267,285	-
	Federal Funds	3,403,376	500,000	7,347,138	1,000,000	1,525,000	-
	All Funds	332,022,937	524,549,724	535,553,817	543,319,648	548,015,184	-

 \_\_\_\_ Agency Request  
2019-21 Biennium

 \_\_\_\_ Governor's Budget  
Page \_\_\_\_\_

 \_\_\_\_ Legislatively Adopted  
Agencywide Program Unit Summary - BPR010

**PROGRAM PRIORITIZATION FOR 2019-21**

Agency Name: Oregon Department of Veterans Affairs																			Agency Number: 27400		
2019-21 Biennium																					
Agency-Wide																					
Agency-Wide Priorities for 2019-21 Biennium																					
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
Priority (ranked with highest priority first)	Agency Initials	Program or Activity Initials	Program Unit/Activity Description	Identify Key Performance Measure(s)	Primary Purpose Program Activity Code	GF	LF	OF	NL-OF	FF	NL-FF	TOTAL FUNDS	Pos.	FTE	New or Enhanced Program (Y/N)	Included as Reduction Option (Y/N)	Legal Req. Code (C, D, FM, FO, S)	Legal Citation	Explain What is Mandatory (Per C, FM, and FO Only)	Comments on Proposed Changes to GBL Included in Agency Request	
Agcy	Prgrm/ Div																				
1	1	ODVA	LS	Loan Services	KPM#1a, KPM#1b	6		3,716,951				\$ 3,716,951	12	12.00	Y	Y	C	Oregon Constitution Article XI-A, ORS 407	Veteran Loan Program funds are Constitutionally restricted and are subject to federal tax law and bond covenants.	See PKG 102 Business Representative Position	
1	1	ODVA	NL	Non Limited Loan Services		6			193,025,000			\$ 193,025,000			N	N	C	Oregon Constitution Article XI-A, ORS 407	Veteran Loan Program funds are Constitutionally restricted and are subject to federal tax law and bond covenants.		
2	1	ODVA	C&A	Statewide Veteran Services	KPM#3, KPM#4	12	5,602,402	4,363,856				\$ 9,966,258	35	34.92	Y	Y		Oregon Constitution Article XI-A, ORS 406		See PKG 101 Building Refresh; PKG 102 Enhance Veteran Services	
3	2	ODVA	AP	Aid Programs Pass-Through to Counties and National Service Orgs.	KPM#3, KPM#4	12	1,996,829	7,643,863		1,000,000		\$ 10,640,692	0	0.00	Y	Y		Oregon Constitution Article XI-A, ORS 406		See PKG 102 Enhance Veteran Services	
4	3	ODVA	PT	Service Delivery Partnerships		12		3,220,900				\$ 3,220,900	0	0.00	N	Y		Oregon Constitution Article XI-A, ORS 406		See PKG 103 Mobilize Partnerships	
5	1	ODVA	VHTD	Veterans Home-The Dalles	KPM#2a, KPM#2b	10		38,304,828				\$ 38,304,828	3	3.00	N	Y	FO	Federal Grant FAL-41-001, ORS 408.360	FAL-41-001 requires a minimum 20 year participation from the closing date of the construction grant. Failure to operate the facility for the required 20 years results in recapture of the grant monies.	See PKG 102 Enhance Veteran Services	
5	2	ODVA	VHL	Veterans Home-Lebanon	KPM#2a, KPM#2b	10		48,828,768				\$ 48,828,768	2	2.00	Y	Y	FO	Federal Grant FAL-41-001, ORS 408.360	FAL-41-001 requires a minimum 20 year participation from the closing date of the construction grant. Failure to operate the facility for the required 20 years results in recapture of the grant monies.	See PKG 102 Enhance Veteran Services	
7	1	ODVA	CS	Conservatorship	KPM#3, KPM#4	12	556,594	2,688,701				\$ 3,245,295	10	10.00	Y	Y		Oregon Constitution Article XI-A, ORS 406		See PKG 101 IT Modernization; PKG 102 Representative Payee Position	
8	2	ODVA	VV	Veteran Volunteer Program		12		283,603				\$ 283,603	1	1.00	Y	Y		Oregon Constitution Article XI-A, ORS 406			
9	3	ODVA	OP	Aging Veteran Outreach Program		12		273,380				\$ 273,380	1	1.00	Y	Y		Oregon Constitution Article XI-A, ORS 406			
10	4	ODVA	EA	Aid Programs Agency Administered	KPM#3, KPM#4	12	107,641					\$ 107,641	0	0.00	Y	Y		Oregon Constitution Article XI-A, ORS 406			
		ODVA	DS	Debt Service		6			215,754,089			\$ 215,754,089			N	N	D	Oregon Constitution Article XI-A, ORS 407	Veteran Loan Program funds are Constitutionally restricted and are subject to federal tax law and bond covenants.		

2017-19

Agency-Wide

107BF23

	ODVA	DS	Debt Service-Lebanon	KPM#2a, KPM#2b	6	287,091													Federal Grant FAI-41-001, ORS 408.360	FAI-41-001 requires a minimum 20 year participation from the closing date of the construction grant. Failure to operate the facility for the required 20 years results in recapture of the grant monies.		
	ODVA	DS	Debt Service-The Dalles	KPM#2a, KPM#2b	6	254,982													Federal Grant FAI-41-001, ORS 408.360	FAI-41-001 requires a minimum 20 year participation from the closing date of the construction grant. Failure to operate the facility for the required 20 years results in recapture of the grant monies.		
	ODVA	DS	Debt Service-3rd Home	KPM#2a, KPM#2b	6	1,707,367								Y	N				Federal Grant FAI-41-001, ORS 408.360	FAI-41-001 requires a minimum 20 year participation from the closing date of the construction grant. Failure to operate the facility for the required 20 years results in recapture of the grant monies.		
	ODVA	DO	Administration & Other Support Services	KPM#1a, KPM#1b	6		5,820,800							17	16.79	N	Y		Oregon Constitution Article XI-A, ORS 407	Veteran Loan Program funds are Constitutionally restricted and are subject to federal tax law and bond covenants.	See PKG-101 IT Modernization and Building Refresh	
	ODVA	FS	Financial Services	KPM#1a, KPM#1b	6		4,025,732							10	10.00	N	Y		Oregon Constitution Article XI-A, ORS 407	Veteran Loan Program funds are Constitutionally restricted and are subject to federal tax law and bond covenants.		
	ODVA	SS	Facilities Services	KPM#1a, KPM#1b	6		3,856,271							8	8.00	N	Y		Oregon Constitution Article XI-A, ORS 407	Veteran Loan Program funds are Constitutionally restricted and are subject to federal tax law and bond covenants.		
						10,512,906	18,474,303	104,553,350	408,779,089	1,000,000	-	\$ 543,319,648	99	98.71								

**7. Primary Purpose Program/Activity Exists**

- 1 Civil Justice
- 2 Community Development
- 3 Consumer Protection
- 4 Administrative Function
- 5 Criminal Justice
- 6 Economic Development
- 7 Education & Skill Development
- 8 Emergency Services
- 9 Environmental Protection
- 10 Public Health
- 11 Recreation, Heritage, or Cultural
- 12 Social Support

**19. Legal Requirement Code**

- C Constitutional
- D Debt Service
- FM Federal - Mandatory
- FO Federal - Optional (once you choose to participate, certain requirements exist)
- S Statutory

Prioritize each program activity for the Agency as a whole

**Document criteria used to prioritize activities:**

Direct benefits/services provided to veterans, their dependents and survivors.  
 Number of veterans, their dependents and survivors served.  
 Type and impact of benefits received (financial, medical, educational, etc.).  
 Impact on Oregon's citizens and ODVA's public stewardship responsibilities.  
 Impact on the credit rating of the State of Oregon.  
 Implementation of Oregon constitutional and statutory authority/intent.  
 Economic impact of services/funding provided and the inherent multiplier effect that occurs throughout Oregon's communities.  
 Impact on state general fund resources.  
 Required administrative and infrastructure related services.



**PROGRAM PRIORITIZATION FOR 2019-21**

Oregon Department of Veterans' Affairs																				Agency Number: 27400	
2019-21 Biennium																					
Loan Program																					
Program/Division Priorities for 2019-21 Biennium																					
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
Priority (ranked with highest priority first)	Agency Initials	Program or Activity Initials	Program Unit/Activity Description	Identify Key Performance Measure(s)	Primary Purpose Program-Activity Code	GF	LF	OF	NL-OF	FF	NL-FF	TOTAL FUNDS	Pos.	FTE	New or Enhanced Program (Y/N)	Included as Reduction Option (Y/N)	Legal Req. Code (C, D, FM, FO, S)	Legal Citation	Explain What is Mandatory (for C, FM, and FO Only)	Comments on Proposed Changes to CSL included in Agency Request	
Agcy	Prgm/Div																				
1	1	ODVA	LS	Loan Services	KPM#1a, KPM#1b	6		3,716,951				\$ 3,716,951	12	12.00	Y	Y	C	Oregon Constitution Article XI-A, ORS 407	Veteran Loan Program funds are Constitutionally restricted and are subject to federal tax law and bond covenants.	See PKG-102 Business Representative Position	
		ODVA	DO	Administration & Other Support Services	KPM#1a, KPM#1b	6		5,820,800				\$ 5,820,800	17	16.79	N	Y	C	Oregon Constitution Article XI-A, ORS 407	Veteran Loan Program funds are Constitutionally restricted and are subject to federal tax law and bond covenants.	See PKG 101 IT Modernization and Building Refresh	
		ODVA	FS	Financial Services	KPM#1a, KPM#1b	6		4,025,732				\$ 4,025,732	10	10.00	N	Y	C	Oregon Constitution Article XI-A, ORS 407	Veteran Loan Program funds are Constitutionally restricted and are subject to federal tax law and bond covenants.		
		ODVA	SS	Facilities Services	KPM#1a, KPM#1b	6		3,856,271				\$ 3,856,271	8	8.00	N	Y	C	Oregon Constitution Article XI-A, ORS 407	Veteran Loan Program funds are Constitutionally restricted and are subject to federal tax law and bond covenants.		
								17,419,754				\$ 17,419,754	47	46.79							

**7. Primary Purpose Program/Activity Exists**

- 1 Civil Justice
- 2 Community Development
- 3 Consumer Protection
- 4 Administrative Function
- 5 Criminal Justice
- 6 Economic Development
- 7 Education & Skill Development
- 8 Emergency Services
- 9 Environmental Protection
- 10 Public Health
- 11 Recreation, Heritage, or Cultural
- 12 Social Support

**19. Legal Requirement Code**

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Within each Program/Division area, prioritize each Budget Program Unit (Activities) by detail budget level in ORBITS

**Document criteria used to prioritize activities:**

- Direct benefits/services provided to veterans, their dependents and survivors.
- Number of veterans, their dependents and survivors served.
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- Impact on the credit rating of the State of Oregon.
- Implementation of Oregon constitutional and statutory authority/intent.
- Economic impact of services/funding provided and the inherent multiplier effect that occurs throughout Oregon's communities.
- Impact on state general fund resources.

- Required administrative and infrastructure related services.

The Loan Program figures shown above include all of the Department's business infrastructure and support costs such as accounting, information services, central office facility expenses, administrative rulemaking and the like.

2017-19

Loan Program

107BF23

**PROGRAM PRIORITIZATION FOR 2019-21**

Oregon Department of Veterans Affairs																			Agency Number: 27400		
2019-21 Biennium																					
Veteran Services																					
Program/Division Priorities for 2019-21 Biennium																					
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
Priority (ranked with highest priority first)	Agency Initials	Program or Activity Initials	Program Unit/Activity Description	Identify Key Performance Measure(s)	Primary Purpose Program - Activity Code	GF	LF	OF	NL-OF	FF	NL-FF	TOTAL FUNDS	Pos.	FTE	New or Enhanced Program (Y/N)	Included as Reduction Option (Y/N)	Legal Req. Code (C, D, FM, FO, S)	Legal Citation	Explain What is Mandatory (for C, FM, and FO Only)	Comments on Proposed Changes to CSL Included in Agency Request	
Acy	Prgm/ Div																				
2	1	ODVA	C&A	Statewide Veteran Services	KPM#3, KPM#4	12	5,602,402	4,363,856				\$ 9,966,258	35	34.92	Y	Y		Oregon Constitution Article XI-A, ORS 406		See PKG 101 Building Refresh, PKG 102 Enhance Veteran Services	
3	2	ODVA	AP	Aid Programs Pass-Through to Counties and National Service Orgs.	KPM#3, KPM#4	12	1,996,829	7,643,863		1,000,000		\$ 10,640,692	0	0.00	Y	Y		Oregon Constitution Article XI-A, ORS 406		See PKG 102 Enhance Veteran Services	
4	3	ODVA	PT	Service Delivery Partnerships		12		3,220,900				\$ 3,220,900	0	0.00	N	Y		Oregon Constitution Article XI-A, ORS 406		See PKG 103 Mobilize Partnerships	
10	4	ODVA	EA	Aid Programs Agency Administered	KPM#3, KPM#4	12	107,641					\$ 107,641	0	0.00	Y	Y		Oregon Constitution Article XI-A, ORS 406			
												\$ -									
												\$ -									
												\$ -									
							7,706,872	15,228,619	-	-	1,000,000	-	\$ 23,935,491	35	34.92						

**7. Primary Purpose Program/Activity Exists**

- 1 Civil Justice
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Within each Program/Division area, prioritize each Budget Program Unit (Activities)  
by detail budget level in ORBITS

**Document criteria used to prioritize activities:**

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- Economic impact of services/funding provided and the inherent multiplier effect  
that occurs throughout Oregon's communities.
- Impact on state general fund resources.
- Required administrative and infrastructure related services.

The figures shown above include do not include any of the Department's business infrastructure and support costs such as accounting, information services, central office facility costs, administrative rulemaking and the like. These costs are included in the Loan Program's figures.

**PROGRAM PRIORITIZATION FOR 2019-21**

Veterans Affairs		Agency Number: 27400																			
2019-21 Biennium		Program/Division Priorities for 2019-21 Biennium																			
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
Priority (ranked with highest priority first)	Agency Initials	Program or Activity Initials	Program Unit/Activity Description	Identify Key Performance Measure(s)	Primary Purpose Program-Activity Code	GF	LF	OF	NL-OF	FF	NL-FF	TOTAL FUNDS	Pos.	FTE	New or Enhanced Program (Y/N)	Included as Reduction Option (Y/N)	Legal Req. Code (C, D, FM, S)	Legal Citation	Explain What is Mandatory for C, F, M, and FO Only	Comments on Proposed Changes to CSL Attached in Agency Request	
Agcy	Prgr	Div																			
5	1	OOVA	VHTD	Veterans Home-The Dalles	KPMK2a, KPMK2b	10		38,304,828				\$ 38,304,828	3	3.00	N	Y	FO	Federal Grant FAI-41-001, ORS 408.360	FAI-41-001 requires a minimum 20 year participation from the closing date of the construction grant. Failure to operate the facility for the required 20 years results in recapture of the grant monies.	See PKG 102 Enhance Veteran Services	
5	1	OOVA	VHL	Veterans Home-Lebanon	KPMK2a, KPMK2b	10		48,828,788				\$ 48,828,788	2	2.00	Y	Y	FO	Federal Grant FAI-41-001, ORS 408.360	FAI-41-001 requires a minimum 20 year participation from the closing date of the construction grant. Failure to operate the facility for the required 20 years results in recapture of the grant monies.	See PKG 102 Enhance Veteran Services	
		OOVA	DS	Debt Service-Lebanon	KPMK2a, KPMK2b	6	287,001					\$ 287,001			N	N	D	Federal Grant FAI-41-001, ORS 408.360	FAI-41-001 requires a minimum 20 year participation from the closing date of the construction grant. Failure to operate the facility for the required 20 years results in recapture of the grant monies.		
		OOVA	DS	Debt Service-The Dalles	KPMK2a, KPMK2b	6	254,982					\$ 254,982			N	N	D	Federal Grant FAI-41-001, ORS 408.360	FAI-41-001 requires a minimum 20 year participation from the closing date of the construction grant. Failure to operate the facility for the required 20 years results in recapture of the grant monies.		
		OOVA	DS	Debt Service-3rd Home	KPMK2a, KPMK2b	6	1,707,367					\$ 1,707,367			Y	N	D	Federal Grant FAI-41-001, ORS 408.360	FAI-41-001 requires a minimum 20 year participation from the closing date of the construction grant. Failure to operate the facility for the required 20 years results in recapture of the grant monies.		
								2,249,440				\$ 87,133,596									
												\$ 89,383,036		5	5.00						

**7. Primary Purpose Program/Activity Exists**

- 1 Civil Justice
- 2 Community Development
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- 4 Administrative Function
- 5 Criminal Justice
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Within each Program/Division area, prioritize each Budget Program Unit (Activities) by detail budget level in ORBITS

**Document criteria used to prioritize activities:**

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 Economic impact of services/funding provided and the inherent multiplier effect that occurs throughout Oregon's communities.  
 Impact on state general fund resources.  
 Required administrative and infrastructure related services.

**PROGRAM PRIORITIZATION FOR 2019-21**

Oregon Department of Veterans' Affairs																			Agency Number: 27400		
2019-21 Biennium																					
Aging Veteran Services																					
Program/Division Priorities for 2019-21 Biennium																					
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
Priority (ranked with highest priority first)	Agency Initials	Program or Activity Initials	Program Unit/Activity Description	Identify Key Performance Measure(s)	Primary Purpose Program - Activity Code	GF	LF	OF	NL-OF	FF	NL-FF	TOTAL FUNDS	Pos.	FTE	New or Enhanced Program (Y/N)	Included as Reduction Option (Y/N)	Legal Req. Code (C, D, FM, FO, S)	Legal Citation	Explain What is Mandatory (for C, FM, and FO Only)	Comments on Proposed Changes to CSL Included in Agency Request	
Agcy	Prgm/ Div																				
7	1	ODVA	CS	Conservatorship	KPM#3, KPM#4	12	556,594	2,688,701				\$ 3,245,295	10	10.00	Y	Y		Oregon Constitution Article XI-A, ORS 406		See PKG 101 IT Modernization, PKG 102 Representative Payee Position	
8	2	ODVA	VV	Veteran Volunteer Program		12		283,603				\$ 283,603	1	1.00	Y	Y		Oregon Constitution Article XI-A, ORS 406			
9	3	ODVA	OP	Aging Veteran Outreach Program		12		273,380				\$ 273,380	1	1.00	Y	Y		Oregon Constitution Article XI-A, ORS 406			
												\$ -									
												\$ -									
							556,594	3,245,684	-	-	-	\$ 3,802,278	12	12.00							

**7. Primary Purpose Program/Activity Exists**

- 1 Civil Justice
- 2 Community Development
- 3 Consumer Protection
- 4 Administrative Function
- 5 Criminal Justice
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- 7 Education & Skill Development
- 8 Emergency Services
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- 10 Public Health
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- D Debt Service
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Within each Program/Division area, prioritize each Budget Program Unit (Activities) by detail budget level in ORBITS

**Document criteria used to prioritize activities:**

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- Implementation of Oregon constitutional and statutory authority/intent.
- Economic impact of services/funding provided and the inherent multiplier effect that occurs throughout Oregon's communities.
- Impact on state general fund resources.

- Required administrative and infrastructure related services.

The figures shown above include do not include any of the Department's business infrastructure and support costs such as accounting, information services, central office facility costs, administrative rulemaking and the like. These costs are included in the Loan Program's figures.

**PROGRAM PRIORITIZATION FOR 2019-21**

Oregon Department of Veterans Affairs																						Agency Number: 27400	
2019-21 Biennium																							
Debt Service Non-Limited																							
Program/Division Priorities for 2019-21 Biennium																							
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22		
Priority (ranked with highest priority first)	Agency Initials	Program or Activity Initials	Program Unit/Activity Description	Identify Key Performance Measure(s)	Primary Purpose Program-Activity Code	GF	LF	OF	NL-OF	FF	NL-FF	TOTAL FUNDS	Pos.	FTE	New or Enhanced Program (Y/N)	Included as Reduction Option (Y/N)	Legal Req. Code (C, D, FM, FO, S)	Legal Citation	Explain What is Mandatory (for C, FM, and FO Only)	Comments on Proposed Changes to CSL Included in Agency Request			
Acy	Prgm/Div																						
1	1	ODVA	NL	Non Limited Loan Services		6			193,025,000			\$ 193,025,000			N	N	C	Oregon Constitution Article XI-A, ORS 407	Veteran Loan Program funds are Constitutionally restricted and are subject to federal tax law and bond covenants.				
		ODVA	DS	Debt Service		6			215,754,089			\$ 215,754,089			N	N	D	Oregon Constitution Article XI-A, ORS 407	Veteran Loan Program funds are Constitutionally restricted and are subject to federal tax law and bond covenants.				
												\$ -											
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												\$ -											
												\$ -											
												\$ -											
												\$ -											
												\$ 215,754,089		0	0.00								

**7. Primary Purpose Program/Activity Exists**

- 1 Civil Justice
- 2 Community Development
- 3 Consumer Protection
- 4 Administrative Function
- 5 Criminal Justice
- 6 Economic Development
- 7 Education & Skill Development
- 8 Emergency Services
- 9 Environmental Protection
- 10 Public Health
- 11 Recreation, Heritage, or Cultural
- 12 Social Support

**19. Legal Requirement Code**

- C Constitutional
- D Debt Service
- FM Federal - Mandatory
- FO Federal - Optional (once you choose to participate, certain requirements exist)
- S Statutory

Within each Program/Division area, prioritize each Budget Program Unit (Activities) by detail budget level in ORBITS

**Document criteria used to prioritize activities:**

- Direct benefits/services provided to veterans, their dependents and survivors.
- Number of veterans, their dependents and survivors served.
- Type and impact of benefits received (financial, medical, educational, etc.).
- Impact on Oregon's citizens and ODVA's public stewardship responsibilities.
- Impact on the credit rating of the State of Oregon.
- Implementation of Oregon constitutional and statutory authority/intent.
- Economic impact of services/funding provided and the inherent multiplier effect that occurs throughout Oregon's communities.
- Impact on state general fund resources.
- Required administrative and infrastructure related services.

### **5% & 10% REDUCTION OPTIONS (ORS 291.216)**

ACTIVITY OR PROGRAM (WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)	DESCRIBE REDUCTION (DESCRIBE THE EFFECTS OF THIS REDUCTION. INCLUDE POSITIONS AND FTE IN 2019-21 AND 2021-23)	AMOUNT AND FUND TYPE (GF, LF, OF, FF. IDENTIFY REVENUE SOURCE FOR OF, FF)	RANK AND JUSTIFICATION (RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED)
1. Reduce Highly Rural Transportation Grant Program (Special Payments)	This action would reduce the amount of the federal VA grant monies provided to highly rural counties for purposes of medical transportation to veterans. Reductions to pass-through funding would result in less medical trips provided to veterans. Ten eligible Oregon counties receive \$100,000 each in a biennium would be reduced by \$5,000 per county. The State provides no matching funds for this grant.	\$50,000 FF	
First 5% FF Reduction Increment		<u>\$50,000 FF</u>	
1. Reduce Highly Rural Transportation Grant Program (Special Payments)	This action would reduce the amount of the federal VA grant monies provided to highly rural counties for purposes of medical transportation to veterans. Reductions to pass-through funding would result in less medical trips provided to veterans. Ten eligible Oregon counties receive \$100,000 each in a biennium would be reduced by \$5,000 per county. The State provides no matching funds for this grant.	\$50,000 FF	
Second 5% FF Reduction Increment		<u>\$50,000 FF</u>	
10% FF Reduction		<u>\$100,000 FF</u>	

### **5% & 10% REDUCTION OPTIONS (ORS 291.216)**

ACTIVITY OR PROGRAM (WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)	DESCRIBE REDUCTION (DESCRIBE THE EFFECTS OF THIS REDUCTION. INCLUDE POSITIONS AND FTE IN 2019-21 AND 2021-23)	AMOUNT AND FUND TYPE (GF, LF, OF, FF. IDENTIFY REVENUE SOURCE FOR OF, FF)	RANK AND JUSTIFICATION (RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED)
1. Reduce Distribution to Counties (CVSO)	This action would weaken the statewide network of veteran service officers and result in fewer federal dollars flowing into the state.	\$93,709 GF	
2. Reduce Distribution to National Service Organizations.	This action would weaken the statewide network of veteran service officers and result in fewer federal dollars flowing into the state.	\$6,132 GF	
3. Eliminate Emergency Assistance	Eliminates amount available to veterans in crisis needing gap financing to avoid homelessness, unemployment and other emergencies.	\$107,641 GF	
4. Reduce 1.00 FTE (Statewide Veteran Service Officer position)	This action would weaken the statewide network of veteran service officers and result in fewer federal dollars flowing into the state.	\$152,482 GF	
5. Reduce Veteran Services Program (Services and Supplies)	Reduces already underfunded services and supplies, increasing unsustainable subsidy from Loan Program.	\$13,505 GF	
6. Reduce Aging Veteran Services Program (Conservatorship)	This action would reduce one Trust Officer Assistant to part-time, weakening the already understaffed program and resulting in slower response times to Oregon's most vulnerable veteran population. Impact would be on personal services (.1757 FTE).	<u>\$27,830 GF</u>	
First 5% GF Reduction Increment		<u>\$401,299 GF</u>	
1. Reduce Distribution to Counties (CVSO)	This action would weaken the statewide network of veteran service officers and result in fewer federal dollars flowing into the state.	\$93,709 GF	
2. Reduce Distribution to National Service Organizations	This action would weaken the statewide network of veteran service officers and result in fewer federal dollars flowing into the state.	\$6,132 GF	
3. Reduce 1.80 FTE (Statewide Veteran Service Officer positions)	This action would weaken the statewide network of veteran service officers and result in fewer federal dollars flowing into the state.	\$273,628 GF	
6. Reduce Aging Veteran Services Program (Conservatorship)	This action would reduce one Trust Officer Assistant to part-time, weakening the already understaffed program and resulting in slower response times to Oregon's most vulnerable veteran population.	<u>\$27,830 GF</u>	

**5% & 10% REDUCTION OPTIONS (ORS 291.216)**

	Impact would be on personal services (.1757 FTE).		
Second 5% GF Reduction Increment		<u>\$401,299 GF</u>	
Total 10% GF Reduction		<u>\$802,598 GF</u>	



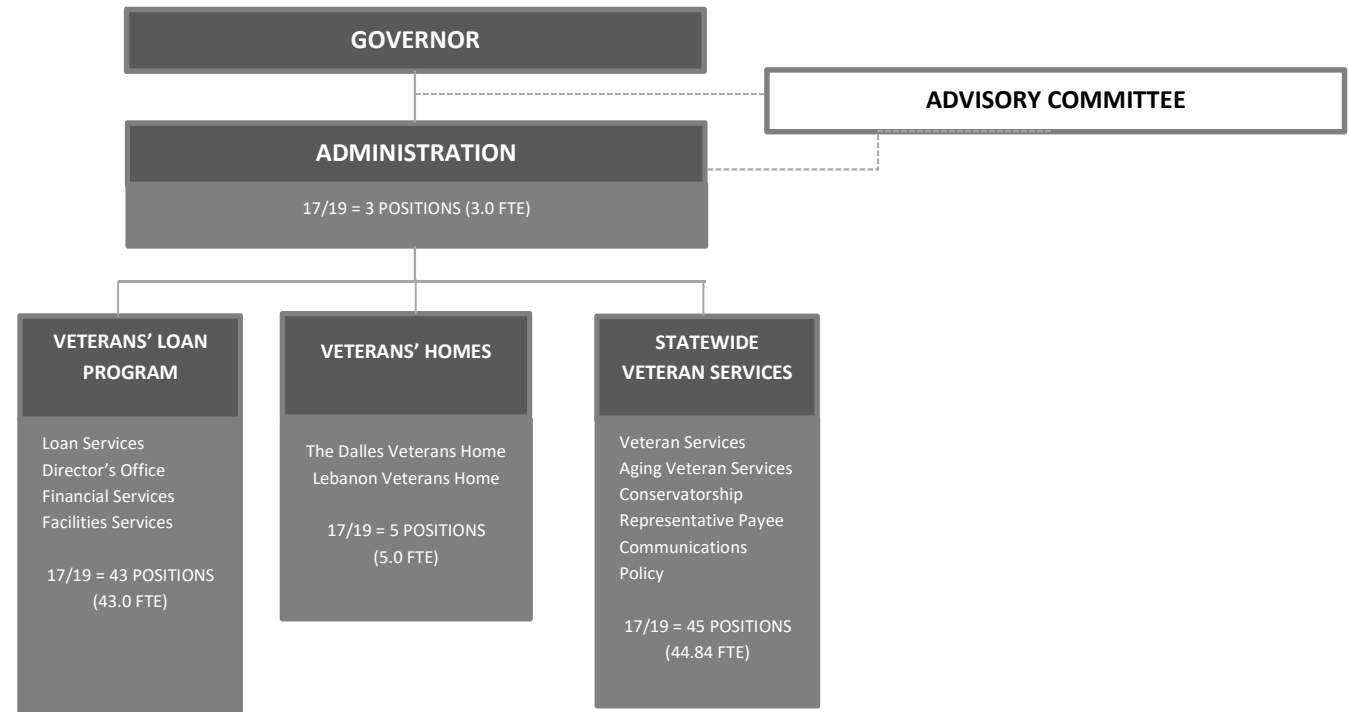
### **5% & 10% REDUCTION OPTIONS (ORS 291.216)**

ACTIVITY OR PROGRAM (WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)	DESCRIBE REDUCTION (DESCRIBE THE EFFECTS OF THIS REDUCTION. INCLUDE POSITIONS AND FTE IN 2019-21 AND 2021-23)	AMOUNT AND FUND TYPE (GF, LF, OF, FF. IDENTIFY REVENUE SOURCE FOR OF, FF)	RANK AND JUSTIFICATION (RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED)
1. Reduce Distribution to Counties (CVSO)	This action would weaken the statewide network of veteran service officers and result in fewer federal dollars flowing into the state.	\$358,325 LF	
2. Reduce Distribution to National Service Organizations.	This action would weaken the statewide network of veteran service officers and result in fewer federal dollars flowing into the state.	\$6,132 LF	
3. Reduce Veteran Services Grant Program	Reduces amount available to non-profit and community partners serving veterans and their families with unique and innovative programs.	\$259,989 LF	
4. Reduce Aging Veteran Services Outreach Program	This action would reduce to part-time a new agency program outreach program intended to identify and serve veterans who are not currently receiving federal VA benefits. Impact would be on personal services (1 position .5 FTE) and services and supplies.	<u>\$114,522 LF</u>	
First 5% GF Reduction Increment		<u>\$738,968 LF</u>	
1. Reduce Distribution to Counties (CVSO)	This action would weaken the statewide network of veteran service officers and result in fewer federal dollars flowing into the state.	\$358,325 LF	
2. Reduce Distribution to National Service Organizations	This action would weaken the statewide network of veteran service officers and result in fewer federal dollars flowing into the state.	\$6,132 LF	
3. Reduce Veteran Services Grant Program	Reduces amount available to non-profit and community partners serving veterans and their families with unique and innovative programs.	\$259,989 LF	
4. Eliminate Aging Veteran Services Outreach Program	This action would eliminate a new agency program outreach program intended to identify and serve veterans who are not currently receiving federal VA benefits. Impact would be on personal services (1 position .5 FTE) and services and supplies.	<u>\$114,522 LF</u>	
Second 5% GF Reduction Increment		<u>\$738,968 LF</u>	
Total 10% GF Reduction		<u>\$1,477,936 LF</u>	

### **5% & 10% REDUCTION OPTIONS (ORS 291.216)**

ACTIVITY OR PROGRAM (WHICH PROGRAM OR ACTIVITY WILL NOT BE UNDERTAKEN)	DESCRIBE REDUCTION (DESCRIBE THE EFFECTS OF THIS REDUCTION. INCLUDE POSITIONS AND FTE IN 2019-21 AND 2021-23)	AMOUNT AND FUND TYPE (GF, LF, OF, FF. IDENTIFY REVENUE SOURCE FOR OF, FF)	RANK AND JUSTIFICATION (RANK THE ACTIVITIES OR PROGRAMS NOT UNDERTAKEN IN ORDER OF LOWEST COST FOR BENEFIT OBTAINED)
1. Reduce Veterans' Home Loan Program (Services and Supplies)	This action would hamper efforts to service portfolio, make loans and react to changes in the real estate market.	\$ 814,862 OF	
2. Reduce Veterans' Home Program (Services and Supplies)	This action would restrict the number residents who could be provided skilled nursing care at the Oregon Veterans' Homes.	\$ 4,355,430 OF	
First 5% OF Reduction Increment		<u>\$ 5,170,292 OF</u>	
1. Reduce Veterans' Home Loan Program	This action would hamper efforts to service portfolio, make loans and react to changes in the real estate market (4 positions, 4.00 FTE).	\$ 596,003 OF	
2. Reduce Veterans' Home Loan Program (Services and Supplies)	This action would hamper efforts to service portfolio, make loans and react to changes in the real estate market.	\$ 218,859 OF	
3. Reduce Veterans' Home Program (Services and Supplies)	This action would restrict the number residents who could be provided skilled nursing care at the Oregon Veterans' Homes.	\$ 4,355,430 OF	
Second 5% OF Reduction Increment		<u>\$ 5,170,292 OF</u>	
10% OF Reduction		<u>\$10,340,584 OF</u>	

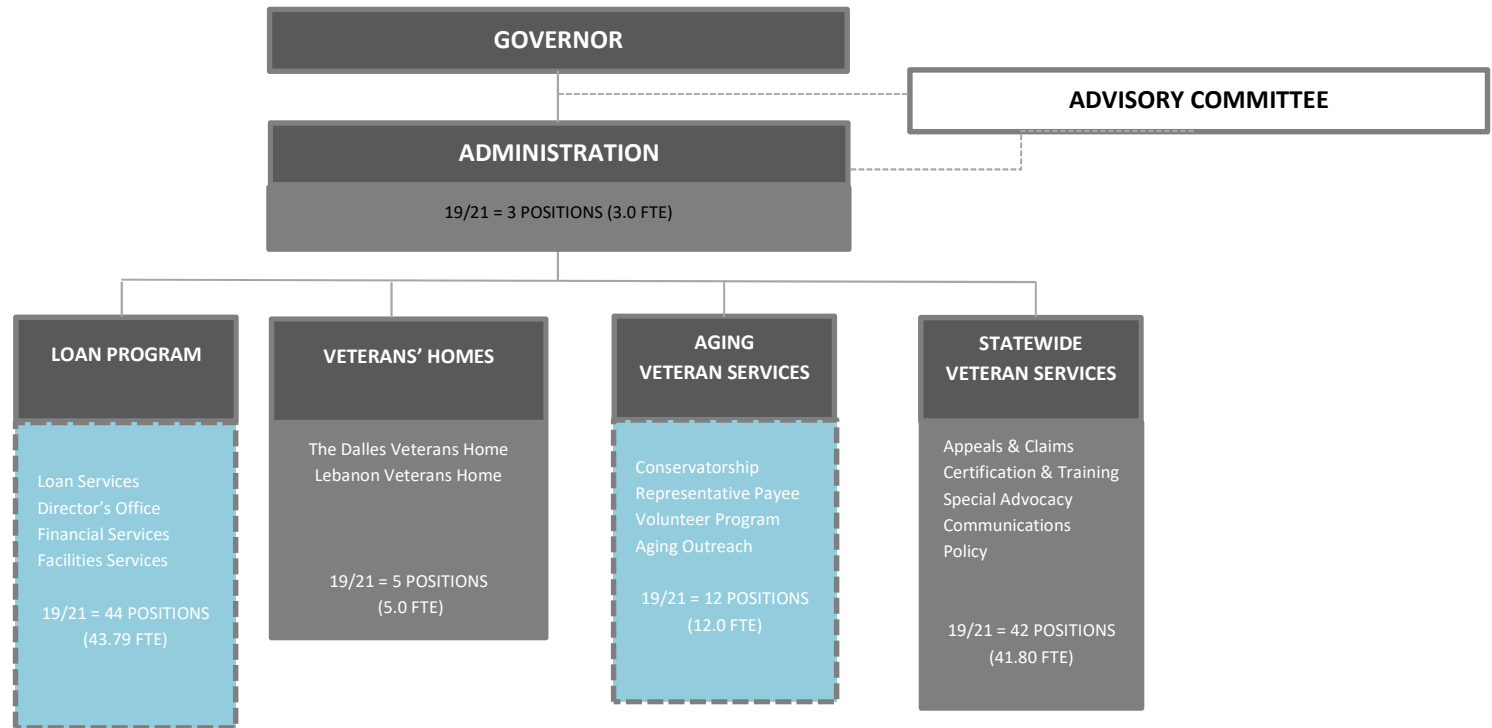
## 2017-19 AGENCY ORGANIZATION CHART



Total 2017-19 Agency Positions  
96 Positions  
(95.84 FTE)

\*As of July 1, 2017

## 2019-21 AGENCY ORGANIZATION CHART



**1 New Position (1.0 FTE)**

Program Analyst 3  
Package 102

**1 New Position (1.0 FTE)**

Admin. Specialist 2  
Package 102

**7 New Position (6.88 FTE)**

Program Analyst 3 (3.0 FTE)  
Internal Auditor 3 (0.88 FTE)  
Compliance Specialist 1 (1.0 FTE)  
Education Specialist 1 (1.0 FTE)  
Ops. & Policy Analyst 4 (1.0 FTE)  
Package 090

Total 2019-21 Agency Positions  
106 Positions  
(105.59 FTE)

## REVENUE FORECAST NARRATIVE

### Total Estimated Revenues

Projected revenues supporting the Oregon Department of Veterans' Affairs (ODVA) programs during the 2019-2021 biennium are expected to consist of Other Fund, Lottery Fund, General Fund and Federal Fund monies. The vast majority of these revenues consist of Other Funds with smaller portions of program funding coming from General Funds, Lottery Funds and Federal Funds. The Veterans' Loan Program is expected to primarily derive its revenue from Other Fund sources. The Veterans' Home Program is also expected to primarily derive its funding for operations from Other Funds, but would also utilize Other Funds and Federal Funds for any significant construction or improvements. The Statewide Veteran Services Program revenue sources consist of a combination of General Fund, Lottery Fund and Federal Fund monies; and the Aging Veteran Services Program revenue sources consist of a combination of General Funds and Lottery Funds.

