

REPORT TO THE

# VETERAN

ADVISORY COMMITTEE

JUNE 2024



OREGON DEPARTMENT  
of VETERANS' AFFAIRS



REPORT TO THE

# VETERAN ADVISORY COMMITTEE

## TABLE OF CONTENTS

Advisory Committee Information	Page 2
Oregon Department of Veterans' Affairs Leadership	Page 3
Veterans Advisory Committee Quarterly Meeting Agenda	Page 4
Director's Report	Page 5
Legislative Report	Page 7
Aging Veteran Services Division Report	Page 8
Appeals and Special Advocacy Division Report	Page 9
Strategic Partnerships Division Report	Page 11
Finance Division - Home Loans Program Report	Page 15
Appendix: Oregon Department of Veterans' Affairs Programs	Page 17



## ADVISORY COMMITTEE INFORMATION

Since the Advisory Committee was established in 1945, it has held a distinct and fundamental role in advising the Director and staff of ODVA. Advisory Committee members are military veterans who are appointed by the Governor and act as advocates for veteran issues and represent veteran concerns across Oregon. The Advisory Committee is fortunate to have volunteer members who bring diverse talents and experiences to the table from every generation of veterans and communities across this state. As an Advisory Committee, they are informed by the broader veterans' community that they serve. As such, all Oregon veterans, their families, and our partners are invited to attend and participate in the quarterly meetings held across the state.

### ADVISORY COMMITTEE MEMBERS *See member bios [here](#)*

Robert "Bob" Van Voorhis, Vice Chair, USA.....	John Day
Christina Wood, Secretary, USAF.....	Portland
James Gardner, Chair, USA .....	Eugene
Christopher Waine, USA.....	Hermiston
Vacant Position.....	
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### COMMITTEE INFO AND CONTACT ONLINE

Learn more about the committee, meetings, or learn how to apply to be appointed by the Governor to serve as a Veterans Advisory Committee Member:

**Webpage:** [www.oregon.gov/odva/Connect/Pages/Advisory-Committee.aspx](http://www.oregon.gov/odva/Connect/Pages/Advisory-Committee.aspx)

**Email:** [odva\\_vaac@odva.oregon.gov](mailto:odva_vaac@odva.oregon.gov)



## OREGON DEPARTMENT OF VETERANS' AFFAIRS LEADERSHIP

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Dr. Nakeia Daniels, USA .....	Director
Vacant.....	Deputy Director
Vacant.....	Executive Assistant to the Director
Jay DeFillipo, USA.....	Legislative Director
Nicole Hoeft.....	Strategic Communications Director
Donna Haole-Valenzuela.....	Chief Financial Officer
David Kampff, USAF.....	Chief Information Officer
Jorden Osborn .....	Interim Human Resources Director
Kelly Breshears.....	Aging Veteran Services Division Director
Sheronne Blasi, USN.....	Strategic Partnerships Director
Joseph Glover, USN.....	Appeals & Special Advocacy Director

### CONTACT ODVA ONLINE

Learn more about agency programs, access a staff directory, or learn about federal and state veteran benefits using the links below:

**Website:** [www.oregon.gov/odva](http://www.oregon.gov/odva)

**Blog:** [www.oregondva.com](http://www.oregondva.com)

**Facebook:** [www.facebook.com/odvavet](http://www.facebook.com/odvavet)

**Subscribe:** <https://public.govdelivery.com/accounts/ORDVA/subscriber/new>

**Order Veteran Benefit Magazines** for your organization or self:

<https://www.surveymonkey.com/r/VeteransBenefitMagazine>



## ADVISORY COMMITTEE QUARTERLY MEETING AGENDA

Wednesday, June 5, 2024 - 9:30 AM | Veteran Town Hall - 11:00 AM-12:00 PM  
Oregon Department of Veterans' Affairs – 700 Summer St. NE, Salem, Oregon 97301

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- I. **CALL MEETING TO ORDER** – Vice Chair Robert VanVoorhis
  - a. Pledge of Allegiance
  - b. Moment of Silence
  
- II. **WELCOME AND INTRODUCTIONS** – Vice Chair Robert VanVoorhis
  
- III. **APPROVAL OF MINUTES** – Secretary Christina Wood
  
- IV. **ODVA DIRECTOR'S REPORT** –Director Dr. Nakeia Daniels
  
- V. **ODVA REPORTS**
  - a. Legislative Briefing – Dr. Daniels on behalf of Jay DeFillipo, Legislative Director
  - b. Aging Veteran Services – Kelly Breshears, Division Director
  - c. Appeals and Special Advocacy – Joe Glover, Division Director
  - d. Strategic Partnerships – Sheronne Blasi, Division Director
  - e. Home Loan Program – Donna Haole-Valenzuela, Chief Financial Officer
  
- VI. **OLD BUSINESS**
  
- VII. **NEW BUSINESS**
  - a. Officer Election Postponement – Vice Chair Robert VanVoorhis
  - b. Advisory Committee Quarterly Meeting Schedule – Secretary Christina Wood
    - i. September 4, 2024 – In-person (location TBD)
      1. Committee Orientation and Membership Handbooks
    - ii. December 4, 2024 – Virtual
    - iii. March 5, 2025 – Virtual
    - iv. June 4, 2025 – In-person (location TBD)
  
- VIII. **BUSINESS MEETING ADJOURNED**

### VETERAN TOWN HALL

Following every quarterly business meeting, the VAC holds a Town Hall which the public is invited to ask questions or share information with the committee and director. This time is set aside for individuals to bring up broader veteran community issues. Members of the community are also invited to submit written public comments to the committee by emailing [odva\\_vaac@odva.oregon.gov](mailto:odva_vaac@odva.oregon.gov)



## ODVA DIRECTOR REPORT

Dr. Nakeia Daniels, Director

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This quarter has been a very productive and busy season for the agency and the Director's Office. As we have been preparing the agency's next biennial budget, closing out the 2024 Regular Session, and engaging in multiple partnership and veteran events, my office has also been actively recruiting for a Deputy Director. This position is an important part of the Executive Staff and I hope to have the role filled this summer. We are also actively engaged with the Governor's Office in filling the Veteran Advisory Committee vacancies with aim to have a fully appointed committee by the September 2024 VAC quarterly meeting.

### **2024 Regular Session**

The 2024 Regular Session adjourned in March with strong support and a significant investment in the effort to construct a third Veterans' Home in Roseburg. In February 2024, Governor Kotek submitted a letter to the Legislature in support of allocating to ODVA the 35% in state or local matching funds required for the Roseburg Veterans' Home grant application to gain placement on the federal grant Priority 1 list.

During the short session, the Legislature appropriated \$35M of General Funds to be allocated to ODVA for the state's matching funds portion for construction of a veterans' home in Roseburg. This April immediately following the end of short session, ODVA submitted updated documentation to USDVA to be moved to the Priority 1 list for funding consideration. The federal priority list is updated annually by the USDVA, and we anticipate the next prioritization cycle to be published in Q3 of FY2025 (Spring 2025). As ODVA continues to progress this project, we look forward to the continued partnership and support of the Legislature that will be needed throughout this process to bring the state's third home to fruition for our most vulnerable veterans.

