



OREGON DEPARTMENT
of VETERANS' AFFAIRS

Strategic Plan

FY 2023-2028



Message From ODVA Director Kelly Fitzpatrick



I am pleased to present the FY 2023 – 2028 Oregon Department of Veterans' Affairs (ODVA) Strategic Plan. This document is the dynamic blueprint for the continued evolution of the Department. It represents the best thinking of our leadership team as we consider what we need to do next to best carry out our mission.

The focus of this plan is to help ODVA become more agile and thus better able to address emerging needs. It does not change the direction we have been heading but increases the speed and depth at which we are able to achieve results.

We approached this plan through the lens of the Balanced Scorecard, working to ensure that we consider the four primary aspects of our duties. First, our focus is to serve our veterans, working effectively with our many partner stakeholders as we do so. Second, we strive to provide our employees with the best processes, proven technology, and equipment we can afford. Third, we invest in our employees to help them continually sharpen their skills so they can do their best work. Fourth, we keep our finances in order.

We developed this strategic plan with diversity, equity, and inclusion (DEI) at its core. Agency managers participated in training and discussions on DEI as we developed the foundation for this plan, ensuring that we challenged old norms as we strive to become an anti-racist culture with an affirming and welcoming environment for everyone.

To keep this plan most effective in our ever-changing world, each year we will reflect on what we have accomplished the previous year, strengthen our intentions for the next four years, add a new fifth year, and select specific actions to hold ourselves accountable for the coming year. Shared ownership around a strategic plan that is relevant and relied upon across the organization is the goal.

A handwritten signature in blue ink that reads "Kelly Fitzpatrick". The signature is fluid and cursive, written in a professional style.

Kelly Fitzpatrick, Director



OREGON DEPARTMENT
of VETERANS' AFFAIRS



MISSION

To honor and serve all Oregon veterans and their families by aligning and delivering earned benefits and services that enhance and improve their lives in recognition of their service to our nation.



VISION

All veterans and their families thrive in Oregon.



VALUES

Stewardship
Excellence
Respect
Vision
Inclusivity
Commitment
Equity



Who We Are and What We Do

The Oregon Department of Veterans' Affairs (ODVA) was founded in 1945 to, in the words of then-Governor Earl Snell, "provide every possible service and assistance to our returning veterans." Today, the ODVA's mission is to help ensure the nearly 300,000 veterans spanning four generations and five major eras of warfare have access to the best care, resources, and opportunities that the nation's veteran benefit system can offer.

ODVA works in partnership with local, state, and federal government and community partners to deliver services, resources, and benefits that meet the needs of today's diverse veteran community.

To deliver on a broad mission, we focus on aligning and partnering around a shared vision and coordination of existing resources. ODVA unites government, private companies, nonprofits, and other veteran service organizations to address issues facing veterans and their families. We build support and policy that address barriers to access earned benefits and implement programs that help address the underlying needs of those veterans who have trouble accessing services. And, we maintain strong relationships with those key partners, allowing us to continue to be a leading voice and advocate for veterans.

In fiscal year 2021, the United States Department of Veterans Affairs benefit expenditure in Oregon totaled nearly \$3.5 billion across disability compensation and pension payments. These are education and health care benefits earned and accessed through honorable military service. These core veteran benefits are powerful economic drivers within Oregon and reduce dependency on state resources, contribute to the health of Oregon's citizens, and increase the state's trained and educated workforce.

Since 2016, Oregon has been a national leader in recognizing and providing support to veterans who have been historically underserved and negatively impacted by systemic and discriminatory policies. ODVA works with traditionally marginalized and underserved veterans including women, LGBTQ+, aging, incarcerated veterans, and those challenged with housing stability. We also serve veterans of color, including tribal veterans belonging to Oregon's nine federally recognized tribal nations.

In this strategy, ODVA builds upon the agency's first strategic framework from 2014-2019 to dive further into the needs of the diverse veteran community, remove barriers that exist to accessing earned benefits and invest in core operational transformation needed to drive ODVA's strategy moving forward.

