

Chair Evans, members of the committee, for the record my name is Karen Peterson and I am a principal auditor in the Oregon Secretary of State Audits Division. I am here today with Sheronne Blasi, one of our audit managers. Thank you for the opportunity for us to share with you the work we did a couple years ago at the Oregon Department of Veterans' Affairs.

In 2014, we began an audit at ODVA because we had not previously conducted performance audit work there. Early on, we spoke to a range of stakeholders and community partners, and heard a lot of positive feedback and praise for the work that ODVA does. At that time, ODVA was undergoing changes in some program areas and had strategic planning efforts underway. So we decided to limit our work to providing additional considerations for the department as it was implementing and refining its strategic plan. Generally, our considerations centered on ways to strengthen the oversight of County Veteran Services Officers, better identify veterans and conduct outreach, continue to develop key partnerships with other agencies and service providers, better collect & utilize data, and improve and expand the training offered by the department.

ODVA manages the system by which most veterans submit claims or applications to the federal VA for benefits. A large part of this is its oversight of County Veteran Service Officers, or its CVSO program. As CVSOs are county employees, there is a challenge with providing the oversight. Still, our report pointed out a few ways the department could consider to strengthen that oversight. They included developing clear performance standards for CVSOs and communicating those standards to those whom CVSOs report, which varies considerably among

counties. For example, the CVSOS may sit within the county health department or directly report to the elected leadership for that county.

Also, the department may wish to develop new or refine existing reporting requirements of CVSOSs. For example, CVSOSs were to conduct outreach activities and refer veterans to other services. But at the time there was no collection of data on the number or types of referrals CVSOSs were providing to veterans that could be used to identify patterns of needs, and there were limited guidelines to CVSOSs to ensure data was consistent.

The identification of veterans is a key starting place to allow the state an opportunity to inform veterans about their benefits. Federal VA data showed that relatively low percentages of Oregon veterans are accessing their federal veterans' benefits, as was the case in other states. Our report noted a couple areas that could be strengthened to help expand the identification and outreach to veterans. These typically involved other agencies, to either work more closely with, and strengthen existing relationships or develop new relationships.

When we looked at some applications for state programs (such as SNAP – Supplemental Nutrition Assistance Program, or TANF – Temporary Assistance to Needy Families), we found they varied in terms of what the application asked with respect to military service. For example, some applications asked for the amount of VA income received or if a member of the household is a veteran. This is an issue, as we heard that many who would likely qualify for veterans' status may not identify themselves as a veteran, such as those who served on active duty but may not have served in combat. So the terminology used is important. ODVA could consider partnering with state agencies to ensure that widely used state

program applications reflect the most appropriate questions to clearly identify individuals who are veterans.

Some agencies, per legislation, are asking members of the public about their military service and sharing the veteran referral information with ODVA. Yet in one case it was unclear whether ODVA could share this information directly with CVSOs. For these and other agencies, again ODVA could consider partnering to ensure the information and data sharing among agencies is effective and streamlined.

**For the record, Sheronne Blasi, Oregon Audits Division**

Related to the information system, ODVA had identified and was working on its capacity to collect and analyze data in their strategic framework. Along with that, we suggested ODVA consider developing a strategy to determine its data needs and uses.

The Public Assistance Reporting Information System (PARIS) is a joint federal and state effort that provides states with matched data that shows those receiving public assistance in that state with those who are also veterans. Typically that is shared with the state agency administering Medicaid and Medicare. Some states have robust PARIS programs, which seem to have been successful in helping to ensure veterans get the maximum federal benefits for which they are entitled.

In some cases, this means those veterans can move from state-funded programs to a wider array of federally-funded programs, freeing up state funds to assist others. These programs typically seem to use a close partnership between health and human service agencies and the state's, veterans' affairs agency.

At the time of our work, Oregon's Department of Human Services was planning a limited pilot to use the PARIS information, primarily for income verification purposes and to encourage veterans to seek out CVSOs on their own. It was unclear at the time the extent the Oregon Health Authority would be participating in the pilot. We suggested ODVA consider developing a partnership with these agencies to ensure the PARIS data information helps veterans access and maximize federal benefits.

Another partnership relates to education. With limited veterans accessing their benefits for higher education, we suggested ODVA consider partnering with Oregon's colleges and universities to assist in recruiting new veteran students and help maximize veterans' educational success.

Also, continuing to develop or strengthen existing ODVA partnerships may help in the marketing of veteran employment programs and may help ensure widespread awareness of support services available to homeless veterans or those at risk of becoming homeless.

Finally, training was another area of consideration. In addition to helping veterans file claims and access federal benefits, ODVA told us CVSOs play an important role in their community by helping veterans access other services. Since training for this work was not currently included in CVSO training and certification process, ODVA may consider including such referral work, given its importance to veterans in our state.

Also, we heard differing views among community partners and CVSOs about how veterans who are receiving state assistance through programs like Medicaid may be affected should they pursue federal VA benefits. ODVA could consider

clarifying how state and federal benefits affect one another for Oregon veterans, and include this information to CVSOs and caseworkers at partner agencies.

Community partners could benefit from this information as well.

As ODVA was refining and implementing its strategic framework, we appreciated the opportunity to provide additional insight, which may further assist veterans in Oregon.

Our limited review noted the following strategies ODVA could consider to further improve coordination of veteran services in Oregon:

- seek methods to expand and continue advocacy for changes at the federal VA, to help ensure Oregon veterans and their families receive services and thrive;
- seek opportunities for clarifying its informational materials, including clear questions about veteran's status on state applications;
- clarify how state and federal benefits affect one another for Oregon veterans and coordinate training on that to CVSOs as well as caseworkers at partner agencies;
- expand its partnerships with agencies to ensure sharing information amongst agencies is effective and streamlined to foster outreach activities to veterans, and consider opportunities to collaborate on effective methods to disseminate veteran benefit information to those eligible;
- partner with DHS and OHA to develop the PARIS data management and referral process to help ensure veterans receive the maximum benefits to which they are entitled;

- seek opportunities to assist the Oregon Employment Department to market the availability and advantages of employment services provided for veterans;
- consider the needs of homeless veterans now and in the future, and partner collaboratively with other public agencies and local service providers to ensure that resources are known and available to the homeless and at risk veteran community;
- partner with Oregon educational institutions with approved GI Bill programs to assist in outreach for recruiting new student veterans and to maximize student veteran success;
- develop a strategy to determine data needs and uses as they relate to the department's strategic framework and improvements to services, then partner with other state agencies to collect and analyze data on veterans;
- develop essential and well-defined CVSO reporting expectations and requirements to ensure the quality of work intended; and
- develop clear CVSO performance standards, and clarify those with the individuals to whom CVSOs report, and develop training specifically for CVSO referral work.

As typical with our reports, we request updates from agencies on the status of our recommendations, or considerations in this case. According to ODVA, it has made multiple efforts that range from expanding its advocacy role, working with federal/state/local partners, to hosting annual veteran benefit expos. It was also developing CVSO standardized position descriptions, expectations, and performance measures. Director Smith is also here to provide an update on the current status of the considerations.