### **Agency Biennial Budget Development and Priorities**

Throughout this last quarter, the agency has been in development of the agency's 2025-27 Agency Request Budget. The agency's biennial budget drives much of our efforts to serve and honor every Oregon veteran. Considerations in this budget cycle include alignment with Governor Kotek priorities to address homelessness and access to behavioral health for veterans, expanding services where possible to prioritize access to care and resources.

### **Agency Strategic Planning and Diversity, Equity, Inclusion and Belonging Engagement**

ODVA Executive Staff will begin strategic planning work this summer to update the agency's current plan. To keep these strategies effective for the Oregon veteran community, each year we reflect on what we have accomplished the previous year, adjust and strengthen our intentions for the next years, and select specific actions to hold ourselves accountable for the coming year.

This spring, we contracted with a DEI consulting company to work with us on foundational DEI priorities that will help us meet agency goals of embedding strategies in the plan to address evolving barriers to ODVA services for Oregon's veterans. Diversity, Equity, and Inclusion (DEI) and Racial Equity are at the

core of ODVA’s vision of ensuring that every veteran and their families thrive in Oregon. Centering DEI allows us to address barriers to accessing veteran services in Oregon. Our goal is to ensure that agency programs and systems are designed to reach and align with every veteran’s evolving needs across their lifespan. This includes the veterans and members of their families who serve veterans as employees of ODVA.

### Engagements and Partnerships

In addition to the continuous outreach efforts by ODVA’s outreach and special advocacy teams, my office continued engagement with multiple partners and veteran events to honor Oregon veterans. To highlight a few, ODVA participated in a second visit to Oregon by U.S. Department of Veterans Affairs Deputy Secretary Tanya Bradsher to several sites in Oregon in May. The Deputy Secretary and her team



*USDVA Deputy Secretary Tanya Bradsher speaking at a roundtable discussion with student veterans and faculty at University of Oregon.*

visited the Roseburg VA Medical Center and met with student veterans and staff at the University of Oregon and Oregon State University. ODVA was grateful for the opportunity to hear firsthand experiences, challenges, achievements and concerns from student veterans and administrators.

Also in May, ODVA was honored to have Governor Kotek provide the keynote at this year’s statewide Memorial Day Ceremony held in Salem. Since the beginning of her administration, the Governor’s Office has been supportive of veteran issues and this agency’s efforts to address access to resources and care.



*ODVA joined participated in a ceremonial groundbreaking for Phase 1 of the Vietnam War Memorial to be built on the Oregon State Grounds by Embracing Tree in Wilson Park.*

In April, I was honored to speak at the induction of U.S. Army Lt. Col. (Ret.) and Vietnam War veteran Dick Tobiason to the Oregon Military Hall of Fame. This event by Remembering America’s Heroes was brought back this year for the first time since 2009. Other veteran inductees included Col. (Ret.) Carol Brown, Maj. Gen. (Ret.) Raymond F. Rees, Chief Master Sgt. (Ret.) Jason M. Burger, Col. (Ret.) Thomas K. Henderson Jr., Master Sgt. (Ret.) Christopher Spence, Master Sgt. (Ret.) John Steignbaugh, and civilians Rodney and Roger Forni and Jan and Jay Weston.

March 29 marked seven years since the Vietnam War Veterans Recognition Act of 2017 was signed into law and the 50th anniversary of the first Welcome Home Vietnam Veterans Day declared by President Richard Nixon in 1974. ODVA hosted a Welcome Home Vietnam Veterans Day ceremony in partnership with the Oregon Vietnam Memorial Fund. Following the ceremony, ODVA joined participated in a ceremonial groundbreaking for Phase 1 of the Vietnam War Memorial to be built on the Oregon State Grounds by Embracing Tree in Wilson Park.



## LEGISLATIVE REPORT

Jay DeFillipo, Legislative Director

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With the approaching summer and 2024 Legislative short session in the rear-view mirror, we are now looking forward to the 2025 long session. The short session had some major wins for ODVA. State funding for Roseburg was at the top of the list with the Joint Ways and Means approving 35 million dollars of general fund money to put us in the running for a third veterans' home in Roseburg. The state portion now puts Oregon on the list for federal funding which could take up to 5 years for a new home. Other wins included continued funding for the IT replacement of our Oregon Home Loan Servicing platform and other budget adjustments to help the agency operate at peak performance.

The focus is now on getting the agency right sized and bringing our support to veterans to the next level. In the legislative world we have started the process of developing legislative concepts and agency policy option packages that fill gaps in the organization and ensure our programs are in tune with the needs of the Oregon veteran population. A specific focus is bringing more support, awareness and identification of historically underserved veterans. This includes looking at the definition of a Veteran and ways to make exceptions for those unique circumstances where a veteran is disqualified due to uniquely unjust circumstances. We are asking to expand some of our grant programs that continue to provide resources to those veterans in need and establishing new ones to address homelessness and mental health topics while also expanded resources to help incarcerated veterans as they transition out of the states prison system. ODVA is also looking at ways to offer a refinance program to our Oregon Veterans Home Loan program which is long overdue and will help those veterans seeking refinance options within the state.

With summer also brings the opportunity to engage at various forums and conferences across the state and nationally. I will be attending a Rules Coordinators conference later this summer that brings rule makers from across the country together to discuss best practices and then I will be also attending the National Association of State Directors Conference with Dr Daniels in late August.

I look forward to the work ahead and with a new Director and lots of support form the Governor's office this upcoming year is beginning to look like an amazing year full of opportunities for positive change within the Agency and for veterans across the state.

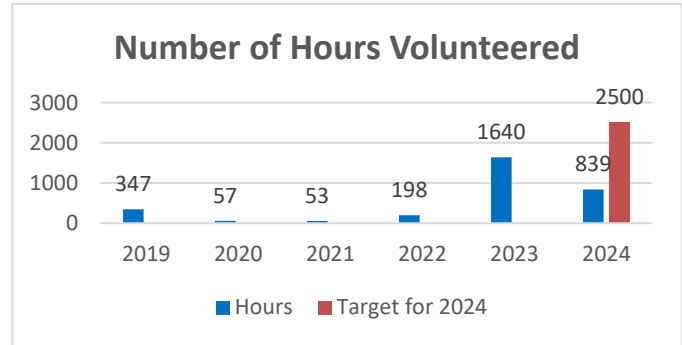
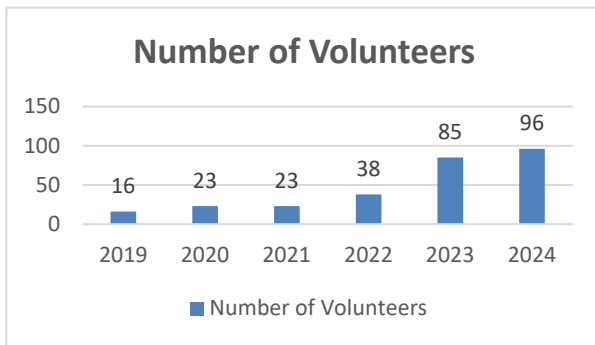


## AGING VETERAN SERVICES DIVISION

Kelly Breshears, Aging Veteran Services Director

### ODVA Veteran Volunteer Program

As of January 1st, 2024, we have had almost 100 active volunteers in the program. These volunteers are in 20 of the 36 counties in Oregon. In that same period, the Volunteer Coordinator has onboarded 25 new volunteers and we have over 839 hours of veteran volunteer service. The goal of the program is to have 2,500 volunteer hours by the end of 2024.