### Primary Other Fund Revenue Sources

ODVA has a number of individual Other Fund revenue sources, but the four largest and most significant revenue sources are:

#### **Veteran Loan Repayments (supports the Veterans' Home Loan Program)**

These revenues consist of payments received by ODVA from loan and contract borrowers repaying their home loans. There are no required matching funds involved and the revenues are used for the support of the Veterans' Home Loan program. Article XI-A of the Oregon Constitution, applicable federal tax laws, and bond-related covenants, place restrictions on the use of these Department's funds and do not permit these monies to be used for general government purposes. The Oregon War Veterans' Fund, a constitutionally-dedicated fund, receives nearly all of the Department's revenues except for General Fund monies, Lottery Fund monies and the Veterans' Home revenues. Article XI-A of the Oregon Constitution permits monies held in the Oregon War Veterans' Fund, subject to applicable federal tax and bond covenant restrictions, to be used for the following purposes:

- Making home loans to veterans
- Payment of debt service on State of Oregon Veterans' Bonds
- Aiding war veterans' organizations in connection with their programs of service to war veterans
- Training service officers appointed by the counties to give aid, as provided by law, to veterans and their dependents and survivors
- Aiding the counties in connection with programs of service to war veterans
- The duties of the Director of Veterans' Affairs as conservator of the estates of Federal VA beneficiaries

- The duties of the Director of Veterans' Affairs in providing services to war veterans, their dependents and survivors
- The payment of the Department's administrative expenses

The primary factors involved with estimating this revenue source are the projected levels of unemployment (and underemployment) in the State, household income levels, the availability of housing stock, real estate values and borrowers that have negative equity in their homes as a result of the Great Recession. These trends have improved in recent years resulting in lower levels of delinquencies, foreclosures and write-offs in ODVA's loan portfolio. Projected revenue is affected by a number of factors including: the size of the loan portfolio, anticipated prepayment levels, loans originated, delinquent and non-performing loan levels. These revenues are used to support the Veterans' Home Loan Program. The projected trend on this revenue source through 2023 is expected to be modestly higher than current levels.

#### **Dedicated Fund General Obligation Bond Proceeds (supports the Veterans' Home Loan Program)**

General obligation bond proceeds as a revenue source consists of monies received by ODVA from its sale of State of Oregon, general obligation bonds (and any interim draws from short-term revolving lines of credit as appropriate) to provide funding for making below-market rate veteran home loans. There are no required matching funds involved and the proceeds are used to support the Veterans' Home Loan program. The general limits on the use of these funds include making home loans to veterans, payment of debt service on State of Oregon Veterans' Bonds, and selected ancillary costs associated with bond issuance.

The primary factors involved with estimating this revenue source are the impact on demand for veteran home loans due to economic uncertainties, employment, availability of housing stock, industry accepted underwriting criteria, and mortgage-related federal regulations. Loans funded by ODVA have increased in recent years and future loan demand will directly affect the dollar amount of bonds issued. Projected revenues take into account a number of factors, including: projected loan demand, amount of bonds that can be refunded, size and number of draws from the revolving lines of credit, and market interest rates. These revenues are used to support the Veterans' Home Loan Program. The projected trend on this revenue source projected through 2023 is expected to increase compared to current levels.

#### **Charges for Services (supports the Veterans' Home Loan Program, and the Veterans' Home Program and the Aging Veteran Services Program)**

Charges for services as a revenue source consists of monies received by ODVA from individuals or entities in exchange for specific services provided. For example, the Veterans' Loan Program receives monies for processing a transfer of ownership of a property, processing of an NSF check from a borrower, or monies arising from a loan origination fee charged to a borrower. The Veterans' Home Program receives monies from private parties, Medicaid, Medicare and the United States Department of Veterans' Affairs for providing daily skilled nursing care. The Aging Veteran Services Program provides

Conservatorship and Representative Payee services in which a modest fee is charged. There are no required matching fund requirements on this revenue source.

The primary factors involved with projecting this revenue source are estimated loan transactions for the Veterans' Home Loan Program; census levels and census mix at the Veterans' Homes along with the impact of long-term care of federal and state health care initiatives on the Veterans' Home Program; and the number of accounts and dollars managed for the Aging Veterans' Services Program. The revenues received are used to support their respective program areas, as appropriate. The projected trend for this revenue source through 2023 is expected to be modestly higher.

#### **Interest and Investment Income (supports the Veterans' Home Loan and Veterans' Home Programs)**

Interest and investment income as a revenue source consists of monies received from invested program monies. There are no required matching funds. Earnings from the Oregon War Veterans' Fund are used to support the Veterans' Home Loan program and earnings from the Oregon Veterans' Home Account are used to support the Veterans' Home program. The Office of the Oregon State Treasury manages these investments and earnings vary, depending on the type of investments and the rate of return.

The primary factors involved with estimating this revenue source are the external interest rate environment and federal programs or policies designed to influence these rates. Projected revenues take into account a number of factors, including: projected interest rate levels, the amount of monies that can be invested and the length of time monies can be invested. These revenues are used to support both the Veterans' Home Loan Program and the Veterans' Home Program as appropriate. The projected trend on this revenue source projected out through 2023 is expected to be modestly higher than in recent years because the Federal Reserve has indicated it anticipates increasing short-term interest rates over the next several years.

#### **Lottery Fund Revenue Source (Primarily supports the Statewide Veteran Services Program and the Aging Veteran Services Program)**

With the passage of Ballot Measure 96 in 2016, 1.5% of net State Lottery proceeds are now deposited into a constitutionally dedicated Veterans Services Fund to provide services for the benefit of veterans. The June 2018 Economic Forecast projects that approximately \$20.9 million and \$21.1 million will be deposited into the constitutionally dedicated Veteran Services Fund in the 2017-2019 biennium and 2019-2021 biennium respectively. There are no matching fund requirements to utilize these revenues.

Funds allocated to ODVA from the constitutionally dedicated Veteran Services Fund are used to primarily support the services and activities of the Statewide Veteran Services Program and the Aging Veteran Services Program.

A primary factor involved with estimating this revenue source is the volatile nature of these revenues. Projected Lottery revenues are provided in the quarterly economic forecasts produced by the Oregon Office of Economic Analysis and are influenced by employment levels, general economic strength, the impact of

alternative non-State affiliated gaming opportunities, etc. The projected trend of this revenue source through 2023 is expected to be modestly higher than current levels.

#### **Federal Fund Revenue Source (supports the Statewide Veterans Services Program and the Veterans Home Program on Major Construction/Improvement Projects)**

ODVA currently receives two primary sources of Federal Fund revenues arising from grants approved and funded by the USDVA. The first source of Federal Fund revenues relates to providing grant funds passed through to 10 highly rural counties to assist veterans in meeting their medical transportation needs. These federal revenues are included and tracked within the Statewide Veteran Services Program. The second primary source of Federal Fund revenue ODVA periodically receives relates to USDVA funding approved for construction/improvement projects at the Oregon's Veterans Homes.

Both sources of Federal Fund revenues can only be used for the approved purpose of the grant funding received. There is no State match required on the rural transportation grant funds but there is a 35% State match required for the USDVA approved construction/improvement projects at the Oregon Veteran Homes.

The primary factor surrounding revenue estimates for this source of funds relates to the ongoing continuity of these USDVA grant programs. The rural transportation grants are projected to be renewed each year at the current allowed funding levels. USDVA approved construction/improvement projects qualifying for grant funding are expected to occur periodically but not necessarily each biennium with the estimated funding levels determined based on the expected cost and scope of the projects.

#### **Proposed Changes in Revenue Sources or Fees**

None.

#### **Proposals for New Legislation**

"Housekeeping Bills" only.



**DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE**

**Veterans' Affairs, Oregon Dept of  
2019-21 Biennium**
**Agency Number: 27400  
Cross Reference Number: 27400-000-00-00-00000**

<i>Source</i>	2015-17 Actuals	2017-19 Leg Adopted Budget	2017-19 Leg Approved Budget	2019-21 Agency Request Budget	2019-21 Governor's Budget	2019-21 Leg. Adopted Audit
<b>Lottery Funds</b>						
Transfer In Lottery Proceeds	-	-	-	3,694,961	-	-
Tsfr From Administrative Svcs	-	14,856,025	15,198,799	14,779,342	23,095,751	-
<b>Total Lottery Funds</b>	<b>-</b>	<b>\$14,856,025</b>	<b>\$15,198,799</b>	<b>\$18,474,303</b>	<b>\$23,095,751</b>	<b>-</b>
<b>Other Funds</b>						
Charges for Services	-	85,446,166	85,446,166	96,146,163	96,146,163	-
Admin and Service Charges	70,447,794	1,218,547	1,218,547	1,264,852	1,800,556	-
Rents and Royalties	200	-	-	-	-	-
General Fund Obligation Bonds	-	13,260,000	13,260,000	-	-	-
Interest Income	225,761	150,000	150,000	150,000	150,000	-
Other Revenues	163,961	100,000	100,000	100,000	100,000	-
Transfer In - Intrafund	19,636,706	19,740,757	23,367,423	17,304,902	17,413,908	-
Transfer Out - Intrafund	(3,750,000)	-	(3,417,690)	-	(109,006)	-
<b>Total Other Funds</b>	<b>\$86,724,422</b>	<b>\$119,915,470</b>	<b>\$120,124,446</b>	<b>\$114,965,917</b>	<b>\$115,501,621</b>	<b>-</b>
<b>Federal Funds</b>						
Federal Funds	4,397,354	500,000	7,347,138	1,000,000	1,525,000	-
Transfer to Counties	(900,000)	-	-	-	-	-
<b>Total Federal Funds</b>	<b>\$3,497,354</b>	<b>\$500,000</b>	<b>\$7,347,138</b>	<b>\$1,000,000</b>	<b>\$1,525,000</b>	<b>-</b>
<b>Nonlimited Other Funds</b>						
Business Lic and Fees	144,000	150,000	150,000	150,000	150,000	-
Non-business Lic. and Fees	46,245	60,000	60,000	60,000	60,000	-
Charges for Services	1,416,264	2,500,000	2,500,000	2,500,000	2,500,000	-
Admin and Service Charges	-	2,000,000	2,000,000	2,000,000	2,000,000	-
Rents and Royalties	960,028	1,500,000	1,500,000	1,500,000	1,500,000	-
Dedicated Fund Oblig Bonds	133,602,554	240,000,000	240,000,000	245,000,000	245,000,000	-
<hr/> <div style="display: flex; justify-content: space-between;"> <span>____ Agency Request 2019-21 Biennium</span> <span>____ Governor's Budget Page _____</span> <span>____ Legislatively Adopted Detail of LF, OF, and FF Revenues - BPR012</span> </div>						

**DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE**
**Veterans' Affairs, Oregon Dept of  
2019-21 Biennium**
**Agency Number: 27400**
**Cross Reference Number: 27400-000-00-00-00000**

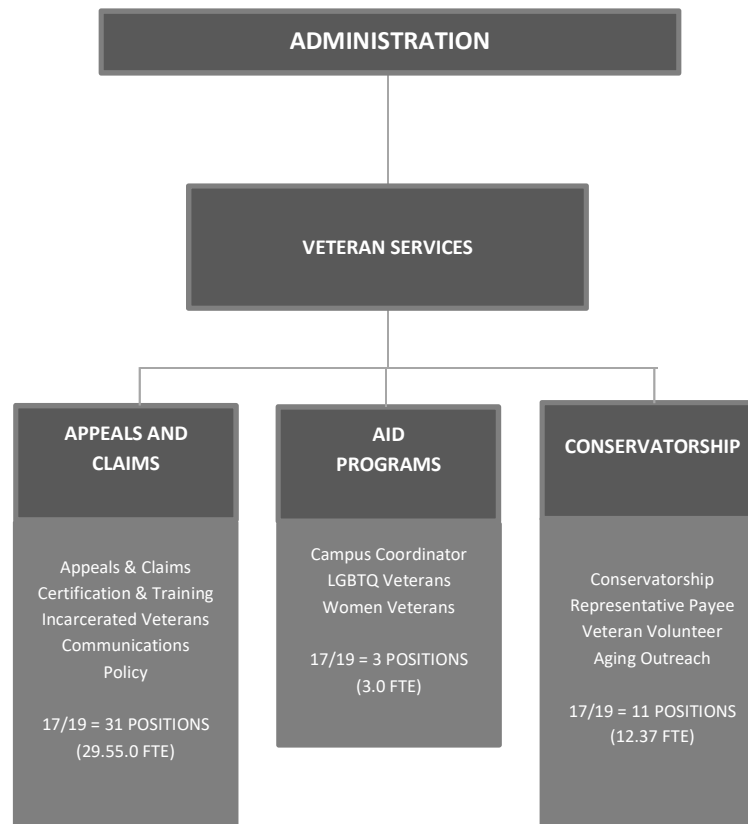
<b>Source</b>	<b>2015-17 Actuals</b>	<b>2017-19 Leg Adopted Budget</b>	<b>2017-19 Leg Approved Budget</b>	<b>2019-21 Agency Request Budget</b>	<b>2019-21 Governor's Budget</b>	<b>2019-21 Leg. Adopted Audit</b>
<b>Nonlimited Other Funds</b>						
Interest Income	24,177,733	53,000,000	53,000,000	53,000,000	53,000,000	-
Sales Income	-	10,000	10,000	10,000	10,000	-
Donations	421,879	600,000	600,000	600,000	600,000	-
Veterans Loan Repayments	80,309,971	86,000,000	86,000,000	95,000,000	95,000,000	-
Insurance Premiums	693,347	-	-	-	-	-
Other Revenues	132,217	1,000,000	1,000,000	1,000,000	1,000,000	-
Transfer In - Intrafund	90,453,034	219,521,159	219,521,159	215,754,089	215,754,089	-
Tsfr From Transportation, Dept	205,270	209,447	209,447	260,069	260,069	-
Transfer Out - Intrafund	(106,339,740)	(239,261,916)	(239,470,892)	(233,058,991)	(233,058,991)	-
<b>Total Nonlimited Other Funds</b>	<b>\$226,222,802</b>	<b>\$367,288,690</b>	<b>\$367,079,714</b>	<b>\$383,775,167</b>	<b>\$383,775,167</b>	<b>-</b>

 \_\_\_\_ Agency Request  
2019-21 Biennium

 \_\_\_\_ Governor's Budget  
Page \_\_\_\_

 \_\_\_\_ Legislatively Adopted  
Detail of LF, OF, and FF Revenues - BPR012

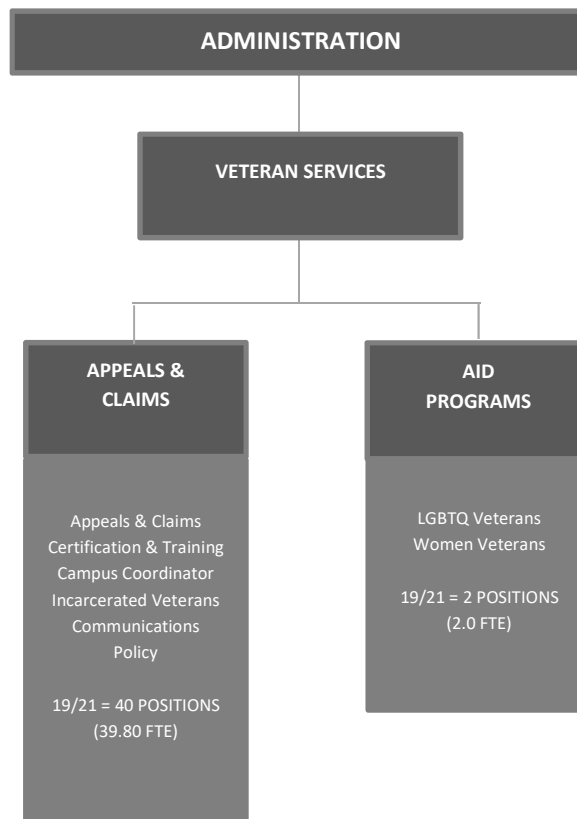
## 2017-19 VETERAN SERVICES PROGRAM ORGANIZATION CHART



Total 2017-19 Veteran Services Program Positions  
45 Positions  
(44.84 FTE)

\*As of July 1, 2017

## 2019-21 VETERAN SERVICES PROGRAM ORGANIZATION CHART



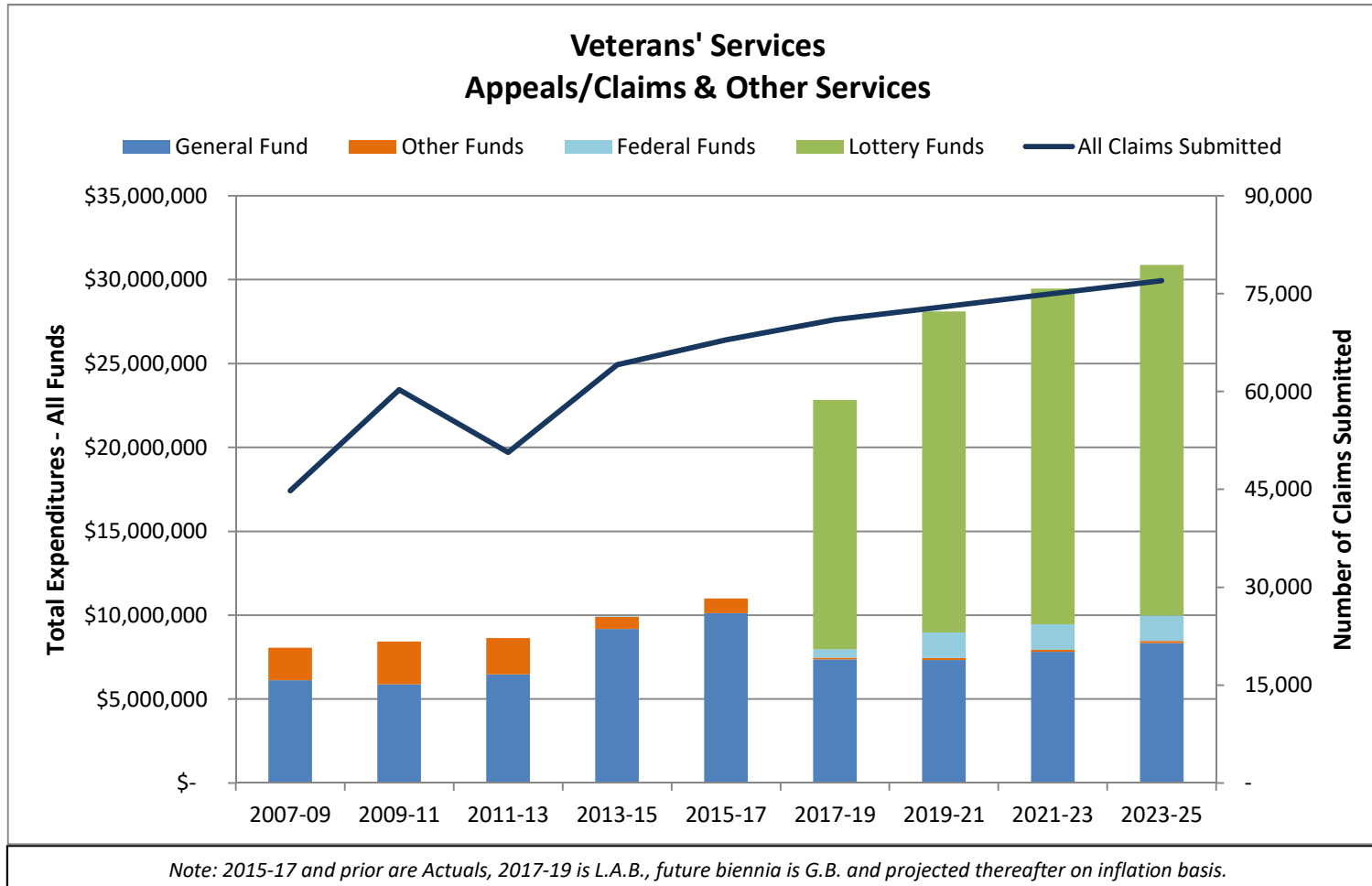
Total 2019-21 Veteran Services Program Positions  
42 Positions  
(41.80 FTE)

**7 New Position (6.88 FTE)**  
 Program Analyst 3 (3.0 FTE)  
 Internal Auditor 3 (0.88 FTE)  
 Compliance Specialist 1 (1.0 FTE)  
 Education Specialist 1 (1.0 FTE)  
 Ops. & Policy Analyst 4 (1.0 FTE)  
 Package 090

## VETERAN SERVICES EXECUTIVE SUMMARY

Focus Area: Thriving Statewide Economy

Program Contact: Sheronne Blasi / 503-373-2249



Note 1: The United States Department of Veterans Affairs announced on October 13, 2009 that hairy cell Leukemia, B-Cell Leukemia, Parkinson's disease and ischemic heart disease were being added to the presumptive list of diseases, recognized by the VA, to be related to exposure to herbicides during Vietnam service. In addition to the new presumptive conditions the court readdressed Nehmer and determined that additional compensation could be awarded on certain Agent Orange ratings.

These announcements caused an influx of claims beginning from the end of 2009 to 2012 from Oregon Vietnam veterans and Vietnam veterans nationwide. These claims peaked in 2011 and claims submission returned to normal rates in 2012.

Note 2: Lottery Funds were a result of voter-passage of Measure 96 in November 2016.

Note 3: Beginning with the 2019-21 biennium, the budget for Conservatorship was moved to Aging Veteran Services. Historical budget amounts remain presented in Veteran Services.

## Program Overview

The Veteran Services Program is responsible for providing advocacy and benefits to veterans, their dependents, and survivors. The program provides benefits counseling, claims and appellate representation, certification and training for counties and national service organizations, emergency financial assistance, and other service delivery partnerships across the state. The division is the front line for all veteran benefits, ensuring that veterans obtain all the benefits to which they are entitled as a result of their military service.

## Program Funding Request

The budget proposal for the next three biennia is as follows:

<u>Biennium</u>	<u>General Funds</u>	<u>Lottery Funds</u>	<u>Other Funds</u>	<u>Federal Funds</u>	<u>Total Funds</u>
<b>2019-2021</b>	\$ 7,335,847	\$ 19,136,745	\$ 109,006	\$ 1,525,000	\$ 28,106,598
<b>2021-2023</b>	\$ 7,821,480	\$ 19,998,855	\$ 113,475	\$ 1,525,000	\$ 29,458,811
<b>2023-2025</b>	\$ 8,339,262	\$ 20,899,804	\$ 118,128	\$ 1,525,000	\$ 30,882,194

The 2019-21 Governor's Budget proposal was developed in conjunction with the department's strategic plan, which emphasizes coordination and partnership with federal, tribal, state and local agencies as well as community partners.

## Program Description

The Veteran Services Program encompasses the following major program areas:

### Statewide Veteran Services

**Appeals and Claims** - The United States Department of Veterans Affairs (Federal VA) benefit system is a legal system. In order to qualify for benefits, veterans must file a claim with the United States proving they are eligible for these benefits through the submission of legal, military and medical evidence.

ODVA employs federally accredited and state certified Veteran Service Officers (VSO's) located in Salem and Portland, who are subject matter experts in Federal VA law (Chapter 38 United States Code and Chapter 38 Code of Federal Regulations) and are allowed to represent veterans who grant the VSO a power of attorney. These VSO's represent veterans, their dependents, and survivors before the Federal VA in their claims and appeals. With its County Veteran Service Officer and National Service Officer partners, ODVA provides claims advocacy, certification and representation to Oregon's 303,000 veterans, resulting in more than 25,000 new claims filed in fiscal years 2017 and 2018.

Statewide Veteran Services submits all claims under ODVA's power of attorney for 36 counties and state VSO's to the Federal VA. This division provides claims quality assurance and liaisons with the Federal VA. This office also represents veterans on county and ODVA claims during various stages of appeals, and handles sensitive claims on a statewide basis.

The office also establishes statewide veteran provider partnerships to leverage community and government resources that serve veterans.

Cost drivers for the program are based on the demand for services, which is anticipated to continue to increase in the next 20 years as the more than 30,000 Oregonians who have served in Iraq and Afghanistan seek their benefits and as the 120,000 Vietnam veterans in Oregon retire and begin seeking benefits for their combat wounds for the first time in more than 40 years.

**Training, Certification and Outreach** - ODVA is responsible for the training, certification, and accreditation of all county and state veteran service officers. The agency holds initial onsite training for all new veteran service officers, one annual conference and will be developing online learning. Training is conducted on the latest Federal VA legal, medical and process information.

ODVA trains and accredits veteran service officers (VSO) to file defensible claims for disability, benefit and pension compensation on behalf of veterans. Claims are filed through ODVA's power of attorney (POA) or a national service organization's POA, as the claims are legal documents reviewed and adjudicated by the U.S. Department of Veterans' Affairs.

It takes approximately 12 months for a new VSO to achieve accreditation. VSO's must understand the intricacies of veteran status, types of military discharges, privacy laws under HIPAA, Federal VA organization and structure, and state and local information resources available to veterans. The VSO's also need to learn the basics of federal laws and eligibility surrounding service connected compensation, non-service connected pensions, survivor benefits, veteran and dependent educational benefits, Veterans Administration healthcare, fiduciary responsibilities and conservatorship assistance available to veterans, how to interview veterans, and how to develop and file (using the correct forms, documentation, and procedures) each kind of claim.

One of the more daunting hurdles for new VSO's is learning to interpret and manage existing claims with complex case files and long histories. VSO's also need to be trained in laws and procedures specific to the appeals process. ODVA provides 40 hours of intensive one-on-one class room training for new VSO's to go over this information initially, along with mock interviews, full practice claims, and training on the automated case management data system, VetraSpec. After this initial intensive introduction, the VSO returns to their home county, and begins interviewing veterans and compiling claims under remote supervision; for the next eighteen months, ODVA provides intensive coaching via phone and email, and will arrange for a site visit to the Portland claims office and the Federal VA, and will also periodically go to a CVSO's county to work with them in their home environment.

Fully-accredited VSO's need continuing education to keep pace with new procedures and directives coming from the Federal VA. Training needs for fully-accredited VSO's include developing curricula and hosting an annual conference with specific workshop tracks and general sessions. Advanced training includes a deeper dive into the Code of Federal Regulation Title 38 governing veterans' benefits, analysis of federal claims and appeals decisions, legal research, and outreach best practices.

### ***Special Advocacy Programs***

***Women Veterans*** - HB3479 (2016) created funding and authority to improve outcomes for Oregon women veterans in five specific areas: outreach, advocacy, data, research, and policy. Initial efforts in the first year focused on outreach and advocacy, achieved via listening sessions with women veterans around Oregon; community meetings to increase awareness of women veterans and their unique experiences, issues, and needs; and meeting with women veterans to assist in claims filing, especially related to difficult or challenging claims.

***LGBTQ Veterans*** - The LGBTQ Veteran Program is a first-of-its-kind program nationally. Created by the legislature in 2016, direct services to veterans in the LGBTQ community are now being provided statewide to assist with military records corrections and service-connected claims work, especially as it relates to discharges that are related to their sexual orientation or identification. The program also assists many from this community with homelessness and housing support, advocacy and empowerment, support groups, and much more. Aggressive outreach into this community is needed in order to inform these veterans, who do not typically self-identify, about veteran benefits and services that they may be eligible for.

***Incarcerated Veterans*** - In 2016, ODVA deployed an Incarcerated Veteran Coordinator position to assist, advise and minimize the negative impact of incarceration on veterans and family members who are receiving or could receive USDVA disability payments. This position also ensures that other state and federal veteran benefits, such as education benefits, are maximized to increase success during incarceration and re-entry, thus reducing the likelihood of recidivism. HB 4038 (2018) authorized ODVA to hire a second Incarcerated Veteran Coordinator.

Cost drivers for the special advocacy programs are driven by the need to provide outreach services to underserved population groups. ODVA's primary outreach costs are personnel and services and supplies costs to participate in statewide outreach activities.

***Veteran Employment and Economic Development*** - The Governor's Budget proposes to fund an Employment and Economic Development Coordinator position to serve as liaison and advocate for veterans in matters pertaining to employment and economic development. A goal would be to connect veterans to employment and economic development resources. The Coordinator will collaborate and liaise with the Oregon Department of Employment veteran employment specialists and the DVOP program. The Coordinator will also be a direct liaison with the U.S. Department of Labor Vets Work



Program, the Small Business Administration, the Oregon National Guard Family Services, reintegration team/Guard employment office, and work with the Governor's Regional Solutions offices concentrating on veteran small business and other opportunities for veterans business and employment; partner with Biz Oregon to promote certification of veteran and disabled veteran owned businesses; assist the agency with promotion of veterans to trade and apprentice programs across the state with a focus on rural Oregon veterans; and work with organizations that promote employment traditionally underserved veterans.

Cost drivers are primarily personnel and services and supplies costs to participate in statewide coordination activities.

**State Approving Agency** – In December 2018, ODVA received approval from the Emergency Board to begin to build the foundational capacity necessary for the USDVA to return the State Approving Authority (SAA) status to Oregon state government. The SAA function is responsible for approving and monitoring postsecondary institutions and training establishments participating in veterans' education benefits administered by USDVA to ensure compliance with state and federal laws. Cost drivers for the SAA program will be the number of institutions and training establishments approved by the USDVA and the related monitoring required by ODVA.

Cost drivers for the State Approving Agency are driven by the number of educational and training programs approved and monitored.

**Veterans' Emergency Financial Assistance Program** - Emergency Aid offers a one-time grant to veterans who have emergency needs. Examples include a veteran whose car needs repair and without this repair cannot work or a homeless veteran who obtains a job, but needs help with rent and deposits for a place to stay. The key is sustainability; the veteran must be able to sustain their finances after receiving the bridge funding via this grant.

The department receives applications for emergency assistance statewide through its network with the county veterans' service officers, local veterans' employment representatives, disabled veterans' outreach program representatives, tribal veterans' representatives and veterans' service organizations. As of June 30, 2018, approximately 1,826 veterans and their families have been assisted through use of this program. This program routinely assists veterans with a one-time grant to help relieve health and welfare emergencies, such as rent, mortgages, utilities, medical care, food, homelessness prevention and other needs to help a veteran maintain the basic necessities of life.

This program has a demand for services that exceeds funding. During the 2017-19 biennium, total grant applications received were 297 while funding allowed for only 72 of those applications to be granted.

Cost drivers for the program are determined by the number applications received.

## **Pass-Through to Counties, Tribes and National Service Organizations**

***County Veteran Service Officers Program (CVSO's)*** – ODVA's statewide partnership with counties began when the legislature appropriated money to aid counties in an effort to promote services to veterans on a local level. It is an effective network of trained county veteran service officer (CVSO) in all 36 counties who provide veteran VA benefit and claims representation.

CVSO's are not supervised by ODVA; however, the agency provides training, certification, accreditation, counsel, and outreach to the CVSO's. The vast majority of CVSO appeal cases also are handled by the Statewide Veteran Service office in Portland. CVSO's perform the same function as state VSO's, ensuring veterans have access to benefits across the state.

Cost drivers for the CVSO program are dependent on the number of counties opting to provide veteran benefit services in their county. The CVSO program is funded by state pass-through monies provided to ODVA. ODVA does not receive any monies to administer this program.

### ***Tribal Veteran Representatives Program (TVR's) -***

The Governor's budget proposes a Tribal Veteran Representative (TVR) Program to provide veteran VA benefit and claims representation. ODVA will partner with tribal governments for with ODVA has a Memorandum of Understanding. TVR's will not be supervised by ODVA; however, the agency will provide training, certification, accreditation, counsel, and outreach to the TVR's. The vast majority of TVR appeal cases will also be handled by the Statewide Veteran Service office in Portland. TVR's will perform the same function as county VSO's, ensuring veterans have access to benefits across the state.

Cost drivers for the TVR program are dependent on the number of tribes opting to provide veteran benefit services directly to veterans. The TVR program is to be funded by state pass-through monies provided to ODVA. The Governor's Budget is also proposing monies for a Tribal Veterans Coordinator.

***National Service Organizations (NSO)*** – ODVA partners with national veteran service organizations in Oregon. National veteran service officers provide veteran benefit and claims representation like state and county veteran service officers, however, they do not work under ODVA's POA. Currently, the Disabled American Veterans, Veterans of Foreign Wars, and National Association of Black Veterans participate in this funding.

Cost drivers for the program are determined by the number of organizations opting to provide benefit and claims representation to their member base. ODVA does not receive any monies to administer this program.

