Report to:
State Assembly Budget Subcommittee No. 4

CalVet and County Veterans Service Officers Strategic Partnership and Best Practices

June 2013

Contents

Introduction 1
CalVet's Strategic Plan 1
Veterans Advocacy and Education 1
CalVet LINCs Role and Relationship with CVSOs 2
Contacting Veterans 3
Best Practices 3
Data collection and sharing 3
Outreach 3
Training 4
Tracked Data 4
Performance Metrics 4
Connecting veterans to benefits and services 5
Best Practices 5
Data collection and sharing 5
Training 5
Claims processing 5
Providing services 6
Tracked Data 6
Performance Metrics 6
Continuous Communication 7
Best Practices 7
CalVet Connect 7
Communication with veterans 7
Communication with stakeholders and community partners 7
Performance Metrics for Continuous Communication 8

Introduction

In accordance with the *2012-13 State Assembly Budget Subcommittee 4 Budget Report* and the Military & Veterans Code, Section 972.1 (d), the *CalVet and County Veterans Service Officers Strategic Partnership and Best Practices Manual* describes best practices and the relationship between the California Department of Veterans Affairs (CalVet) and the County Veterans Service Officers (CVSOs) for effectively reaching and connecting veterans and their families with the benefits and services they have earned.

This document is a product of collaborative, in-person meetings and discussions between CalVet and CVSOs regarding how to best serve California's veterans. With some tactical changes, the best practices described are achievable using the current resources available to CalVet and the CVSOs. However, as performance is measured by metrics over time, we may seek additional resources in order for our efforts to make a more significant impact on veterans.

Background

CalVet's veteran outreach efforts are primarily conducted through our successful partnership with the CVSOs, who work within their communities with local organizations to advocate for their respective veteran population. Together, we work as a collaborative venture between the state and county governments to connect veterans with their benefits.

Our relationship ensures veterans and their families are served and represented by trained and accredited professionals. CVSOs are a critical component in the state's efforts to interface with individual veterans and their families; they are our strategic partners in reaching veterans. They are on the front lines for this important mission and play the key role in ensuring that veterans and their families are aware of their benefits, and in fact apply for and receive them. Together, the CVSOs, through claims initiation and development, and the Department, through claims development and representation, provide assistance to veterans and their families in preparing and submitting claims and in representing claimants before the federal, state and local agencies providing veterans benefits.

CalVet's Strategic Plan

Vision - CalVet will be the state's leading advocate and resource so veterans can achieve the highest quality of life.

Mission - Serve California's veterans and their families.

Core Values - Excellence, Integrity, Professionalism, Commitment, Stewardship, Compassionate Service, Teamwork

The CalVet Enterprise Strategic Plan for FY 2013-14 to 2015-16 describes the goals and objectives for achieving our mission. The plan will be posted on the CalVet website in July 2013.

Veterans Advocacy and Education

CalVet's strategic objectives for veteran advocacy and education to achieve the strategic goals involves three main efforts:

1. Contact
2. Connect
3. Continuous Communication

CVSOs play a key role in how we accomplish our mission in these areas. Moving forward, there will be ongoing dialogue between CalVet and the CVSOs about the collaborative strategies and best practices at the semi-annual strategic planning meetings already in place.

CalVet LINCs Role and Relationship with CVSOs

Local Interagency Network Coordinators (LINC) are CalVet's direct line for conducting outreach and coordinating collaborative-provider services delivery to CA's veterans. LINCs support the CalVet outreach mission by locating veterans throughout the state; educating them on the full-spectrum of benefits; assessing their needs and priorities; and referring veterans to the direct services that will best suit their individual reintegration plans. LINCs work with CVSOs to contact, connect, and communicate with veterans, their families, and service providers. They play an integral role in many aspects of helping veterans to apply for and receive veterans benefits and services.

LINCs should be coordinating and vetting all outreach efforts with their local CVSO in the most efficient and effective ways possible. They should develop a supportive/supported relationship with the CVSO. Being trained on the claims process and the CVSO's claims duties will allow for the best situational awareness of veterans in need of claims assistance. LINCs can help in their regions not only through coordination with the CVSO, but also by continuously improving on the information landscape of services in the region (via 211 or other provider listing services, for example).

LINCs should coordinate collaboratives as participants and (in some cases), initiators, but not as chairs. Collaboratives should include federal and state agencies, the Veterans Health Administration (VHA), community partners, and elected officials or their representative agents.

Although some military members separate through California but settle in another state, the United States Department of Veterans Affairs (USDVA) Transition Assistance Program/Transition GPS is an important opportunity for LINCs. At these events, they are able to contact new veterans and have them complete the CalVet Reintegration Form, which is shared with each state's veterans affairs office. As with all outreach efforts, this should be coordinated with the local CVSO, so that strong practices are compared and refined for any given set of event types. The size and veteran density of a region and the amount of events available will help the CVSO/LINC team decide which events should be deconflicted for separate attendance, and which should be considered for joint attendance.