**Number of people reached:** In the 839 hours volunteers reached out to more than 2,795 individuals. Of those contacts, 2,526 were at group events like those listed below. Additionally, 269 contacts were volunteers meeting with individual veterans or their family members to discuss benefits and refer veterans for services.

**Examples of events attended by our volunteers:** Willamette Sportsman Show, Eugene Spring RV Show, Deschutes Sportsman Show, La Pine Rhubarb Festival, Three Rivers VFW, Linn County Biz-Expo, Lebanon Veterans Home Spring Fling, Corvallis Oregon Kiwanis Club Pancake Breakfast, Elks Lodge Statewide Convention, VA Hospital Outreach, Elks Club Lincoln City, Deschutes Community College, Jackson County Senior Fair, Central Point Oregon Adult Care Home Conference, and multiple senior centers throughout the state.

**Story of Success:** One of our volunteers reached out to the spouse of a low-income Vietnam Era veteran in their community. As a result of this volunteer's efforts, the veteran received a 10% disability rating for hearing loss. Five months later, the veteran was diagnosed with stage four prostate cancer, with less than six months to live.

With the volunteer's support, the spouse helped the veteran apply for compensation related to Agent Orange exposure at the County Veteran Service Office. Unfortunately, the veteran passed away sooner than expected, but the claim for compensation is still being processed. Once approved, it will result in a significant retroactive payment and eligibility for Dependency and Indemnity Compensation for the spouse, significantly improving this low-income widow's financial situation.



## APPEALS AND SPECIAL ADVOCACY DIVISION

Joe Glover, Appeals and Special Advocacy Division Director

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### Houseless Veteran Advocacy

The Houseless Veteran Advocacy program (WVC) exists to help provide both direct and indirect support to the almost 1,600 veterans in Oregon who are either experiencing houselessness, or at imminent risk of becoming houseless.

Per the U.S. Department of Housing and Urban Development 2023 Annual Homelessness Assessment Report to Congress, it is estimated that Oregon has the fifth highest number of veterans experiencing houselessness in the nation. Additionally, approximately 56% of these veterans are living unsheltered which is defined as lacking an adequate nighttime residence.

For direct service support, the program coordinator is an accredited Veterans Service Officer who assists linking veterans with federal and state resources such as federal disability payments, needs-based Pension, and free or reduced health care. This program also assists veterans with applying for federal GI Bill education benefits and Vocational, Readiness, and Employment to allow veterans to pursue higher education and training when appropriate.

Because ODVA does not provide direct housing placement, the program must rely upon networking of resources and partnerships across the state to ensure that prompt and appropriate support is being given. The networking and resource benefits that are provided to veterans and their families through this program directly help eliminate or significantly reduce the number of veterans who are experiencing houselessness, it helps eliminate or significantly reduces the number of veterans who are experiencing mental or behavioral health crises by placing a focus on enrollment and connection with Veterans Health Administration support.

Outreach events such as “Standdowns” help bring awareness of resources and support available to these veterans in their local communities, and ODVA maintains a commitment to being a presence at these events.

There are no tiered service levels for access to this program. The WVC works with veterans and families who served in the military and require support. This program work includes making sure that all veterans who are either currently experiencing houselessness or imminently at risk of losing stable housing are supported. Eligibility requirements to access this program or service does not require honorable service, nor does it require eligibility under ORS 408.225.

In addition to assistance applying for veteran related benefits, the HVC reviews the monthly applicants for the Oregon Veterans Emergency Financial Assistance Program (OVEFAP) that ODVA administers. The OVEFAP receives applications from veterans and surviving spouses from all over the state that are often seeking emergency support for housing and rent, but unfortunately with the average requested amount

over \$3,000 per applicant, the monthly need far outweighs the program's resources. By cross-supporting these veterans with other programs that may be able to assist in supporting their needs.

The next standdown event will be on June 14<sup>th</sup> at the Klamath County Fairgrounds. It will feature services such as:

Meals, Clothing, Haircuts, Local Community Resources, VA Benefits Counseling, Social Security Information, Food Stamp Referrals, Housing, Employment Referrals & Information, Eye Exams & Glasses, hearing needs, Substance Abuse Counseling and Referrals, and DOD Surplus.

Following that, there will be one held on July 24<sup>th</sup> at the VA White City campus, and then September 11<sup>th</sup> in Salem and the Salem YMCA which is being organized by former Veterans Advisory Committee member Rosy Macias.

If an individual wishes to reach out to Gabe Maestas, the agency's Houseless Veteran Program Coordinator, they are able to do so through a variety of different ways. ODVA has established a general email for veteran outreach and engagement: [HouselessVets@odva.oregon.gov](mailto:HouselessVets@odva.oregon.gov) or [Gabe.Maestas@odva.oregon.gov](mailto:Gabe.Maestas@odva.oregon.gov). Gabe can also be reached at 971-388-8219.

#### **Houseless Veteran Coordinator - Team Success Story:**

Recently, the Houseless Veteran Coordinator reached out to a veteran through a list provided to ODVA through the state partnership with the Oregon Department of Motor Vehicles.

This veteran's address was "General Delivery", which is indicative that they did not have stable housing and was likely unsheltered. The veteran responded back to the email indicating that they were not in a safe place, and that they were needing assistance with support, specifically Intimate Partner Violence.

This information was sent over to the ODVA Women Veteran Coordinator who was able to reach out to the Veterans Health Administration in Portland who has a program to support those that have experienced or are experiencing Intimate Partner Violence / Domestic Violence.

This is someone who had never previously sought benefits or services related to their military service, and was not enrolled in VA Health Care.

The VHA caseworker immediately reached out to the veteran and arrangements are being made to have the veteran placed into in-patient care, and ultimately with the goal of transitioning into safe and stable supportive housing.