Our mission is to honor and serve all Oregon veterans and their families by aligning and delivering earned benefits and services that enhance and improve their lives in recognition of

their service to our nation. Our vision is that all veterans and their families thrive in Oregon. Our values guide our work in service to Oregon veterans to deliver every possible service and assistance to our returning veterans and their families as intended at our founding.

Key Program Areas

ODVA provides services across four primary benefit functions and provides core operations to support and enhance the effectiveness and efficiency of the benefit program areas. The development of the 2023-2028 strategic plan included careful consideration of existing operations and potential strategies to maximize resources that impact not only the greatest number of veterans, but also those who have been traditionally underserved due to systemic inequities within government. The plan builds upon the foundational 2014-2019 strategic plan to build a roadmap for the next five years that incorporates lessons learned from the COVID-19 crisis and takes a veteran-centric, data-driven approach to leverage the many new programs and partnerships that Oregon has implemented in previous years.

- » **Statewide Veterans Services** is responsible for providing advocacy and delivering core veteran benefits to veterans, their dependents, and their survivors. The program provides benefits counseling, claims and appellate representation, partnerships, training and certification for counties, tribal and national veterans' service organizations to assist veterans, grant programs that direct funding to veterans and governmental and non-profit organizations certification and training for county and tribal Veteran Service Offices, monitoring of post-secondary institutions through the State Approving Agency function, and special advocacy for traditionally underserved veterans including women, LGBTQ, incarcerated, students, houseless, and tribal.
- » **Aging Veteran Services** was established to address the needs and concerns of our rapidly aging veteran demographic and their families and to provide expertise and outreach in aging veterans' benefits and services. The program provides oversight of the two Oregon Veterans' Homes and programs providing direct services to aging and vulnerable veterans. Claims assistance and advocacy focuses on the needs of aging veterans. The Conservatorship program serves as a court appointed conservator to protect and manage veterans' financial assets. Representative Payee services ensure the timely payments of recurring expenses on behalf of vulnerable veterans to ensure their basic living needs are met. Specialized volunteer and outreach advocates conduct local outreach to aging veterans to educate and connect veterans to benefits.

- » **Oregon Veterans' Homes** provide veterans, spouses, and Gold Star parents access to high-quality skilled-nursing care at affordable rates as a state and federal benefit. Residents receive 24-hour-a-day, long-term skilled nursing, memory-related care, and rehabilitative care by a nursing staff whose skills and understanding meet the unique and special needs of veterans. ODVA operates two Veterans' Homes in Oregon, located in The Dalles and Lebanon.
- » **Home Loan Program** provides low-interest rate mortgages on single-family, owner-occupied homes to eligible and qualified Oregon veterans. Oregon is one of five states that offer a state veteran home loan using federal Qualified Veteran Mortgage Bonds.

Balanced Scorecard Perspectives

We used the lens of the Balanced Scorecard to set the direction for ODVA over the five-year plan horizon and beyond, building on our mission statement, vision, and core values. The Balanced Scorecard is a strategic planning framework useful in ensuring all aspects of an organization are considered against all other aspects of the organization. The concept was first introduced by David Norton and Robert Kaplan in 1992. The Balanced Scorecard lens helps us ensure we consider the four primary aspects of our duties. The lens we applied is made up of four perspectives:

- » **Customers and Stakeholders** - Our focus is to serve our veterans, working effectively with our many partner stakeholders as we do so.
- » **Process/Technology/Internal Operations** - We strive to provide our employees with the best possible processes, proven technology, and equipment that we can afford.
- » **Learning and Growth** - We invest in our employees to help them continually sharpen their skills so they can do their best work to serve veterans.
- » **Financial** - We are good stewards of our finances.

Diversity, Equity, and Inclusion

As ODVA began development of the 2023-2028 Strategic Plan, the agency also began work in tandem to achieve a shared understanding of diversity, equity, and inclusion (DEI) and how to incorporate strategies to address barriers to ODVA services to Oregon's most vulnerable veterans.

Senior leadership have spent the better part of a year developing the goals and actions of this plan with an intentional DEI focus that builds upon our agency’s positive reputation of building and sustaining strong partnerships and dedicated advocacy and service to those who served.