## Grant Programs and Pass-Through to Partners

***Veteran Services Grant Fund*** - House Bill 2891 (2017) established the Oregon Department of Veterans' Affairs Veteran Services Grant Fund, and initially allocated \$550,000 for Grant Program Funds. The purpose of the grant funds is to leverage existing programs and resources available to veterans in local communities. Eligible grant recipients are not-for-profit organizations, local and tribal governments, and other related entities that provide direct services to veterans in Oregon.

Cost drivers for the program are solely the grant funds directly awarded to organizations through the grant process. The Governor's Budget proposes an additional \$1.5 million for the Veteran Services Grant Fund, which will include \$20,000 for ODVA to provide statewide or regional meetings to share best practices and encourage innovation.

***Campus Veteran Resources Grant Fund*** - Senate Bill 143 (2017) established a one-time \$1 million Campus Veteran Resource Center Grant Program for campus veteran resource centers and resource coordinators on the campuses of Oregon community colleges and public universities. The purpose of the grant funds is to help veterans successfully transition from military service to college life, succeed in college and complete educational goals, and transition from college to the workforce in the community.

Cost drivers for the program are solely the grant funds directly awarded to organizations through the grant process. The Governor's Budget proposes funding to continue this legislatively created grant fund. Policy Option Package 103 requests \$700,000, which will include \$15,000 for ODVA to provide statewide or regional meetings to share best practices and encourage innovation.

***Highly Rural Transportation Grant*** – In 2013, ODVA applied for and received grant funding from the federal VA to assist with VA-approved medical transportation needs to veterans in Oregon's highly rural areas. ODVA disburses these funds to existing county transportation networks to pay for veteran transportation to and from VA-approved medical appointments. 2017 was the fourth cycle of the federal VA highly rural transportation grant. All 10 qualifying counties, which are defined as less than seven people per square mile, are participating in the grant. Since the inception of this program, and through June 30, 2018, veterans have utilized transportation provided by this grant to take over 18,900 trips to their medical appointments. The use of this program allows veterans to use federal VA healthcare appointments and to maximize the use of the veteran's choice program for transportation to medical appointments outside VA healthcare. This program encompasses all five VA healthcare catchment areas and serves a base of rural veterans that are in need of transportation to their appointments.

Cost drivers for the program are solely the grant funds directly awarded to organizations through the grant process.

The Governor's Budget proposes state funding to create a transportation grant program for rural counties that do not meet the federal definition of "highly rural." Policy Option Package 103 requests \$600,000 for a state grant program, which will include \$10,000 for ODVA to provide statewide or regional meetings to share best practices and encourage innovation.

**Homeless Veteran Grant Fund** - Statewide grants will be awarded based on a competitive process. Programs and services that grant funding may expand and enhance are: supported and non-supported transitional housing, the number of facilities that focus on underserved and hard to place veterans such as veterans with families, women, LGBTQ, and formerly incarcerated veterans, basic shelter space in rural Oregon. Grants would also focus improving/increasing access to support services such as training and employment, addictions and behavioral health services for homeless veterans or those at risk of becoming homeless. The Homeless Veteran Coordinator will develop and enhance existing partnerships, and act as a facilitator and liaison with state, local and non-profit partners whose work focuses on ending veteran homelessness to identify gaps in regional and local service delivery. The Coordinator will also work extensively with the Federal VA and US Department of Housing and Urban Development.

Cost drivers for the program are solely the grant funds directly awarded to organizations through the grant process. The Governor's Budget proposes \$760,000 for a grant program, and \$300,000 for a Homeless Veteran Coordinator position.

**Veteran Behavioral Health Grant Funds** – The purpose of this request is to create a statewide grant program to support veteran behavioral health needs, including addressing barriers to access and utilization of behavioral health care. Statewide, competitive grants from this request would be used by grantees to achieve, expanded and augment either direct or indirect behavioral health services for veterans. Services could include: expansion of the OHA Veteran Peer Support pilot, county mental health programs for direct services for veterans, veteran suicide awareness and prevention, expansion of behavioral health services for supportive housing programs, and programs and services designed to reduce barriers and improve access to veteran behavioral health services, such as improved access to transportation to appointments. Grant proposals addressing recommendations contained in the 2019 Veterans' Behavioral Health Services Improvement Study would be considered as well.

Cost drivers for the program are solely the grant funds directly awarded to organizations through the grant process. The Governor's Budget proposes \$560,000 for a grant program.

**Suicide Prevention and Crisis Line** – ODVA was allocated \$350,000 in funds for FY 17-19 to contract with a provider for a suicide prevention and crisis line. ODVA awarded the funds and oversees the contract that is intended to assist veterans in receiving services that help prevent and assist veterans in crisis. ODVA does not retain funds to administer this program.

## Program Justification and Link to Focus Areas

ODVA's veteran services programs impacts across multiple State focus areas, but particularly Healthy/Safe Oregonians and Thriving State Economy.

As demand for veteran services increase, so does the amount of federal dollars that are delivered back into Oregon's economy. The Federal VA dollars that returned to the state were approximately \$1.36 billion in direct cash benefits to veterans in 2017, and more than \$2.84 billion in total Federal VA benefits across disability compensation, healthcare and education.

To Oregon veterans, benefits enable them to be productive and self-sufficient citizens. Disability compensation is awarded for both physical and mental injuries incurred while serving their country, which helps pay their mortgage and other bills. Federal VA health care ensures veterans will not need to use state resources, like the Oregon Health Plan. Education benefits increases the number of college graduates and vocationally trained people in the work force. Severely disabled veterans receive significant compensation, which ensures they will not need unemployment, food stamps, Medicaid or other state programs.

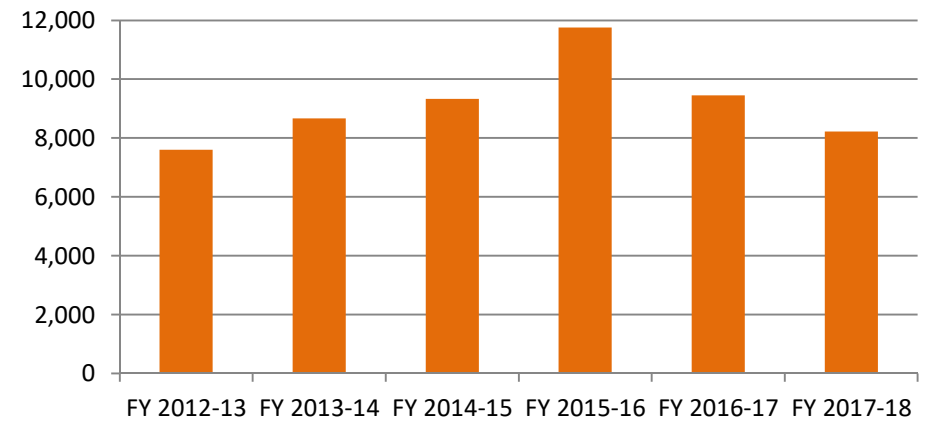
Although Federal VA dollars do not go directly to the state in the form of revenue, they are just as an important economic factor in communities where veterans, their dependents and survivors use these benefits to buy goods and services locally.

## Program Performance

### ***New Power of Attorneys***

New Powers of Attorney (POA's) for fiscal years 2017 and 2018 totaled 17,675. This number is significant, representing the number of new veterans who have engaged a veteran service officer as an advocate to start the disability claims process. In the last two years, ODVA has begun to see a slight decline in the number of new POA's. One possible reason is that the veteran population in Oregon has declined more than 7% over the last two years. As WWII, Korea and Vietnam veterans age, that number will continue to increase across the nation.

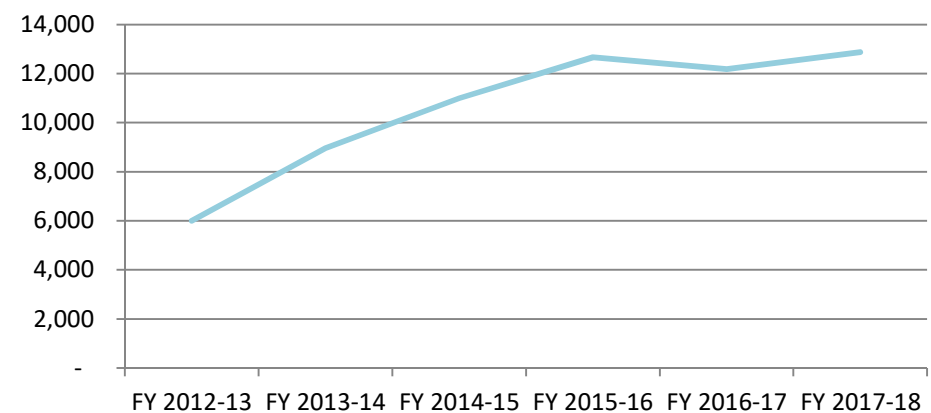
### **New Power of Attorneys**



### ***New Claims Filed***

25,061 new claims were filed in fiscal years 2017 and 2018 on behalf of Oregon veterans in Oregon through ODVA and county partnerships. As the veteran population ages, ODVA expects the number of new claims filed to remain consistent or decline slightly over the next 10 years. The number of new claims reflects new veterans under ODVA's Power of Attorney (POA) as well as new claims filed on behalf of veterans under POA.

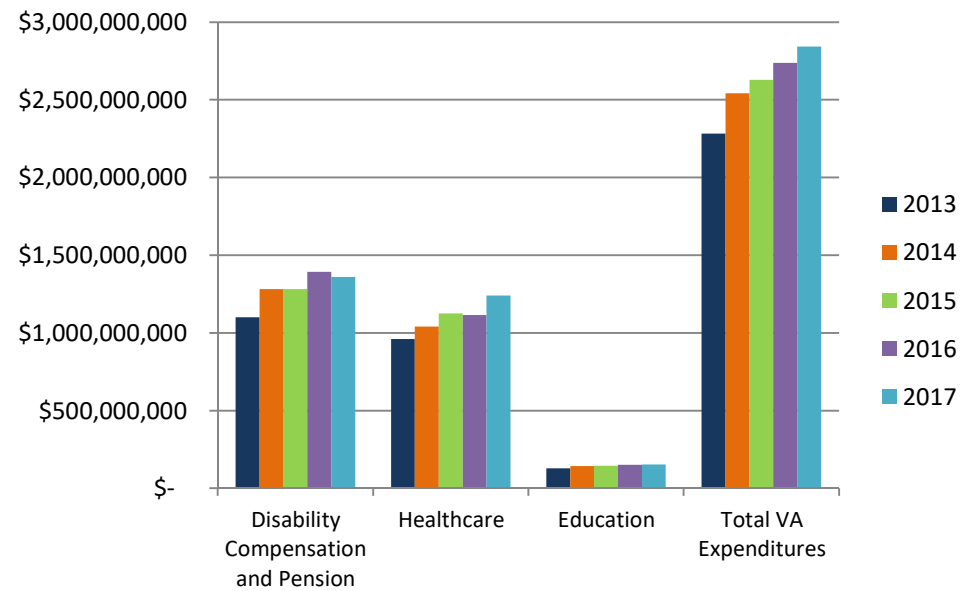
### **New Claims Filed**



**Federal Dollars**

Total VA Expenditure Disability Compensation and Pension benefits for Oregon veterans in FY 2017 was \$1.35 billion. These federal dollars are not only a financial benefit to the state but it also means that federal dollars rather than state safety net dollars are used to help veterans and their families.

Federal VA Expenditures in Oregon



## Enabling Legislation/Program Authorization

The programs included in Statewide Veteran Services are established in ORS Chapters 406 and 408. Authority for veterans' services also is found in 38 United State Code Chapter 59.

## Funding Streams

The revenue source for Veteran Services is General Funds, Lottery Funds and Federal Funds.

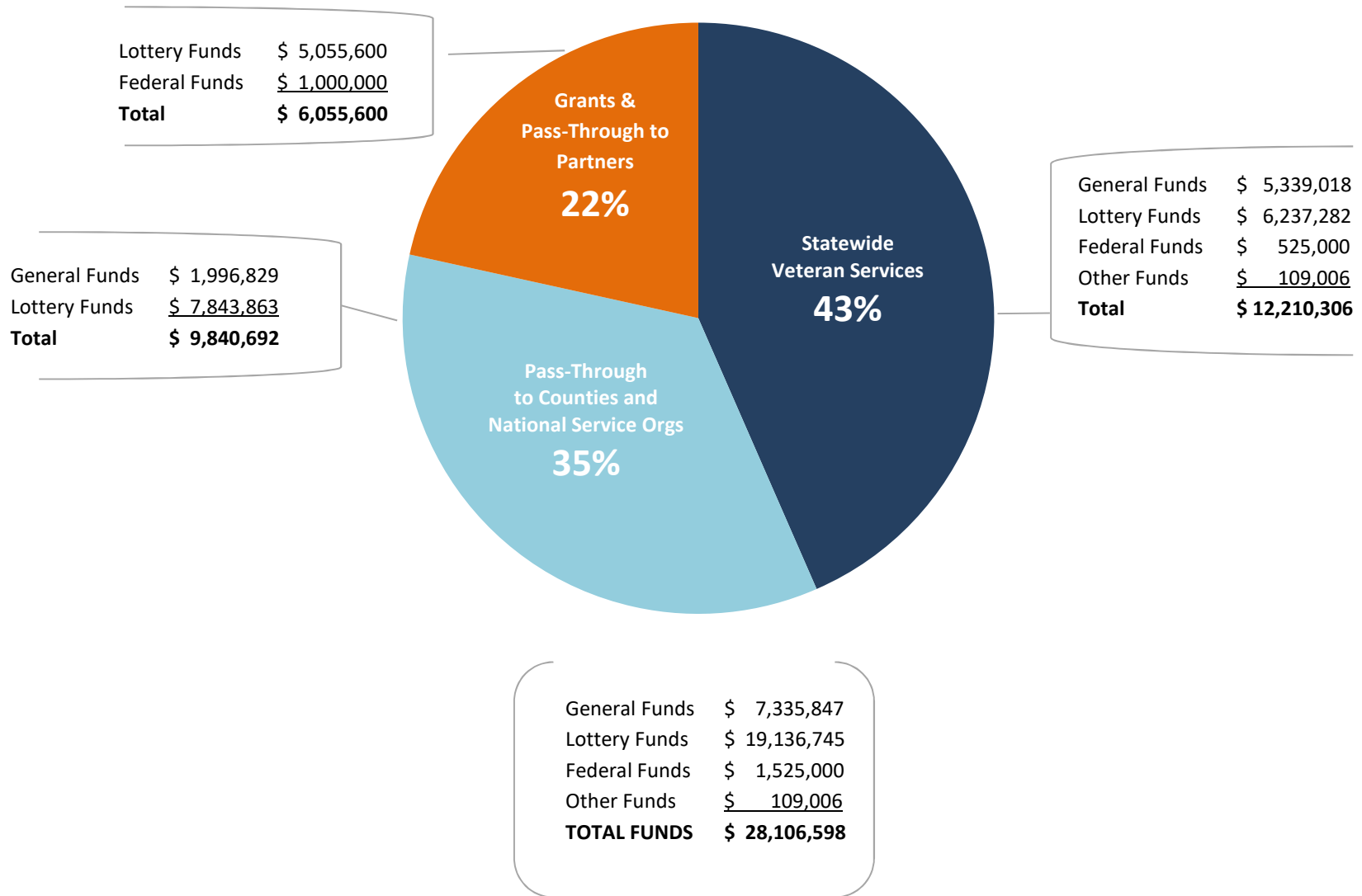
## 2019-21 Funding Proposal Expected Results

The 2019-21 funding proposal for the Veteran Services Program is expected to improve and maximize services to veterans statewide and assist the agency with meeting the following goals:

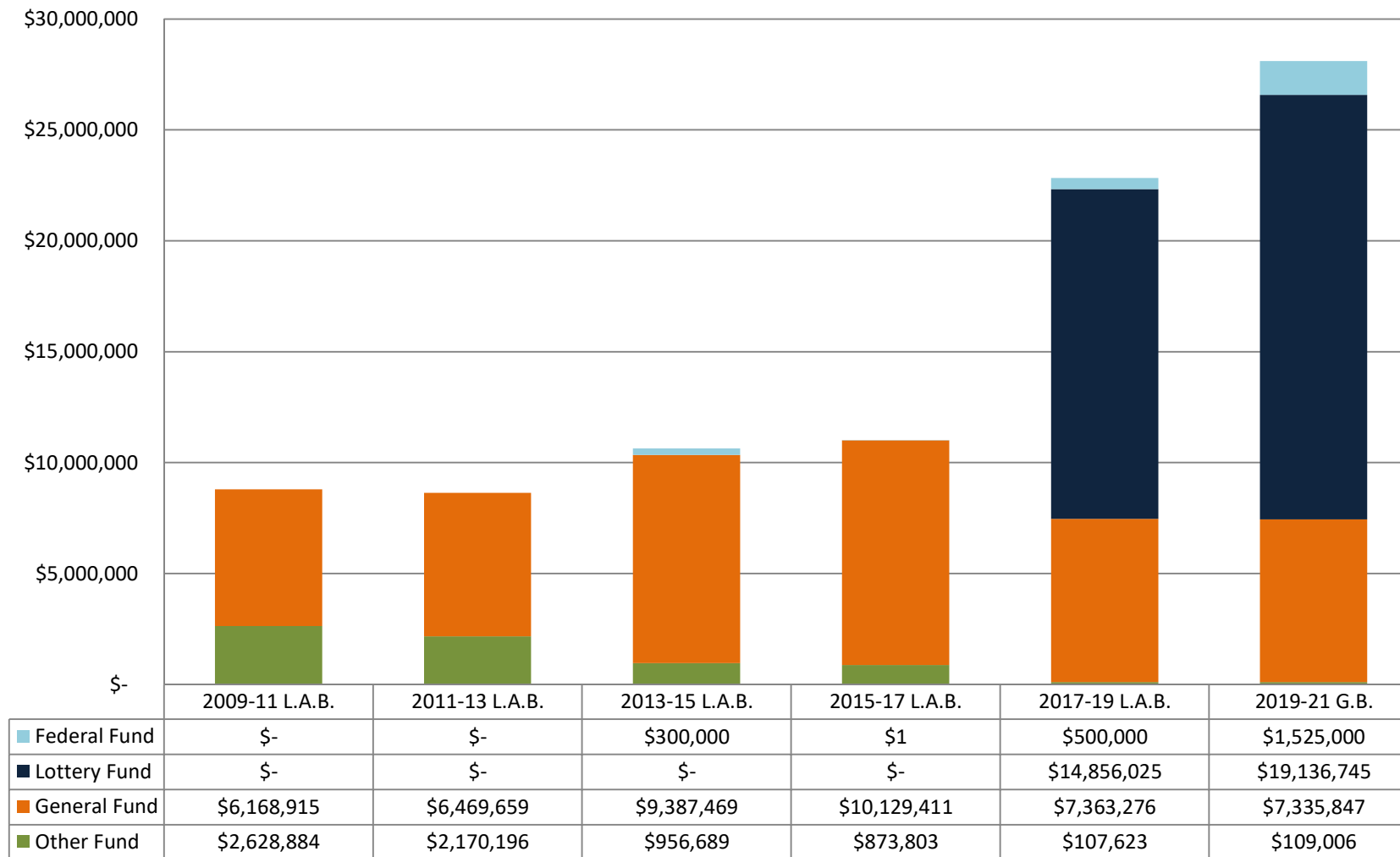
- **Expand and meet needs of statewide Veteran Service training and certification demand**  
Increased funding for county veteran services has resulted in a 22% increase in the number of trained and certified veteran service officers across the state. The agency will continue to meet the needs for training and certification with the expansion of funding to meet the increase.
- **Continue to improve and leverage service delivery partnerships**  
The Department will continue to expand its statewide network of partners and invest in organizations providing direct services and resources to veterans through grant and partnership programs.



## 2019-21 GOVERNOR'S BUDGET VETERAN SERVICES PROGRAM EXPENDITURES



## VETERAN SERVICES PROGRAM HISTORICAL OPERATING BUDGET COMPARISON



Note 1: Lottery Funds were a result of voter-passage of Measure 96 in November 2016.

Note 2: Beginning with the 2019-21 biennium, the budget for Conservatorship was moved to Aging Veteran Services. Historical budget amounts remain presented in Veteran Services.

\*Includes all Packages but excludes Nonlimited and Capital Construction Expenditures.

## VETERAN SERVICES PROGRAM NARRATIVE

### Veteran Services Program Environmental Factors and Trends

**Increase in the number of veterans filing claims and continuously changing veteran demographics** - From WWII to the most current conflict in Afghanistan, veterans are seeking benefits, services and resources at unprecedented rates. Since the beginning of the Iraq and Afghanistan conflicts, the total dollars being received by Oregon veterans has more than tripled from \$924 million (2003) to more than \$2.8 billion (2017).

According to the Federal VA's FY17 Geographic Distribution of VA Expenditures Report, Oregon veterans received more than \$1.36 billion in Compensation and Pension Payments, \$152 million in Education and Readjustment benefits, and more than \$1.24 billion in Health Care.

In the last decade, veteran benefits and compensation received by veterans in Oregon has more than doubled. More veterans are filing claims, seeking and receiving healthcare and using their earned education benefits, however the Federal VA's system has experienced a significant bottleneck in the rating and awarding these benefits.

**Oregon Veteran Demographics and Trends** - Today, there are an estimated 303,689 veterans in Oregon whose service from World War II (3.7%), Korea (7.2%), Vietnam (37.5%), the Gulf War/Post 9/11 (28.8%) and the intervening peacetime operations (22.8%). Nearly three quarters of this population served during a war or major conflict. Women veterans make up approximately 8.4% of Oregon veterans, while 10.5% are minorities and 1% is Native American.

**Seven out of ten veterans are not accessing or utilizing federal veterans benefits** - One of ODVA's key strategic goals is to target veteran services in order to serve more veterans and serve them better. Only three in ten veterans are receiving federal veteran's benefits; therefore, 70% of Oregon veterans are not receiving these federal benefits such as education, health care, disability compensation or pension benefits.

Increasing the number of veterans who receive the benefits they have earned is a challenging undertaking. ODVA is approaching this issue on three fronts. First, by investing in a 21st century veteran services system, ensuring veteran services offices are well-staffed and resourced, and focusing ODVA statewide veteran services on training, claims review, advocacy and support. Second, ODVA's goal is to develop intentional and strategic relationships with state, local, federal and tribal agencies, non-profits and others across systems to increase veterans' access and utilization of existing resources. Finally, ODVA's goal is to drive veteran engagement through a robust and sustainable outreach to veterans and the veteran community.

### Program Details

The Veteran Services Program is responsible for providing advocacy and benefits to veterans, their dependents, and survivors as well as lead policy and partnership efforts on behalf of Oregon veterans. The program provides benefits counseling, claims and appellate representation, certification and training for

counties and national service organizations, emergency financial assistance, and other service delivery partnerships across the state. The division is the front line for all veteran benefits, ensuring that veterans obtain all the benefits to which they are entitled as a result of their military service.

### **Statewide Veteran Services**

#### **Appeals and Claims**

**Workload:** ODVA, in partnership with the County Veteran Service Offices provides claims and counseling advocacy and representation to Oregon's 303,000 veterans, resulting in more than 25,000 new claims on their behalf during fiscal years 2017 and 2018. In that same time, as part of appeals work, 2,861 Notice of Disagreements (NOD), and 1,510 Form 9's (continuation of the NOD process) were filed for veterans through ODVA's Statewide Veteran Service offices.

#### **Certification and Training**

**Workload:** Responsible for training and certification of veteran service officers in Oregon. During fiscal years 2017 and 2018, 27 new Veteran Service Officers were trained to file claims according to federal CFR, Title 38 and 26 accreditations were awarded. Currently, there are a total of 97 trained and certified Veteran Service Officers across the state, located in all 36 Oregon counties.

#### **Special Advocacy**

##### **Women Veterans**

**Workload:** HB3479 (2016) created funding and authority to improve outcomes for Oregon women veterans in five specific areas: outreach, advocacy, data, research, and policy. Initial efforts in the first year focused on outreach and advocacy, achieved via listening sessions with women veterans around Oregon; community meetings to increase awareness of women veterans and their unique experiences, issues, and needs; and meeting with women veterans to assist in claims filing, especially related to difficult or challenging claims.

##### **LGBTQ Veterans**

**Workload:** The LGBTQ Veteran Program is a first-of-its-kind program nationally. Created by the legislature in 2016, direct services to veterans in the LGBTQ community are now being provided statewide to assist with military records corrections and service-connected claims work, especially as it relates to discharges that are related to their sexual orientation or identification. The program also assists many from this community with homelessness and housing support, advocacy and empowerment, support groups, and much more. Aggressive outreach into this community is needed in order to inform these veterans, who do not typically self-identify, about veteran benefits and services that they may be eligible for.

### ***Incarcerated Veterans***

**Workload:** In 2016, ODVA deployed an Incarcerated Veteran Coordinator position to assist, advise and minimize the negative impact of incarceration on veterans and family members who are receiving or could receive USDVA disability payments. This position also ensures that other state and federal veteran benefits, such as education benefits, are maximized to increase success during incarceration and re-entry, thus reducing the likelihood of recidivism. The addition of a second Incarcerated Veteran Coordinator in late 2018 allowed ODVA to significantly increase its outreach, preventing veterans from passing through the intake process without a veteran status evaluation, and allowing multiple meetings with veterans that have more complex issues related to their incarceration. Transition assistance for veterans releasing from incarceration is focused on connecting them with all available benefits in their community, and refers veterans to their County Veteran Service Officer (CVSO) to assistance with additional USDVA claims work and to increase the likelihood of the veteran accessing resources in the local community, and help reduce recidivism.

### ***Veteran Employment and Economic Development***

**Workload:** The Veteran Employment and Economic Development Coordinator will collaborate and liaise with the Oregon Department of Employment, veteran employment specialists and the DVOP program. The Coordinator will also be a direct liaison with the U.S. Department of Labor Vets Work Program, the Oregon National Guard Family Services, reintegration team/Guard employment office, and work with the Governor's Regional Solutions office concentrating on veteran small business and other opportunities for veterans business and employment; partner with Biz Oregon to promote veteran owned businesses and disabled veteran owned businesses. The Coordinator will assist the agency with promotion of veterans to trade and apprentice programs across the state with a focus on rural Oregon veterans; and work with organizations that promote employment of traditionally underserved veterans.

### ***State Approving Agency***

**Workload:** The United States Department of Veterans Affairs (USDVA) oversees the administration of GI Bill educational benefits for eligible veterans and other participants through annual performance contracts with designated State Approving Agencies (SAAs). SAAs ensure that veterans have access to educational and training opportunities and that federal veterans' benefits are in compliance with applicable laws and regulations by approving educational and training programs; overseeing programs through supervisory visits and compliance surveys; and providing technical support and outreach to schools and veterans. ODVA has requested to be designated as Oregon's State Approving Agency (SAA) beginning October 1, 2019. The SAA function will be responsible for approving and monitoring postsecondary institutions and training establishments participating in veterans' education benefits administered by USDVA to ensure compliance with state and federal laws.

**Customers:** Veterans, private and public institutions where a veteran may hold a debt or need to make payments to receive a service.

**Source of Funding:** Federal Funds and Lottery Funds.

**Expenditures:** The program's 2019-21 Governor's Budget is \$525,000 (Federal Funds) and \$145,930 (Lottery Funds).

**Positions and FTE:** 2019-21 Governor's Budget funds 3 positions (3.0 FTE).

### **Emergency Financial Assistance Program**

**Workload:** In the 2017-19 biennium, total grant applications received were 297 while funding allowed for only 72 of those applications to be granted.

**Customers:** Veterans, private and public institutions where a veteran may hold a debt or need to make payments to receive a service.

**Source of Funding:** General Funds.

**Expenditures:** The program's 2019-21 Governor's Budget is \$107,641.

**Positions and FTE:** 2019-21 Governor's Budget funds 0 positions (0 FTE).

**Customers:** Statewide Veteran Services has the responsibility to provide services to more than 303,000 veterans in Oregon, their family members who may qualify for benefits, as well as the county and national veteran service offices and service provider organizations across Oregon. Other customers include federal, state, local and non-profit organizations who offer benefits and services (employment, homelessness resources, mental health, etc.).

**Source of Funding:** Lottery Fund and General Fund dollars pay for most direct Veteran Services Program personnel cost and a portion of the program's services and supplies. The remainder of direct services and supplies and indirect personnel costs are funded through Other Fund Loan Program dollars.

**Expenditures:** \$12,210,306 (\$6,237,282 Lottery Funds, \$5,339,018 General Funds, \$525,000 Federal Funds and \$109,006 Other Funds).

**Positions and FTE:** 2019-21 Governor's Budget funds 36 Veteran Services positions (36.0 FTE) and 6 Administration positions (5.88 FTE) related to Public Information, Policy and Internal Audit.

## Pass-Through to Counties, Tribes and National Service Organizations

### County Veteran Service Officers (CVSO's) Program

**Workload:** ODVA provides support to the County Veteran Service Offices (CVSO) through training, guidance, claims review and appellate representation; advocacy for our veterans, dependents and /or survivors in pursuit of benefits; and interoperability with the U.S. Department of Veterans Portland Regional Office. ODVA provides pass through dollars to counties to support enhancement and expansion of CVSO operations. The administration of these monies requires counties that provide veterans services to file an annual application to receive funding and then submit quarterly reports of activities, expenditures, and federal VA benefits recovered in order to receive payment.

**Customers:** County Veteran Service Offices.

**Source of Funding:** Lottery Funds and General Funds.

**Expenditures:** \$9,040,692 (\$7,166,509 Lottery Funds and \$1,874,183 General Funds).

**Positions and FTE:** 2019-21 Governor's Budget funds 0 positions (0 FTE).

### National Service Organizations (NSO)

**Workload:** The NSOs submit an annual request for funding to ODVA and this is reviewed and processed by the department for approval and budgeting. The monies are then distributed on a quarterly basis following the review and processing of NSO quarterly reports of expenditure and activities.

**Customers:** National Service Organizations.

**Source of Funding:** Lottery Funds and General Funds.

**Expenditures:** \$600,000 (\$477,354 Lottery Funds and \$122,646 General Funds).

**Positions and FTE:** 2019-21 Governor's Budget level funds 0 positions (0 FTE).

### **Tribal Veteran Representatives (TVR's)**

**Workload:** The purpose this request is to support Tribal Veteran Representative (TVR) advocacy in support of SB 80, bringing services to Oregon Tribal Veterans and their families. Monies from this request will allow established tribal veteran offices to receive funding for their programs in the same manner as Oregon's County Veteran Services Officer (CVSO) network. This funding will allow tribal veteran offices to expand and enhance their services and reach more tribal veterans and their families. The ODVA Tribal Veteran Coordinator will be the point of contact for all tribal veteran advocacy. This position will work with established TVR offices for training and liaison with ODVA and assist TVRs with connecting tribal veterans to Federal VA veteran's services. The Coordinator will work extensively with the Federal VA Office of Tribal Government Relations to effectively liaison between federal, to state to tribal council and will work with organizations such as NARA, ATNI and the National Congress of American Indians (NCAI).

**Customers:** Tribal governments.

**Source of Funding:** Lottery Funds.

**Expenditures:** \$200,000 Lottery Funds.

**Positions and FTE:** 2019-21 Governor's Budget funds 1 position (1.0 FTE). Note: for budget purposes the position and related personal services and services and supplies funding is included in Statewide Veteran Services, not pass-through to Counties, Tribes and NSO's.

### **Grant Programs and Pass-Through to Partners**

#### **Veteran Services Grant Fund**

**Workload:** House Bill 2891 (2017) established the Oregon Department of Veterans' Affairs Veteran Services Grant Fund, and allocated \$550,000 for Grant Funds. ODVA established grant requirements and communication, grant review teams from the veteran community, and an award process. The response to the Request for Grant Proposals was overwhelming: 59 grant proposals were submitted, totaling \$5,354,422. The requests for grant funds were almost ten times the amount of the available funds. In April 2018, the Evaluation Committee, based on the scoring criteria for the grant proposals and a limitation of \$550,000 in available funds, was able to fund 10 proposals. Two of these proposals were partially funded. The committee was only able to fund 19% of all proposals submitted. Unfortunately, there was not enough money to award grants to many organizations that submitted very worthy proposals.

ODVA will continue to monitor the grant's effectiveness in assisting the veterans' community as legislatively intended. Cost drivers for the program are solely the grant funds directly awarded to organizations through the grant process. The Governor's Budget proposes an additional \$1.5 million for the



Veterans Services Grant Fund, which will include \$20,000 for ODVA to provide statewide or regional meetings to share best practices and encourage innovation.

**Customers:** Government and community-based organizations.

**Source of Funding:** Lottery Funds.

**Expenditures:** \$2,070,900 Lottery Funds.

**Positions and FTE:** 2019-21 Governor's Budget funds 0 positions (0 FTE).

### **Campus Veteran Resources Grant Fund**

**Workload:** Senate Bill 143 (2017) established a \$1,000,000 Campus Veteran Resource Center Grant Program for campus veteran resource centers and resource coordinators on the campuses of Oregon community colleges and public universities. The purpose of the grant funds is to help veterans successfully transition from military service to college life, succeed in college and complete educational goals, and transition from college to the workforce in the community. Fourteen community colleges and universities were awarded funding for the veteran resources on campus.

Cost drivers for the program are solely the grant funds directly awarded to Oregon community colleges and public universities through the grant process. The Governor's Budget proposes funding to continue this legislatively created grant fund. Policy Option Package 103 requests \$700,000, which will include \$15,000 for ODVA to provide statewide or regional meetings to share best practices and encourage innovation.

**Customers:** Higher Education in Oregon

**Source of Funding:** Lottery Funds.

**Expenditures:** \$700,000 Lottery Funds.

**Positions and FTE:** 2019-21 Governor's Budget funds 0 positions (0 FTE).

### **Highly Rural & Rural Transportation Grants**

**Workload:** In 2013, ODVA applied for and received grant funding from the federal VA to assist with medical transportation needs to veterans in Oregon's highly rural areas. ODVA disburses these funds to existing county transportation networks to pay for veteran transportation to and from VA and non-VA medical appointments. 2017 was the fourth renewal of the federal VA highly rural transportation grant. All 10 highly rural counties, which are defined as less than 7 people per square mile, are participating in the grant. Since the inception of this program, and through March 31, 2018, veterans have utilized transportation provided by this grant to take over 17,900 trips to their medical appointments. The use of this program allows veterans to use federal VA healthcare appointments and to maximize the use of the veteran's choice program for transportation to medical appointments outside VA healthcare. This program encompasses four out of the five VA healthcare catchment areas and serves a base of rural veterans that are in need of transportation to their appointments.

Cost drivers for the program are solely the grant funds directly awarded to organizations through the grant process.

The Governor's Budget proposes state funding to expand this program into counties that are rural, but do not meet the federal restrictions defining the county as highly rural. Policy Option Package 103 requests \$600,000, which will include \$10,000 for ODVA to provide statewide or regional meetings to share best practices and encourage innovation.