## STRATEGIC PARTNERSHIPS DIVISION

Sheronne Blasi, Strategic Partnerships Division Director

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**The Strategic Partnerships Team** is made up of Special Advocacy Coordinators (e.g. Tribal Veterans, Incarcerated Veterans, Campus Veterans; the Veterans Education Team (State Approving Agency, Campus Veteran Coordinator, and an Education Manager); a Grants Coordinator; a Grants Specialist; and the Division Director. Below are highlights from three of the programs, including some background information.

### **Incarcerated Veteran Program**

The Incarcerated Veteran program was established in August 2016 to assist incarcerated veterans transitioning into Oregon Department of Corrections (ODOC) custody and then as they transition back to their communities. The program Coordinator verifies the veteran status of those taken into custody so benefit eligibility can be assessed. The Coordinator also focuses on mitigating the negative outcomes for veterans and family members due to incarceration. This includes ensuring timely notification to the USDVA of the veteran's incarceration to prevent overpayments, addressing overpayments by establishing manageable payment plans, and transferring withheld monetary benefits to family members if financial need can be established. A targeted outcome of determining benefit eligibility is to prevent recidivism and minimize homelessness among veterans after their release. Helping veterans access benefits ensures they have additional resources upon release. For instance, determining eligibility for USDVA housing programs can help veterans secure housing previously unknown as a resource.

ODVA has two Incarcerated Veteran Coordinator positions, one of which has been vacant several months. Fortunately, the second position was filled recently with the hiring of Kim McKandes, who comes to ODVA from the Oregon Youth Authority. We look forward to leveraging his justice-involved experience to continue to build our program and to meet the unique needs of veterans in custody. Kim joins Pat McGuffin, a 30 year U.S. Air Force veteran who was ODVA's first Incarcerated Veteran Coordinator and is responsible for developing such a successful program. Pat's position is stationed in Eastern Oregon, where the majority of adults in custody veterans are housed with the ODOC.

Another way we are helping veterans in custody is by establishing a Veteran Assistance Program within the ODOC. In collaboration with ODOC we working to expand on a program established at the Oregon State Penitentiary where a specially selected veteran in custody advises other veterans on benefit eligibility. This Veteran Benefit Specialist explains the claim process, ensures veterans know the correct forms to use and how to submit claims. This helps prevent procedural denials of claims, unnecessary and time-consuming rework by both veterans and the USDVA and reduces general frustration with the application process. It also increases the likelihood claims can be approved before the veterans are released back to their communities, which can provide more resources for formerly incarcerated veterans. This is in addition to the work done by ODVA's Coordinators.

**Success Story:** Pat McGuffin recently assisted a veteran suffering from a mental condition as he transitioned back to his community. The veteran was having trouble reinstating his full VA disability compensation, felt hopeless and was suicidal. Pat intervened with the USDVA, so the veteran not only received his full compensation, but received a refund of previously withheld compensation and suspended the collection of future payments for an overpayment debt for six months. This gave the veteran an opportunity to secure transportation critical for his job search in his rural location and to secure housing after being homeless for several months.

### **State Approving Agency (SAA)**

State Approving Agencies (SAA's) nationally have been around since the origin of the GI Bill® to promote and safeguard quality education and training programs for veterans, ensure greater education and training opportunities for veterans, and protect the integrity of the GI Bill®. SAA's in each state work under a Cooperative Agreement with the U.S. Department of Veterans' Affairs (VA) to review, evaluate, approve, and exercise oversight of schools and training facilities to ensure state and federal quality criteria are met for veterans using their G.I. Bill® funds.

ODVA has been successfully administering the SAA for the State of Oregon since October, 2019. The Oregon SAA exercises oversight of 200+ approved education and training facilities which include colleges and universities, professional certificate programs (such as cosmetology and commercial truck driving schools), flight schools, apprenticeships, and on-the-job training programs (OJT). Thanks to the tireless work of the two full-time SAA staff, Eboni Frederick-Pettway and Lisa Deneen, the Oregon SAA has developed a reputation with our education partners for providing consistently excellent service and support while earning the VA's top rating for SAA's each year during their annual review.

The VA added a new compliance action for SAA's in the FFY24 VA/SAA Cooperative Agreement which went into effect on October 1, 2023. SAA's are now required to complete Supervisory Visits at Education and Training Institutions (ETI's) as chosen by a cooperative annual effort between VA and SAA's. Supervisory Visits are a great way to provide individual training for ETI's that will help eliminate certification errors that can result in debt for GI Bill® beneficiaries.

**Success Story:** While completing initial Supervisory Visits for FFY24, the SAA team noticed trends in the issues that newer School Certifying Officials (SCO's) were struggling with. During these Supervisory Visits the SAA identified best practices of experienced SCOs to set up inter-institution mentor relationships, pairing experienced SCO's with less experienced SCO's in similar facility types (universities, flight programs, cosmetology schools, etc.). Early feedback for this effort has been positive and indicates benefits for all parties! The new Supervisory Visit model for SAA's allows more flexibility for SAA's to build these relationships.

### **Oregon Veteran Emergency Financial Assistance Program (OVEFAP)**

The purpose of the Oregon Veterans' Emergency Financial Assistance Program (OVEFAP) is to provide one-time emergency financial assistance grants to veterans and their immediate families. Historically, recipients have used this program to overcome financial insecurity caused by hardships such as: loss of income, un-reimbursable medical and dental expenses, unanticipated home or vehicle repairs, utility costs, etc. Grants have also been used to help stabilize veterans who are, or at risk of, homelessness by assisting with monthly rent or mortgage payments, security deposits, application fees, utility payments, or rental arrears. This program partners with County and Tribal Veteran Service Officers (VSOs) to connect veterans to information about their earned federal and state veteran benefits.

ODVA receives applications monthly from veterans, or eligible immediate family members. The most common awards are for rent, utilities, and mortgage payments; home and vehicle repairs; medical and dental expenses; and transportation. All applicants are also provided with referrals to Community Action Agencies, WorkSource, non-profits, and other resources as they exist in their local communities.