You’ll find aspects of that work within the priorities that follow. The agency evaluated each priority within the plan to lay the foundation for a more diverse, equitable, and inclusive agency — one that reflects our unchanging mission, but also eliminates the assumptions that all veterans have fair and equitable access to their earned benefits in Oregon. This work, embedded within the strategic plan, will drive us to evolve our culture while embodying the highest ideals of our agency and the veterans and families we serve.

Strategies

All agency strategies align to one of the Balanced Scorecard perspectives as described in the narratives that follow.

As part of the process, all candidate strategies were evaluated for urgency, importance, risk/difficulty of implementation, and resources required for implementation.

ODVA’s Plan reflect the areas of focus for ODVA to lead and grow over the next five years. In turn, this will allow us to address pressing veteran and organizational needs by tapping into opportunities in ways that are consistent with the guiding principles so that we can achieve our vision.

For each Balanced Scorecard perspective, the Plan outlines the current and future states for each strategy. The strategies reflect ODVA’s commitments over the next five years. The strategies inform actions and next steps, and they guide resource deployment. The strategies are change oriented — they express something ODVA is going to approach differently in the future to lead and grow in the priority areas.

Each strategy is supported by one or more initiatives we will strive to accomplish in the next year. In some cases, we will be able to fully realize the strategy. In most cases, we will only make prioritized progress due to limited resources or the difficulties involved.

FY 2023-2028 Strategic Plan

Perspective: Customers and Stakeholders

Our focus is to serve our veterans, working effectively with our many partner stakeholders as we do so.

Reimagine and Communicate Agency Identity

Current State: Among the veteran community and across the state, there is limited understanding of what ODVA does in coordination with USDVA, counties, and other partners.

Future state: Veterans understand ODVA's mission and role and are served through coordinated services that are fluid, low friction, and result in high satisfaction.

Initiative: Conduct listening sessions with employees and partners to identify how the agency is currently perceived across all benefit delivery systems and program services. Evaluate the information and use it to inform the next phase needed to enhance the awareness of ODVA's mission and role.

Create an Equity Framework for What We Do for Veterans in Support of the Oregon Statewide Initiative

Current State: Equity is not part of all agency operations, programs, and culture. Awareness exists, but realization is not uniform.

Future state: Equity is infused throughout the organization ensuring equity in process and equity in outcomes through the identification and removal of barriers and increased engagement, in consultation with veteran communities of color and other historically marginalized segments of the larger veteran community. Every policy and process will have been reviewed and adjusted by using the framework.

Initiatives: As part of the Agency Request Budget for 2023-2025, include Policy Option Packages for DEI-related resources (staff, data collection capabilities) to acquire internal DEI expertise. Consult with experts to create a DEI framework. Initially identify one area in each operational division to assess using a DEI-centered approach.

Define the Oregon Veteran Customer Journey

Current state: Case management capabilities across agency are not connected to a central access point for information. ODVA lacks resources (staff/technology) to collect and analyze data that would help the agency identify and address veteran needs.

Future state: The agency collects data that informs programmatic decisions and continuously updates the agency's understanding of the needs and interactions with each veteran customer. ODVA can provide seamless customer service to veterans and their families, regardless of what division in the agency is serving them. ODVA minimizes barriers to services by continuously evaluating veterans' needs and experiences over time.

Initiatives: Phase 1: request data resources in the 2023-2025 ARB and procure them. Phase 2: Mobilize data resources, collect data to better define the current state of the Oregon veteran community, including demographics by region across the state. Phase 3: Map veterans' journey to benefits and services. Identify customer pain points, barriers to services, and operational inefficiencies veterans experience.

Improve Internal Communications Around ODVA Mission and Strategic Goals

Current State: Divisions generally have their own goals that might not align with agency goals/objectives.

Future state: Division leaders and staff are aware of agency mission and goals and align Division goals appropriately.

Initiatives: Communicate the strategic plan and the status of goal achievement over time. Enhance communications across the agency by setting up a performance alignment system.

Strengthen Existing Partnerships and Establish New Partnerships

Current State: ODVA has limited visibility into partnership work done for veterans, relying on written reports.

Future State: Greater understanding of and insight into work that partners (e.g., CVSO/TVSO, grantees, NSO's, and other state and local partners) do for veterans and their families by mutually established means of communication, beyond current reporting processes.