**Customers:** Transportation Districts, rural veterans in need of medical services

**Source of Funding:** Federal Funds and Lottery Funds.

**Expenditures:** \$1,600,000 (\$1,000,000 Federal Funds and \$600,000 Lottery Funds)

**Positions and FTE:** 2019-21 Governor's Budget funds 0 positions (0 FTE).

### **Veteran Homelessness Grant Funds**

**Workload:** The Governor's Budget proposes a new Veteran Homelessness Grant fund. The purpose of the grant funds is to provide funding for a statewide grant program to address veteran housing stability and homelessness. Statewide grants will be awarded based on a competitive process. Programs and services that grant funding may create, expand and enhance are: supported and non-supported transitional housing, facilities that focus on underserved and hard to place veterans such as veterans with families, women, LGBTQ, and formerly incarcerated veterans, and basic shelter space

in rural Oregon. Grants would also focus improving/increasing access to support services such as training and employment, addictions and behavioral health services for homeless veterans or those at risk of becoming homeless.

The Homeless Veteran Coordinator will develop and enhance the agency's existing partnerships, and act as a facilitator and liaison with state, local and non-profit partners whose work focuses on ending veteran homelessness, and identify gaps in regional and local service delivery. The Coordinator will also work extensively with the Federal VA and US Department of Housing and Urban Development.

Cost drivers for the program are grant funds directly awarded to organizations through the grant process. The Governor's Budget proposes a new Veteran Homeless Grant program.

**Customers:** Government and community-based organizations.

**Source of Funding:** Lottery Funds.

**Expenditures:** \$760,000 Lottery Funds.

**Positions and FTE:** 2019-21 Governor's Budget funds 1 position (1.0 FTE). Note: for budget purposes the position and related personal services and services and supplies funding is included in Statewide Veteran Services, not in grant funds for Veteran Homelessness.

### **Veteran Behavioral Health Grant Funds**

**Workload:** The purpose of this request is to create a statewide grant program to support veteran behavioral health needs, including addressing barriers to access and utilization of behavioral health care. Statewide, competitive grants from this request would be used by grantees to achieve, expand and augment either direct or indirect behavioral health services for veterans. Services could include: expansion of the OHA Veteran Peer Support pilot, county mental health programs for direct services for veterans, expansion of behavioral health services for supportive housing programs, veteran suicide awareness and prevention programming, and programs and services designed to reduce barriers and improve access to veteran behavioral health services, such as improved access to transportation to appointments. Grant proposals addressing recommendations contained in the 2019 Veterans' Behavioral Health Services Improvement Study would be given serious consideration.

**Customers:** Government and community-based organizations.

**Source of Funding:** Lottery Funds.

**Expenditures:** \$560,000 Lottery Funds.

**Positions and FTE:** 2019-21 Governor's Budget funds 0 positions (0 FTE).

### **Suicide Prevention and Crisis Line**

**Workload:** ODVA was allocated funds for FY 17-19 to contract with a provider for a suicide prevention and crisis line. ODVA awarded the funds and oversees the contract that is intended to assist veterans in receiving services that help prevent and assist veterans in crisis. ODVA does not retain funds to administer this program.

**Customers:** Veterans in Crisis, crisis services organizations in Oregon

**Source of Funding:** Lottery Funds.

**Expenditures:** \$364,700 Lottery Funds.

**Positions and FTE:** 2019-21 Governor's Budget funds 0 positions (0 FTE).

## Revenue Sources/Proposed Revenue Changes

**Revenue Sources** - The base budget revenue source for the Veteran Services Program is from General Funds, Lottery Funds and Federal Funds. There are no matching funds available for use in the Veterans' Services programs.

## Proposed Legislation

There is no agency proposed legislation that impacts this program area.

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Veterans' Affairs, Oregon Dept of  
Pkg: 010 - Non-PICS Psnl Svc / Vacancy Factor**

**Cross Reference Name: Veterans' Services Program  
Cross Reference Number: 27400-002-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	80,309	-	-	-	-	-	80,309
Transfer In - Intrafund	-	-	(29,078)	-	-	-	(29,078)
Transfer In Lottery Proceeds	-	-	-	-	-	-	-
Tsfr From Administrative Svcs	-	(59,062)	-	-	-	-	(59,062)
<b>Total Revenues</b>	<b>\$80,309</b>	<b>(\$59,062)</b>	<b>(\$29,078)</b>	-	-	-	<b>(\$7,831)</b>
<b>Personal Services</b>							
Pension Obligation Bond	12,225	17,437	(34,615)	-	-	-	(4,953)
Unemployment Assessments	-	-	-	-	-	-	-
Mass Transit Tax	2,623	1,959	-	-	-	-	4,582
Vacancy Savings	65,461	(78,458)	5,536	-	-	-	(7,461)
<b>Total Personal Services</b>	<b>\$80,309</b>	<b>(\$59,062)</b>	<b>(\$29,079)</b>	-	-	-	<b>(\$7,832)</b>
<b>Total Expenditures</b>							
Total Expenditures	80,309	(59,062)	(29,079)	-	-	-	(7,832)
<b>Total Expenditures</b>	<b>\$80,309</b>	<b>(\$59,062)</b>	<b>(\$29,079)</b>	-	-	-	<b>(\$7,832)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	1	-	-	-	1
<b>Total Ending Balance</b>	<b>-</b>	<b>-</b>	<b>\$1</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>\$1</b>

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**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Veterans' Affairs, Oregon Dept of  
Pkg: 022 - Phase-out Pgm & One-time Costs**
**Cross Reference Name: Veterans' Services Program  
Cross Reference Number: 27400-002-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
Transfer In - Intrafund	-	-	(78,545)	-	-	-	(78,545)
Transfer In Lottery Proceeds	-	-	-	-	-	-	-
Tsfr From Administrative Svcs	-	(1,400,000)	-	-	-	-	(1,400,000)
<b>Total Revenues</b>	-	<b>(\$1,400,000)</b>	<b>(\$78,545)</b>	-	-	-	<b>(\$1,478,545)</b>
<b>Personal Services</b>							
Unemployment Assessments	-	-	(2,672)	-	-	-	(2,672)
Vacancy Savings	-	-	-	-	-	-	-
<b>Total Personal Services</b>	-	-	<b>(\$2,672)</b>	-	-	-	<b>(\$2,672)</b>
<b>Services &amp; Supplies</b>							
Employee Training	-	-	(353)	-	-	-	(353)
Office Expenses	-	-	(1,886)	-	-	-	(1,886)
State Gov. Service Charges	-	-	(70,903)	-	-	-	(70,903)
Employee Recruitment and Develop	-	-	(54)	-	-	-	(54)
Other Services and Supplies	-	-	(2,676)	-	-	-	(2,676)
<b>Total Services &amp; Supplies</b>	-	-	<b>(\$75,872)</b>	-	-	-	<b>(\$75,872)</b>
<b>Capital Outlay</b>							
Data Processing Software	-	(100,000)	-	-	-	-	(100,000)
Professional Services	-	(300,000)	-	-	-	-	(300,000)
<b>Total Capital Outlay</b>	-	<b>(\$400,000)</b>	-	-	-	-	<b>(\$400,000)</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Veterans' Affairs, Oregon Dept of  
Pkg: 022 - Phase-out Pgm & One-time Costs**

**Cross Reference Name: Veterans' Services Program  
Cross Reference Number: 27400-002-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Special Payments</b>							
Dist to Other Gov Unit	-	(1,000,000)	-	-	-	-	(1,000,000)
<b>Total Special Payments</b>	-	<b>(\$1,000,000)</b>	-	-	-	-	<b>(\$1,000,000)</b>
<b>Total Expenditures</b>							
Total Expenditures	-	(1,400,000)	(78,544)	-	-	-	(1,478,544)
<b>Total Expenditures</b>	-	<b>(\$1,400,000)</b>	<b>(\$78,544)</b>	-	-	-	<b>(\$1,478,544)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	(1)	-	-	-	(1)
<b>Total Ending Balance</b>	-	-	<b>(\$1)</b>	-	-	-	<b>(\$1)</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**
**Veterans' Affairs, Oregon Dept of  
Pkg: 031 - Standard Inflation**
**Cross Reference Name: Veterans' Services Program  
Cross Reference Number: 27400-002-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	152,094	-	-	-	-	-	152,094
Transfer In Lottery Proceeds	-	-	-	-	-	-	-
Tsfr From Administrative Svcs	-	680,594	-	-	-	-	680,594
<b>Total Revenues</b>	<b>\$152,094</b>	<b>\$680,594</b>	-	-	-	-	<b>\$832,688</b>
<b>Services &amp; Supplies</b>							
Instate Travel	2,426	5,629	-	-	-	-	8,055
Out of State Travel	52	209	-	-	-	-	261
Employee Training	423	1,128	-	-	-	-	1,551
Office Expenses	4,980	7,472	-	-	-	-	12,452
Telecommunications	526	584	-	-	-	-	1,110
State Gov. Service Charges	49,544	291,016	-	-	-	-	340,560
Data Processing	2,081	950	-	-	-	-	3,031
Publicity and Publications	-	6,946	-	-	-	-	6,946
Professional Services	8,041	16,632	-	-	-	-	24,673
Attorney General	4,237	-	-	-	-	-	4,237
Employee Recruitment and Develop	7	-	-	-	-	-	7
Dues and Subscriptions	189	1,378	-	-	-	-	1,567
Intra-agency Charges	-	46,305	-	-	-	-	46,305
Other Services and Supplies	2,103	475	-	-	-	-	2,578
Expendable Prop 250 - 5000	-	1,187	-	-	-	-	1,187
IT Expendable Property	442	5,335	-	-	-	-	5,777
<b>Total Services &amp; Supplies</b>	<b>\$75,051</b>	<b>\$385,246</b>	-	-	-	-	<b>\$460,297</b>

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**Veterans' Affairs, Oregon Dept of  
Pkg: 031 - Standard Inflation**
**Cross Reference Name: Veterans' Services Program  
Cross Reference Number: 27400-002-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Capital Outlay</b>							
Professional Services	-	7,600	-	-	-	-	7,600
<b>Total Capital Outlay</b>	<b>-</b>	<b>\$7,600</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>\$7,600</b>
<b>Special Payments</b>							
Dist to Counties	68,612	262,358	-	-	-	-	330,970
Dist to Non-Gov Units	4,490	25,390	-	-	-	-	29,880
Dist to Individuals	3,941	-	-	-	-	-	3,941
<b>Total Special Payments</b>	<b>\$77,043</b>	<b>\$287,748</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>\$364,791</b>
<b>Total Expenditures</b>							
Total Expenditures	152,094	680,594	-	-	-	-	832,688
<b>Total Expenditures</b>	<b>\$152,094</b>	<b>\$680,594</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>\$832,688</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

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**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**
**Veterans' Affairs, Oregon Dept of  
Pkg: 060 - Technical Adjustments**
**Cross Reference Name: Veterans' Services Program  
Cross Reference Number: 27400-002-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(563,137)	-	-	-	-	-	(563,137)
Transfer In Lottery Proceeds	-	-	-	-	-	-	-
Tsfr From Administrative Svcs	-	(2,289,862)	-	-	-	-	(2,289,862)
<b>Total Revenues</b>	<b>(\$563,137)</b>	<b>(\$2,289,862)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(\$2,852,999)</b>
<b>Personal Services</b>							
Class/Unclass Sal. and Per Diem	(260,127)	(1,072,509)	-	-	-	-	(1,332,636)
Empl. Rel. Bd. Assessments	(171)	(596)	-	-	-	-	(767)
Public Employees' Retire Cont	(44,144)	(182,005)	-	-	-	-	(226,149)
Pension Obligation Bond	(43,011)	(17,437)	-	-	-	-	(60,448)
Social Security Taxes	(19,899)	(82,047)	-	-	-	-	(101,946)
Worker's Comp. Assess. (WCD)	(161)	(567)	-	-	-	-	(728)
Mass Transit Tax	(1,560)	(6,435)	-	-	-	-	(7,995)
Flexible Benefits	(88,993)	(317,382)	-	-	-	-	(406,375)
Vacancy Savings	6,676	18,458	-	-	-	-	25,134
<b>Total Personal Services</b>	<b>(\$451,390)</b>	<b>(\$1,660,520)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(\$2,111,910)</b>
<b>Services &amp; Supplies</b>							
Instate Travel	(9,561)	(55,689)	-	-	-	-	(65,250)
Out of State Travel	-	(5,709)	-	-	-	-	(5,709)
Employee Training	(4,545)	(21,060)	-	-	-	-	(25,605)
Office Expenses	(12,939)	(61,699)	-	-	-	-	(74,638)
Telecommunications	(440)	(7,224)	-	-	-	-	(7,664)
State Gov. Service Charges	(45,963)	(155,167)	-	-	-	-	(201,130)

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**Veterans' Affairs, Oregon Dept of  
Pkg: 060 - Technical Adjustments**
**Cross Reference Name: Veterans' Services Program  
Cross Reference Number: 27400-002-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
Data Processing	-	(25,950)	-	-	-	-	(25,950)
Professional Services	(2,491)	(47,932)	-	-	-	-	(50,423)
Attorney General	(25,277)	-	-	-	-	-	(25,277)
Employee Recruitment and Develop	(192)	-	-	-	-	-	(192)
Dues and Subscriptions	(616)	(10,380)	-	-	-	-	(10,996)
Other Services and Supplies	(9,723)	(7,785)	-	-	-	-	(17,508)
Expendable Prop 250 - 5000	-	(12,352)	-	-	-	-	(12,352)
IT Expendable Property	-	(10,795)	-	-	-	-	(10,795)
<b>Total Services &amp; Supplies</b>	<b>(\$111,747)</b>	<b>(\$421,742)</b>	-	-	-	-	<b>(\$533,489)</b>
<b>Capital Outlay</b>							
Professional Services	-	(207,600)	-	-	-	-	(207,600)
<b>Total Capital Outlay</b>	-	<b>(\$207,600)</b>	-	-	-	-	<b>(\$207,600)</b>
<b>Total Expenditures</b>							
Total Expenditures	(563,137)	(2,289,862)	-	-	-	-	(2,852,999)
<b>Total Expenditures</b>	<b>(\$563,137)</b>	<b>(\$2,289,862)</b>	-	-	-	-	<b>(\$2,852,999)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-

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**Veterans' Affairs, Oregon Dept of  
Pkg: 060 - Technical Adjustments**

**Cross Reference Name: Veterans' Services Program  
Cross Reference Number: 27400-002-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Total Positions</b>							
Total Positions							(11)
<b>Total Positions</b>	-	-	-	-	-	-	<b>(11)</b>
<b>Total FTE</b>							
Total FTE							(10.92)
<b>Total FTE</b>	-	-	-	-	-	-	<b>(10.92)</b>

**DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE**

**Veterans' Affairs, Oregon Dept of** **Agency Number: 27400**  
**2019-21 Biennium** **Cross Reference Number: 27400-002-00-00-00000**

<i>Source</i>	2015-17 Actuals	2017-19 Leg Adopted Budget	2017-19 Leg Approved Budget	2019-21 Agency Request Budget	2019-21 Governor's Budget	2019-21 Leg. Adopted Audit
<b>Lottery Funds</b>						
Transfer In Lottery Proceeds	-	-	-	2,739,708	-	-
Tsfr From Administrative Svcs	-	14,856,025	15,198,799	12,488,911	19,136,745	-
<b>Total Lottery Funds</b>	<b>-</b>	<b>\$14,856,025</b>	<b>\$15,198,799</b>	<b>\$15,228,619</b>	<b>\$19,136,745</b>	<b>-</b>
<b>Other Funds</b>						
Transfer In - Intrafund	969,206	107,623	107,623	-	109,006	-
<b>Total Other Funds</b>	<b>\$969,206</b>	<b>\$107,623</b>	<b>\$107,623</b>	<b>-</b>	<b>\$109,006</b>	<b>-</b>
<b>Federal Funds</b>						
Federal Funds	1,080,629	500,000	1,000,000	1,000,000	1,525,000	-
Transfer to Counties	(900,000)	-	-	-	-	-
<b>Total Federal Funds</b>	<b>\$180,629</b>	<b>\$500,000</b>	<b>\$1,000,000</b>	<b>\$1,000,000</b>	<b>\$1,525,000</b>	<b>-</b>

01/14/19 REPORT NO.: PPDFISCAL DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM PAGE 2  
 REPORT: PACKAGE FISCAL IMPACT REPORT 2019-21 PROD FILE  
 AGENCY: 27400 DEPT OF VETERANS AFFAIRS PICS SYSTEM: BUDGET PREPARATION  
 SUMMARY XREF: 002-00-00 Veterans' Services Program PACKAGE: 060 - Technical Adjustments

POSITION NUMBER	CLASS COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
0008036	OAS C0107 AP	ADMINISTRATIVE SPECIALIST 1	1-	1.00-	24.00-	03	3,130.00	25,165- 18,022-			49,955- 35,776-	75,120- 53,798-
0008160	OAS C0322 AP	PUBLIC SERVICE REP 2		.50-	12.00-	05	2,766.00	11,119- 14,564-			22,073- 28,911-	33,192- 43,475-
0008160	OAS C0322 AP	PUBLIC SERVICE REP 2		.50	12.00	05	2,766.00	11,119 8,651			22,073 17,172	33,192 25,823
0010043	OAS C0107 AP	ADMINISTRATIVE SPECIALIST 1	1-	1.00-	24.00-	09	4,096.00	32,932- 19,933-			65,372- 39,572-	98,304- 59,505-
0010044	OAS C0108 AP	ADMINISTRATIVE SPECIALIST 2	1-	1.00-	24.00-	03	3,565.00				85,560- 56,368-	85,560- 56,368-
0010068	OAS C0107 AP	ADMINISTRATIVE SPECIALIST 1	1-	1.00-	24.00-	02	2,994.00	24,072- 17,752-			47,784- 35,242-	71,856- 52,994-
0022011	OAS C0108 AP	ADMINISTRATIVE SPECIALIST 2		.50-	12.00-	08	4,514.00	18,146- 16,293-			36,022- 32,346-	54,168- 48,639-
0022011	OAS C0108 AP	ADMINISTRATIVE SPECIALIST 2		.50	12.00	08	4,514.00	18,146 10,380			36,022 20,607	54,168 30,987
0031018	MMS X7004 AP	PRINCIPAL EXECUTIVE/MANAGER C	1-	1.00-	24.00-	09	7,208.00	57,952- 26,094-			115,040- 51,800-	172,992- 77,894-
0034003	MESNZ7008 AP	PRINCIPAL EXECUTIVE/MANAGER E		.45-	10.80-	02	6,542.00	23,669- 5,867-			46,985- 11,647-	70,654- 17,514-
0034003	MESNZ7008 AP	PRINCIPAL EXECUTIVE/MANAGER E		.45	10.80	02	6,542.00	23,669 11,150			46,985 22,131	70,654 33,281
0034004	MESNZ7010 AP	PRINCIPAL EXECUTIVE/MANAGER F	1-	1.00-	24.00-	07	9,177.00				220,248- 89,528-	220,248- 89,528-
0196018	OAS C0861 AP	PROGRAM ANALYST 2	1-	.92-	22.00-	05	5,442.00				119,724- 64,779-	119,724- 64,779-

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 REPORT: PACKAGE FISCAL IMPACT REPORT 2019-21 PROD FILE  
 AGENCY: 27400 DEPT OF VETERANS AFFAIRS PICS SYSTEM: BUDGET PREPARATION  
 SUMMARY XREF: 002-00-00 Veterans' Services Program PACKAGE: 060 - Technical Adjustments

POSITION NUMBER	CLASS COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
7212006	OAS C0861 AP	PROGRAM ANALYST 2	1-	1.00-	24.00-	05	5,442.00				130,608- 67,458-	130,608- 67,458-
7214003	OAS C0784 AP	VETERANS TRUST OFFICER	1-	1.00-	24.00-	08	5,189.00	41,720- 22,098-			82,816- 43,866-	124,536- 65,964-
7214006	OAS C0784 AP	VETERANS TRUST OFFICER	1-	1.00-	24.00-	09	5,442.00	43,754- 22,598-			86,854- 44,860-	130,608- 67,458-
7214007	OAS C0784 AP	VETERANS TRUST OFFICER	1-	1.00-	24.00-	04	4,295.00	34,532- 20,328-			68,548- 40,354-	103,080- 60,682-
TOTAL PICS SALARY								260,127-			1,072,509-	1,332,636-
TOTAL PICS OPE								153,368-			582,597-	735,965-
TOTAL PICS PERSONAL SERVICES =			11-	10.92-	262.00-			413,495-			1,655,106-	2,068,601-

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Veterans' Affairs, Oregon Dept of  
Pkg: 101 - 21st Century Service Delivery**

**Cross Reference Name: Veterans' Services Program  
Cross Reference Number: 27400-002-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	-	-	-	-	-	-	-
Transfer In Lottery Proceeds	-	-	-	-	-	-	-
Tsfr From Administrative Svcs	-	237,500	-	-	-	-	237,500
<b>Total Revenues</b>	-	<b>\$237,500</b>	-	-	-	-	<b>\$237,500</b>
<b>Capital Outlay</b>							
Building Structures	-	200,000	-	-	-	-	200,000
Professional Services	-	37,500	-	-	-	-	37,500
<b>Total Capital Outlay</b>	-	<b>\$237,500</b>	-	-	-	-	<b>\$237,500</b>
<b>Total Expenditures</b>							
Total Expenditures	-	237,500	-	-	-	-	237,500
<b>Total Expenditures</b>	-	<b>\$237,500</b>	-	-	-	-	<b>\$237,500</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-

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Essential and Policy Package Fiscal Impact Summary - BPR013



**DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE**

**Veterans' Affairs, Oregon Dept of  
2019-21 Biennium**
**Agency Number: 27400**
**Cross Reference Number: 27400-002-00-00-00000**

<b>Source</b>	<b>2015-17 Actuals</b>	<b>2017-19 Leg Adopted Budget</b>	<b>2017-19 Leg Approved Budget</b>	<b>2019-21 Agency Request Audit</b>	<b>2019-21 Governor's Budget</b>	<b>2019-21 Leg. Adopted Audit</b>
<b>Lottery Funds</b>						
Transfer In Lottery Proceeds	-	-	-	2,739,708	-	-
Tsfr From Administrative Svcs	-	14,856,025	15,198,799	12,488,911	-	-
<b>Total Lottery Funds</b>	-	<b>\$14,856,025</b>	<b>\$15,198,799</b>	<b>\$15,228,619</b>	-	-
<b>Other Funds</b>						
Transfer In - Intrafund	969,206	107,623	107,623	-	-	-
<b>Total Other Funds</b>	<b>\$969,206</b>	<b>\$107,623</b>	<b>\$107,623</b>	-	-	-
<b>Federal Funds</b>						
Federal Funds	1,080,629	500,000	1,000,000	1,000,000	-	-
Transfer to Counties	(900,000)	-	-	-	-	-
<b>Total Federal Funds</b>	<b>\$180,629</b>	<b>\$500,000</b>	<b>\$1,000,000</b>	<b>\$1,000,000</b>	-	-

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Detail of LF, OF, and FF Revenues - BPR012

## INVIGORATE CORE OPERATIONS POLICY OPTION PACKAGE 101

21<sup>st</sup> Century Service Delivery – Package 101 (Agency priority # 1)

### Introduction

One of ODVA's goals and objectives to better serve Oregon veterans is to “invigorate core operations” and “build a better, stronger and more durable department for future generations.”

To meet these objectives, ODVA needs to replace outdated and inadequate software applications with effective, efficient platforms designed for modern day needs that will improve services to veterans and mitigate risks. In addition, ODVA needs to provide sufficient resources and support to introduce new technologies. Finally, ODVA needs to modernize the workplace by refreshing the second floor interior of the ODVA building that is several years overdue, according to DAS recommendations.

This policy option package invigorates ODVA core operations by:

1. Modernizing technology service delivery for the Home Loan Program.
2. Modernizing technology service delivery for the Conservatorship Program (part of Aging Veterans Services).
3. Modernizing technology services by providing sufficient resources and support to introduce new technologies.
4. Modernizing the workplace by refreshing the second floor interior of the ODVA building.

### 1. Home Loan Origination and Servicing Modernization

#### Purpose

The purpose of this funding request is to improve the Home Loan Program loan origination and loan servicing services to veterans, improve agency effectiveness and accuracy, and mitigate risks.

The Home Loan Program originates and services home loans for veterans. However, the current loan origination and servicing applications are separate, custom applications that contain redundant information about the veteran borrower and the loan. Because the applications are separate, they are inefficient and susceptible to multiple data entry errors.

ODVA's Home Loan Program is an Oregon constitutionally authorized and mandated benefit for Oregon veterans. The agency last updated origination and servicing technology in 1999, in response to issues that arose in the 1980's, and the agency invested nearly \$1 million to customize a COTs system (commercial off-the-shelf software) that would address a number of issues including servicing a number of non-amortizing loans. Two of these three systems that were implemented 19 years ago do not meet the needs of the agency's current business model, do not allow changes to be made to implement new federal compliance requirements, and do not meet the expectations of our veteran borrowers.

### How Achieved

The goals of improving the Home Loan Program loan origination and loan servicing services to veterans, improve agency effectiveness and accuracy, and mitigate risks can be achieved through the implementation of a new Home Loan origination and servicing application during the 2019-21 biennium.

The goal is to ensure that the loan origination and loan servicing solutions can work together seamlessly to reduce duplication of effort and mitigate long-term risks associated with stop-gap software applications that were introduced to respond to changing federal regulations. An "end-to-end" home loan system combines an origination and a servicing system. In addition, this new software system will significantly improve the veterans' customer service experience by allowing veterans to review their home loan information online.

ODVA recently engaged professional services to help audit the agency's current technology system's architecture and business processes. The information from the audit currently informs the technology requirements for a solution, and has been used to identify viable solutions and estimated costs.

The critical components of a home loan origination/loan servicing IT system include:

1. Robust reporting capabilities to ensure critical data are available to plan for future loan allocations and bond financings, as well as federal compliance information.
2. Control the lending life cycle from new business and loan servicing to default management.
3. Enable customer-facing account management through the web.
4. Ability to work with third-party originators.
5. Ability to keep the applications current with minimal investment after implementation.

In the 2017-19 biennial budget process, the agency requested and received funding to replace the current Home Loan applications. The agency chose not to begin this project in the 2017-19 biennium due to limited expert staff resources and the need to further understand the future state business requirements.

**Staffing Impact**

None.

**Quantifying Results**

Home Loan Program Expected Outcomes

Ability to quickly respond to federally-mandated regulatory changes like those that occurred during the 2015 – 2017 biennium

1. Allow ODVA to better control the three stages of the home loan lending life cycle
  - a. New business origination
  - b. Loan servicing
  - c. Default management
2. Enable customer-focused experiences
3. Maximize staff efficiency
4. Minimize data input errors
5. Satisfy federal regulatory compliance
6. Allow ODVA to provide enhanced information to veterans.

The results of installing an end-to-end loan origination and servicing system for the Home Loan Program will be measured by the following:

1. Loan file data entry time and processing time
2. Number of regulatory events and negative audit findings
3. Borrower satisfaction
4. Application user satisfaction

**Fiscal Impact/Cost**

The professional study provided to the agency outlined the following costs for the end-to-end home loan origination and loan servicing project:

\$ 50,000	OF	Employee Training (Capital Outlay)
\$ 50,000	OF	IT Professional Services (Capital Outlay)
<u>\$ 150,000</u>	OF	Data Processing Software (Capital Outlay)
\$ 250,000	OF	TOTAL

## 2. Conservatorship Program Technology Modernization

### Purpose

The purpose of this funding request is to improve the Conservatorship and Representative Payee Program services to veterans, improve agency effectiveness and accuracy, and mitigate risks to the \$30 million program.

The Conservatorship System software application enables court-appointed ODVA conservators and trust officers to deliver critical conservatorship and representative payee services to the state's most vulnerable veterans. These veterans rely on ODVA and the Conservatorship System to manage and care for all of their financial needs, which total almost \$30 million in client assets.

In the 2017-19 biennial budget process, the agency requested and received funding to replace the current Conservatorship application. There were many unknown factors at the time of the request; primarily the agency anticipated that an existing COTS (commercial off-the-shelf software) solution would meet the needs of the program business requirements. For example, the expected and funded cost of the project (\$600,000) was based on estimates researched in 2014-16, which were informed using a high-level understanding of the program requirements.

During the 2015-17 biennium, ODVA engaged professional system and analysis services to help audit the current systems architecture and business processes. The information from the audit currently informs the technology requirements for a solution, and has been used to identify viable solutions and estimated costs, including: 1) costs for professional IT services (\$200,000); and costs associated with changes in the scope of work because of changes to policy and reporting requirements within the conservator industry (\$200,000). These changes were not anticipated in the 2017-19 agency request budget. Based on the professional assessment, ODVA has determined that:

1. No out-of-the-box software solution without customization will meet the business need for the agency.;
2. ODVA does not have in-house resources or expertise to manage an IT project of this scale and does not have the capability to perform business analysis to adjust processes that would reduce needed customization; and
3. Bringing in professional services to resolve these issues (through project management, business analysis, and system integration) will cost an estimated \$200,000.
4. Changes in scope based on regulatory changes may likely require additional work and funding on technological and business planning processes. To ensure the agency is able to implement the right application to perform required functions, the initial estimated costs increase an additional \$200,000.

ODVA is continuing to work with OSCIO's office through the Stage Gate review process as well as DAS for business case review and development.

To date, ODVA has worked on the following aspects of this project: initial solution and vendor research to inform the business case; conservator application architecture mapping, baseline requirement gathering; initial business process analysis; business case development; planned timeline; professional services solicitation drafted; OSCIO engagement on Stage Gate review process; DAS engagement on business case review; and \$600,000 of approved project funding through the 2017-19 biennium.

### **How Achieved**

The objectives of improving the Conservatorship Program and Representative Payee services to veterans, improve agency effectiveness and accuracy, and mitigate risks to the \$30 million conservatorship and representative payee Program can be achieved through the implementation of the new Conservatorship IT application.

Based on a third-party professional assessment of the Conservatorship system and planned system during the 2017-19 biennium, successful implementation of the new IT system must include:

1. Contracting for professional IT services for project management, business analysis, and system integration for the Conservatorship System software replacement; and
2. Additional development based on changes to the initial requirements.

### **Staffing Impact**

None.

### **Quantifying Results**

Expected Outcomes include:

1. Significant risk mitigation by eliminating the current dependencies on:
  - a. A single, contracted application developer
  - b. Legacy and largely unsupported application language and platform
2. Improved staff efficiency and accuracy through:
  - a. Automated workflow processes
  - b. Graphical and user-friendly interface
  - c. Reduced IT overhead

3. Compliance with ODVA strategic plan to build a better, stronger and more durable department for future generations
4. Long-term support and sustainability for the ODVA Conservatorship Program and System application
5. Integration of the Conservatorship System into other existing and future ODVA core program applications
  - a. Business intelligence
  - b. Improved customer service models
6. Application extensibility is retained to meet potential changes to the business needs of the ODVA Conservatorship Program
7. Number of types of reports that may be generated that will ultimately improve operations
8. Increased ODVA Conservatorship Program capacity.

Results of developing a replacement for the legacy Conservatorship System will be measured by the following:

1. The number of Conservatorship System support requests
2. Case file data entry and processing time
3. Application user satisfaction

### **Fiscal Impact/Cost**

The professional study provided to the agency outlined the following costs for the implementation of the Conservatorship system:

\$ 200,000	LF	IT Professional services (project management, business analysis, and system integration) (Capital Outlay)
<u>\$ 200,000</u>	LF	Software customization and development costs (Capital Outlay)
\$ 400,000	LF	TOTAL

### **3. Technology Services and Supplies**

#### **Purpose**

The purpose of this funding request is to provide sufficient resources and support to introduce new technologies to ODVA.

The existing services and supplies allocation is insufficient to accommodate a responsive introduction of new technologies and modern solutions. This limits the agency's ability to quickly expand services and adapt to changing business and regulatory requirements. Existing services and supplies resources accentuates existing "technical debt" accrued over many years of general budget cutbacks, staff reductions and retirements. This request seeks to restore the ability of ODVA to introduce modern technology solutions into the agency while maintaining operational business continuity.

**How Achieved**

The goal of providing sufficient resources and support to introduce new technologies to ODVA will be achieved by implementing a plan developed by the agency that will enable ODVA to accommodate enterprise information security policy changes, absorb new demand for mobile solutions, consolidate and centralize database solutions, introduce new and modern information systems thereby creating capacity and greater work efficiency, procure expert talent, and develop a solid knowledgebase and technology foundation for the agency. The five priorities for this project include:

1. Enhanced information security (Certificate authority/public key infrastructure, mobile device management/enterprise mobile management, network access controls, monitoring and data loss prevention, and professional services)
2. Expanded network capability (Wireless network, technology to support building infrastructure updates, professional services to support systems integration)
3. Staff development
4. Database and modern application support and services
5. Renewed technology infrastructure (Technology sandbox, and assets to improve efficiencies like fiber optic, telecom racks, closets and cabinets, inventory storage)

**Staffing Impact**

None.

**Quantifying Results**

The results of investing in technology services and supplies will be measured by the following:

1. Enhanced information security
2. Expanded network capability
3. Staff development
4. Database and modern application support and services
5. Renewed technology infrastructure

In addition, expenditures for professional services is included to provide regular technology performance audits and discovery services to measure results and outcomes of related investments. Using a typical technology lifecycle of 18-24 months, and project completion as a baseline, third-party performance audits



should be undertaken every other biennium, or 3-4 years. The most current baseline, and potential milestone metrics information, is contained within 2017 discovery service engagement reports.

#### Fiscal Impact/Cost

\$ 108,000		Enhanced information security
\$ 72,000		Expanded network capability
\$ 30,000		Staff development
\$ 10,000		Database and modern application support and services
<u>\$ 20,000</u>		Renewed technology infrastructure
\$ 240,000		TOTAL
\$ 120,000	LF	Information Technology (Services and Supplies)
<u>\$ 120,000</u>	OF	Information Technology (Services and Supplies)
\$ 240,000		TOTAL

#### 4. ODVA Second Floor Building Refresh

##### Purpose

The Department of Administrative Services recommends a refresh of state building interiors every ten years; it has been more than ten years since the interior of the ODVA building was painted and new carpet installed. With funding from the 2017-19 budgets, the agency completed the renovation of the third floor and is working on the renovation of the first floor. With the recognition of the very challenging bidding environment in 2017 and 2018, additional funds will be needed to complete the second floor renovation. The project will primarily encompass the painting and re-carpeting of all staff and public areas.

##### How Achieved

The goal of implementing a plan for the second floor renovations requires a schedule that provides for the removal of old carpet, painting of all walls and installation of new carpet. The most efficient and effective way to complete this project will require all staff to be moved to various locations within the building while the work is underway. The painting of all wall surfaces will be completed and coordinated with the carpet contractor and signage will be installed as remodeled areas are completed. In recognition of individual agency's operational requirements (OVDA and building tenants), work that may impact their areas will be performed after hours and on weekends where and when it is feasible. This project will need new funding because there are no internal financial

resources that can be redirected to accomplish this project.

**Staffing Impact:**

None.

**Quantifying Results:**

The expected outcomes will include the following on the second floor of the ODVA building: removal of old carpet, painting, carpet and installation, temporary moving costs and other related construction costs.