<p><b>Reporting for FY 2024 (as of April 30, 2024):</b></p> <ul style="list-style-type: none"> <li>• Amount Requested: \$1,132,148</li> <li>• Amount Awarded: \$97,580</li> <li>• Total Applications Received: 211</li> <li>• Applications Awarded: 61</li> <li>• Average Request Amount: \$5,366</li> <li>• Average amount awarded monthly: \$9,758</li> <li>• Average Award Amount: \$1,600</li> <li>• % Applications Awarded: 29%</li> <li>• Average number of applications submitted monthly: 21</li> <li>• Average number of awards monthly: 6</li> <li>• Average total amount requested monthly: \$113,215</li> </ul>	<p><b>Award Reporting for FY2024 (as of April 30, 2024):</b>  <i>67% housing related; 33% non-housing related.</i></p> <ul style="list-style-type: none"> <li>• Burial: ~2% (rounded up)</li> <li>• Dental: 3%</li> <li>• Home Repair: 10%</li> <li>• Living Expenses: 5%</li> <li>• Medical Bill: 3% (rounded)</li> <li>• Mortgage: 15%</li> <li>• Mortgage &amp; Utilities: 3%</li> <li>• Rent: 31%</li> <li>• Rent &amp; Utilities: 7%</li> <li>• Rent &amp; Vehicle Repair: 0%</li> <li>• School: ~2% (rounded up)</li> <li>• Transportation: 10%</li> <li>• Utilities: 2% (rounded)</li> <li>• Vehicle Repair: 8%</li> </ul>
<p><b>Race/Ethnicity Type: Applicant %</b>  <i>23% BIPOC; 68% white; 9% No answer</i></p> <ul style="list-style-type: none"> <li>• American Indian / Alaska native: 2%</li> <li>• Asian: 1%</li> <li>• Black / African American: 8%</li> <li>• Hispanic / Latinx: 5%</li> <li>• Multiple: 5%</li> <li>• Native Hawaiian / Pacific Islander: 2%</li> <li>• White: 68%</li> <li>• Choose not to answer: 9%</li> </ul>	<p><b>Race/Ethnicity Type: Awardee %</b>  <i>22% BIPOC; 67% white; 11% No answer</i></p> <ul style="list-style-type: none"> <li>• American Indian / Alaska native: 2%</li> <li>• Asian: 3%</li> <li>• Black / African American: 3%</li> <li>• Hispanic / Latinx: 5%</li> <li>• Multiple: 7%</li> <li>• Native Hawaiian / Pacific Islander: 2%</li> <li>• White: 67%</li> <li>• Choose not to answer: 11%</li> </ul>
<p><b>Gender Identity: Applicant %</b>  <i>68% male; 17% female; 1 % trans male or female; 1% other; 12% No answer</i></p> <ul style="list-style-type: none"> <li>• Male: 68%</li> <li>• Female: 17%</li> <li>• Trans male: 0%</li> <li>• Trans female: 1%</li> <li>• Other: 1%</li> <li>• Choose Not to Answer: 12%</li> </ul>	<p><b>Gender Identity: Awardee%</b>  <i>52% male; 28% female; 0 % trans male or female; 3% other; 16% No answer</i></p> <ul style="list-style-type: none"> <li>• Male: 52%</li> <li>• Female: 28%</li> <li>• Trans male: 0%</li> <li>• Trans female: 0%</li> <li>• Other: 3%</li> <li>• Choose Not to Answer: 16%</li> </ul>

<p><b><u>Applicant %</u></b></p> <ul style="list-style-type: none"> <li>• Veteran: 94%</li> <li>• Immediate Family: 6%</li> <li>• Conservator: 0%</li> </ul>	<p><b><u>Awardee %</u></b></p> <ul style="list-style-type: none"> <li>• Veteran: 92%</li> <li>• Immediate Family: 8%</li> <li>• Conservator: 0%</li> </ul>
<p><b><u>Applicant's Age:</u></b></p> <ul style="list-style-type: none"> <li>• % Applicants 65 years or older: 26%</li> <li>• % Applicants younger than 65 years: 74%</li> </ul>	<p><b><u>Awardee's Age:</u></b></p> <ul style="list-style-type: none"> <li>• % Awardees 65 years or older: 26%</li> <li>• % Awardees younger than 65 years: 74%</li> </ul>
<p><b>FY 2020 Metrics:</b></p> <ul style="list-style-type: none"> <li>• Total Amount Requested: \$303,994</li> <li>• Amount Awarded: \$53,866</li> <li>• Total Applications: 127</li> <li>• Applications Awarded: 35</li> </ul> <p><b>FY 2021 Metrics:</b></p> <ul style="list-style-type: none"> <li>• Total Amount Requested: \$336,407</li> <li>• Amount Awarded: \$49,992</li> <li>• Total Applications: 95</li> <li>• Applications Awarded: 33</li> </ul>	<p><b>FY 2022 Metrics:</b></p> <ul style="list-style-type: none"> <li>• Total Amount Requested: \$880,556</li> <li>• Amount Awarded: \$106,134</li> <li>• Total Applications: 134</li> <li>• Applications Awarded: 56</li> </ul> <p><b>FY 2023 Metrics:</b></p> <ul style="list-style-type: none"> <li>• Total Amount Requested: \$889,701</li> <li>• Amount Awarded: \$116,984</li> <li>• Total Applications: 167</li> <li>• Applications Awarded: 55</li> </ul>



# HOME LOAN PROGRAM REPORT

Cody Cox, Home Loan Program Manager

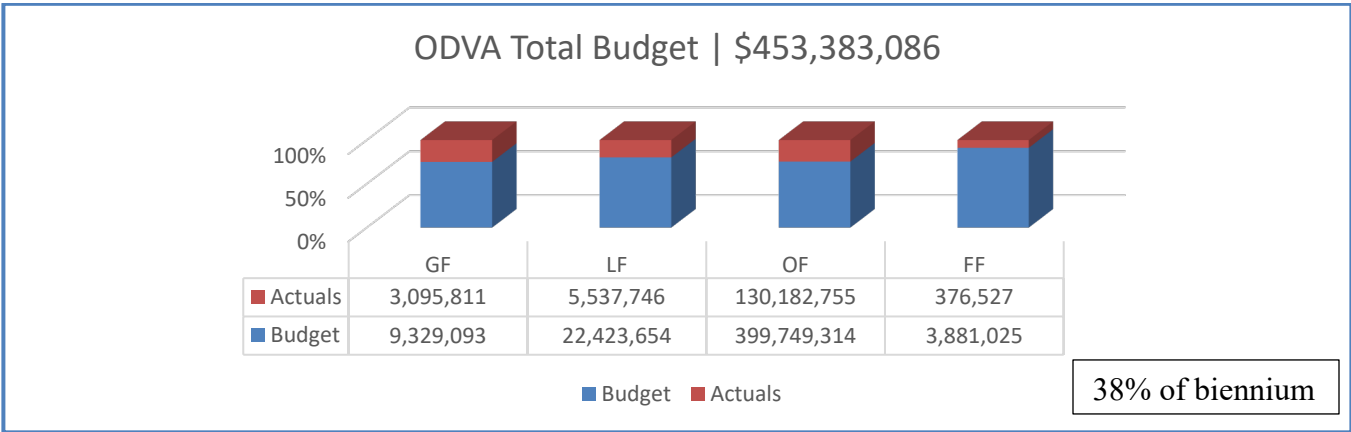
## Finance Division

The finance division includes the Home Loan, Facilities, Procurement, Finance (Accounting and Budget) programs.