Initiatives: Phase 1: Taking a collaborative approach with partners, assess the partnership. Solicit input from existing partners for feedback on strengths/opportunities for improvement. Based on survey results develop a plan for improving partnerships expanding partnerships based on gaps in current partnerships. Begin implementing the plan to expand and increase partnerships. Develop feedback loop for all partners.
Phase 2: Evaluate initial work to strengthen partnerships and develop new partnerships. Evaluate the initial feedback loop and actual feedback collected, and document results. Implement changes/improvements based on feedback and present summary to leadership for evaluation.

Prepare to Construct Roseburg State Veterans' Home

Current State: A third Veterans' Home is legislatively mandated to be located in Roseburg. Current planning efforts place the future home on the grounds adjacent to the VA Roseburg Medical Center. Progress is stalled by lack of the USDVA-required 35% of the project total state/local matching funds needed to advance the project on the USDVA State Home Construction Grant (SHCG) priority list for the 65% federal funding. In 2021 ODVA contracted with an owner's representative to perform initial groundwork that could be accomplished before the required funds are appropriated.

Future state: Oregon's third Veterans' Home provides the state's veterans, spouses and Gold Star families with skilled nursing care in Roseburg, Oregon.

Initiatives: These phases will require at least five to eight years. Phase 1: ODVA and its owner's representative will work to finalize the site plan, identify opportunities for establishing MOUs with VA Roseburg Medical Center and local entities, while awaiting legislative appropriation of the 35% local match. Phase 2: Once the 35% matching funds are physically available, ODVA will re-apply for the USDVA SHCG funding in conjunction with fulfillment of grant artifacts and actions required to establish eligibility. Phase 3: ODVA will begin construction of a third veterans' home upon the successful award of the USDVA SHCG funding.

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Perspective: Process, Technology, and Internal Operations

We strive to provide our employees with the best resources, including information, proven technology, and equipment that we can afford.

Communications with Employees

Current State: Ad hoc communications from agency leadership to both inform staff and listen to their concerns during COVID-19.

Future state: Consistent communications with all staff using collaboration tools and varied media (i.e., in-person, Zoom, etc.).

Initiatives: ODVA Communications Director and managers develop a refined communication process, identifying tools for enhanced two-way communication.

Update Internal Policies and Procedures Process

Current State: Outdated and incomplete policies and procedures.

Future state: Clear and detailed policies and procedures that are easily accessible to all staff and simple to update utilizing new technologies, and are consistent in format across the agency. Owners of policies are clearly identified, and review processes are in place.

Initiatives: Review existing policies. Identify policies/procedures that have become outdated or irrelevant. Obtain copies of other state agencies' policies. Revise the policies and make recommendations to the director.

Strategically Use Data to Measure ODVA's Performance and Tell Meaningful Stories About ODVA's Ability to Serve the Veterans Community

Current state: Agency lacks internal resources for data collection and analysis. ODVA must rely on USDVA data, which is often outdated.

Future state: ODVA acquires the staff and technology needed to collect and analyze data. Tracking methodologies are developed. ODVA uses data to inform decisions about programs that will best assist veterans.

Initiatives: ODVA director and deputy consult with other states and Oregon state agencies to determine appropriate staffing levels and other data collection resources, including potential for interagency data sharing agreements. Use findings and recommendations from this research to inform 2023-2025 ARB and implement concepts across the agency.

Evaluate and Streamline the Organization

Current State: Business processes are spread across multiple divisions, creating potential redundancy and inefficiencies.

Future state: The agency structure is rebalanced to minimize unnecessary redundancy and to improve efficiency.

Initiatives: The director and deputy director will use input from strategic planning development discussions and from division administrators to perform an agency-wide assessment. The process will identify (1) duplicated functions; (2) obsolete functions; (3) functions that should be performed elsewhere in ODVA; (4) functions that the division must continue to perform; and (5) staffing levels that require adjustment.

Based on the assessments, the director will decide whether and how functions should be realigned and rebalanced across the agency.

Enhance Agency for Purchasing/Procurement Processes

Current State: ODVA needs additional internal procurement resources that will meet newly emerging needs.