**Fiscal Impact/Cost**

\$475,000	LF	Building Refresh (Capital Outlay)
<u>\$500,000</u>	OF	Building Refresh (Capital Outlay)
\$975,000		TOTAL

**Revenue Source**

\$ 250,000	OF	Home Loan Origination and Servicing Modernization (Capital Outlay)
\$ 400,000	LF	Conservatorship Program Technology Modernization (Capital Outlay)
\$ 120,000	LF	Technology Services and Supplies (Services and Supplies)
\$ 120,000	OF	Technology Services and Supplies (Services and Supplies)
\$ 475,000	LF	ODVA Second Floor Building Refresh (Capital Outlay)
<u>\$ 500,000</u>	OF	ODVA Second Floor Building Refresh (Capital Outlay)
<b>\$1,865,000</b>		<b>TOTAL (Capital Outlay of \$1,625,000 and Services and Supplies of \$240,000)</b>

**GRAND TOTALS**

\$ 875,000	LF	TOTAL Capital Outlay
<u>\$ 120,000</u>	LF	TOTAL Services and Supplies
\$ 995,000	LF	TOTAL Combined
\$ 750,000	OF	TOTAL Capital Outlay
<u>\$ 120,000</u>	OF	TOTAL Services and Supplies
\$ 870,000	OF	TOTAL Combined
\$1,865,000		TOTAL

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Veterans' Affairs, Oregon Dept of  
Pkg: 101 - 21st Century Service Delivery**

**Cross Reference Name: Veterans' Services Program  
Cross Reference Number: 27400-002-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	237,500	-	-	-	-	-	237,500
<b>Total Revenues</b>	<b>\$237,500</b>	-	-	-	-	-	<b>\$237,500</b>
<b>Capital Outlay</b>							
Building Structures	200,000	-	-	-	-	-	200,000
Professional Services	37,500	-	-	-	-	-	37,500
<b>Total Capital Outlay</b>	<b>\$237,500</b>	-	-	-	-	-	<b>\$237,500</b>
<b>Total Expenditures</b>							
Total Expenditures	237,500	-	-	-	-	-	237,500
<b>Total Expenditures</b>	<b>\$237,500</b>	-	-	-	-	-	<b>\$237,500</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-

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Essential and Policy Package Fiscal Impact Summary - BPR013

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Veterans' Affairs, Oregon Dept of  
Pkg: 102 - Target Veteran Services**

**Cross Reference Name: Veterans' Services Program  
Cross Reference Number: 27400-002-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
Transfer In Lottery Proceeds	-	-	-	-	-	-	-
Tsfr From Administrative Svcs	-	60,000	-	-	-	-	60,000
<b>Total Revenues</b>	-	<b>\$60,000</b>	-	-	-	-	<b>\$60,000</b>
<b>Services &amp; Supplies</b>							
Professional Services	-	-	-	-	-	-	-
Other Services and Supplies	-	60,000	-	-	-	-	60,000
<b>Total Services &amp; Supplies</b>	-	<b>\$60,000</b>	-	-	-	-	<b>\$60,000</b>
<b>Total Expenditures</b>							
Total Expenditures	-	60,000	-	-	-	-	60,000
<b>Total Expenditures</b>	-	<b>\$60,000</b>	-	-	-	-	<b>\$60,000</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-

## VETERAN SERVICES POLICY OPTION PACKAGE 102

### Target Veteran Services – Package 102 (Agency priority # 2)

#### Introduction

ODVA's vision for veterans, stated in its five-year strategic plan, is that "Veterans and their families thrive in Oregon." One of the goals and its objective that supports that vision is to "Target veteran services: Serve more veterans and serve them better." This package targets services for veterans and supports the objective of serving more veterans and serving them better and includes enhancing training opportunities for veteran service officers that serve veterans and the capabilities of the conservatorship and representative payee programs that provide direct support to our most fragile veterans, and increase veterans' accessibility to ODVA home loans.

The package components are grouped into three major categories:

1. Statewide Veteran Services: Enhanced training for state, county, tribal and National Service Organization veteran service officers
  - Enhanced statewide and regional training conferences for county, tribal and NSO veteran services
2. Aging Veterans Services: Representative Payee Position and Conservatorship Staff Training
  - Representative Payee Position due to increased demand for services
  - Training for Conservatorship staff to meet certification requirements
3. Home Loan Program: Increase Home Loans in Underserved Markets
  - Establish an ODVA Home Loan Business Representative to develop home loan business

## 1. Statewide Veteran Services: Enhanced training for state, county, tribal and National Service Organization veteran service officers

### Purpose

Oregon Department of Veterans' Affairs holds the power of attorney for claims filing with the United States Department of Veterans Affairs (USDVA), which requires the agency to be responsible for the training, certification, and accreditation of all county and state veteran service officers (VSOs). ODVA holds initial 40-hour training classes for new VSOs, multiple onsite training days for unaccredited VSOs, one annual conference (held in different locations around the state), and ten one-day regional training conferences each year. The agency provides this training at no cost to state and county VSOs and invites tribal and National Service Organization partners. When the community requests it, other service providers are also included. Examples of this are funeral directors learning how to provide burial benefits to local veterans and medical providers who want to learn more about correct billing practices for the VA Choice program. ODVA has also brought in federal VA representatives for one day intensive training for all accredited VSOs on one topic, such as updated VA Pension filing requirements.

It takes approximately 12 months for a new VSO to achieve accreditation. VSOs must understand the intricacies of veteran status, types of military discharges, privacy laws under HIPAA, Federal VA organization and structure, and state and local information resources available to veterans. The VSOs also need to learn the basics of federal laws and eligibility surrounding service-connected compensation, non-service connected pensions, survivor benefits, veteran and dependent educational benefits, Veterans healthcare, fiduciary responsibilities and conservatorship assistance available to veterans, how to interview veterans, and how to develop and file (using Federal VA claims management software, the correct forms, supporting documentation, and procedures) each kind of claim.

Fully-accredited VSOs need continuing education to keep pace with new procedures and directives coming from the Federal VA. Training needs for fully-accredited VSOs include developing curricula and hosting an annual conference with specific workshop tracks and general sessions. Advanced training includes a deeper dive into the Code of Federal Regulation Title 38 governing veterans' benefits, analysis of federal claims and appeals decisions, legal research, and outreach best practices.

Since 2015, ODVA has hosted an annual three-day Tribal Veteran Representative conference. We do not accredit these representatives, but offer the only veteran service officer training available to them. ODVA is offering to enter into an agreement with each Tribal government to accredit their representatives, but it will take time. Until that happens, the representatives in those communities will continue to receive the best training available. ODVA additionally invites National Service Organizations that receive pass-through funding from the Oregon Legislature to the annual VSO conference. One organization regularly sends three VSOs and others sometimes opt to send their newer VSOs.

In addition to basic conference costs for the venue and travel expenses, ODVA often provides national professional trainers for the annual statewide conference to provide expertise on fundamental and changes in Federal VA claims filings, appellate processes, because the claims are legal documents reviewed and adjudicated by the U.S. Department of Veterans' Affairs. These trainers are attorneys associated with a non-profit organization that focuses on providing pro bono representation to veterans and their eligible dependents, and ensuring the government delivers the benefits to which veterans are entitled. These organizations have provided the legal work that has recently resulted in most of the landmark rulings affecting the veteran benefit landscape.

ODVA also provides other specialized trainers at the conferences, including professional behavioral health experts on suicide prevention and Post Traumatic Stress Disorder, recognizing and dealing with stress in the high pressure workplace, and how to best interpret medical evidence for the prosecution of a benefits claim.

Since 2015, the number of state and county veteran service officers has increased by 46%. In June 2015, there were 71 county and state veteran service officers (55 county and 16 state VSOs). In June 2018, there were 104 state and county veteran service officers, including 81 county and 23 state VSOs. The training demands are great: a total of 16 new veteran service officers, who require intensive training, were hired by the counties and the state in the last year, as well as training new VSOs due to turnover.

During the period of significant increases in the number of veteran service officers, from 2015 to 2018, the budgeted costs for training services and supplies was not increased, and remained at \$45,795 for both 2015-17 and 2017-19. Therefore, in addition to the costs of training a significant number of new veteran service officers, which increases the overall training costs incurred, the costs for conference venues and associated costs, travel, materials and professional trainers have increased over the past four to six years.

### **How Achieved**

The goal of providing training to the significant increase in state and county VSOs, meeting ODVA's Federal VA certification and accreditation requirements, and extending training to our tribal and National Service Organization partners can be achieved with additional dedicated funds for annual and regional training conferences in the amount of \$60,000 LF.

These funds will be used to cover the costs of conference venues and associated costs, professional legal trainers, travel, specialized trainers and the additional expenses incurred in conducting initial 40-hour trainings for new VDOs, the two annual conferences and 10 regional conferences each year.



**Staffing Impact**

There is no direct staffing impact.

**Quantifying Results**

The increased training efforts and greater access to training by the VSOs will result in well-trained, highly skilled and professional veteran service officers who can be accredited in a timely manner and are capable of filing well-developed claims and advocating for veterans and their eligible dependents.

**Fiscal Impact/Cost**

\$ 60,000 LF      Training costs for veteran service officers (Services and Supplies)

**2. Aging Veterans Services: Representative Payee Position and Conservatorship Staff Training****Purpose**

The purpose of this request is to provide needed representative payee services to veterans due to increased demand for services and to cover training costs for Conservatorship staff to meet statutorily mandated certification requirements

Through the Aging Veteran Services Program, ODVA is committed to prioritizing resources and services for aging veterans (65 years of age and older), who represent more than half of Oregon's veteran population. Part of Aging Veteran Services program is the Conservatorship and Representative Payee program. This program provides financial and case-management services to the most vulnerable Oregon veterans who are unable to manage their own finances. One of the greatest benefits of these programs is that it prevents the institutionalization of these senior veterans, thereby reducing costs that would have been borne by the state general fund.

The current representative payee program is staffed by one individual, who provides services for approximately 146 veterans; however, the average national caseload for representative payees is about 100 cases per rep payee. Despite growing demands, ODVA has been forced to stop accepting new representative payee clients, except in dire circumstances, because the current caseload is too high.

Staff members in the Conservatorship and Representative Payee program are required to be certified by the national Center for Guardianship Certification (CGC). The training and coursework requirements for certification increased on January 1, 2018, including 30 hours of coursework for certification and 10 hours each year of continuing education.

### How Achieved

The addition of one new Representative Payee (\$137,753 LF) would reduce the per person caseload, while increasing the total number of veterans served, and allow each representative payee to handle approximately 100 veterans. ODVA is also requesting Services and Supplies relating to this position in the amount of \$15,000 LF, for a total of \$152,753 LF. If funding is not provided for the representative payee position, the caseload for the current representative payee will need to be reduced by approximately 45-50 rep payee cases.

Statutorily mandated Initial and continuing education training required for certification of Conservatorship and Representative Payee staff by the Center for Guardian Certification would be funded with \$ 20,000 LF Services and Supplies.

### Staffing Impact

Establish one Representative Payee (Administrative Specialist 2)

### Quantifying Results

A Representative Payee position will decrease the caseload per staff members, better serve representative payee clients, and allow ODVA to take on new clients. ODVA will also be able to meet certification requirements for Conservatorship and Representative Payee staff.

### Fiscal Impact/Cost

\$ 152,753 LF Representative payee position (\$137,753 LF personal services and \$15,000 LF for Services and Supplies)

\$ 20,000 LF Training costs conservatorship staff (Services and Supplies)

\$ 172,753 LF Total

### 3. Home Loan Program: Increase Home Loans for Veterans

#### Purpose

The purpose of this request is to increase the number of veteran home loans, including those in underserved markets, to provide a greater number of home loans to eligible veterans and create a more robust Home Loan Program.

The ODVA Home Loan program is dependent on its contractual partners, including mortgage brokers, mortgage lenders and real estate professionals for loan production. However, the program has not fully established a marketing presence in Oregon to introduce, train, and service these lending partners who serve the acquisition and financing needs of veterans.

#### How Achieved

The purpose of increasing the number of home loans to veterans would be achieved by establishing a dedicated staff person who would be tasked with identifying, marketing and establishing new contractual lending partners, including mortgage brokers and mortgage lenders; attending mortgage-related tradeshows; providing training and education to lenders and real estate professionals; and meeting with new and existing lender clients to enhance business relationships. Services and supplies include significant travel expenses.

#### Staffing Impact

Establish one Business Development Representative (Program Analyst 3)

#### Quantifying Results

Results would be quantified on two levels: first, the increase in the amount of mortgage brokers and lenders that submit loan packages to ODVA, and second, the increase in loan production.

#### Fiscal Impact/Cost

\$ 227,517 OF Business Development Representative (\$191,247 OF Personal Services and \$ 36,270 OF Services and Supplies)

#### Revenue Sources:

\$ 60,000	LF	Training costs for veteran service officers (Services and Supplies)
\$ 152,753	LF	Representative Payee position (\$137,753 LF Personal Services and \$15,000 LF Services and Supplies)
\$ 20,000	LF	Training costs conservatorship staff (Services and Supplies)
<u>\$ 227,517</u>	OF	Business Development Representative (\$191,247 OF Personal Services and \$36,270 OF Services and Supplies)
<b>\$ 460,270</b>		<b>TOTAL (Personal Services of \$329,000 and Services and Supplies of \$131,270)</b>

**GRAND TOTALS**

\$ 137,753	LF	TOTAL Personal Services
<u>\$ 95,000</u>	LF	TOTAL Services and Supplies
\$ 232,753	LF	TOTAL Combined
\$ 191,247	OF	TOTAL Personal Services
<u>\$ 36,270</u>	OF	TOTAL Services and Supplies
\$ 227,517	OF	TOTAL Combined
\$ 460,270		TOTAL

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Veterans' Affairs, Oregon Dept of  
Pkg: 102 - Target Veteran Services**

**Cross Reference Name: Veterans' Services Program  
Cross Reference Number: 27400-002-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
Transfer In Lottery Proceeds	-	-	-	-	-	-	-
Tsfr From Administrative Svcs	-	60,000	-	-	-	-	60,000
<b>Total Revenues</b>	<b>-</b>	<b>\$60,000</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>\$60,000</b>
<b>Services &amp; Supplies</b>							
Professional Services	-	-	-	-	-	-	-
Other Services and Supplies	-	60,000	-	-	-	-	60,000
<b>Total Services &amp; Supplies</b>	<b>-</b>	<b>\$60,000</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>\$60,000</b>
<b>Total Expenditures</b>							
Total Expenditures	-	60,000	-	-	-	-	60,000
<b>Total Expenditures</b>	<b>-</b>	<b>\$60,000</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>\$60,000</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

## VETERAN SERVICES POLICY OPTION PACKAGE 103

### Mobilize Partnerships – Package 103 (Agency priority #3)

#### Introduction

One of ODVA's four strategic plan goals and its objective is to "Mobilize Partnerships" in order to "leverage all resources available to veterans." ODVA forges and mobilizes partnerships with other state, county, local, tribal and federal governmental agencies and non-profits that have subject matter expertise and delivery systems. Working with these partnerships, ODVA provides expertise on the critical needs and special issues facing veterans. Through these partnerships, ODVA is able to achieve another strategic goal and its objective: to "Target Veteran Services" and "serve more veterans and serve them better."

ODVA's purpose is to leverage existing state resources to expand and enhance direct service to veterans including: mental health care; physical health care; housing security; employment opportunities and stability; education and training; and transportation accessibility and availability. The agency's key partners include the National Service Organizations, which provide critical services for veterans. The goals of leveraging these partnerships are to:

- Maximize up-front, preventative resources to reduce expensive, back-end state safety net systems;
- Enhance collaboration to create, connect and support statewide networks for veterans and family resources; and
- Bring the veterans' focus to key state outcome areas.

This package mobilizes ODVA partnerships with non-profits, National Service Organizations, state, local and tribal governments in four targeted areas for veterans using pass-through funding or through ODVA grants:

1. National Service Organization Partnerships: Enhance state pass-through funds
  - Enhance existing pass-through funding.
  - Provide federal claims filing and other critical services to veterans.
2. Oregon Public Universities and Community Colleges Partnerships: Renew ODVA Campus Veteran Grant Program
  - Renew existing campus veteran grant program for Campus Veteran Centers and Coordinators.
3. Community Partnerships: Renew ODVA Veteran Services Grant Program
  - Partners: Non-profits, National Service Organizations, state, local and tribal governments.
  - Renew and enhance existing grant program.
  - Direct services for veterans: mental/physical health care; housing; employment; education/training; and transportation.
4. Community Partnerships: New ODVA Health Care Transportation Grant Program
  - Non-profits, National Service Organizations, state, local and tribal governments.

- New grant program.
- Transportation for health care access.

## 1. National Service Organization Partnerships: Enhance state pass-through funds

### Purpose

The purpose of this funding request is to increase the amount of pass-through funds from ODVA to certain veterans' organizations known as National Service Organizations (NSOs) that provide critical services to veterans, including filing disability compensation benefit claims and referring veterans to key service providers in their community. ODVA's partnership with National Service Organizations in Oregon began in 1949 and ORS 406.310 provides specific authority to provide resources to NSOs.

NSOs are organizations accredited by the United States Department of Veterans Affairs (USDVA) and include, but are not limited to, the American Legion, Veterans of Foreign Wars, National Association for Black Veterans, Disabled American Veterans and others. The USDVA accreditation allows NSOs to serve as veteran advocates and assist veteran claimants in the preparation, presentation, and prosecution of their claims.

NSO's play a critical role in Oregon veteran's access and utilization of federal VA benefits because some veterans are very aligned with their local NSO and are more comfortable approaching and working with a local NSO veteran service officer than with a county or state veteran service officer. The goal of ODVA is to reach and serve as many veterans as possible.

An increase in the pass-through funding to NSOs will assist the NSOs in staffing veteran service officers and increase the number of disability compensation and pension benefit claims the NSOs file on behalf of Oregon veterans. The "return on investment" is significant because the average annual disability claim is over \$15,000 for an Oregon veteran.

### How Achieved

The purpose of expanding and enhancing the work of the National Service Organizations that provide critical services to veterans, including filing disability compensation and benefit claims would be achieved through providing additional pass-through dollars to these NSOs. The current service level for pass-through funding to NSOs is \$245,292 for the 2019-21 biennium. Providing additional pass-through dollars to the NSOs greatly increases the availability of veteran services in local communities and builds on a strong return on investment results seen over the last two biennia.

Currently, five NSOs receive pass-through funding. Recently, the Military Order of the Purple Heart (an NSO with chapters in Oregon) decided to end all assistance provided to veterans for claims filings and close their National Service Program Offices as of June 30, 2018, citing a lack of sufficient funding. This will put greater pressure on the existing resources of the other four NSOs and the county veteran service officers.

The proposal is to increase the pass-through from the current service level of \$245,292 (\$122,646 GF and \$122,646 LF) to a total of \$600,000 (an increase of \$354,708 LF). Although the roughly 150% increase is significant, the work of the NSOs as an alternative to the county veteran service offices is very important and they file a substantial number of claims. In addition, the NSO's play an important role in improving the health and welfare of Oregon veterans, including suicide prevention and awareness. The NSOs are an important partner to Oregon Department of Veterans' Affairs in our efforts to serve more veterans and serve them better.

**Staffing Impact**

None

**Quantifying Results**

National Service Organizations must provide quarterly budget information and information on the number of claims filed on behalf of veterans. ODVA anticipates these funds will increase the number of claims filed.

**Fiscal Impact/Cost**

\$ 354,708 LF      Pass-through to National Service Organizations

**2. Oregon Public Universities and Community Colleges: Renew ODVA Campus Veteran Grant Program****Purpose**

The purpose of this funding request is to enhance and expand the Campus Veteran Grant Program that provides grants to Oregon community colleges and public universities and to provide for a conference on best practices and innovations for the grantees. As background, Senate Bill 143 (2017) established a \$1 million (Lottery Funds) grant program to expand campus veteran resource centers and campus veteran coordinators on the campuses of Oregon community colleges and public universities. The purposes of the grants were to help veterans successfully transition from military service to college life, succeed in college and



complete educational goals, and transition from college to the workforce in the community. Fourteen Oregon universities and community colleges applied and all fourteen were selected to receive these funds.

Senate Bill 143 states that “Grant recipients may use grant funds . . . for the expansion and enhancement of existing campus veteran resource center programs, including training campus veteran coordinators, purchasing computer and other equipment and supplies, hiring additional staff, hosting veteran events, facilitating access to workforce and community resources that were not previously available and meeting other identified needs for the successful and continued operation of the existing centers and coordinators.”

Preliminary outcomes, based on required quarterly reporting from the grantees, confirm that the Campus Grant Program is a great success. All schools quickly implemented implementation plans to hire Campus Veteran Coordinators; establish or renovate Campus Veteran Centers and purchase study tables, computers and printers; and to provide outreach and events to attract veterans and their families to the resources available to them. The schools were innovative, tailored their plans to the veterans they serve and have had an excellent response from campus veterans.

Campus veteran resource centers and veteran coordinators provide a benefit to both the veteran and the community college. In 2015, almost 13,500 Oregon veterans received more than \$146 million in Federal VA education benefits. These educational benefits include financial resources in support of attending community colleges, universities, and certification and training programs. A strong veterans program can help attract and retain veterans, resulting in increasing and retaining these federal funds. Campus veteran coordinators serve as a resource to administration and staff, providing an understanding and appreciation of the strengths of veterans and the veteran’s unique challenges and needs.

A campus veteran resource program, which includes a resource center and a coordinator, aligns with one of the priorities in Oregon's Higher Education Coordinating Commission (HECC) 2016-20 Strategic Plan: “focus on outcomes that promote life successes.” The campus veteran program supports this goal by providing the resources to help the veteran transition from the military into the community college experience, complete their certificate or degree program, and transition into the workforce and community.

### **How Achieved**

The goals are to maintain, expand and enhance campus veteran resource centers and campus veteran coordinators at community colleges and state universities (“colleges”) using best practices and innovative models from existing programs. These goals would be achieved through a pass-through distribution of \$685,000 in grant funds from ODVA to community colleges and universities, and an additional \$15,000 for ODVA to sponsor state or regional training conferences for grantees and applicants to share best practices, innovations and strategic planning.

Senate Bill 143 provided for \$1 million in grant funds. There are 17 community colleges and 7 public universities in Oregon, however, a number of these schools do not have a great enough veteran's population to justify a campus veterans program. Of the 24 community colleges and public universities in Oregon, 14 schools applied for and were awarded grants of up to \$100,000. Senate Bill 143 also provided a permanent Campus Veterans Coordinator position within ODVA who works closely with all public universities and community colleges to monitor grant implementation and reporting requirements, and provides training, support and facilitates networking between veteran coordinators and schools.

ODVA is requesting a total of \$700,000 for this Grant Program in the 2019-21 biennium, including \$685,000 pass-through to the schools and \$15,000 for ODVA sponsored conferences. ODVA has reduced the overall expenditures for this Grant program from \$1 million for 2017-19 for two reasons. First, a portion of the \$1 million in grants was provided to the schools for one-time renovations and upgrades for the campus veteran resource centers, including purchasing furniture and equipment. Second, part of the overall purpose of the program was to help the schools jump-start their programs with the expectation that the schools would provide additional resources to support their programs in 2019-21.

The key to successful Campus Veterans Service Programs are the Campus Veterans Coordinators. It is important that these positions are continued now that the programs are established. Note that Senate Bill 143 has restrictions on the use of grant funds for coordinator positions and requires the schools to match funds for a coordinator's salary: "A grant recipient may use up to \$25,000 of grant funds awarded under this section to pay a campus veteran resource coordinator's salary if the grant recipient commits to matching at least 50 percent of grant funds used for that purpose."

The priorities for grant awards for 2019-21 would include applications for funds for resource centers and coordinators for schools that did not apply for a grant in 2017-19; funds for campus veteran coordinators with matching funds from the schools; and funds for events and programs that emphasized transitioning from school to employment.

Note: ORS 406.130 contains temporary provisions authorizing the campus veteran resource center grants that sunset on January 2, 2020. Section 3 states: "No later than August 31, 2018, the Department of Veterans' Affairs shall report to the interim legislative committees relating to veterans on the implementation of the grant programs established under section 1 of this 2017 Act and on further steps required to expand the programs during the 2019-2021 biennium. The department shall report in the manner provided by ORS 192.245 and may include recommendations for legislation. In addition, Section 4 states: "No later than September 15, 2018, the Advisory Committee appointed under ORS 406.210 shall review and consider the grant programs established under section 1 of this 2017 Act, including the quarterly reports submitted by the grant recipients under section 1 (8) of this 2017 Act and the report prepared by the Department of Veterans' Affairs under section 3 of this 2017 Act, and report to the interim legislative committees relating to veterans. The Advisory Committee shall evaluate

the merits of the grant programs, how grants were awarded to community colleges and public universities and how grant funds were used by grant recipients. The report must address funding priorities for implementation of legislation that will accomplish one or more of the purposes and objectives of this 2017 Act and make recommendations for legislation.”

Therefore, the sunset date for the authorizing statute would need to be repealed or the program could be accomplished through a budget note to the agency.

**Staffing Impact:**

There is no direct staffing impact for this package.

**Quantifying Results:**

Results of the program would be quantified using the following measures:

1. Number of veterans served
2. Demographics of veteran: age, gender, geographical area
3. Types of services provided
4. Innovation in type or delivery of service
5. Nature of problem to be addressed

**Fiscal Impact/Cost**

\$ 700,000 LF      \$685,000 pass-through to public universities and community colleges (Special Payments) and \$15,000 for training conferences (Services and Supplies)

**3. Community Partnerships: Renew ODVA Veteran Services Grant Program****Purpose**

The purpose of this funding request is to maintain, enhance and expand the Veteran Services Grant Program that provides grants to community partners, including non-profits, National Service Organizations, and other state, county, local and tribal governmental agencies.

House Bill 2891 (2017) established the Veteran Services Grant Fund and allocated \$550,000 LF available for grants and \$5,000 LF to ODVA for administrative costs for the 2017-19 biennium (a total of \$555,000 LF). HB 2891 authorized ODVA to fund grants from \$25,000 to \$250,000 and funds could only be used to achieve expanded outreach and services to Oregon veterans in the following areas:

- Mental health care or physical health care;
- Housing security;
- Employment opportunities and employment stability;
- Education and training opportunities;
- Transportation accessibility and availability;
- Promoting veterans' organizations that provide critical services for veterans; or
- Supporting existing programs identified by the Veterans' Affairs Advisory Committee.

The Veteran Services Grant Program had \$550,000 available for grant awards. The response to the Request for Grant Proposals was overwhelming: 59 grant proposals were submitted, totaling \$5,354,422. The requests for grant funds were approximately ten times the amount of the available funds. Ultimately, the Evaluation committee funded 10 grants, or only 17% of the total number of grants requested. Grants ranging from \$25,000 to \$135,840 were awarded for the following purposes:

- Transportation for veterans to local medical appointments.
- Outreach to all veterans, including tribal, and provide medical, dental and eye care.
- Establish shuttle service for veterans between Coos County and Roseburg VA hospital.
- Emergency housing for veterans/families waiting for rehousing/permanent. Plus job training/SOAR program. Transportation.
- Case management for veteran's access/use of community services/benefits; develop action plan, assist on applications.
- Outreach and case management for Native American/Alaska Indian homeless veterans address health/mental health care, housing.
- First responder for veteran homelessness prevention and assistance.
- Rental assistance, job training assistance.
- Provide homeless veterans meals, stable transitional housing, laundry, shower, connection to veteran service organizations.
- Train veterans as veteran-specific Peer Support Specialists to support veterans with behavioral health issues.
- Provide full legal services to veterans with a focus on issues of economic stability and housing security

The Grant Program process demonstrated the great need for veteran services, and the creativity, innovation and extraordinary work that is currently being done by our community partners for veterans.

**How Achieved**

The ability to maintain and expand the Veteran Services Grant Program that provides grants to community partners, including non-profits, National Service Organizations, and other state, county, local and tribal governmental agencies will be achieved by providing an additional \$1,000,000 for the Veteran Service Grant Program, including \$980,000 for grants to community partners and \$20,000 for ODVA to sponsor state or regional training conferences for grantees and applicants to share best practices, innovations and strategic planning.

The first priority for grant funds would be to the community partners and programs receiving the grants in 2017-19, provided the outcomes and results warrant continuing support. ODVA believes it would be helpful to change the maximum dollar amount of a grant award from \$250,000 to \$125,000 because of the great demand for grants and to allow more grants to be funded. If funding is provided for Health Care Transportation Grants (see section 4 of this Policy Option Package), then grants applications for Health Care Transportation Grants under the Veteran Services Grants would be excluded.

Note: Because HB 2891 (see ORS 406.142) was so restrictive in requirements, in order to set priorities, change the dollar amounts of the awards, or place limitations of applications or funding for certain types of funding (for example, eliminate transportation applications), a statutory change would be required.

**Staffing Impact:**

There is no direct staffing impact for this package.

**Quantifying Results:**

Results of the program would be quantified using the following measures:

1. Number of veterans served
2. Demographics of veteran: age, gender, geographical area
3. Types of services provided
4. Innovation in type or delivery of service

**Fiscal Impact/Cost**

\$1,000,000 LF \$980,000 pass-through grants to community partners (Special Payments) and \$20,000 for training conferences (Services and Supplies)

#### 4. Community Partnerships: New ODVA Veterans Health Care Transportation Grant Program

##### Purpose

The purpose of this funding request is to provide veterans with access to health care and behavioral health care transportation, including point to point transportation services.

The lack of transportation to medical appointments is one of the greatest barriers to health care access for veterans and, in certain situations, becomes a complete barrier to accessing health care. There is a lack of reliable transportation to transport veterans to various Federal VA health facilities or to private health care. Many Oregon veterans need access to Federal VA facilities in Portland or Roseburg or across state lines in Walla Walla, Washington or Boise, Idaho, which adds complexity to a veteran's transportation needs.

Veterans, particularly those living in rural areas and those with significant disabilities, often find that transportation is one barrier to health care with which they must contend. Nationally, of the approximately 3 million rural veterans enrolled in the VA health care system, 56% are age 65 or older, 41% have service-related disabilities, and 39% earned less than \$26,000 annually (FY 13). Often one or more of these factors impacts the veteran's ability to travel to health care appointments. For example, an age- or service-related disability may make driving difficult or unsafe; or the veteran may only be comfortable driving close to home, but not to a VA medical center located a long distance away.

Financial limitations are another potential barrier, preventing veterans from paying for fuel or car maintenance, or accessing for-hire travel options, such as taxis. Options for sharing a ride with others may be difficult to find or arrange, or family members may have obligations of their own which makes it difficult for them to drive veterans to appointments. Rural veterans often experience many of these conditions. In addition, rural veterans may have access to fewer local general and specialist health care providers than their urban peers, live in communities where smaller hospital systems are closing due to financial instability, and have limited broadband coverage making it more difficult for them to access telehealth services. Indeed, the VA data shows that veterans who live in rural settings have greater health care needs and lower health-related quality-of-life scores compared with urban veterans.

##### How Achieved

The goal of providing veterans with access to health care and behavioral health care transportation ("Veterans Health Care Transportation Grant Program"), including point to point transportation services would be achieved by establishing a Health Care Transportation Grant Program that provides grants to community partners, including non-profits, National Service Organizations, and other state, county, local and tribal governmental agencies for transportation services for Oregon veterans in rural or highly rural counties. The Grant Program would provide \$590,000 in funds available for grants and \$10,000 for ODVA to sponsor state or regional training conferences for grantees and applicants to share best practices, innovations and strategic planning.

In 2013, ODVA applied and administered USDVA's Highly Rural Transportation Grant Program (HRTG) in Oregon, that provide health care transportation grants for eight "highly rural counties" (fewer than seven residents per square mile). In 2015, ODVA obtained grants for all ten counties in Oregon classified as "highly rural," which include: Sherman, Gilliam, Morrow, Wallowa, Wheeler, Grant, Baker, Lake, Harney and Malheur. These USDVA provides grants in the amount of \$50,000 per year to ODVA for each of the designated highly rural counties. This program has been very successful with over one million miles driven since the start of the program in 2013. Most of the veterans served by this program would not have an alternative form of transportation for point to point transportation to health care and mental health care services.

The new Veterans Health Care Transportation Grant Program would expand this successful concept to other counties and fill the gaps for veterans in rural and highly rural counties who are unable to take advantage of the services provided under the HRTG. Grants would be awarded based on the following criteria: need for transportation for veterans, providing transportation where there are gaps in services, existing transportation infrastructure, existing transportation authority, and infrastructure that could benefit from funding designed specifically for veterans and maximize the value of the funds.

The program would allow for innovation and flexibility for a grant applicant to design a transportation program for veterans that would maximize the use of funds; maximize the use of the current transportation infrastructure and routes; maximize the connection with transportation resources with other counties, municipalities and non-profit organizations; and maximize the number of veterans who would benefit from the program.

**Staffing Impact:**

There is no direct staffing impact for this package.

**Quantifying Results:**

Results of the programs would be quantified using the following measures:

1. Number of veterans served
2. Demographics of veteran: age, gender, geographical area
3. Types of services provided
4. Innovation in type or delivery of service
5. Nature of problem to be addressed (gaps in services)

**Fiscal Impact/Cost**

\$ 600,000 LF      \$590,000 pass-through grants to community partners (Special Payments) and \$10,000 for training conferences (Services and Supplies)

**Revenue Source**

\$ 354,708	LF	National Service Organization partnerships: Enhance state pass-through funds (Special Payments)
\$ 700,000	LF	Oregon Public Universities and Community Colleges: Renew ODVA Campus Veteran Grant Program \$ 685,000 pass-through to public universities and community colleges (Special Payments) \$ 15,000 to ODVA for state/regional conferences; innovations and best practices (Services and Supplies)
\$ 1,000,000	LF	Community Partnerships: Renew ODVA Veteran Services Grant Program \$ 980,000 pass-through grants to community partners (Special Payments) \$ 20,000 to ODVA for state/regional conferences; innovations and best practices (Services and Supplies)
\$ 600,000	LF	Community Partnerships: New ODVA Veterans Health Care Transportation Grant Program \$ 590,000 pass-through grants to community partners (Special Payments) \$ 10,000 to ODVA for state/regional conferences; innovations and best practices (Services and Supplies)
<u>\$ 2,654,708</u>	LF	<b>TOTAL (Special Payments of \$2,609,708 and Services and Supplies of \$45,000)</b>



**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Veterans' Affairs, Oregon Dept of  
Pkg: 103 - Mobilize Partnerships**

**Cross Reference Name: Veterans' Services Program  
Cross Reference Number: 27400-002-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
Transfer In Lottery Proceeds	-	2,654,708	-	-	-	-	2,654,708
Tsfr From Administrative Svcs	-	-	-	-	-	-	-
<b>Total Revenues</b>	-	<b>\$2,654,708</b>	-	-	-	-	<b>\$2,654,708</b>
<b>Special Payments</b>							
Dist to Other Gov Unit	-	1,300,000	-	-	-	-	1,300,000
Dist to Non-Gov Units	-	1,354,708	-	-	-	-	1,354,708
<b>Total Special Payments</b>	-	<b>\$2,654,708</b>	-	-	-	-	<b>\$2,654,708</b>
<b>Total Expenditures</b>							
Total Expenditures	-	2,654,708	-	-	-	-	2,654,708
<b>Total Expenditures</b>	-	<b>\$2,654,708</b>	-	-	-	-	<b>\$2,654,708</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	-	-	-	-	-	-	-

## ANALYST ADJUSTMENTS PACKAGE 090

### 1. Veteran Services Program: Grant Program on Homelessness

#### Purpose

To provide funding for a statewide grant program to address veteran housing stability and homelessness.

#### How Achieved

Statewide grants will be awarded based on a competitive process. Programs and services that grant funding may expand and enhance are: supported and non-supported transitional housing, the number of facilities that focus on underserved and hard to place veterans such as veterans with families, women, LGBTQ, and formerly incarcerated veterans, basic shelter space in rural Oregon. Grants would also focus improving/increasing access to support services such as training and employment, addictions and behavioral health services for homeless veterans or those at risk of becoming homeless.