- Home Loan program offers home loans to our Oregon veterans,
- Facilities is responsible for maintenance of the ODVA building in Salem and the Veteran Homes in Lebanon and the Dalles. This program has been pivotal in providing all support work and engaging with internal and external partners regarding the Roseburg Veteran Home.
- Procurement, Accounting and Budget ensures that the agency is in compliance and acts within rules and statutes, policies, procedures and processes as designated by the legislative branch, Secretary of State and the executive branch, the Department of Administrative Services

## Budget

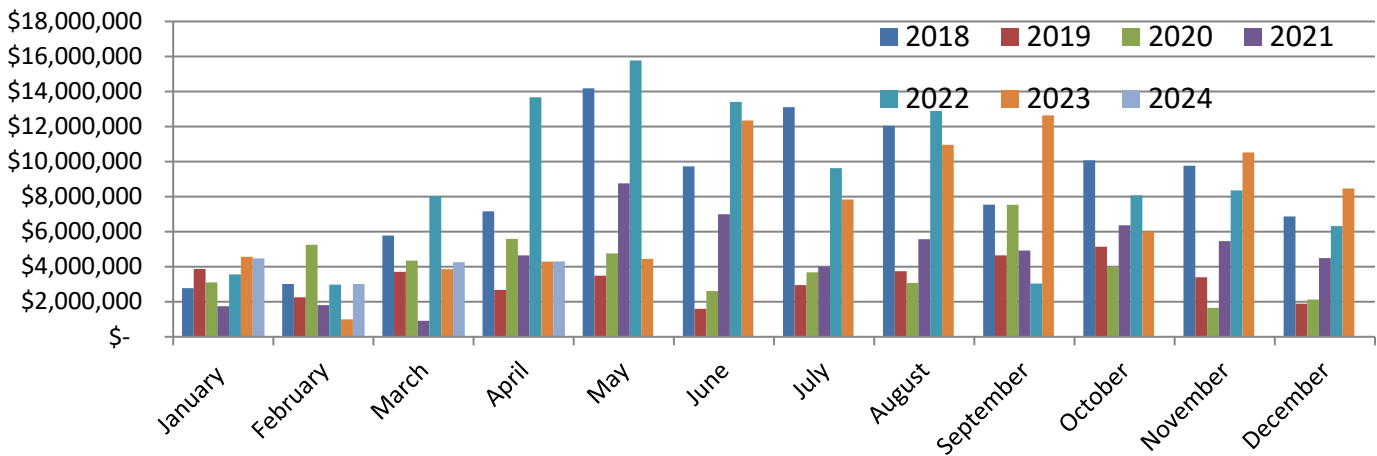
ODVA holds a total budget of \$435,383,086 and has spent \$139,192,839 to date; with 38% or 9 months of the biennium completed. The largest expenditures, for the agency, is attributed to our Home Loan Program.



## Home Loan Program

- Home Loan Program production for the 1st Quarter 2024 was 29 loans for \$11.8 million. For the same period in 2023, production volume was 27 loans for \$13.8 million. While production was higher than that same period in 2023, the pace was muted due to higher interest rates and a lack of housing inventory.
- The chart below shows a 2018 - 2023 monthly production comparison of dollar volume funded for the OrVet Home Loan program.





- At the end of the 1st Quarter 2024, ODVA has a total of 1,560 loans in portfolio, with a total dollar amount under servicing of \$384,938,105. Of these, 1,499 loans and \$381,035,725 are ‘new’ loans. ‘Old’ loans were at 61 units totaling \$3,902,380. At the end of the 1st Quarter 2023, the ODVA had a total of 1,444 for \$333,429,621 under servicing. Year over year, our servicing portfolio increased by \$51,505,484, which represents an increase of 15.45%.

**Loan Delinquency Review**

- ODVA has not had any foreclosures for the past 4+ years.
- ODVA has no loans in a bankruptcy status.
- The total of all loans reporting in the 90-day settles at 0.6% in unit delinquency on a portfolio of 1,560.

**Retirement**

Steve Schlag, our ODVA underwriter, confirmed his retirement effective 05/31/2024 after 17 years. ODVA has successfully recruited and hired for this position with a long-term experienced underwriter.

**-END OF REPORT-**



## APPENDIX

### Summary Of Programs

**Aging Veteran Outreach** - The Aging Veteran Outreach Coordinator position was established in 2017 and coordinates services directed at aging veterans residing in their homes or in care facilities around the state. The position is an integral part of the agency mission to ensure aging and vulnerable veterans receive the highest quality and priority representation from an ODVA veteran service officer. The outreach coordinator works with the Department of Human Services and other agencies on aging in conjunction with the Federal VA to ensure each aging veteran has applied for benefits and is receiving all entitlements through USDVA and other government and nonprofit entities.

More information: [www.oregon.gov/odva/Resources/Pages/Aging-Veterans.aspx](http://www.oregon.gov/odva/Resources/Pages/Aging-Veterans.aspx)

**Appeals and Claims:** The United States Department of Veterans Affairs (USDVA), Veterans Benefits Administration (VBA) involves a complex legal system. To qualify for benefits, veterans, their dependents, and survivors must file a claim against the United States by providing evidence they are eligible to receive the benefit through the submission of legal, military, and medical evidence.

ODVA employs state certified and federally accredited Veterans Service Officers (VSO's), who are subject matter experts in Federal VA law (Chapter 38 United States Code and Chapter 38 Code of Federal Regulations). These VSO's represent veterans, their dependents, and survivors before the Veterans Benefits Administration (VBA) and the Board of Veterans Appeals (BVA) in claims and appeals, through a signed Power of Attorney.

More information: Email [ORVets.Benefits@odva.oregon.gov](mailto:ORVets.Benefits@odva.oregon.gov)

**Campus Veteran Resource Center Grant:** Senate Bill 143 (2017) established the Campus Veteran Resource Center Grant Program to support 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.

More information: [www.oregon.gov/odva/agency-programs/grants/Pages/Campus-Grant.aspx](http://www.oregon.gov/odva/agency-programs/grants/Pages/Campus-Grant.aspx)

**Conservatorship and Representative Payee Programs:** In 1964, the Legislative Assembly authorized the Conservatorship program to manage the financial affairs of veterans who were unable to oversee their own affairs and had no other recourse. Today, ODVA's Conservatorship Program provides professional fiduciary services to manage income and assets of veterans and their dependents deemed incompetent by the Federal VA to manage their federal resources. Conservatorship clients are appointed to ODVA as Conservator by a circuit court judge.

Conservatorship helps to ease the burdens often associated with paying bills, collecting funds on debts owed to the veteran, corresponding with creditors, and buying or selling real-estate, or other investments. The professional fiduciaries work closely with family members and other interested parties, such as guardians, in planning for the welfare and best interests of the veteran.

In 2014, SB 251 clarified law to allow ODVA to act as fiduciary and Representative Payee for veterans. Representative Payees serve veterans deemed incompetent by managing the veteran's monthly income

provided by the USDVA and/or the Social Security Administration. The Representative Payee applies for benefits, establishes budgets, arranges payment for care and other bills for services for the client. The Representative Payee works with the USDVA, Social Security Administration, guardians, family members, social workers, and other responsible individuals in the community to ensure the veterans' financial needs are met within their ability to pay.