Future State: Operating within State purchasing guidelines and process, the agency makes appropriate use of the state buying decision processes and maximizes opportunities to tap into OregonBuys businesses.

Initiatives: Identify purchasing / procurement pinch points. Update related policies and procedures. Fully resource and train ODVA staff.

Modernize Building and Employee Workspaces

Current State: Much of ODVA's building space used by agency staff is aging and outdated. Office furniture and equipment are worn. Building infrastructure needs investments (HVAC, access control, etc.).

Future State: Modernized workspaces are redesigned to accommodate the changing work-environment, based on lessons learned from COVID, including support of hybrid work with areas enabled for periodic in-office work. Updated infrastructure provides improved employee health and safety, and building energy efficiency, and extended life.

Initiatives: Incorporating COVID-19 lessons learned, redesign ODVA space to maximize efficiencies. Refresh building paint and carpet and replace equipment to extend useful life and to reduce energy use. Create a plan to provide updated office furniture and workspaces in the future.

FY 2023-2028 Strategic Plan

Perspective: Learning and Growth

We invest in our employees to help them continually sharpen their skills so they can do their best work to serve veterans.

Increase Onboarding Effectiveness

Current state: Onboarding processes for new agency employees is minimal and mainly performed by section managers and an initial meet-and-greet with the director.

Future state: All employees experience a seamless agency onboarding. Processes are established to coordinate 1) pre-employment actions by management and technical staff; 2) HR and management onboarding activities day of new employment including the introduction to agency processes, policies and other functional knowledge activities, and; 3) agency welcome – scheduled meetings with agency leadership.

Initiatives: Create a workgroup consisting of internal and external partners to develop an agency onboarding plan. HR completes implementation and training of the new plan.

Create Staff Development Plans

Current State: ODVA lacks well-developed training plans, career advancement opportunity paths, and succession planning across the agency.

Future State: Training plans for all applicable agency positions are implemented and the agency has career pathways and job rotation opportunities that continuously expand the agency's ability to maintain and promote agency staff within the state's workforce.

Initiatives: Analyze positions, classifications, and career paths by subject matter experts. Understand / train tools available within HRIS (Workday) for continuity with enterprise. Conduct external analysis for career pathing outside of the agency. Create training and career development plans that are both individualized and equitable.

Enhance Employee Performance Feedback Processes

Current State: Perceived lack of regular and formal feedback that informs an employee's understanding of their work performance and potential opportunities for professional growth. The Workday Performance and Accountability Feedback system is still relatively new and not yet familiar enough to be used to its full capacity.

Future State: All employees meet quarterly with management to discuss performance feedback and to develop professional goals; inclusive and equitable support plans are created jointly between employees and managers.

Initiatives: ODVA HR conducts periodic management training on expectations for annual performance reviews for staff. Quarterly check-ins are utilized to start the process of providing feedback and goal setting every 3 months. Agency standards are set for quarterly check-ins and management goals are aligned with the strategic plan. Agency standards are set for annual performance appraisals and staff goals are aligned with the strategic plan. Standards are adjusted and expectations are maintained.

Create a Mentoring Program

Current State: ODVA does not have a formal mentoring program.

Future State: An ODVA mentoring program assists employees in preparing for promotional opportunities within the Oregon State Government.

Initiatives: Establish HR lead and conduct a Deputy-sponsored workgroup to a) survey staff expectations and b) research what other agencies might have regarding mentorship programs and c) provide recommendations to the Director. Implement the mentorship program with quarterly check-ins to evaluate progress at the 6- and 12-month marks. Periodically reconvene the workgroup to renew survey results and make change recommendations.

Enhance Staff Engagement

Current State: ODVA lacks an engagement group.

Future State: An ODVA Staff Engagement Group plans and implements opportunities that engage with staff designed to provide a platform for staff to interact, participate, and learn about activities across the agency and state.

Initiatives: Create a workgroup consisting of interested employees to gather feedback and develop potential ideas to engage better with staff, including activities geared toward agency learning and growing in the understanding of DEI.

Create Training About ODVA to Educate Partners

Current State: No general training exists for agency partners about who we are and how we serve veterans.