The Homeless Veteran Coordinator will develop and enhance existing partnerships, and act as a facilitator and liaison with state, local and non-profit partners whose work focuses on ending veteran homelessness to identify gaps in regional and local service delivery. The Coordinator will also work extensively with the Federal VA and US Department of Housing and Urban Development.

#### Staffing Impact

Establish one Homeless Veteran Coordinator (Program Analyst 3)

#### Quantifying Results

Results will be quantified by tracking measurable outcomes reported quarterly by grantees. Measurable outcomes will be identified as part of the grant request process. Program impacts will also be tracked and reported on a regular basis by the Homeless Veteran Coordinator.

#### Fiscal Impact/Cost

\$ 300,000 LF	Homeless Veteran Coordinator (\$192,046 LF Personal Services and \$107,954 LF Services and Supplies)
<u>\$ 760,000 LF</u>	Pass-through funding to eligible organizations (\$760,000 LF Special Payments)
\$1,060,000	Total

### 2. Veteran Services Program: Augment Veteran Services Grant Program

**Purpose**

These funds will add to the Agency Request Budget for veteran services grants. HB 2891 (2017) authorized \$550,000 for grants to expand outreach and services to veterans, however the requests for grant funds was approximately ten times the amount of available funds (\$5,354,422). The Grant Program process demonstrated the great need for veteran services, and the creativity, innovation and work being performed to support veterans and their families.

**How Achieved**

Statewide, competitive grants from this request would be used by grantees to achieve expanded outreach and services to veterans in the following areas: mental and physical healthcare, housing security, employment opportunities and stability, education and training opportunities, transportation, promoting veterans' organizations that provide critical services, and supporting programs identified by the Veterans' Affairs Advisory Committee.

**Staffing Impact**

None.

**Quantifying Results**

Results will be quantified by tracking measurable outcomes reported quarterly by grantees. Measurable outcomes will be identified as part of the grant approval process.

**Fiscal Impact/Cost**

\$ 500,000 LF Pass-through funding for grants to eligible not-for-profit organizations (\$500,000 LF Special Payments)

**3. Veteran Services Program: Tribal Veteran Partnership****Purpose**

The purpose this request is to support Tribal Veteran Representative (TVR) advocacy in support of SB 80, bringing services to Oregon Tribal Veterans and their families.

**How Achieved**

Monies from this request will allow established tribal veteran offices to receive funding for their programs in the same manner as Oregon's County Veteran Services Officer (CVSO) network. This funding will allow tribal veteran offices to expand and enhance their services and reach more Tribal Veterans and their families.

The ODVA Tribal Veteran Coordinator will be the point of contact for all tribal veteran advocacy. This position will work with established TVR offices for training and liaison with ODVA. Assist TVR with connecting tribal veterans to Federal VA veteran's services. The Coordinator will also work extensively with the Federal VA Office of Tribal Government Relations to effectively liaison between federal, to state to tribal council and will work with organizations such as NARA, ATNI and the National Congress of American Indians (NCAI).

**Staffing Impact**

Establish one Tribal Veteran Coordinator (Program Analyst 3)

**Quantifying Results**

Results will be quantified by tracking quarterly reports submitted by Tribal Veteran Representatives interviews with veterans, outreach conducted, federal VA claims filed, appeals, and VA benefits awarded.

**Fiscal Impact/Cost**

\$ 300,000 LF	Tribal Veteran Coordinator (\$192,046 LF Personal Services and \$107,954 LF Services and Supplies)
<u>\$ 200,000 LF</u>	Pass-through funding to Tribal Veteran Offices (\$200,000 LF Special Payments)
\$ 500,000	Total

**4. Veteran Services Program: Grant Program on Veteran Behavioral Health Needs****Purpose**

The purpose of this request is to create a statewide grant program to support veteran behavioral health needs, including addressing barriers to access and utilization of behavioral health care.

**How Achieved**

Statewide, competitive grants from this request would be used by grantees to achieve, expanded and augment either direct or indirect behavioral health serves for veterans. Services could include: expansion of the OHA Veteran Peer Support pilot, county mental health programs for direct services for veterans, expansion of behavioral health services for supportive housing programs, and programs and services designed to reduce barriers and improve access to veteran behavioral health services, such as improved access to transportation to appointments. Grant proposals addressing recommendations contained in the 2019 *Veterans' Behavioral Health Services Improvement Study* would be considered as well.

**Staffing Impact**

None.

**Quantifying Results**

Results will be quantified by tracking and reporting measurable outcomes reported quarterly by grantees. Measurable outcomes will be identified as part of the grant request process.

**Fiscal Impact/Cost**

\$ 560,000 LF Pass-through funding for grants to eligible organizations (\$560,000 LF Special Payments)

**5. Veteran Services Program: Employment and Economic Development Coordinator****Purpose**

The purpose of this request is to fund an Employment and Economic Development Coordinator position to serve as liaison and advocate for veterans in matters pertaining to employment and economic development.

**How Achieved**

The Coordinator will collaborate and liaise with the Oregon Department of Employment, veteran employment specialists and the DVOP program. Will also be a direct liaison with the U.S. Department of Labor Vets Work Program, the Oregon National Guard Family Services, reintegration team/Guard employment office, and work with the Governor's Regional Solutions office concentrating on veteran small business and other opportunities for veterans business and employment. Will partner with Biz Oregon to promote veteran owned businesses and disabled veteran owned businesses. Assist the agency with promotion of veterans to trade and apprentice programs across the state with a focus on rural Oregon veterans. Work with organizations that promote employment traditionally underserved veterans.

**Staffing Impact**

Establish one Veteran Employment and Economic Development Coordinator (Program Analyst 3)

**Quantifying Results**

Results will be quantified by tracking the number of partnerships made with federal, state, local and industry contacts. Indirect results will include measuring and reporting veteran employment within Oregon.

**Fiscal Impact/Cost**

\$ 300,000 LF Veteran Employment and Economic Development Coordinator (\$192,046 LF Personal Services and \$107,954 LF Services and Supplies)

## 6. Veteran Services Program: State Approving Agency (SAA)

### Purpose

The purpose of this request is to establish three new full-time permanent positions (0.75 FTE) to establish the Oregon Department of Veterans' Affairs as the U.S. Department of Veterans Affairs State Approving Agency (SAA) for veterans' education programs. SAAs ensure that veterans have access to educational and training opportunities and that federal veterans' benefits are in compliance with applicable laws and regulations by approving educational and training programs; overseeing programs through supervisory visits and compliance surveys; and providing technical support and outreach to schools and veterans.

### How Achieved

ODVA has requested to be designated as Oregon's SAA beginning October 1, 2019. Prior to being awarded the contract, ODVA will need to demonstrate to USDVA that the agency has the capacity and expertise, including qualified personnel and resources, to begin performing SAA responsibilities.

### Staffing Impact

Establish three positions: Compliance Specialist 1, Education Specialist 1 and Operations and Program Analyst 4.

USDVA reimburses SAAs for direct costs incurred to perform SAA functions, including salaries and benefits, travel, and other administrative expenses, up to an annual maximum contract amount (approximately \$300,000 for Oregon).

### Quantifying Results

Results will be quantified by veteran's access to a variety of educational programs and that Oregon postsecondary schools and institutions continue to receive federal veterans' education funding.

### Fiscal Impact/Cost

\$ 145,930 LF	State Approving Agency Personnel (\$29,172 LF Personal Services and \$116,758 LF Services and Supplies)
\$ 525,000 FF	State Approving Agency Personnel (\$525,000 FF Personal Services)
\$ 670,930	Total

## 7. Veteran Services Program: Program Stabilization and Funding Alignment

### Purpose

To provide funding to more fully reimburse the Loan Program for the cost of services provided to the Veteran Services and Aging Veteran Service Program areas.

**How Achieved**

Monies provided by this request will offset the costs sustained by the Loan Program in support of the Veteran Services and Aging Veteran Service Program areas. Internal program cost tracking systems will continue to be employed to determine the appropriate cost reimbursements necessary to the Loan Program.

**Staffing Impact**

None.

**Quantifying Results**

Results will be quantified by tracking the costs incurred by each program area and determining if the Loan Program's subsidization of the Veteran Services and Aging Veteran Service program areas has been substantially reduced or eliminated.

**Fiscal Impact/Cost**

\$ 535,704 LF            Program Stabilization Service and Supplies (\$535,704 LF Services and Supplies)

**8. Home Loan Program: Down Payment and Closing Cost Assistance Funding for Veteran Loans****Purpose**

The purpose of this request is to provide funds for down payment and closing cost assistance (DPCCA) to qualified veteran home loan borrowers.

**How Achieved**

Monies from this request would be used to provide veterans a home loan option that would include DPCCA. The veteran applicants would have the choice on whether to apply for a standard home loan or a home loan with DPCCA monies included.

**Staffing Impact**

None.

**Quantifying Results**

Results will be quantified by tracking and monitoring the number and dollar amount of loans originated with DPCCA.

**Fiscal Impact/Cost**

\$ 500,000 LF DPCCA in the form of grants or loans to veterans (\$500,000 LF Services and Supplies)

## 9. Veterans' Home Program: Roseburg Architectural Design and Environmental Costs

### Purpose

The purpose of this request is to provide initial funds for preliminary architectural design and environmental costs related to the Roseburg Veterans' Home.

### How Achieved

The Roseburg Veterans' Home is in the early stages of planning. In order to further refine initial cost estimates and advance further on the United States Department of Veterans Affairs (USDVA) priority list for construction grants, initial architectural design and environmental costs need to be incurred.

### Staffing Impact

None.

### Quantifying Results

Results will be quantified by completion of initial architectural design and environmental work and further advancement on the USDVA priority grant list.

### Fiscal Impact/Cost

\$ 250,000 LF Roseburg Architectural/Engineering Costs (\$250,000 LF Services and Supplies)

## 10. Veteran Services Program: Enhance Internal Audit Function

### Purpose

The purpose of this request is to establish a more robust and effective internal audit function.

As background, based on the authority under ORS 184.360, the Department of Administrative Services (DAS) established criteria for certain state agencies to have an internal audit function (See OAR 125-700-0125). ODVA meets these criteria and is required to have an internal audit function and currently contracts out targeted internal audit services.



### How Achieved

The purpose of establishing a more robust and effective internal audit function and complying with DAS requirements would be achieved by adding one internal auditor position. This full-time position would expand internal audit activities and add capacity for ODVA to more fully examine its programs, resource utilization, policies and procedures, and compliance activities to assess how effectively and efficiently the agency is operating.

### Staffing Impact

Establish one Internal Auditor 3 position.

### Quantifying Results

Results will be identified through the findings/recommendations from the internal audit reviews. Additional results will also be measured by identifying the post-review actions implemented to address specified internal audit findings/recommendations.

### Fiscal Impact/Cost

\$ 109,006 LF	Internal Auditor Position – 0.5 FTE (\$97,006 LF Personal Services and \$12,000 LF Services and Supplies)
<u>\$ 109,006 OF</u>	Internal Auditor Position – 0.5 FTE (\$97,006 OF Personal Services and \$12,000 OF Services and Supplies)
\$ 218,012	Total

## 11. Aging Veteran Services & Veteran Services Program: General Fund Reductions

### Purpose

The purpose of this item is to comply with Governor's Budget process to reduce agency general funds through vacancy savings and reduction of inflation.

### How Achieved

ODVA was provided amounts of vacancy savings and reduction of inflation from the Department of Administrative Services, Budget and Management.

### Staffing Impact

None.

### Quantifying Results

None.

**Fiscal Impact/Cost**

(\$ 77,459 GF)	Vacancy Savings (\$71,129 GF Personal Services, Appeals & Claims; \$6,330 GF Personal Services, Conservatorship)
<u>(\$ 18,663 GF)</u>	Reduction of Inflation Factor (\$17,186 GF Services and Supplies, Appeals & Claims; \$1,447 GF Services and Supplies, Conservatorship)
(\$ 96,122 GF)	Total

Revenue Sources:

\$ 300,000 LF	Veteran Homelessness Coordinator (\$192,046 LF Personal Services and \$107,954 LF Services and Supplies)
\$ 760,000 LF	Pass-through funding to eligible organizations (\$760,000 LF Special Payments)
\$ 500,000 LF	Pass-through funding for grants to eligible not-for-profit organizations (\$500,000 LF Special Payments)
\$ 300,000 LF	Tribal Veteran Coordinator (\$192,046 LF Personal Services and \$107,954 LF Services and Supplies)
\$ 200,000 LF	Pass-through funding to Tribal Veteran Offices (\$200,000 LF Special Payments)
\$ 560,000 LF	Pass-through funding for Behavioral Health related grants to eligible organizations (\$560,000 LF Special Payments)
\$ 300,000 LF	Veteran Employment & Economic Development Coordinator (\$192,046 LF Personal Services and \$107,954 LF Services and Supplies)
\$ 145,930 LF	State Approving Agency Personnel (\$29,172 LF Personal Services and \$116,758 LF Services and Supplies)
\$ 525,000 FF	State Approving Agency Personnel (\$525,000 FF Personal Services)
\$ 535,704 LF	Program Stabilization Service and Supplies (\$535,704 LF Services and Supplies)
\$ 500,000 LF	Down Payment/Closing Cost Assistance in the form of grants or loans to veterans (\$500,000 LF Services and Supplies)
\$ 250,000 LF	Roseburg Architectural/Engineering Costs (\$250,000 LF Services and Supplies)
\$ 109,006 LF	Internal Auditor Position – 0.5 FTE (\$97,006 LF Personal Services and \$12,000 LF Services and Supplies)
\$ 109,006 OF	Internal Auditor Position – 0.5 FTE (\$97,006 OF Personal Services and \$12,000 OF Services and Supplies)
(\$ 77,459 GF)	Vacancy Savings (\$71,129 GF Personal Services, Appeals & Claims; \$6,330 GF Personal Services, Conservatorship)
<u>(\$ 18,663 GF)</u>	Reduction of Inflation Factor (\$17,186 GF Services and Supplies, Appeals & Claims; \$1,447 GF Services and Supplies, Conservatorship)
<b>\$4,998,524</b>	<b>Total (Personal Services of \$1,246,863; Services and Supplies of \$1,731,661; and Special Payments of \$2,020,000)</b>

**GRAND TOTALS**

<b>\$ 702,316</b>	<b>LF</b>	<b>TOTAL Personal Services</b>
<b>\$ 1,738,324</b>	<b>LF</b>	<b>TOTAL Services and Supplies</b>

<b><u>\$ 2,020,000</u></b>	<b>LF</b>	<b>TOTAL Special Payments</b>
<b>\$ 4,460,640</b>	<b>LF</b>	<b>TOTAL Combined</b>
<b>\$ 97,006</b>	<b>OF</b>	<b>TOTAL Personal Services</b>
<b><u>\$ 12,000</u></b>	<b>OF</b>	<b>TOTAL Services and Supplies</b>
<b>\$ 109,006</b>	<b>OF</b>	<b>TOTAL Combined</b>
<b>\$ 525,000</b>	<b>FF</b>	<b>TOTAL Personal Services</b>
<b>(\$ 77,459)</b>	<b>GF</b>	<b>TOTAL Personal Services</b>
<b><u>(\$ 18,663)</u></b>	<b>GF</b>	<b>TOTAL Services and Supplies</b>
<b>(\$ 96,122)</b>	<b>GF</b>	<b>TOTAL Combined</b>
<b>\$ 4,998,524</b>		<b>TOTAL</b>

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**
**Veterans' Affairs, Oregon Dept of  
Pkg: 090 - Analyst Adjustments**
**Cross Reference Name: Veterans' Services Program  
Cross Reference Number: 27400-002-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
General Fund Appropriation	(88,315)	-	-	-	-	-	(88,315)
Federal Funds	-	-	-	525,000	-	-	525,000
Transfer In - Intrafund	-	-	109,006	-	-	-	109,006
Transfer In Lottery Proceeds	-	-	-	-	-	-	-
Tsfr From Administrative Svcs	-	3,710,640	-	-	-	-	3,710,640
<b>Total Revenues</b>	<b>(\$88,315)</b>	<b>\$3,710,640</b>	<b>\$109,006</b>	<b>\$525,000</b>	-	-	<b>\$4,256,331</b>
<b>Personal Services</b>							
Class/Unclass Sal. and Per Diem	-	453,882	61,194	340,920	-	-	855,996
Empl. Rel. Bd. Assessments	-	224	26	169	-	-	419
Public Employees' Retire Cont	-	77,025	10,384	57,854	-	-	145,263
Social Security Taxes	-	34,723	4,681	26,079	-	-	65,483
Worker's Comp. Assess. (WCD)	-	213	25	161	-	-	399
Mass Transit Tax	-	2,722	367	-	-	-	3,089
Flexible Benefits	-	128,791	15,393	97,706	-	-	241,890
Vacancy Savings	(71,129)	-	-	-	-	-	(71,129)
Reconciliation Adjustment	-	4,736	4,936	2,111	-	-	11,783
<b>Total Personal Services</b>	<b>(\$71,129)</b>	<b>\$702,316</b>	<b>\$97,006</b>	<b>\$525,000</b>	-	-	<b>\$1,253,193</b>
<b>Services &amp; Supplies</b>							
Instate Travel	(950)	99,030	3,000	-	-	-	101,080
Employee Training	(158)	24,000	2,500	-	-	-	26,342
Office Expenses	(1,272)	83,440	2,350	-	-	-	84,518
Telecommunications	-	19,080	1,650	-	-	-	20,730

 \_\_\_\_ Agency Request  
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Essential and Policy Package Fiscal Impact Summary - BPR013

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Veterans' Affairs, Oregon Dept of  
Pkg: 090 - Analyst Adjustments**
**Cross Reference Name: Veterans' Services Program  
Cross Reference Number: 27400-002-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
Publicity and Publications	-	-	-	-	-	-	-
Professional Services	(13,004)	203,670	-	-	-	-	190,666
Dues and Subscriptions	(55)	-	-	-	-	-	(55)
Intra-agency Charges	-	535,704	-	-	-	-	535,704
Other Services and Supplies	(1,747)	-	-	-	-	-	(1,747)
Expendable Prop 250 - 5000	-	2,400	-	-	-	-	2,400
IT Expendable Property	-	21,000	2,500	-	-	-	23,500
<b>Total Services &amp; Supplies</b>	<b>(\$17,186)</b>	<b>\$988,324</b>	<b>\$12,000</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>\$983,138</b>
<b>Special Payments</b>							
Dist to Other Gov Unit	-	-	-	-	-	-	-
Dist to Non-Gov Units	-	-	-	-	-	-	-
Other Special Payments	-	2,020,000	-	-	-	-	2,020,000
<b>Total Special Payments</b>	<b>-</b>	<b>\$2,020,000</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>\$2,020,000</b>
<b>Total Expenditures</b>							
Total Expenditures	(88,315)	3,710,640	109,006	525,000	-	-	4,256,331
<b>Total Expenditures</b>	<b>(\$88,315)</b>	<b>\$3,710,640</b>	<b>\$109,006</b>	<b>\$525,000</b>	<b>-</b>	<b>-</b>	<b>\$4,256,331</b>
<b>Ending Balance</b>							
Ending Balance	-	-	-	-	-	-	-
<b>Total Ending Balance</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>

 \_\_\_\_ Agency Request  
2019-21 Biennium

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Page \_\_\_\_\_

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Essential and Policy Package Fiscal Impact Summary - BPR013

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

Veterans' Affairs, Oregon Dept of  
Pkg: 090 - Analyst Adjustments

Cross Reference Name: Veterans' Services Program  
Cross Reference Number: 27400-002-00-00-00000

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
Total Positions							
Total Positions							7
<b>Total Positions</b>	-	-	-	-	-	-	<b>7</b>
Total FTE							
Total FTE							6.88
<b>Total FTE</b>	-	-	-	-	-	-	<b>6.88</b>

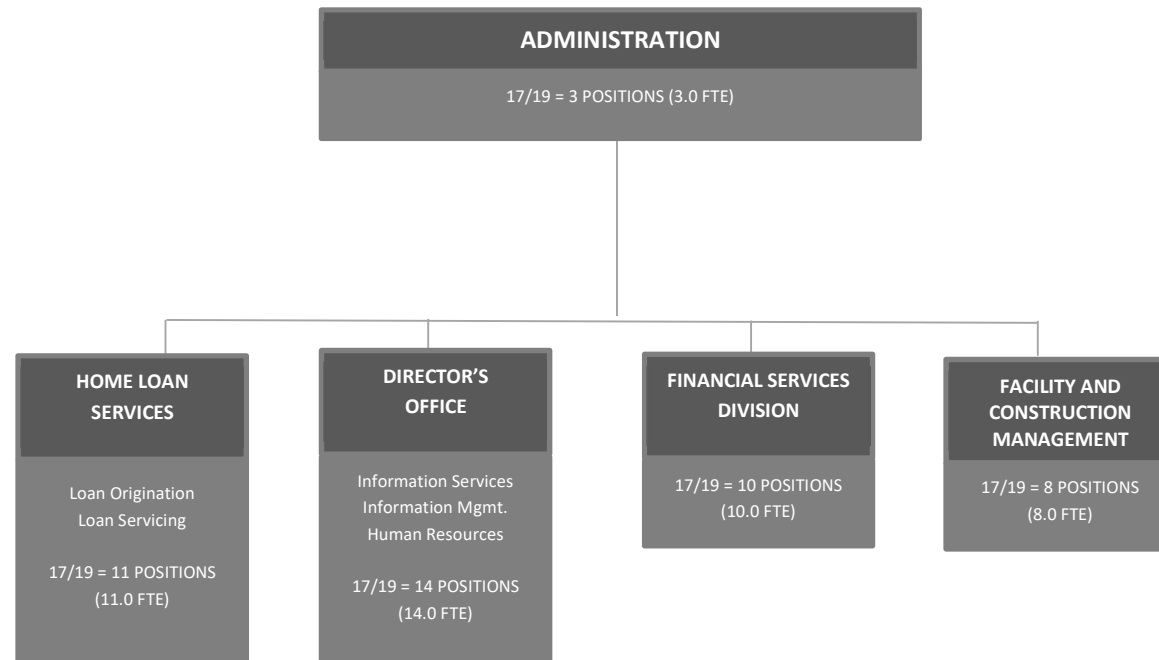
01/14/19 REPORT NO.: PDPFISCAL DEPT. OF ADMIN. SVCS. -- PPDB PICS SYSTEM PAGE 4  
 REPORT: PACKAGE FISCAL IMPACT REPORT 2019-21 PROD FILE  
 AGENCY: 27400 DEPT OF VETERANS AFFAIRS PICS SYSTEM: BUDGET PREPARATION  
 SUMMARY XREF:002-00-00 Veterans' Services Program PACKAGE: 090 - Analyst Adjustments

POSITION NUMBER	CLASS COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
7312002	OAS C0862 AP	PROGRAM ANALYST 3	1	1.00	24.00	02	5,189.00				124,536 65,964	124,536 65,964
7312003	OAS C0862 AP	PROGRAM ANALYST 3	1	1.00	24.00	02	5,189.00				124,536 65,964	124,536 65,964
7312004	OAS C0862 AP	PROGRAM ANALYST 3	1	1.00	24.00	02	5,189.00				124,536 65,964	124,536 65,964
7312010	OAS C0873 AP	OPERATIONS & POLICY ANALYST 4	1	1.00	24.00	02	5,993.00			143,832 70,714		143,832 70,714
7312011	OAS C2300 AP	EDUCATION PROGRAM SPECIALIST 1	1	1.00	24.00	02	5,442.00			130,608 67,458		130,608 67,458
7312012	OAS C5246 AP	COMPLIANCE SPECIALIST 1	1	1.00	24.00	02	3,565.00			66,480 43,797	19,080 12,571	85,560 56,368
7312020	MMN X5618 AA	INTERNAL AUDITOR 3	1	.88	21.00	02	5,828.00		61,194 30,509		61,194 30,513	122,388 61,022
TOTAL PICS SALARY									61,194	340,920	453,882	855,996
TOTAL PICS OPE									30,509	181,969	240,976	453,454
TOTAL PICS PERSONAL SERVICES =			7	6.88	165.00			91,703	522,889	694,858	1,309,450	

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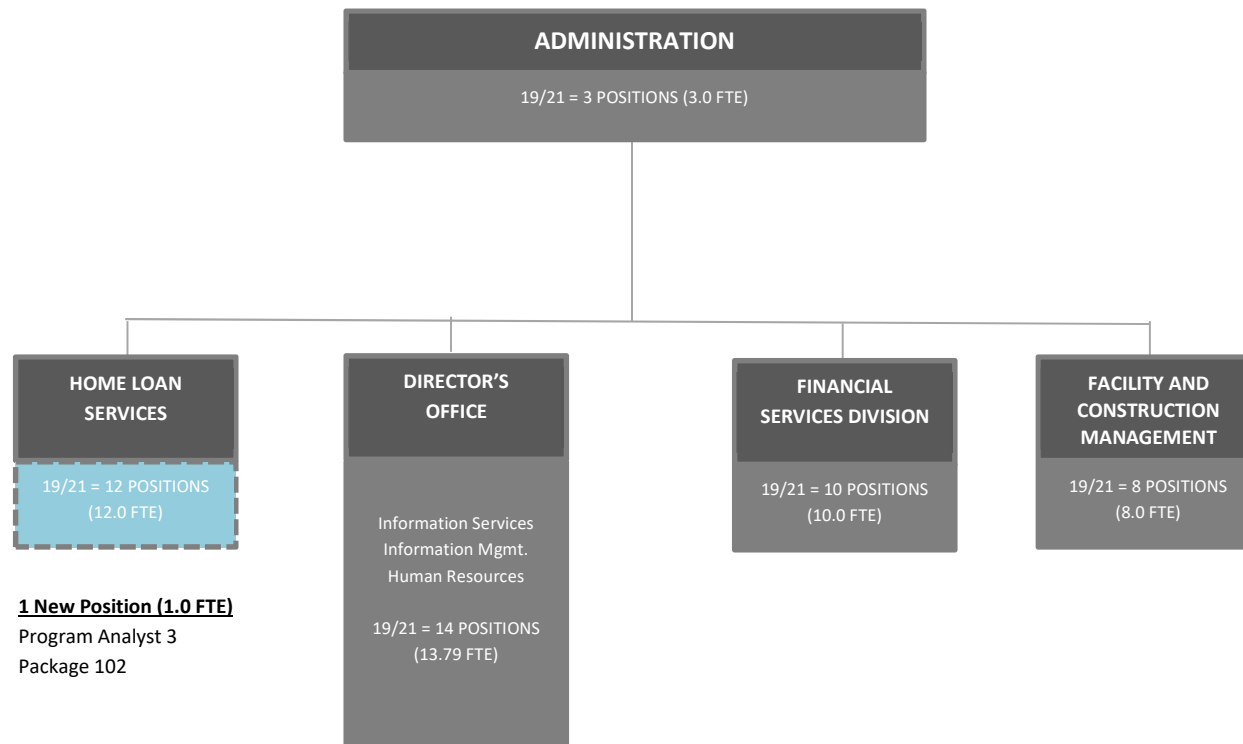


## 2017-19 VETERANS' HOME LOAN PROGRAM ORGANIZATION CHART



Total 2017-19 Veterans' Home Loan Program Positions  
46 Positions  
(46.0 FTE)

## 2019-21 VETERANS' HOME LOAN PROGRAM ORGANIZATION CHART

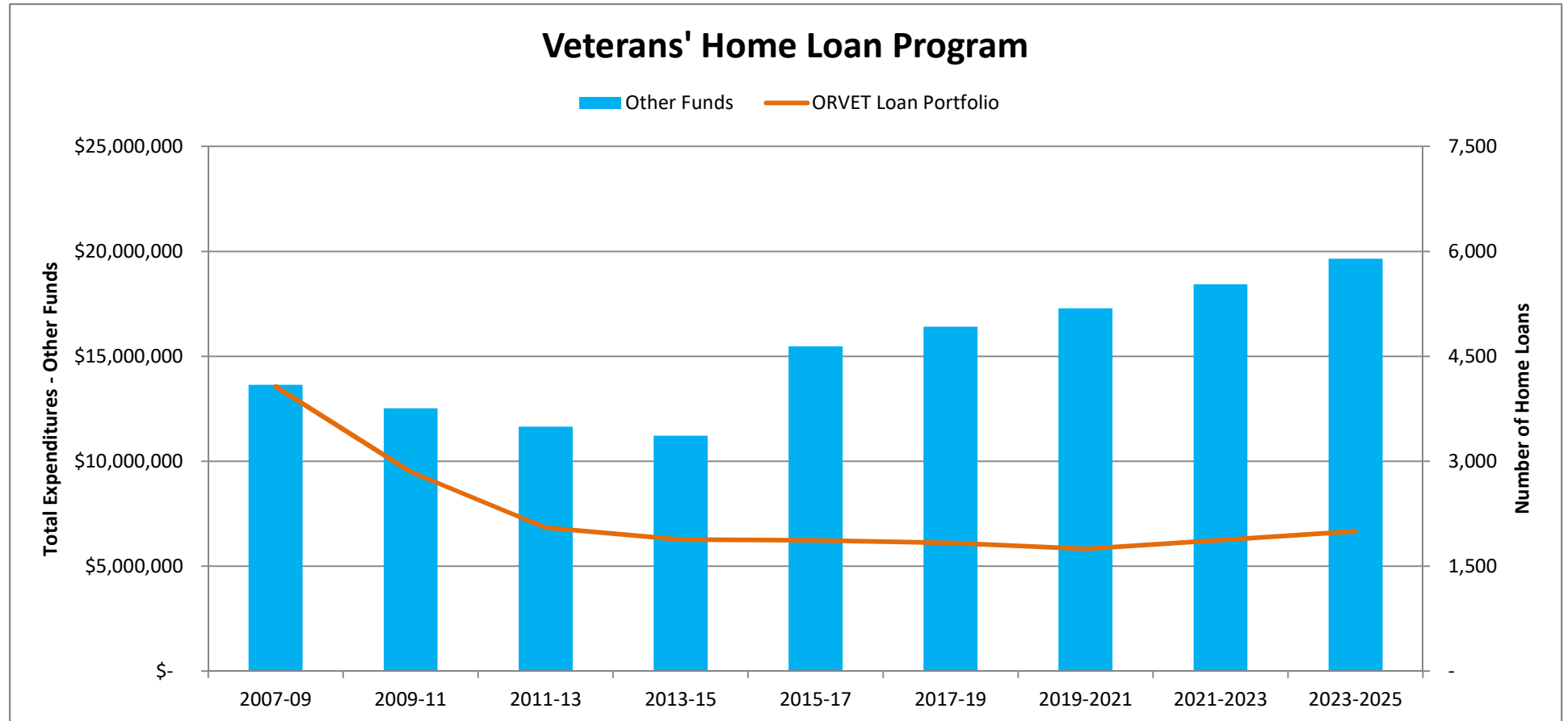


Total 2019-21 Veterans' Home Loan Program Positions  
47 Positions  
(46.79 FTE)

## HOME LOAN PROGRAM EXECUTIVE SUMMARY

Focus Area: Thriving Statewide Economy and Healthy Safe Community

Program Contact: Cody Cox / 503-373-2170



Note: 2015-17 and prior are Actuals, 2017-19 is L.A.B., future biennia is G.B. and projected thereafter on inflation basis.

## Program Overview

Wanting to provide a benefit to World War II veterans returning home, Oregon citizens voted in 1945 to create a Veterans' Home Loan program, establishing it in Article XI-A of the Oregon Constitution. Identified as the Home Loan program, this historically self-sufficient program provides low-interest rate mortgages on single-family owner-occupied homes to qualified veterans.

## Program Funding Request

The budget proposal for the next three biennia are as follows:

<u>Biennium</u>	<u>Other Funds</u>	<u>Lottery Funds</u>	<u>Total Funds</u>
<b>2019-2021</b>	\$ 17,283,914	\$ 500,000	\$ 17,783,914
<b>2021-2023</b>	\$ 18,428,109	\$ -	\$ 18,428,109
<b>2023-2025</b>	\$ 19,648,050	\$ -	\$ 19,648,050

The program is funded primarily by revenues derived from mortgage loan and contract repayments, proceeds from bond sales, fee and rental income and investment earnings. The 2019-21 funding proposal will provide the ability to originate and service loans for the Home Loan Program, and the necessary core operations of the department.

The proposed amount of Other Funds for the 2017-19 biennium has increased from the prior biennium due primarily to facility project costs related to a refresh of the Veterans building in Salem and replacement of the Loan Program IT system. Proposals for future biennia currently include inflation factors; however, at the end of each biennia the Department will evaluate current operational and staffing needs and will make adjustments accordingly.

## Program Description

Oregon is one of only five states in the nation that have been grandfathered under federal tax law to offer a state veteran home loan program; the other four states include Alaska, California, Texas, and Wisconsin. The concept behind the veteran home loan programs is that these states want to provide an enhanced housing benefit to their veterans for their past service and sacrifice. Historically, this enhanced housing benefit has generally resulted in significantly lower home loan interest rates than are normally available in the marketplace, which have been achieved through the issuance of tax-free, state general obligation bonds called Qualified Veteran Mortgage Bonds (QVMB). Through this program, veteran borrowers can generally save between \$15,000 to \$50,000 by obtaining a 30-year ODVA Home Loan compared to similar products available in the conventional market. QVMB's have limitations on how they can be used, most notably, borrowers must apply for a loan within 25 years of discharge from military service and funds cannot be used for refinancing. The Home Loan Program also has access to limited amounts of less restrictive bond monies from which it can also make loans to veterans who apply for a loan after 25 years from date of

discharge. It is this money that is being used to finance loans made to Oregon's veterans that were made eligible as a result of the passage of Measure 70 in 2010. The program offers financing up to the Fannie Mae limit, currently \$484,350.

Partnering with private mortgage brokers and lenders across the state in a unique public-private partnership allows veterans anywhere in the state to access the benefit which they have earned. These partnerships allow the Home Loan program access to every community, while minimizing the need for individual field offices throughout the state.

Since 1945, the program has provided more than \$8.0 billion of low-interest loans to more than 336,000 veterans and at one time, the Oregon Department of Veterans' Affairs (ODVA) was one of the largest lenders in the state with a portfolio of more than 140,000 loans. In addition to originating loans, the program currently services all of its loans. The benefit to the veteran of ODVA servicing its own loans, is the enhanced customer service provided to the veterans and their families, as well as the flexibility and ability to restructure loans if the veteran borrower experiences financial hardship.

The program has been most robust when large numbers of veterans returned to Oregon, such as after World War II, the Korean War, and the Vietnam War. However, since those conflicts, warfare has changed and large "draft" armies are not being deployed, which means large numbers of veterans are not returning to Oregon seeking loans. In recent years, that fact, coupled with the current housing market recession, high unemployment and underemployment, low conventional mortgage rates, and the inability to use QVMB monies for refinancing, has resulted in a significant portfolio reduction in this program. The portfolio as of June 30, 2018 was approximately 1,877 loans totaling \$331.7 million.

**Cost Drivers** – The largest cost drivers for the program are bond interest costs, personnel costs and operational services and supplies costs. As of June 30, 2018, ODVA had approximately \$350 million in bond indebtedness, with approximately 14% of the portfolio in variable rate bonds and 86% fixed rate. In the recent low interest rate environment, the variable rate debt has been extremely beneficial to be able to offer a low interest rate on mortgage loan product. Personnel costs include direct loan program staff and support staff. Operational services and supplies costs include expenses related to the program and certain veteran services expenses unaffiliated with the loan program.