Learn more: [www.oregon.gov/odva/Benefits/Pages/Long-Term-Care.aspx](http://www.oregon.gov/odva/Benefits/Pages/Long-Term-Care.aspx)

**County Veterans Service Officers Program (CVSO's):** ODVA's statewide partnership with counties began when the legislature appropriated money to aid counties to promote services to veterans on a local level. It is an effective network of trained County Veterans Service officer (CVSO) in all 36 counties who provide veterans, their eligible dependents, and survivors, with VA benefit and claims representation.

CVSO's are not supervised by ODVA; however, the agency provides initial and ongoing training, certification and accreditation, guidance and support, and outreach to the CVSO's. The vast majority of CVSO appeals cases to the USDVA are handled by the ODVA Appeals Team in Portland.

Locate a County VSO: [www.oregon.gov/odva/Services/Pages/County-Services.aspx](http://www.oregon.gov/odva/Services/Pages/County-Services.aspx)

**Highly Rural Transportation Grant:** Since 2014, ODVA has administered the U.S. Department of Veterans Affairs (USDVA), Highly Rural Transportation Grant (HRTG), which provides free transportation to and from VA and VA-authorized medical appointments for any veteran living in one of ten Oregon's VA defined highly rural counties. The agency partners with ODOT to distribute grant funding to its transportation district partners within each of the ten counties. Services include door-to-door pick-up and drop-off in ADA-compliant vehicles, with assistance in loading or unloading at no cost to the veteran. The program runs on a year-to-year basis, and transportation services are subject to grant fund availability each federal fiscal year. As of the end of 2022, veterans living in highly rural counties have received free rides totaling more than 2 million miles.

Locate transportation: [www.oregon.gov/odva/Services/Pages/Transportation-Services.aspx](http://www.oregon.gov/odva/Services/Pages/Transportation-Services.aspx)

**Home Loan Program:** A constitutional amendment approved by voters in 1944 established the Veterans' Home and Farm Loan Program to fund the purchase of homes and farms by Oregon residents who served in the armed forces during World War II. Persons who joined the armed forces on or after September 1, 1940 were eligible to receive loans if they served for at least 90 days after mobilization and were honorably separated or discharged, or furloughed into a reserve unit.

Today, this program provides low-interest rate mortgages on single-family, owner-occupied homes to qualified veterans. The Home Loan program is a historically self-supporting program, using Other Funds. 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.

More information: [www.oregon.gov/odva/Home-Loans/Pages/default.aspx](http://www.oregon.gov/odva/Home-Loans/Pages/default.aspx)

**Houseless Veterans:** The 2019-21 LAB established the agency's first Houseless Veteran Coordinator. ODVA began the Houseless Veteran Program upon hiring its first Houseless Veteran Coordinator in June 2021. The Houseless Veteran Coordinator collaborates with federal, state, county, and tribal agencies, Veterans Service Officers, and community homeless service providers to meet the urgent and unique needs of Oregon's diverse veteran communities. In addition to advocating for Oregon veterans experiencing houselessness or at risk of being houseless, the program provides direct service to veterans and their families seeking federal and state veterans'

benefits, including access to local VA health care, documentation of service, as well as other available state benefits, and local homeless services organizations and low-income assistance programs.

More information: [www.oregon.gov/odva/Resources/Pages/Homeless-Veterans.aspx](http://www.oregon.gov/odva/Resources/Pages/Homeless-Veterans.aspx)

**Incarcerated Veterans:** First established in 2016 and then codified by HB 4038 (2018), the Incarcerated Veterans Program is in its seventh 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/or transitioning to release. Since the program began in August 2016 the ODVA Incarcerated Veteran Coordinators, in coordination with the Oregon Department of Corrections, met with over 3,500 individuals transitioning through the state prison system to determine veteran status, and then provide assistance as needed to veterans and their families.

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 identify available resources, ensure all possible benefit claims are filed and enroll veterans in Federal VA healthcare.

Learn more: [www.oregon.gov/odva/Resources/Pages/Justice-Involved-Veterans.aspx](http://www.oregon.gov/odva/Resources/Pages/Justice-Involved-Veterans.aspx)

**LGBTQ+ Veterans:** Senate Bill 946 (2015) created the LGBTQ+ Veterans program that offers direct services to veterans in the LGBTQ+ community, assists with military records corrections, discharge upgrades, and service-connected claims work for VA benefits. The program also provides extensive outreach to LGBTQ+ veterans and assists with enrolling veterans with specialized health care through a Veterans Health Administration LGBTQ+ Veteran Care Coordinator. Through these efforts, veterans within the LGBTQ+ community now receive trauma-informed, and dignity-affirming care while also connecting these veterans with state and local services.

Learn more: [www.oregon.gov/odva/Resources/Pages/LGBTQ-Veterans.aspx](http://www.oregon.gov/odva/Resources/Pages/LGBTQ-Veterans.aspx)

**National Service Organizations (NSO):** ODVA partners with national veteran service organizations in Oregon which provide veteran benefit and claims representation like state, county, and tribal Veterans Service Officers, however, they do not work under ODVA's Power of Attorney, and are not trained and certified by ODVA. Currently, the American Legion, Disabled American Veterans, Veterans of Foreign Wars, and National Association of Black Veterans participate in this funding opportunity.

**Oregon Veterans' Homes:** The 1993 Legislative Assembly authorized the Director of Veterans' Affairs to establish and administer a State Veterans' Home to provide long-term care for needy, disabled veterans. The Dalles was selected as the location for the first Oregon Veterans' Home and opened in the fall of 1997. The 1995 Legislative Assembly laid groundwork for establishing a second Veteran's Home to be operated by a non-government entity. The statute limits Oregon to two Veteran's homes until they are constructed and operated for a period of time to determine efficiency and feasibility. Cited in Lebanon, the second OVH opened in 2014. The 2011 Legislative Assembly, through HB 2578 gave authority to build a third Veterans' Home in Roseburg.

Care at the Oregon Veteran's Homes is an "earned benefit" available to veterans, their spouses and parents who had a child die while serving in the United States Armed Forces. To be eligible for this benefit, qualifying veterans must have served as defined by the Federal VA. Both homes provide rehabilitative and long-term nursing services by staff whose knowledge and skills meet the unique needs of veterans. In addition, both homes have an endorsed memory care community which allows them to care for veterans with Alzheimer's and other dementias.

Learn about Oregon Veterans' Homes: [www.oregon.gov/odva/Vets-Homes/Pages/default.aspx](http://www.oregon.gov/odva/Vets-Homes/Pages/default.aspx)

**Rural Veterans Healthcare Transportation Grant:** During the 2019 Legislative session, and again in the 2021 session, ODVA was provided funding to create a veteran’s healthcare transportation program for counties and tribes that are rural, but do not meet the federal restrictions defining the county as highly rural. Veterans are provided free rides to their healthcare and behavioral healthcare related appointments and are not restricted to VA facilities. ODVA partners with the Oregon Department of Transportation (ODOT) to administer this grant program.