Future State: Effective partner training is implemented supporting increased knowledge and understanding of who ODVA is and how we serve veterans.

Initiatives: Establish a workgroup with participants from ODVA's Training, Certification and Outreach team, Communications, and Aging Veteran Services (Volunteer Coordinator) to a) research what other states/USDVA have, b) design training components, c) provide recommendations to the Director and e) report progress to Division Managers. Once approved, HR will integrate training into onboarding and yearly training plans.

FY 2023-2028 Strategic Plan

Perspective: Financial

We are good stewards of our finances.

Ensure Financial Accountability and Empower Managers by Aligning Responsibility with Authority

Current State: ODVA managers lack manager-oriented financial reports and authority to make informed financial decisions impacting their programs.

Future State: Managers are empowered and held accountable to make financial decisions that are informed and coordinated across the agency.

Initiatives: Financial Services develops budget reports by Division and trains division administrators and managers how to read and use them.

Ensure Financial Viability of Home Loan Program

Current State: Home Loan portfolio is declining due to rapid payoffs of older loans and veterans refinancing with lenders offering lower rates.

Future State: Portfolio that is sustainable, with potential for growth.

Initiatives: The top Home Loans priorities are to procure and implement modernized IT systems for both the Originations and Servicing sections within the Home Loans Team. Other initiatives include hiring a business development representative and developing Home Loan program business and marketing plans to enhance focus on historically underserved veterans (veterans of color, rural, etc.).

Eliminate Practice of Using Home Loans-Generated Other Funds to Subsidize ODVA Staff and Programs

Current State: Many Statewide Veteran Services and Aging Veteran Services program costs are subsidized by the Home Loan Program.

Future State: Align program costs with appropriate funding sources.

Initiatives: Annually update Cost Allocation Plan. For Personnel continuously re-evaluate vacant support positions and keep them vacant (or eliminate vacant positions) if not necessary. Identify alternative funding sources for positions to ensure one funding source is not carrying the full cost for all programs.

Ensure Financial Viability of the State Veterans' Home Program

Current State: The State Veterans' Home Program is generally self-supporting but census at both homes has decreased significantly due to COVID.

Future State: Each Veterans' Home is self-supporting and better able to withstand future economic downturns and disruptions such as COVID.

Initiatives: Complete yearly review of Veterans' Homes revenue census and payor rates with long-term marketing strategies in mind. Evaluate current marketing strategies, research other avenues of marketing areas where ODVA and Westcare/VCCO can improve outreach, especially to veterans of color and LGBTQ+ veterans. Evaluate if ODVA has the resources to do enhanced marketing outreach/communication.

Ensure Financial Viability of The Conservatorship/Representative Payee Program

Current State: The Conservatorship and Rep Payee programs rely on outdated IT systems. The program serves more than 200 clients and is funded by a combination of General Fund, Lottery Fund, and client fees.

Future State: Conservatorship and Rep Payee staff are supported by a modernized IT system. Program costs are no longer subsidized by the Home Loans program.

Initiatives: The most impactful priority for ensuring financial viability of these programs is to procure a modernized IT system. This effort can begin once the Home Loan IT projects have been substantially completed.

Cadence

Forward

Connecting the strategic plan to day-to-day work

As reflected in this strategic plan, the agency has identified many opportunities to functionally **improve not only operational processes that support our veteran program areas**, but also **enhance the culture of Diversity, Equity, and Inclusion within our own walls** and in our programs to **serve and honor all veterans**. We planned new and inclusive approaches to further identify and ultimately **remove systemic barriers to accessing veteran services** in Oregon.

The focus of this plan is to help ODVA become more agile and thus better able to address emerging needs. It does not change the direction we have been heading but increases the speed and depth at which we are able to achieve results.

We developed this strategic plan with DEI at its core to ensure we challenged old norms as we strive to become an anti-racist culture with an affirming and welcoming environment for everyone.

To keep this plan most effective in our dynamic world, each year we will reflect on what we have accomplished the previous year, revise and develop goals for the next four years, and add a new fifth year. Shared ownership around a strategic plan that is relevant and relied upon across the organization will better enable ODVA to deliver the programs and services that Oregon veterans and their families need and deserve.