### Program Justification and Link to Focus Areas

ODVA's home loan program impacts across multiple State focus areas, but particularly Healthy/Safe community and Thriving State Economy.

The connection between home ownership and the local economy includes multiple levels. From the builders and construction workers who construct the home, to the realtors and mortgage brokers that market and qualify borrowers for the home, to the title company employees and bank employees who fund the loans, to the actual borrower who needs employment for a paycheck to pay the mortgage – jobs are provided and prosperity is enhanced when housing purchases are

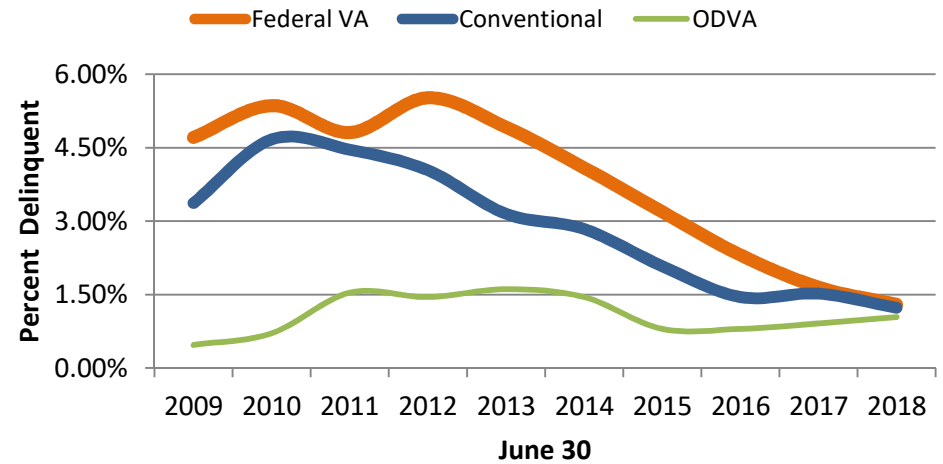
made. Additionally, local governments are funded through property tax revenues and communities strengthened when homeowners have a vested interest in their neighborhood.

Home ownership has always been a key factor in economic recovery. Throughout the state's economic cycles, the Home Loan has consistently been an attractive product for the state's 303,000 veterans. Through strict attention to quality underwriting, accurate loan servicing and lower delinquent rates, the Home Loan provides Oregon's veterans a home loan program with fiscal integrity and an opportunity for home ownership with historically low interest rates, earned through their service in the United States Armed Forces.

## Program Performance

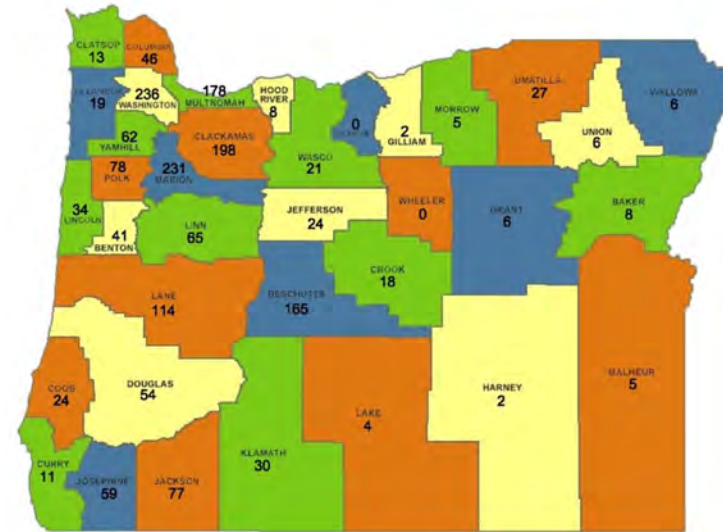
### Low Delinquency Rate

The Home Loan program has a consistent record of having significantly lower delinquency rates than comparable Federal VA or Conventional loan products. Quality underwriting, avoidance of adjustable rate mortgages and a willingness to work with delinquent borrowers on modified repayment plans all contribute to lower delinquency rates than comparable products.



### Number of ORVET Home Loans by County

*Statewide Loans* - Committed to providing service to veterans wherever they live in the state, the Home Loan program partners with mortgage brokers and lenders in communities statewide. From large banks to single-person mortgage broker offices, the program continually seeks to maintain and expand its partnerships. Over the past five years, nearly all loan originations have come through broker and lender partners.



## Enabling Legislation/Program Authorization

The Home Loan program is established in Article XI-A of the Oregon Constitution and has statutory authority via ORS Chapter 407.

## Funding Streams

The Home Loan program is a self-supporting program, currently using Other Funds only. These Other Funds monies are Constitutionally-dedicated for certain veteran programs. Revenues are derived from loan and contract repayments, proceeds from bond sales, fee and rental income and investment earnings. No General Fund monies are used in its operations.

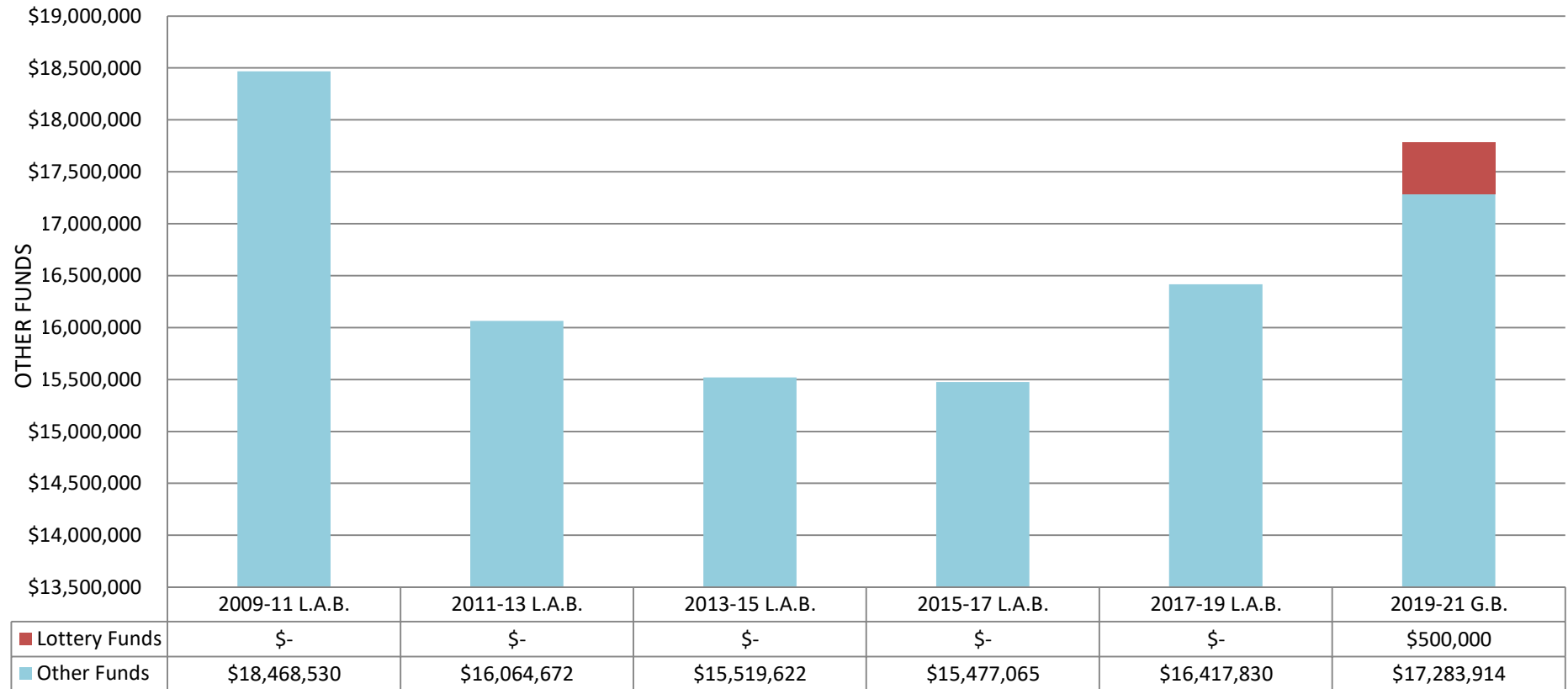
In addition to being Constitutionally-dedicated, Loan Program funds are restricted in their use by federal tax law, bond covenants, standby bond purchase agreements and liquidity provider agreements.

## 2019-21 Funding Proposal

The 2019-21 funding proposal for the Home Loan Program maintains the program at current service level. Major budget components besides operational cost include capital projects related to building refresh and modernization of the Home Loan origination and servicing applications.



## VETERANS' HOME LOAN PROGRAM HISTORICAL OPERATING BUDGET COMPARISON



L.A.B. – Legislatively Adopted Budget

G.B. – Governor's Budget

\*\*Includes all Packages but excludes Nonlimited and Capital Construction Expenditures.

## HOME LOAN PROGRAM NARRATIVE

### Home Loan Program Environmental Factors and Trends

**Limited Funding Sources and Product** – Due to a change in federal tax law, there are limited sources of funding available for those veterans that apply for a home loan more than 25 years after they have left active duty service. In November 2010, Oregon voters overwhelmingly passed Ballot Measure 70 allowing an amendment to the Oregon Constitution which now makes the Oregon Veterans' Home Loan program a lifetime benefit. Monies derived from pre-Ullman bond refunding's (general obligation bonds originally issued prior to 1981) are available to continue to fund these loans. However, these funding sources are limited, and while some funds will be available during the 2019-2021 biennium, the availability of these monies in future periods will decline.

**Qualified Veterans Mortgage Bonds (QVMB)** are tax-free, state general obligation bonds. This is the type of money generally used to fund the majority of veteran Home Loans in Oregon. Currently, federal law limits the use of this money to purchase only loans and does not allow loans to be made to veterans who are 25 years past discharge from military service.

**Inability to Refinance Loans or Lend to Veterans Discharged More Than 25 Years** - Because of the uncertain economic conditions, a predominate amount of customer interaction involves requests for a refinance product. Qualified Veterans Mortgage Bonds (QVMB) are tax-free, state general obligation bonds and may not be used to refinance homes. This is the type of money generally used to fund the majority of veteran Home Loans in Oregon. Currently, federal law limits the use of this money to purchase only loans and does not allow loans to be made to veterans who are 25 years past discharge from military service.

**Home Loan Market** – Interest rates, home prices and general economic conditions can help or hinder ODVA's home loan program. Both the Oregon and national economy is gradually improving. Consumers continue to be cautious with discretionary expenditures thereby resulting in flat or slow growth in several key industry areas. Banks suffered billions of dollars in real estate related write-downs thereby leading them to tighten down on their credit underwriting. Until the well-being of the consumer and financial institutions improve markedly, economic growth likely will continue to be limited.

**Home Values** – As the effects of the housing crisis diminish, a new set of challenges are encountered. In the face of historically low home interest rates, housing prices have increased substantially, returning to pre-crisis levels. This rapid increase has created an shortage of available inventory creating a seller's market. Many prospective home purchasers are either priced out of the market or unsuccessful in winning bidding wars.

**Nonperforming Assets** - Close monitoring of nonperforming assets and early intervention with borrowers who become delinquent will continue to be an important issue.

## Program Details

Oregon is one of only five states in the nation that have been grandfathered under federal tax law to offer a state veteran home loan program. Historically, this state housing benefit has resulted in significantly lower home loan interest rates than are normally available in the marketplace. The program offers financing up to the Fannie Mae limit, currently \$484,350

**Customers:** Home Loan customers include veterans, private-sector mortgage lenders, realtors, mortgage brokers, appraisers, title companies, insurance companies, and credit reporting agencies. The Department also has partnered in the past with Oregon Housing and Community Services (OHCS) to make tax-exempt funds available through OHCS for low- and moderate-income housing.

**Source of Funding:** Other Funds. Primary sources of revenue consist of loan and contract-related repayments, investment earnings, fee and rental income, and proceeds from bond sales. Lottery funds are proposed for Down Payment and Closing Cost Assistance.

**Expenditures:** \$17,283,914 Other Funds. \$500,000 Lottery Funds for a Down Payment Assistance program for veterans seeking an ORVET home loan.

**Positions and FTE:** 2019-21 Governor's Budget funds 12 positions (12.0 FTE) for Direct Loan Services and 35 (34.79 FTE) other agency operational positions, for a total of 47 (46.79 FTE) positions.

**Workload:** The Home Loan Program has been most robust when large numbers of veterans returned to Oregon, such as after World War II, the Korean War, and the Vietnam War. However, warfare has changed and large "draft" armies are not being deployed; which means large numbers of veterans are not returning to Oregon seeking loans. In recent years, fewer veterans, coupled with the housing market recession, high unemployment, low conventional mortgage rates, and the inability to use QVMB monies for refinancing, has constrained the size of the home loan portfolio. As of June 30, 2018, the portfolio included approximately 1,877 loans totaling more than \$331 million.

## Funding Proposal Expected Results

The Governor's Budget would provide spending authority to the Veterans' Home Loan program that will assist the Department with meeting the following goals:

- **Maintain the fiscal integrity of the Veterans' Home Loan program**

The Department is responsible for the repayment of approximately \$350 million of the state's outstanding general obligation debt as of June 30, 2018. When available and appropriate, early bond calls and special redemptions will be utilized to reduce payments for debt service. Through strict attention to quality underwriting, accurate loan servicing, and when necessary, timely collection activities, the successful operation of the Veterans' Home Loan program will continue. State-owned (foreclosed) properties will continue to be closely monitored in order to maximize returns.

Delinquencies and non-performing assets will continue to be closely monitored, and early intervention will be employed to assist borrowers and to protect the Department's interests. During the biennium, the Department will strive to keep its delinquent accounts (90 or more days delinquent and active foreclosures) to 1.5 percent or less of all outstanding accounts.

- **Provide more Oregon veterans with an opportunity for home ownership**

The Department will continue to use the proceeds arising from the sale of tax-exempt Qualified Veterans' Mortgage Bonds to fund home loans. With Oregon National Guard units serving in the Middle East, the Department anticipates that the pool of post-1976 eligible veterans will grow in time. The Department will continue its outreach efforts to this new group of veterans, ensuring that they are fully informed of the benefits available to them and the potential savings in housing costs available to them, generally ranging between \$15,000 to \$50,000.

- **Improve service delivery through additional business partners**

The Department will continue to expand its statewide network of mortgage lenders and brokers who originate ODVA home loans. To help further develop these partnerships, ODVA is requesting funding to add a business development position within the department. By providing local access to ODVA home loans via ODVA-approved lenders and brokers, additional veterans may be served in their local communities.

- **Enhance efficiency and customer service by replacing two separate antiquated systems with an end-to-end loan origination and servicing system.**

- **Plans to implement database infrastructure to provide access to web-based tools to assist veteran borrowers and Loan Program partners.**

## Revenue Sources/Proposed Revenue Changes

**Revenue Sources** - The Veterans' Home Loan program operates solely on Other Funds. These Other Fund monies consist of loan and contract repayments, proceeds from bond sales, fee and rental income, and investment earnings. No General Fund monies are used in its operations. The Veterans' Home Loan program requires no matching funds.

**Limits on Use of Revenue** - Limitations on revenue usage exist since these funds are derived from tax-exempt debt issued by the State of Oregon. Thus, the use of these revenues must be compatible with federal tax laws and Oregon's constitutional and statutory authority. A listing of constitutionally authorized uses, (subject to applicable federal tax restrictions) is provided in the Revenues portion of this document.

**Basis for Estimates** - A variety of factors were used to produce the estimate for the 2019-2021 base budget. Included were estimates of loan and contract-related repayments, investment earnings, fee and rental income, and proceeds from bond sales. Loan and contract related repayments consist of payments received by the Department from its mortgagors and contracts for principal, interest, taxes and insurance. Historical payment patterns were used to help make the projections. Historical earnings performance was also used, along with projected earning rates, estimates of the size and type of investments, and projected

investment terms to forecast the Department's investment earnings. Fee and rental income consists of payments received from the Department's mortgagors for a variety of loan-related services, and for the leasing of space in the Veterans' Building. Historical payment trends and projections relevant to the increase/decrease of fee-based transactions and rental and leasing activities were utilized to produce an estimate for the biennium.

## Changes in Revenue Sources

The Governor's Budget for 2019-21 proposes \$500,000 in Lottery Funds for Down Payment and Closing Cost Assistance.

## Proposed Legislation

### LC 27400-002: Technical Amendments Relating the Home Loan Program

LC 27400-002 amends ORS Chapter 407, relating to the agency's home loan program, to provide clarity and readability; update archaic provisions; conform statutes to the practices, policies and federal bond and lending requirements; and eliminate provisions that have not been used for years or are prohibited uses of bond proceeds.

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Veterans' Affairs, Oregon Dept of  
Pkg: 010 - Non-PICS Psnl Svc / Vacancy Factor**

**Cross Reference Name: Loan Program  
Cross Reference Number: 27400-001-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Personal Services</b>							
Temporary Appointments	-	-	1,750	-	-	-	1,750
Overtime Payments	-	-	875	-	-	-	875
Shift Differential	-	-	88	-	-	-	88
All Other Differential	-	-	762	-	-	-	762
Public Employees' Retire Cont	-	-	293	-	-	-	293
Pension Obligation Bond	-	-	49,789	-	-	-	49,789
Social Security Taxes	-	-	266	-	-	-	266
Unemployment Assessments	-	-	1,064	-	-	-	1,064
Mass Transit Tax	-	-	5,023	-	-	-	5,023
Vacancy Savings	-	-	316,702	-	-	-	316,702
<b>Total Personal Services</b>	-	-	<b>\$376,612</b>	-	-	-	<b>\$376,612</b>
<b>Total Expenditures</b>							
Total Expenditures	-	-	376,612	-	-	-	376,612
<b>Total Expenditures</b>	-	-	<b>\$376,612</b>	-	-	-	<b>\$376,612</b>
<b>Ending Balance</b>							
Ending Balance	-	-	(376,612)	-	-	-	(376,612)
<b>Total Ending Balance</b>	-	-	<b>(\$376,612)</b>	-	-	-	<b>(\$376,612)</b>

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**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Veterans' Affairs, Oregon Dept of  
Pkg: 022 - Phase-out Pgm & One-time Costs**

**Cross Reference Name: Loan Program  
Cross Reference Number: 27400-001-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
Facilities Maintenance	-	-	(733,333)	-	-	-	(733,333)
Expendable Prop 250 - 5000	-	-	(200,000)	-	-	-	(200,000)
<b>Total Services &amp; Supplies</b>	-	-	<b>(\$933,333)</b>	-	-	-	<b>(\$933,333)</b>
<b>Capital Outlay</b>							
Data Processing Software	-	-	(50,000)	-	-	-	(50,000)
Professional Services	-	-	(200,000)	-	-	-	(200,000)
<b>Total Capital Outlay</b>	-	-	<b>(\$250,000)</b>	-	-	-	<b>(\$250,000)</b>
<b>Total Expenditures</b>							
Total Expenditures	-	-	(1,183,333)	-	-	-	(1,183,333)
<b>Total Expenditures</b>	-	-	<b>(\$1,183,333)</b>	-	-	-	<b>(\$1,183,333)</b>
<b>Ending Balance</b>							
Ending Balance	-	-	1,183,333	-	-	-	1,183,333
<b>Total Ending Balance</b>	-	-	<b>\$1,183,333</b>	-	-	-	<b>\$1,183,333</b>

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**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Veterans' Affairs, Oregon Dept of  
Pkg: 031 - Standard Inflation**

**Cross Reference Name: Loan Program  
Cross Reference Number: 27400-001-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
Instate Travel	-	-	5,663	-	-	-	5,663
Out of State Travel	-	-	2,940	-	-	-	2,940
Employee Training	-	-	6,478	-	-	-	6,478
Office Expenses	-	-	27,649	-	-	-	27,649
Telecommunications	-	-	5,767	-	-	-	5,767
State Gov. Service Charges	-	-	51,748	-	-	-	51,748
Data Processing	-	-	6,109	-	-	-	6,109
Publicity and Publications	-	-	598	-	-	-	598
Professional Services	-	-	44,209	-	-	-	44,209
IT Professional Services	-	-	2,186	-	-	-	2,186
Attorney General	-	-	97,061	-	-	-	97,061
Dispute Resolution Services	-	-	176	-	-	-	176
Employee Recruitment and Develop	-	-	133	-	-	-	133
Dues and Subscriptions	-	-	1,678	-	-	-	1,678
Facilities Rental and Taxes	-	-	1,223	-	-	-	1,223
Fuels and Utilities	-	-	10,837	-	-	-	10,837
Facilities Maintenance	-	-	25,636	-	-	-	25,636
Agency Program Related S and S	-	-	298	-	-	-	298
Intra-agency Charges	-	-	35	-	-	-	35
Other Services and Supplies	-	-	1,312	-	-	-	1,312
Expendable Prop 250 - 5000	-	-	6,268	-	-	-	6,268
IT Expendable Property	-	-	1,452	-	-	-	1,452
<b>Total Services &amp; Supplies</b>	-	-	<b>\$299,456</b>	-	-	-	<b>\$299,456</b>

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**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Veterans' Affairs, Oregon Dept of  
Pkg: 031 - Standard Inflation**

**Cross Reference Name: Loan Program  
Cross Reference Number: 27400-001-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Capital Outlay</b>							
Data Processing Software	-	-	6,389	-	-	-	6,389
Building Structures	-	-	1,663	-	-	-	1,663
Equipment - Part of Building	-	-	2,711	-	-	-	2,711
Other Capital Outlay	-	-	3,117	-	-	-	3,117
<b>Total Capital Outlay</b>	-	-	<b>\$13,880</b>	-	-	-	<b>\$13,880</b>
<b>Total Expenditures</b>							
Total Expenditures	-	-	313,336	-	-	-	313,336
<b>Total Expenditures</b>	-	-	<b>\$313,336</b>	-	-	-	<b>\$313,336</b>
<b>Ending Balance</b>							
Ending Balance	-	-	(313,336)	-	-	-	(313,336)
<b>Total Ending Balance</b>	-	-	<b>(\$313,336)</b>	-	-	-	<b>(\$313,336)</b>

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**DETAIL OF LOTTERY FUNDS, OTHER FUNDS, AND FEDERAL FUNDS REVENUE**

**Veterans' Affairs, Oregon Dept of  
2019-21 Biennium**
**Agency Number: 27400  
Cross Reference Number: 27400-001-00-00-00000**

<i>Source</i>	2015-17 Actuals	2017-19 Leg Adopted Budget	2017-19 Leg Approved Budget	2019-21 Agency Request Budget	2019-21 Governor's Budget	2019-21 Leg. Adopted Audit
<b>Lottery Funds</b>						
Tsfr From Administrative Svcs	-	-	-	-	500,000	-
<b>Total Lottery Funds</b>	-	-	-	-	<b>\$500,000</b>	-
<b>Other Funds</b>						
Admin and Service Charges	2,540,713	1,218,547	1,218,547	1,264,852	1,800,556	-
Transfer In - Intrafund	9,619,634	18,483,134	18,692,110	16,154,902	16,154,902	-
Transfer Out - Intrafund	-	-	-	-	(109,006)	-
<b>Total Other Funds</b>	<b>\$12,160,347</b>	<b>\$19,701,681</b>	<b>\$19,910,657</b>	<b>\$17,419,754</b>	<b>\$17,846,452</b>	-

## INVIGORATE CORE OPERATIONS POLICY OPTION PACKAGE 101

21<sup>st</sup> Century Service Delivery – Package 101 (Agency priority # 1)

### Introduction

One of ODVA's goals and objectives to better serve Oregon veterans is to “invigorate core operations” and “build a better, stronger and more durable department for future generations.”

To meet these objectives, ODVA needs to replace outdated and inadequate software applications with effective, efficient platforms designed for modern day needs that will improve services to veterans and mitigate risks. In addition, ODVA needs to provide sufficient resources and support to introduce new technologies. Finally, ODVA needs to modernize the workplace by refreshing the second floor interior of the ODVA building that is several years overdue, according to DAS recommendations.

This policy option package invigorates ODVA core operations by:

1. Modernizing technology service delivery for the Home Loan Program.
2. Modernizing technology service delivery for the Conservatorship Program (part of Aging Veterans Services).
3. Modernizing technology services by providing sufficient resources and support to introduce new technologies.
4. Modernizing the workplace by refreshing the second floor interior of the ODVA building.

### 1. Home Loan Origination and Servicing Modernization

#### Purpose

The purpose of this funding request is to improve the Home Loan Program loan origination and loan servicing services to veterans, improve agency effectiveness and accuracy, and mitigate risks.

The Home Loan Program originates and services home loans for veterans. However, the current loan origination and servicing applications are separate, custom applications that contain redundant information about the veteran borrower and the loan. Because the applications are separate, they are inefficient and susceptible to multiple data entry errors.

ODVA's Home Loan Program is an Oregon constitutionally authorized and mandated benefit for Oregon veterans. The agency last updated origination and servicing technology in 1999, in response to issues that arose in the 1980's, and the agency invested nearly \$1 million to customize a COTs system (commercial off-the-shelf software) that would address a number of issues including servicing a number of non-amortizing loans. Two of these three systems that were implemented 19 years ago do not meet the needs of the agency's current business model, do not allow changes to be made to implement new federal compliance requirements, and do not meet the expectations of our veteran borrowers.

### How Achieved

The goals of improving the Home Loan Program loan origination and loan servicing services to veterans, improve agency effectiveness and accuracy, and mitigate risks can be achieved through the implementation of a new Home Loan origination and servicing application during the 2019-21 biennium.

The goal is to ensure that the loan origination and loan servicing solutions can work together seamlessly to reduce duplication of effort and mitigate long-term risks associated with stop-gap software applications that were introduced to respond to changing federal regulations. An "end-to-end" home loan system combines an origination and a servicing system. In addition, this new software system will significantly improve the veterans' customer service experience by allowing veterans to review their home loan information online.

ODVA recently engaged professional services to help audit the agency's current technology system's architecture and business processes. The information from the audit currently informs the technology requirements for a solution, and has been used to identify viable solutions and estimated costs.

The critical components of a home loan origination/loan servicing IT system include:

1. Robust reporting capabilities to ensure critical data are available to plan for future loan allocations and bond financings, as well as federal compliance information.
2. Control the lending life cycle from new business and loan servicing to default management.
3. Enable customer-facing account management through the web.
4. Ability to work with third-party originators.
5. Ability to keep the applications current with minimal investment after implementation.

In the 2017-19 biennial budget process, the agency requested and received funding to replace the current Home Loan applications. The agency chose not to begin this project in the 2017-19 biennium due to limited expert staff resources and the need to further understand the future state business requirements.

**Staffing Impact**

None.

**Quantifying Results**

## Home Loan Program Expected Outcomes

Ability to quickly respond to federally-mandated regulatory changes like those that occurred during the 2015 – 2017 biennium

1. Allow ODVA to better control the three stages of the home loan lending life cycle
  - a. New business origination
  - b. Loan servicing
  - c. Default management
2. Enable customer-focused experiences
3. Maximize staff efficiency
4. Minimize data input errors
5. Satisfy federal regulatory compliance
6. Allow ODVA to provide enhanced information to veterans.

The results of installing an end-to-end loan origination and servicing system for the Home Loan Program will be measured by the following:

1. Loan file data entry time and processing time
2. Number of regulatory events and negative audit findings
3. Borrower satisfaction
4. Application user satisfaction

**Fiscal Impact/Cost**

The professional study provided to the agency outlined the following costs for the end-to-end home loan origination and loan servicing project:

\$ 50,000	OF	Employee Training (Capital Outlay)
\$ 50,000	OF	IT Professional Services (Capital Outlay)
<u>\$ 150,000</u>	OF	Data Processing Software (Capital Outlay)
\$ 250,000	OF	TOTAL

## 2. Conservatorship Program Technology Modernization

### Purpose

The purpose of this funding request is to improve the Conservatorship and Representative Payee Program services to veterans, improve agency effectiveness and accuracy, and mitigate risks to the \$30 million program.

The Conservatorship System software application enables court-appointed ODVA conservators and trust officers to deliver critical conservatorship and representative payee services to the state's most vulnerable veterans. These veterans rely on ODVA and the Conservatorship System to manage and care for all of their financial needs, which total almost \$30 million in client assets.

In the 2017-19 biennial budget process, the agency requested and received funding to replace the current Conservatorship application. There were many unknown factors at the time of the request; primarily the agency anticipated that an existing COTS (commercial off-the-shelf software) solution would meet the needs of the program business requirements. For example, the expected and funded cost of the project (\$600,000) was based on estimates researched in 2014-16, which were informed using a high-level understanding of the program requirements.

During the 2015-17 biennium, ODVA engaged professional system and analysis services to help audit the current systems architecture and business processes. The information from the audit currently informs the technology requirements for a solution, and has been used to identify viable solutions and estimated costs, including: 1) costs for professional IT services (\$200,000); and costs associated with changes in the scope of work because of changes to policy and reporting requirements within the conservator industry (\$200,000). These changes were not anticipated in the 2017-19 agency request budget. Based on the professional assessment, ODVA has determined that:

1. No out-of-the-box software solution without customization will meet the business need for the agency.;
2. ODVA does not have in-house resources or expertise to manage an IT project of this scale and does not have the capability to perform business analysis to adjust processes that would reduce needed customization; and
3. Bringing in professional services to resolve these issues (through project management, business analysis, and system integration) will cost an estimated \$200,000.
4. Changes in scope based on regulatory changes may likely require additional work and funding on technological and business planning processes. To ensure the agency is able to implement the right application to perform required functions, the initial estimated costs increase an additional \$200,000.

ODVA is continuing to work with OSCIO's office through the Stage Gate review process as well as DAS for business case review and development.

To date, ODVA has worked on the following aspects of this project: initial solution and vendor research to inform the business case; conservator application architecture mapping, baseline requirement gathering; initial business process analysis; business case development; planned timeline; professional services solicitation drafted; OSCIO engagement on Stage Gate review process; DAS engagement on business case review; and \$600,000 of approved project funding through the 2017-19 biennium.

### **How Achieved**

The objectives of improving the Conservatorship Program and Representative Payee services to veterans, improve agency effectiveness and accuracy, and mitigate risks to the \$30 million conservatorship and representative payee Program can be achieved through the implementation of the new Conservatorship IT application.

Based on a third-party professional assessment of the Conservatorship system and planned system during the 2017-19 biennium, successful implementation of the new IT system must include:

1. Contracting for professional IT services for project management, business analysis, and system integration for the Conservatorship System software replacement; and
2. Additional development based on changes to the initial requirements.

### **Staffing Impact**

None.

### **Quantifying Results**

Expected Outcomes include:

1. Significant risk mitigation by eliminating the current dependencies on:
  - a. A single, contracted application developer
  - b. Legacy and largely unsupported application language and platform
2. Improved staff efficiency and accuracy through:
  - a. Automated workflow processes
  - b. Graphical and user-friendly interface
  - c. Reduced IT overhead

3. Compliance with ODVA strategic plan to build a better, stronger and more durable department for future generations
4. Long-term support and sustainability for the ODVA Conservatorship Program and System application
5. Integration of the Conservatorship System into other existing and future ODVA core program applications
  - a. Business intelligence
  - b. Improved customer service models
6. Application extensibility is retained to meet potential changes to the business needs of the ODVA Conservatorship Program
7. Number of types of reports that may be generated that will ultimately improve operations
8. Increased ODVA Conservatorship Program capacity.

Results of developing a replacement for the legacy Conservatorship System will be measured by the following:

1. The number of Conservatorship System support requests
2. Case file data entry and processing time
3. Application user satisfaction

### Fiscal Impact/Cost

The professional study provided to the agency outlined the following costs for the implementation of the Conservatorship system:

\$ 200,000	LF	IT Professional services (project management, business analysis, and system integration) (Capital Outlay)
<u>\$ 200,000</u>	LF	Software customization and development costs (Capital Outlay)
\$ 400,000	LF	TOTAL

### 3. Technology Services and Supplies

#### Purpose

The purpose of this funding request is to provide sufficient resources and support to introduce new technologies to ODVA.

The existing services and supplies allocation is insufficient to accommodate a responsive introduction of new technologies and modern solutions. This limits the agency's ability to quickly expand services and adapt to changing business and regulatory requirements. Existing services and supplies resources accentuates existing "technical debt" accrued over many years of general budget cutbacks, staff reductions and retirements. This request seeks to restore the ability of ODVA to introduce modern technology solutions into the agency while maintaining operational business continuity.



**How Achieved**

The goal of providing sufficient resources and support to introduce new technologies to ODVA will be achieved by implementing a plan developed by the agency that will enable ODVA to accommodate enterprise information security policy changes, absorb new demand for mobile solutions, consolidate and centralize database solutions, introduce new and modern information systems thereby creating capacity and greater work efficiency, procure expert talent, and develop a solid knowledgebase and technology foundation for the agency. The five priorities for this project include:

1. Enhanced information security (Certificate authority/public key infrastructure, mobile device management/enterprise mobile management, network access controls, monitoring and data loss prevention, and professional services)
2. Expanded network capability (Wireless network, technology to support building infrastructure updates, professional services to support systems integration)
3. Staff development
4. Database and modern application support and services
5. Renewed technology infrastructure (Technology sandbox, and assets to improve efficiencies like fiber optic, telecom racks, closets and cabinets, inventory storage)

**Staffing Impact**

None.

**Quantifying Results**

The results of investing in technology services and supplies will be measured by the following:

1. Enhanced information security
2. Expanded network capability
3. Staff development
4. Database and modern application support and services
5. Renewed technology infrastructure

In addition, expenditures for professional services is included to provide regular technology performance audits and discovery services to measure results and outcomes of related investments. Using a typical technology lifecycle of 18-24 months, and project completion as a baseline, third-party performance audits

should be undertaken every other biennium, or 3-4 years. The most current baseline, and potential milestone metrics information, is contained within 2017 discovery service engagement reports.

#### **Fiscal Impact/Cost**

\$ 108,000		Enhanced information security
\$ 72,000		Expanded network capability
\$ 30,000		Staff development
\$ 10,000		Database and modern application support and services
<u>\$ 20,000</u>		Renewed technology infrastructure
\$ 240,000		TOTAL
\$ 120,000	LF	Information Technology (Services and Supplies)
<u>\$ 120,000</u>	OF	Information Technology (Services and Supplies)
\$ 240,000		TOTAL

#### **4. ODVA Second Floor Building Refresh**

##### **Purpose**

The Department of Administrative Services recommends a refresh of state building interiors every ten years; it has been more than ten years since the interior of the ODVA building was painted and new carpet installed. With funding from the 2017-19 budgets, the agency completed the renovation of the third floor and is working on the renovation of the first floor. With the recognition of the very challenging bidding environment in 2017 and 2018, additional funds will be needed to complete the second floor renovation. The project will primarily encompass the painting and re-carpeting of all staff and public areas.

##### **How Achieved**

The goal of implementing a plan for the second floor renovations requires a schedule that provides for the removal of old carpet, painting of all walls and installation of new carpet. The most efficient and effective way to complete this project will require all staff to be moved to various locations within the building while the work is underway. The painting of all wall surfaces will be completed and coordinated with the carpet contractor and signage will be installed as remodeled areas are completed. In recognition of individual agency's operational requirements (OVDA and building tenants), work that may impact their areas will be performed after hours and on weekends where and when it is feasible. This project will need new funding because there are no internal financial

resources that can be redirected to accomplish this project.