Locate transportation: [www.oregon.gov/odva/Services/Pages/Transportation-Services.aspx](http://www.oregon.gov/odva/Services/Pages/Transportation-Services.aspx)

**State Approving Agency:** In 2019, ODVA assumed the State Approving Agency (SAA) function for the state of Oregon under a contract with the USDVA. The SAA monitors and approves eligible schools and training facilities that administer federal GI Bill® education benefits to ensure compliance with applicable state and federal laws designed to protect the integrity of the GI Bill® program. ODVA receives federal funds primarily to cover salary-related costs, and some state funding supplements the program.

More information: [www.oregon.gov/odva/agency-programs/Pages/SAA.aspx](http://www.oregon.gov/odva/agency-programs/Pages/SAA.aspx)

**Military Help Line:** Since 2017, ODVA has contracted with Lines for Life to provide a military and veterans crisis hotline that provides 24/7, confidential crisis support for veterans and their loved ones. ODVA does not retain funds to administer this program.

Call the Lines for Life Military Helpline today: 1-888-457-4838 or [www.linesforlife.org/get-help-now/services-and-crisis-lines/military-helpline/](http://www.linesforlife.org/get-help-now/services-and-crisis-lines/military-helpline/)

**Training, Certification and Outreach:** ODVA is responsible for the training, certification, and accreditation of all county, tribal, and state Veterans Service Officers (VSOs) operating under ODVA’s power of attorney with the USDVA. Training is conducted on the latest Federal VA legal, medical and process information, as well as eligibility information pertaining to accessing Veterans Health Administration (VHA) and National Cemetery Administration (NCA) benefits.

ODVA trains and accredits VSOs to file defensible claims for disability compensation, and pension benefits on behalf of veterans and their families. Claims are filed through ODVA’s Powers 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.

More information: Email [ORVets.Benefits@odva.oregon.gov](mailto:ORVets.Benefits@odva.oregon.gov)

**Tribal Veterans Service Officer Program (TVSO’s):** SB 80 (2017) directed ODVA to provide aid and assistance to federally recognized Indian tribes in Oregon with regard to programs and services for Native American veterans overseen by the tribes. The legislation also codified efforts of the federal VA’s Office of General Counsel, supporting accreditation of tribal veterans representatives in Oregon.

The budget includes pass-through funding for a Tribal Veterans Service Officer (TVSO) Program to provide direct veteran VA benefit and claims representation through the federally recognized tribes in Oregon. ODVA partners with tribal governments which have a Memorandum of Understanding with ODVA. As with County VSOs, Tribal VSO’s are not supervised by ODVA; however, the agency provides training, certification, accreditation, guidance and support, and outreach support to their programs. The majority of TVSO appeal cases are also handled by ODVA’s Appeals office in Portland.

Locate a Tribal Veteran Services Office: [www.oregon.gov/odva/Services/Pages/Tribal-Veteran-Services.aspx](http://www.oregon.gov/odva/Services/Pages/Tribal-Veteran-Services.aspx)

**Veteran Services Grant:** House Bill 2891 (2017) established the Oregon Department of Veterans' Affairs Veteran Services Grant Fund. 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. Examples of services provided free of charge to veterans include legal assistance, housing supports and services, outreach to tribal veterans, behavioral health services, peer-to-peer support services, and employment assistance programs.

More information: [www.oregon.gov/odva/agency-programs/grants/Pages/Veteran-Services-Grant.aspx](http://www.oregon.gov/odva/agency-programs/grants/Pages/Veteran-Services-Grant.aspx)

**Veteran Volunteer Program:** Established by HB 2908 in 2017, the Veteran Volunteer Program, developed in 2018, was created to train and coordinate volunteer activity around the state to identify aging veterans who are not yet receiving veteran benefits and connect them with County or Tribal Veteran Service Offices to learn about potential state and federal earned benefits. Once a veteran has been referred to a local Veteran Service Office, volunteers provide follow up to ensure that the veterans have access to any services or benefits needed. In addition to educating veterans about their earned benefits, volunteers provide vital information about other state resources such as food stamps, Medicaid, and housing programs for which veterans may qualify. While not trained VSOs, these volunteers help to guide veterans to the various offices where they can receive assistance.

Learn more about volunteering: [www.oregon.gov/odva/Benefits/Pages/Volunteer-Program.aspx](http://www.oregon.gov/odva/Benefits/Pages/Volunteer-Program.aspx)

**Veterans Educational Bridge Grant:** House Bill 2201 (2019), created the ODVA Veterans Educational Bridge Grant Program to assist veterans in education or training programs who experience an interruption in their degree or training progress due to unavailability of necessary courses or have student debt preventing them from registering for courses. The bill also provided funding for a grant administrator to implement and oversee the grant program.

The purpose of the grant program is to provide financial assistance to veterans who are unable to receive GI Bill® benefit payments when classes or training hours are not available or have student debt preventing registration for courses. The Bridge Grant can help stabilize the veteran's household finances until they are able to access classes or training hours which will allow them to resume their benefit payments. The goal of the program is to support veterans' successful completion of their academic programs and transition to civilian career and community life.

More information: [www.oregon.gov/odva/agency-programs/grants/Pages/Educational-Bridge-Grant.aspx](http://www.oregon.gov/odva/agency-programs/grants/Pages/Educational-Bridge-Grant.aspx)

**Veterans' Emergency Financial Assistance Program:** Established by HB 3504 (2005), the purpose of this program is to provide a one-time grant to veterans or their immediate family members who need emergency financial assistance. Grants are awarded monthly to veterans who experience sudden and unanticipated financial instability. Most grant requests are in support of keeping veterans in their homes by assisting with expenses such as past-due monthly rent and mortgage payments, utility payments, home and vehicle repair, dental and medical expenses. Applicants are also connected with a local county or tribal Veteran Service Officer for access to other veteran services and benefits, and community resources to encourage financial stability.

Grant Application:

[www.oregon.gov/odva/Documents/VS1024%20Oregon%20Veterans%E2%80%99%20Emergency%20Financial%20Assistance%20Program%20Application\\_02-2022.pdf](http://www.oregon.gov/odva/Documents/VS1024%20Oregon%20Veterans%E2%80%99%20Emergency%20Financial%20Assistance%20Program%20Application_02-2022.pdf)

**Women Veterans:** House Bill 3479 (2015) created funding and authority for a program to improve outcomes for Oregon women veterans in five specific areas: outreach, advocacy, data, research, and policy. Focused outreach and advocacy is achieved via listening sessions and ongoing outreach to women veterans around Oregon, to

increase awareness of women veterans and their unique experiences, issues, and needs as well as to assist in claims filing, especially related to difficult or challenging claims.

Learn more: [www.oregon.gov/odva/Resources/Pages/Women-Veterans.aspx](http://www.oregon.gov/odva/Resources/Pages/Women-Veterans.aspx)