

SB 35 STAFF MEASURE SUMMARY

Senate Committee On Veterans and Emergency Preparedness

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Sub-Referral To: Senate Committee On Judiciary

Meeting Dates: 1/30, 2/6

WHAT THE MEASURE DOES:

Exempts Oregon Department of Veterans' Affairs (ODVA) from requirement to include vouchers for disbursements as part of conservatorship accountings filed with court. Lifts sunset on campus veteran resources grant program.

ISSUES DISCUSSED:

- Court supervision of conservatorships
- Record-keeping and filing requirements
- Success of campus veteran resource grant program

EFFECT OF AMENDMENT:

No amendment.

BACKGROUND:

Senate Bill 35 impacts two unrelated programs at the Oregon Department of Veterans' Affairs (ODVA), each discussed in turn below: the conservatorship program and the grant program for campus veteran resources.

Conservators are appointed to manage the estates of protected persons: ODVA's conservatorship program operates on behalf of over 140 veterans. Conservators are required to provide financial information to courts on at least an annual basis, including an estate's prior balances, current values, property received, and disbursements made, among other things. Absent a court ruling to the contrary, vouchers for distributions (copies of checks) must accompany each accounting unless the conservator is a trust company in compliance with statutes that regulate Oregon trust businesses and financial institutions. If no vouchers are required, they must still be maintained along with other records, made available for inspection or copying by interested persons, and described as part of the annual accounting submitted to the court. The financial institution required for ODVA's conservatorship program is the Oregon State Treasury, which pools all conservatorship client funds into one account, with no individual client statements. Copies of disbursement vouchers are sent to ODVA monthly, in digital form, saved to compact discs. In order for the correct vouchers to accompany an accounting filed on behalf of a particular client, ODVA searches these discs to locate records by number that correspond to each of the client estates it manages.

The grant program administered by ODVA for campus veteran resources was established by Senate Bill 143 (2017). Grant funds are used to expand and enhance campus veteran resource centers at public universities and community colleges. The current Governor's Budget would allocate \$700,000 to it; it is scheduled to sunset January 2, 2020.

Senate Bill 35 exempts the Oregon Department of Veterans' Affairs from having to include disbursement vouchers with annual financial accountings submitted to the court for estates administered under its conservatorship program, and lifts the sunset on campus veteran resource grants.

PRELIMINARY