**Staffing Impact:**

None.

**Quantifying Results:**

The expected outcomes will include the following on the second floor of the ODVA building: removal of old carpet, painting, carpet and installation, temporary moving costs and other related construction costs.

**Fiscal Impact/Cost**

\$475,000	LF	Building Refresh (Capital Outlay)
<u>\$500,000</u>	OF	Building Refresh (Capital Outlay)
\$975,000		TOTAL

**Revenue Source**

\$ 250,000	OF	Home Loan Origination and Servicing Modernization (Capital Outlay)
\$ 400,000	LF	Conservatorship Program Technology Modernization (Capital Outlay)
\$ 120,000	LF	Technology Services and Supplies (Services and Supplies)
\$ 120,000	OF	Technology Services and Supplies (Services and Supplies)
\$ 475,000	LF	ODVA Second Floor Building Refresh (Capital Outlay)
<u>\$ 500,000</u>	OF	ODVA Second Floor Building Refresh (Capital Outlay)
<b>\$1,865,000</b>		<b>TOTAL (Capital Outlay of \$1,625,000 and Services and Supplies of \$240,000)</b>

**GRAND TOTALS**

\$ 875,000	LF	TOTAL Capital Outlay
<u>\$ 120,000</u>	LF	TOTAL Services and Supplies
\$ 995,000	LF	TOTAL Combined
\$ 750,000	OF	TOTAL Capital Outlay
<u>\$ 120,000</u>	OF	TOTAL Services and Supplies
\$ 870,000	OF	TOTAL Combined
\$1,865,000		TOTAL

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Veterans' Affairs, Oregon Dept of  
Pkg: 101 - 21st Century Service Delivery**

**Cross Reference Name: Loan Program  
Cross Reference Number: 27400-001-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
Data Processing	-	-	120,000	-	-	-	120,000
<b>Total Services &amp; Supplies</b>	-	-	<b>\$120,000</b>	-	-	-	<b>\$120,000</b>
<b>Capital Outlay</b>							
Data Processing Software	-	-	50,000	-	-	-	50,000
Building Structures	-	-	425,000	-	-	-	425,000
Professional Services	-	-	275,000	-	-	-	275,000
<b>Total Capital Outlay</b>	-	-	<b>\$750,000</b>	-	-	-	<b>\$750,000</b>
<b>Total Expenditures</b>							
Total Expenditures	-	-	870,000	-	-	-	870,000
<b>Total Expenditures</b>	-	-	<b>\$870,000</b>	-	-	-	<b>\$870,000</b>
<b>Ending Balance</b>							
Ending Balance	-	-	(870,000)	-	-	-	(870,000)
<b>Total Ending Balance</b>	-	-	<b>(\$870,000)</b>	-	-	-	<b>(\$870,000)</b>

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## VETERAN SERVICES POLICY OPTION PACKAGE 102

### Target Veteran Services – Package 102 (Agency priority # 2)

#### Introduction

ODVA's vision for veterans, stated in its five-year strategic plan, is that "Veterans and their families thrive in Oregon." One of the goals and its objective that supports that vision is to "Target veteran services: Serve more veterans and serve them better." This package targets services for veterans and supports the objective of serving more veterans and serving them better and includes enhancing training opportunities for veteran service officers that serve veterans and the capabilities of the conservatorship and representative payee programs that provide direct support to our most fragile veterans, and increase veterans' accessibility to ODVA home loans.

The package components are grouped into three major categories:

1. Statewide Veteran Services: Enhanced training for state, county, tribal and National Service Organization veteran service officers
  - Enhanced statewide and regional training conferences for county, tribal and NSO veteran services
2. Aging Veterans Services: Representative Payee Position and Conservatorship Staff Training
  - Representative Payee Position due to increased demand for services
  - Training for Conservatorship staff to meet certification requirements
3. Home Loan Program: Increase Home Loans in Underserved Markets
  - Establish an ODVA Home Loan Business Representative to develop home loan business

## 2. Statewide Veteran Services: Enhanced training for state, county, tribal and National Service Organization veteran service officers

### Purpose

Oregon Department of Veterans' Affairs holds the power of attorney for claims filing with the United States Department of Veterans Affairs (USDVA), which requires the agency to be responsible for the training, certification, and accreditation of all county and state veteran service officers (VSOs). ODVA holds initial 40-hour training classes for new VSOs, multiple onsite training days for unaccredited VSOs, one annual conference (held in different locations around the state), and ten one-day regional training conferences each year. The agency provides this training at no cost to state and county VSOs and invites tribal and National Service Organization partners. When the community requests it, other service providers are also included. Examples of this are funeral directors learning how to provide burial benefits to local veterans and medical providers who want to learn more about correct billing practices for the VA Choice program. ODVA has also brought in federal VA representatives for one day intensive training for all accredited VSOs on one topic, such as updated VA Pension filing requirements.

It takes approximately 12 months for a new VSO to achieve accreditation. VSOs must understand the intricacies of veteran status, types of military discharges, privacy laws under HIPAA, Federal VA organization and structure, and state and local information resources available to veterans. The VSOs also need to learn the basics of federal laws and eligibility surrounding service-connected compensation, non-service connected pensions, survivor benefits, veteran and dependent educational benefits, Veterans healthcare, fiduciary responsibilities and conservatorship assistance available to veterans, how to interview veterans, and how to develop and file (using Federal VA claims management software, the correct forms, supporting documentation, and procedures) each kind of claim.

Fully-accredited VSOs need continuing education to keep pace with new procedures and directives coming from the Federal VA. Training needs for fully-accredited VSOs include developing curricula and hosting an annual conference with specific workshop tracks and general sessions. Advanced training includes a deeper dive into the Code of Federal Regulation Title 38 governing veterans' benefits, analysis of federal claims and appeals decisions, legal research, and outreach best practices.

Since 2015, ODVA has hosted an annual three-day Tribal Veteran Representative conference. We do not accredit these representatives, but offer the only veteran service officer training available to them. ODVA is offering to enter into an agreement with each Tribal government to accredit their representatives, but it will take time. Until that happens, the representatives in those communities will continue to receive the best training available. ODVA additionally invites National Service Organizations that receive pass-through funding from the Oregon Legislature to the annual VSO conference. One organization regularly sends three VSOs and others sometimes opt to send their newer VSOs.

In addition to basic conference costs for the venue and travel expenses, ODVA often provides national professional trainers for the annual statewide conference to provide expertise on fundamental and changes in Federal VA claims filings, appellate processes, because the claims are legal documents reviewed and adjudicated by the U.S. Department of Veterans' Affairs. These trainers are attorneys associated with a non-profit organization that focuses on providing pro bono representation to veterans and their eligible dependents, and ensuring the government delivers the benefits to which veterans are entitled. These organizations have provided the legal work that has recently resulted in most of the landmark rulings affecting the veteran benefit landscape.

ODVA also provides other specialized trainers at the conferences, including professional behavioral health experts on suicide prevention and Post Traumatic Stress Disorder, recognizing and dealing with stress in the high pressure workplace, and how to best interpret medical evidence for the prosecution of a benefits claim.

Since 2015, the number of state and county veteran service officers has increased by 46%. In June 2015, there were 71 county and state veteran service officers (55 county and 16 state VSOs). In June 2018, there were 104 state and county veteran service officers, including 81 county and 23 state VSOs. The training demands are great: a total of 16 new veteran service officers, who require intensive training, were hired by the counties and the state in the last year, as well as training new VSOs due to turnover.

During the period of significant increases in the number of veteran service officers, from 2015 to 2018, the budgeted costs for training services and supplies was not increased, and remained at \$45,795 for both 2015-17 and 2017-19. Therefore, in addition to the costs of training a significant number of new veteran service officers, which increases the overall training costs incurred, the costs for conference venues and associated costs, travel, materials and professional trainers have increased over the past four to six years.

### **How Achieved**

The goal of providing training to the significant increase in state and county VSOs, meeting ODVA's Federal VA certification and accreditation requirements, and extending training to our tribal and National Service Organization partners can be achieved with additional dedicated funds for annual and regional training conferences in the amount of \$60,000 LF.

These funds will be used to cover the costs of conference venues and associated costs, professional legal trainers, travel, specialized trainers and the additional expenses incurred in conducting initial 40-hour trainings for new VDOs, the two annual conferences and 10 regional conferences each year.



**Staffing Impact**

There is no direct staffing impact.

**Quantifying Results**

The increased training efforts and greater access to training by the VSOs will result in well-trained, highly skilled and professional veteran service officers who can be accredited in a timely manner and are capable of filing well-developed claims and advocating for veterans and their eligible dependents.

**Fiscal Impact/Cost**

\$ 60,000 LF      Training costs for veteran service officers (Services and Supplies)

**2. Aging Veterans Services: Representative Payee Position and Conservatorship Staff Training****Purpose**

The purpose of this request is to provide needed representative payee services to veterans due to increased demand for services and to cover training costs for Conservatorship staff to meet statutorily mandated certification requirements

Through the Aging Veteran Services Program, ODVA is committed to prioritizing resources and services for aging veterans (65 years of age and older), who represent more than half of Oregon's veteran population. Part of Aging Veteran Services program is the Conservatorship and Representative Payee program. This program provides financial and case-management services to the most vulnerable Oregon veterans who are unable to manage their own finances. One of the greatest benefits of these programs is that it prevents the institutionalization of these senior veterans, thereby reducing costs that would have been borne by the state general fund.

The current representative payee program is staffed by one individual, who provides services for approximately 146 veterans; however, the average national caseload for representative payees is about 100 cases per rep payee. Despite growing demands, ODVA has been forced to stop accepting new representative payee clients, except in dire circumstances, because the current caseload is too high.

Staff members in the Conservatorship and Representative Payee program are required to be certified by the national Center for Guardianship Certification (CGC). The training and coursework requirements for certification increased on January 1, 2018, including 30 hours of coursework for certification and 10 hours each year of continuing education.

### How Achieved

The addition of one new Representative Payee (\$137,753 LF) would reduce the per person caseload, while increasing the total number of veterans served, and allow each representative payee to handle approximately 100 veterans. ODVA is also requesting Services and Supplies relating to this position in the amount of \$15,000 LF, for a total of \$152,753 LF. If funding is not provided for the representative payee position, the caseload for the current representative payee will need to be reduced by approximately 45-50 rep payee cases.

Statutorily mandated Initial and continuing education training required for certification of Conservatorship and Representative Payee staff by the Center for Guardian Certification would be funded with \$ 20,000 LF Services and Supplies.

### Staffing Impact

Establish one Representative Payee (Administrative Specialist 2)

### Quantifying Results

A Representative Payee position will decrease the caseload per staff members, better serve representative payee clients, and allow ODVA to take on new clients. ODVA will also be able to meet certification requirements for Conservatorship and Representative Payee staff.

### Fiscal Impact/Cost

\$ 152,753 LF Representative payee position (\$137,753 LF personal services and \$15,000 LF for Services and Supplies)

\$ 20,000 LF Training costs conservatorship staff (Services and Supplies)

\$ 172,753 LF Total

### 3. Home Loan Program: Increase Home Loans for Veterans

#### Purpose

The purpose of this request is to increase the number of veteran home loans, including those in underserved markets, to provide a greater number of home loans to eligible veterans and create a more robust Home Loan Program.

The ODVA Home Loan program is dependent on its contractual partners, including mortgage brokers, mortgage lenders and real estate professionals for loan production. However, the program has not fully established a marketing presence in Oregon to introduce, train, and service these lending partners who serve the acquisition and financing needs of veterans.

#### How Achieved

The purpose of increasing the number of home loans to veterans would be achieved by establishing a dedicated staff person who would be tasked with identifying, marketing and establishing new contractual lending partners, including mortgage brokers and mortgage lenders; attending mortgage-related tradeshows; providing training and education to lenders and real estate professionals; and meeting with new and existing lender clients to enhance business relationships. Services and supplies include significant travel expenses.

#### Staffing Impact

Establish one Business Development Representative (Program Analyst 3)

#### Quantifying Results

Results would be quantified on two levels: first, the increase in the amount of mortgage brokers and lenders that submit loan packages to ODVA, and second, the increase in loan production.

#### Fiscal Impact/Cost

\$ 227,517 OF Business Development Representative (\$191,247 OF Personal Services and \$ 36,270 OF Services and Supplies)

#### Revenue Sources:

\$ 60,000	LF	Training costs for veteran service officers (Services and Supplies)
\$ 152,753	LF	Representative Payee position (\$137,753 LF Personal Services and \$15,000 LF Services and Supplies)
\$ 20,000	LF	Training costs conservatorship staff (Services and Supplies)
<u>\$ 227,517</u>	OF	Business Development Representative (\$191,247 OF Personal Services and \$36,270 OF Services and Supplies)
<b>\$ 460,270</b>		<b>TOTAL (Personal Services of \$329,000 and Services and Supplies of \$131,270)</b>

**GRAND TOTALS**

\$ 137,753	LF	TOTAL Personal Services
<u>\$ 95,000</u>	LF	TOTAL Services and Supplies
\$ 232,753	LF	TOTAL Combined
\$ 191,247	OF	TOTAL Personal Services
<u>\$ 36,270</u>	OF	TOTAL Services and Supplies
\$ 227,517	OF	TOTAL Combined
\$ 460,270		TOTAL

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 REPORT: PACKAGE FISCAL IMPACT REPORT 2019-21 PROD FILE  
 AGENCY: 27400 DEPT OF VETERANS AFFAIRS PICS SYSTEM: BUDGET PREPARATION  
 SUMMARY XREF: 001-00-00 Loan Program PACKAGE: 102 - Target Veteran Services

POSITION NUMBER	CLASS COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
0196127	OAS C0862 AP	PROGRAM ANALYST 3	1	1.00	24.00	02	5,189.00		124,536 65,964			124,536 65,964
TOTAL PICS SALARY									124,536			124,536
TOTAL PICS OPE									65,964			65,964
TOTAL PICS PERSONAL SERVICES =			1	1.00	24.00				190,500			190,500

**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Veterans' Affairs, Oregon Dept of  
Pkg: 102 - Target Veteran Services**

**Cross Reference Name: Loan Program  
Cross Reference Number: 27400-001-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
Transfer In - Intrafund	-	-	-	-	-	-	-
<b>Total Revenues</b>	-	-	-	-	-	-	-
<b>Transfers Out</b>							
Transfer Out - Intrafund	-	-	-	-	-	-	-
<b>Total Transfers Out</b>	-	-	-	-	-	-	-
<b>Personal Services</b>							
Class/Unclass Sal. and Per Diem	-	-	124,536	-	-	-	124,536
Empl. Rel. Bd. Assessments	-	-	61	-	-	-	61
Public Employees' Retire Cont	-	-	21,134	-	-	-	21,134
Social Security Taxes	-	-	9,527	-	-	-	9,527
Worker's Comp. Assess. (WCD)	-	-	58	-	-	-	58
Mass Transit Tax	-	-	747	-	-	-	747
Flexible Benefits	-	-	35,184	-	-	-	35,184
<b>Total Personal Services</b>	-	-	<b>\$191,247</b>	-	-	-	<b>\$191,247</b>
<b>Services &amp; Supplies</b>							
Instate Travel	-	-	17,500	-	-	-	17,500
Employee Training	-	-	5,000	-	-	-	5,000
Office Expenses	-	-	5,350	-	-	-	5,350
Telecommunications	-	-	1,920	-	-	-	1,920
Professional Services	-	-	-	-	-	-	-
Dues and Subscriptions	-	-	1,500	-	-	-	1,500

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**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Veterans' Affairs, Oregon Dept of  
Pkg: 102 - Target Veteran Services**

**Cross Reference Name: Loan Program  
Cross Reference Number: 27400-001-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Services &amp; Supplies</b>							
Expendable Prop 250 - 5000	-	-	5,000	-	-	-	5,000
<b>Total Services &amp; Supplies</b>	-	-	<b>\$36,270</b>	-	-	-	<b>\$36,270</b>
<b>Total Expenditures</b>							
Total Expenditures	-	-	227,517	-	-	-	227,517
<b>Total Expenditures</b>	-	-	<b>\$227,517</b>	-	-	-	<b>\$227,517</b>
<b>Ending Balance</b>							
Ending Balance	-	-	(227,517)	-	-	-	(227,517)
<b>Total Ending Balance</b>	-	-	<b>(\$227,517)</b>	-	-	-	<b>(\$227,517)</b>
<b>Total Positions</b>							
Total Positions	-	-	-	-	-	-	1
<b>Total Positions</b>	-	-	-	-	-	-	<b>1</b>
<b>Total FTE</b>							
Total FTE	-	-	-	-	-	-	1.00
<b>Total FTE</b>	-	-	-	-	-	-	<b>1.00</b>

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 REPORT: PACKAGE FISCAL IMPACT REPORT 2019-21 PROD FILE  
 AGENCY: 27400 DEPT OF VETERANS AFFAIRS PICS SYSTEM: BUDGET PREPARATION  
 SUMMARY XREF: 001-00-00 Loan Program PACKAGE: 102 - Target Veteran Services

POSITION NUMBER	CLASS COMP	CLASS NAME	POS CNT	FTE	MOS	STEP	RATE	GF SAL/OPE	OF SAL/OPE	FF SAL/OPE	LF SAL/OPE	AF SAL/OPE
0196127	OAS C0862 AP	PROGRAM ANALYST 3	1	1.00	24.00	02	5,189.00		124,536 65,964			124,536 65,964
TOTAL PICS SALARY									124,536			124,536
TOTAL PICS OPE									65,964			65,964
TOTAL PICS PERSONAL SERVICES =			1	1.00	24.00				190,500			190,500



## ANALYST ADJUSTMENTS PACKAGE 090

### 1. Veteran Services Program: Grant Program on Homelessness

#### Purpose

To provide funding for a statewide grant program to address veteran housing stability and homelessness.

#### How Achieved

Statewide grants will be awarded based on a competitive process. Programs and services that grant funding may expand and enhance are: supported and non-supported transitional housing, the number of facilities that focus on underserved and hard to place veterans such as veterans with families, women, LGBTQ, and formerly incarcerated veterans, basic shelter space in rural Oregon. Grants would also focus improving/increasing access to support services such as training and employment, addictions and behavioral health services for homeless veterans or those at risk of becoming homeless.

The Homeless Veteran Coordinator will develop and enhance existing partnerships, and act as a facilitator and liaison with state, local and non-profit partners whose work focuses on ending veteran homelessness to identify gaps in regional and local service delivery. The Coordinator will also work extensively with the Federal VA and US Department of Housing and Urban Development.

#### Staffing Impact

Establish one Homeless Veteran Coordinator (Program Analyst 3)

#### Quantifying Results

Results will be quantified by tracking measurable outcomes reported quarterly by grantees. Measurable outcomes will be identified as part of the grant request process. Program impacts will also be tracked and reported on a regular basis by the Homeless Veteran Coordinator.

#### Fiscal Impact/Cost

\$ 300,000 LF	Homeless Veteran Coordinator (\$192,046 LF Personal Services and \$107,954 LF Services and Supplies)
<u>\$ 760,000 LF</u>	Pass-through funding to eligible organizations (\$760,000 LF Special Payments)
\$1,060,000	Total

## 2. Veteran Services Program: Augment Veteran Services Grant Program

### Purpose

These funds will add to the Agency Request Budget for veteran services grants. HB 2891 (2017) authorized \$550,000 for grants to expand outreach and services to veterans, however the requests for grant funds was approximately ten times the amount of available funds (\$5,354,422). The Grant Program process demonstrated the great need for veteran services, and the creativity, innovation and work being performed to support veterans and their families.

### How Achieved

Statewide, competitive grants from this request would be used by grantees to achieve expanded outreach and services to veterans in the following areas: mental and physical healthcare, housing security, employment opportunities and stability, education and training opportunities, transportation, promoting veterans' organizations that provide critical services, and supporting programs identified by the Veterans' Affairs Advisory Committee.

### Staffing Impact

None.

### Quantifying Results

Results will be quantified by tracking measurable outcomes reported quarterly by grantees. Measurable outcomes will be identified as part of the grant approval process.

### Fiscal Impact/Cost

\$ 500,000 LF      Pass-through funding for grants to eligible not-for-profit organizations (\$500,000 LF Special Payments)

## 3. Veteran Services Program: Tribal Veteran Partnership

### Purpose

The purpose this request is to support Tribal Veteran Representative (TVR) advocacy in support of SB 80, bringing services to Oregon Tribal Veterans and their families.

### How Achieved

Monies from this request will allow established tribal veteran offices to receive funding for their programs in the same manner as Oregon's County Veteran Services Officer (CVSO) network. This funding will allow tribal veteran offices to expand and enhance their services and reach more Tribal Veterans and their families.

The ODVA Tribal Veteran Coordinator will be the point of contact for all tribal veteran advocacy. This position will work with established TVR offices for training and liaison with ODVA. Assist TVR with connecting tribal veterans to Federal VA veteran's services. The Coordinator will also work extensively with the Federal VA Office of Tribal Government Relations to effectively liaison between federal, to state to tribal council and will work with organizations such as NARA, ATNI and the National Congress of American Indians (NCAI).

### **Staffing Impact**

Establish one Tribal Veteran Coordinator (Program Analyst 3)

### **Quantifying Results**

Results will be quantified by tracking quarterly reports submitted by Tribal Veteran Representatives interviews with veterans, outreach conducted, federal VA claims filed, appeals, and VA benefits awarded.

### **Fiscal Impact/Cost**

\$ 300,000 LF	Tribal Veteran Coordinator (\$192,046 LF Personal Services and \$107,954 LF Services and Supplies)
<u>\$ 200,000 LF</u>	Pass-through funding to Tribal Veteran Offices (\$200,000 LF Special Payments)
\$ 500,000	Total

## **4. Veteran Services Program: Grant Program on Veteran Behavioral Health Needs**

### **Purpose**

The purpose of this request is to create a statewide grant program to support veteran behavioral health needs, including addressing barriers to access and utilization of behavioral health care.

### **How Achieved**

Statewide, competitive grants from this request would be used by grantees to achieve, expanded and augment either direct or indirect behavioral health serves for veterans. Services could include: expansion of the OHA Veteran Peer Support pilot, county mental health programs for direct services for veterans, expansion of behavioral health services for supportive housing programs, and programs and services designed to reduce barriers and improve access to veteran

behavioral health services, such as improved access to transportation to appointments. Grant proposals addressing recommendations contained in the 2019 *Veterans' Behavioral Health Services Improvement Study* would be considered as well.

**Staffing Impact**

None.

**Quantifying Results**

Results will be quantified by tracking and reporting measurable outcomes reported quarterly by grantees. Measurable outcomes will be identified as part of the grant request process.

**Fiscal Impact/Cost**

\$ 560,000 LF Pass-through funding for grants to eligible organizations (\$560,000 LF Special Payments)

**5. Veteran Services Program: Employment and Economic Development Coordinator****Purpose**

The purpose of this request is to fund an Employment and Economic Development Coordinator position to serve as liaison and advocate for veterans in matters pertaining to employment and economic development.

**How Achieved**

The Coordinator will collaborate and liaise with the Oregon Department of Employment, veteran employment specialists and the DVOP program. Will also be a direct liaison with the U.S. Department of Labor Vets Work Program, the Oregon National Guard Family Services, reintegration team/Guard employment office, and work with the Governor's Regional Solutions office concentrating on veteran small business and other opportunities for veterans business and employment. Will partner with Biz Oregon to promote veteran owned businesses and disabled veteran owned businesses. Assist the agency with promotion of veterans to trade and apprentice programs across the state with a focus on rural Oregon veterans. Work with organizations that promote employment traditionally underserved veterans.

**Staffing Impact**

Establish one Veteran Employment and Economic Development Coordinator (Program Analyst 3)

**Quantifying Results**

Results will be quantified by tracking the number of partnerships made with federal, state, local and industry contacts. Indirect results will include measuring and reporting veteran employment within Oregon.

**Fiscal Impact/Cost**

\$ 300,000 LF Veteran Employment and Economic Development Coordinator (\$192,046 LF Personal Services and \$107,954 LF Services and Supplies)

**6. Veteran Services Program: State Approving Agency (SAA)**

**Purpose**

The purpose of this request is to establish three new full-time permanent positions (0.75 FTE) to establish the Oregon Department of Veterans' Affairs as the U.S. Department of Veterans Affairs State Approving Agency (SAA) for veterans' education programs. SAAs ensure that veterans have access to educational and training opportunities and that federal veterans' benefits are in compliance with applicable laws and regulations by approving educational and training programs; overseeing programs through supervisory visits and compliance surveys; and providing technical support and outreach to schools and veterans.

**How Achieved**

ODVA has requested to be designated as Oregon's SAA beginning October 1, 2019. Prior to being awarded the contract, ODVA will need to demonstrate to USDVA that the agency has the capacity and expertise, including qualified personnel and resources, to begin performing SAA responsibilities.

**Staffing Impact**

Establish three positions: Compliance Specialist 1, Education Specialist 1 and Operations and Program Analyst 4.

USDVA reimburses SAAs for direct costs incurred to perform SAA functions, including salaries and benefits, travel, and other administrative expenses, up to an annual maximum contract amount (approximately \$300,000 for Oregon).

**Quantifying Results**

Results will be quantified by veteran's access to a variety of educational programs and that Oregon postsecondary schools and institutions continue to receive federal veterans' education funding.

**Fiscal Impact/Cost**

\$ 145,930 LF	State Approving Agency Personnel (\$29,172 LF Personal Services and \$116,758 LF Services and Supplies)
<u>\$ 525,000 FF</u>	State Approving Agency Personnel (\$525,000 FF Personal Services)
\$ 670,930	Total

## 7. Veteran Services Program: Program Stabilization and Funding Alignment

### Purpose

To provide funding to more fully reimburse the Loan Program for the cost of services provided to the Veteran Services and Aging Veteran Service Program areas.

### How Achieved

Monies provided by this request will offset the costs sustained by the Loan Program in support of the Veteran Services and Aging Veteran Service Program areas. Internal program cost tracking systems will continue to be employed to determine the appropriate cost reimbursements necessary to the Loan Program.

### Staffing Impact

None.

### Quantifying Results

Results will be quantified by tracking the costs incurred by each program area and determining if the Loan Program's subsidization of the Veteran Services and Aging Veteran Service program areas has been substantially reduced or eliminated.

### Fiscal Impact/Cost

\$ 535,704 LF      Program Stabilization Service and Supplies (\$535,704 LF Services and Supplies)

## 8. Home Loan Program: Down Payment and Closing Cost Assistance Funding for Veteran Loans

### Purpose

The purpose of this request is to provide funds for down payment and closing cost assistance (DPCCA) to qualified veteran home loan borrowers.

### How Achieved

Monies from this request would be used to provide veterans a home loan option that would include DPCCA. The veteran applicants would have the choice on whether to apply for a standard home loan or a home loan with DPCCA monies included.

### Staffing Impact

None.

**Quantifying Results**

Results will be quantified by tracking and monitoring the number and dollar amount of loans originated with DPCCA.

**Fiscal Impact/Cost**

\$ 500,000 LF DPCCA in the form of grants or loans to veterans (\$500,000 LF Services and Supplies)

**9. Veterans' Home Program: Roseburg Architectural Design and Environmental Costs****Purpose**

The purpose of this request is to provide initial funds for preliminary architectural design and environmental costs related to the Roseburg Veterans' Home.

**How Achieved**

The Roseburg Veterans' Home is in the early stages of planning. In order to further refine initial cost estimates and advance further on the United States Department of Veterans Affairs (USDVA) priority list for construction grants, initial architectural design and environmental costs need to be incurred.

**Staffing Impact**

None.

**Quantifying Results**

Results will be quantified by completion of initial architectural design and environmental work and further advancement on the USDVA priority grant list.

**Fiscal Impact/Cost**

\$ 250,000 LF Roseburg Architectural/Engineering Costs (\$250,000 LF Services and Supplies)

**10. Veteran Services Program: Enhance Internal Audit Function****Purpose**

The purpose of this request is to establish a more robust and effective internal audit function.

As background, based on the authority under ORS 184.360, the Department of Administrative Services (DAS) established criteria for certain state agencies to have an internal audit function (See OAR 125-700-0125). ODVA meets these criteria and is required to have an internal audit function and currently contracts out targeted internal audit services.

### **How Achieved**

The purpose of establishing a more robust and effective internal audit function and complying with DAS requirements would be achieved by adding one internal auditor position. This full-time position would expand internal audit activities and add capacity for ODVA to more fully examine its programs, resource utilization, policies and procedures, and compliance activities to assess how effectively and efficiently the agency is operating.

### **Staffing Impact**

Establish one Internal Auditor 3 position.

### **Quantifying Results**

Results will be identified through the findings/recommendations from the internal audit reviews. Additional results will also be measured by identifying the post-review actions implemented to address specified internal audit findings/recommendations.

### **Fiscal Impact/Cost**

\$ 109,006 LF	Internal Auditor Position – 0.5 FTE (\$97,006 LF Personal Services and \$12,000 LF Services and Supplies)
<u>\$ 109,006 OF</u>	Internal Auditor Position – 0.5 FTE (\$97,006 OF Personal Services and \$12,000 OF Services and Supplies)
\$ 218,012	Total

## **11. Aging Veteran Services & Veteran Services Program: General Fund Reductions**

### **Purpose**

The purpose of this item is to comply with Governor's Budget process to reduce agency general funds through vacancy savings and reduction of inflation.

### **How Achieved**



ODVA was provided amounts of vacancy savings and reduction of inflation from the Department of Administrative Services, Budget and Management.

**Staffing Impact**

None.

**Quantifying Results**

None.

**Fiscal Impact/Cost**

(\$ 77,459 GF)	Vacancy Savings (\$71,129 GF Personal Services, Appeals & Claims; \$6,330 GF Personal Services, Conservatorship)
(\$ 18,663 GF)	Reduction of Inflation Factor (\$17,186 GF Services and Supplies, Appeals & Claims; \$1,447 GF Services and Supplies, Conservatorship)
(\$ 96,122 GF)	Total

Revenue Sources:

\$ 300,000 LF	Veteran Homelessness Coordinator (\$192,046 LF Personal Services and \$107,954 LF Services and Supplies)
\$ 760,000 LF	Pass-through funding to eligible organizations (\$760,000 LF Special Payments)
\$ 500,000 LF	Pass-through funding for grants to eligible not-for-profit organizations (\$500,000 LF Special Payments)
\$ 300,000 LF	Tribal Veteran Coordinator (\$192,046 LF Personal Services and \$107,954 LF Services and Supplies)
\$ 200,000 LF	Pass-through funding to Tribal Veteran Offices (\$200,000 LF Special Payments)
\$ 560,000 LF	Pass-through funding for Behavioral Health related grants to eligible organizations (\$560,000 LF Special Payments)
\$ 300,000 LF	Veteran Employment & Economic Development Coordinator (\$192,046 LF Personal Services and \$107,954 LF Services and Supplies)
\$ 145,930 LF	State Approving Agency Personnel (\$29,172 LF Personal Services and \$116,758 LF Services and Supplies)
\$ 525,000 FF	State Approving Agency Personnel (\$525,000 FF Personal Services)
\$ 535,704 LF	Program Stabilization Service and Supplies (\$535,704 LF Services and Supplies)
\$ 500,000 LF	Down Payment/Closing Cost Assistance in the form of grants or loans to veterans (\$500,000 LF Services and Supplies)
\$ 250,000 LF	Roseburg Architectural/Engineering Costs (\$250,000 LF Services and Supplies)
\$ 109,006 LF	Internal Auditor Position – 0.5 FTE (\$97,006 LF Personal Services and \$12,000 LF Services and Supplies)
\$ 109,006 OF	Internal Auditor Position – 0.5 FTE (\$97,006 OF Personal Services and \$12,000 OF Services and Supplies)
(\$ 77,459 GF)	Vacancy Savings (\$71,129 GF Personal Services, Appeals & Claims; \$6,330 GF Personal Services, Conservatorship)
(\$ 18,663 GF)	Reduction of Inflation Factor (\$17,186 GF Services and Supplies, Appeals & Claims; \$1,447 GF Services and Supplies, Conservatorship)
<b>\$4,998,524</b>	<b>Total (Personal Services of \$1,246,863; Services and Supplies of \$1,731,661; and Special Payments of \$2,020,000)</b>

**GRAND TOTALS**

\$ 702,316	LF	TOTAL Personal Services
\$ 1,738,324	LF	TOTAL Services and Supplies
<u>\$ 2,020,000</u>	LF	TOTAL Special Payments
\$ 4,460,640	LF	TOTAL Combined

\$ 97,006	OF	TOTAL Personal Services
<u>\$ 12,000</u>	OF	TOTAL Services and Supplies
\$ 109,006	OF	TOTAL Combined

\$ 525,000	FF	TOTAL Personal Services
(\$ 77,459)	GF	TOTAL Personal Services
<u>(\$ 18,663)</u>	GF	TOTAL Services and Supplies
(\$ 96,122)	GF	TOTAL Combined

\$ 4,998,524		TOTAL
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**ESSENTIAL AND POLICY PACKAGE FISCAL IMPACT SUMMARY**

**Veterans' Affairs, Oregon Dept of  
Pkg: 090 - Analyst Adjustments**

**Cross Reference Name: Loan Program  
Cross Reference Number: 27400-001-00-00-00000**

<i>Description</i>	General Fund	Lottery Funds	Other Funds	Federal Funds	Nonlimited Other Funds	Nonlimited Federal Funds	All Funds
<b>Revenues</b>							
Admin and Service Charges	-	-	535,704	-	-	-	535,704
Transfer In - Intrafund	-	-	-	-	-	-	-
Transfer In Lottery Proceeds	-	-	-	-	-	-	-
Tsfr From Administrative Svcs	-	500,000	-	-	-	-	500,000
<b>Total Revenues</b>	<b>-</b>	<b>\$500,000</b>	<b>\$535,704</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>\$1,035,704</b>
<b>Transfers Out</b>							
Transfer Out - Intrafund	-	-	(109,006)	-	-	-	(109,006)
<b>Total Transfers Out</b>	<b>-</b>	<b>-</b>	<b>(\$109,006)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>(\$109,006)</b>
<b>Services &amp; Supplies</b>							
Professional Services	-	500,000	-	-	-	-	500,000
<b>Total Services &amp; Supplies</b>	<b>-</b>	<b>\$500,000</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>\$500,000</b>
<b>Total Expenditures</b>							
Total Expenditures	-	500,000	-	-	-	-	500,000
<b>Total Expenditures</b>	<b>-</b>	<b>\$500,000</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>\$500,000</b>
<b>Ending Balance</b>							
Ending Balance	-	-	426,698	-	-	-	426,698
<b>Total Ending Balance</b>	<b>-</b>	<b>-</b>	<b>\$426,698</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>\$426,698</b>

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## 2017-19 OREGON VETERANS' HOME PROGRAM ORGANIZATION CHART



Total 2017-19 Oregon Veterans' Home Program Positions  
5 Positions  
(5.0 FTE)

\*As of July 1, 2017

## 2019-21 OREGON VETERANS' HOME PROGRAM ORGANIZATION CHART



Total 2019-21 Oregon Veterans' Home Program Positions  
5 Positions  
(5.0 FTE)

## OREGON VETERAN HOMES PROGRAM EXECUTIVE SUMMARY

Focus Area: Healthy and Safe Communities  
Program Contact: Ana Potter / 503-373-2028