Direct LINC communication with the CVSO is important, and CalVet headquarters information sharing with the LINC and CVSO is just as important to the effectiveness of outreach operations. CalVet is the hub of veteran information for California, so sharing that information through ways such as talking points is ideal. These talking points should consist of current updates on the status of legislation, news, and other important changes for veterans. This information sharing will ensure that CalVet executives and staff, CVSOs, and the legislature all have the same decision points to connect for effective action. A two-way mode of the communication is vital to this synergistic relationship. Through these CVSO/LINC joint efforts, CalVet can best advocate for our customers, communicate and overcome roadblocks to success, and ultimately provide the highest levels of care that our state's veterans so richly deserve.

Contacting Veterans

Connecting veterans to the services and benefits they need is first dependent on the ability to establish that initial connection as they return home and attempt to transition back into the community. This has posed a challenge for all veteran stakeholders, but CalVet and the CVSOs are positioned to be successful by working together through various best practices.

Best Practices

Data collection and sharing

1. CalVet acts as the clearing house for data and information and as the link to the CVSOs who are the boots on the ground. If CalVet could collect and analyze veteran data such as demographics and contact information, CVSOs would benefit because there is no data analysis function currently.
2. Expand the relationships CalVet and CVSOs have with the Veterans Benefits Administration (VBA) and the Veterans Health Administration (VHA) to include regular conversations regarding data sharing, meetings, events, and services for veterans.
3. Although CVSOs have not been fully funded for the initiative, PARIS has provided additional leads to CVSOs to follow up with. As resources become more available, CVSOs would be able to increase efforts with those leads.
4. CalVet sends military service record (DD 214 or Certificate of Release or Discharge from Active Duty from the Department of Defense) lists to the CVSOs who conduct outreach to other agencies and colleges.

Outreach

1. All inquiries and outreach requests originating with and involving CalVet are streamlined through the CalVet Veterans Services Division to ensure accuracy, reduce barriers, and decrease silos. For example, issues or activities touching the LINCs or the Veterans Homes should be coordinated through the CalVet Veterans Services Division.
2. CalVet and CVSOs build relationships with community partners such as local elected officials, mental health agencies, Department of Social Services, criminal justice system, and non-/for-profit organizations.
   - An annual Veterans Council would get representatives from these groups together to discuss how to better contact veterans and their families.
   - CVSOs establish referral relationships with community partners to help identify veterans. CVSOs reinforce this with the community partners on a regular basis.
3. Increase public presence and public awareness of veterans. Rebrand and remessage who veterans are and the strengths veterans bring to the community. Debunk myths regarding veterans and the benefits and services that may or may not be available.
   - Ensure that we are asking "Have you served in the military?" instead of "Are you a veteran?"
   - Create Public Service Announcements (PSA) to show in the lobbies of the CVSO and other agencies such as mental health.
   - Increase the frequency of press releases regarding veteran benefit information.
   - Movie theater ads, PSAs, bus advertisements, etc.
4. CVSOs and CalVet conduct veteran events such as VetConnect, Yellow Ribbon Events, Stand Downs, presentations at hospitals and long-term care facilities. Staff explain to veterans and their families about veteran benefits, hand out resource books and reintegration forms. Consider holding separate outreach events for different war eras and gender.
5. Best practices for contacting women veterans:

- Hold separate, quarterly events for women veterans.
- Go to places where women are instead of expecting them to come to veteran events. Examples include faith-based and other community events.
- Create comfortable environments for women.
- Offer one-on-one meetings with women veterans.
- Have sensitivity to "vets are vets".

6. A CVSO subcommittee on Outreach will be created, where best practices, legislation, and other topics could be discussed to increase communication among the CVSOs on these topics. CalVet could be involved with this meeting.
7. CalVet will develop a Veteran Outreach Toolkit that can be given to California's veteran service providers. It will have the essential information providers need to help outreach to veterans and their families.
8. Acquire additional staff to assist with outreach efforts. Staff and volunteers with work experience who are certified with the local government agency can increase the number of vets who are contacted.
9. All of these best practices will also focus on how to improve contacting veterans in various emerging veteran demographic groups such as women, Lesbian, Gay, Bi-sexual, and Transgender (LGBT), and Don't Ask Don't Tell repeal (DADT).

Training

1. Military Culture 101 Classes – Through collaboratives, conduct training for service providers, staffers, and other veteran stakeholders about recent veteran legislation, culture, and sensitivity.

Tracked Data

- Number of CalVet Resource Books distributed
- Number of tool kits distributed
- Number of Stand Downs funded through CalVet
- Number of veterans served through walk-ins and phone calls to CVSOs

Performance Metrics

Ways we can measure success in contacting veterans and their families (targets to be determined):

- Number of Reintegration Forms received.
- Number of emails in the CalVet Listserv
- Number of attendees at outreach events
- Number of events LINCs or CVSOs attended
- Number of unique referrals made
- Number of unique visits to CalVet website

Connecting veterans to benefits and services

After making contact with veterans and their families, we need to connect them with the benefits and services they need and have earned. This connection involves a wide variety of efforts made by CalVet and CVSOs including directly helping with and filing VA benefit claims and making phone calls and referrals to service providers on behalf of veterans and family members in need.

Best Practices

Data collection and sharing

1. CalVet is exploring data mining VetPro (veteran case management system) to develop data to produce reports for analysis, which will also enable CVSOs to transfer files.
2. CalVet and CVSOs will develop best practices on data sharing for veteran stakeholders in California.
3. CalVet is working towards gaining access to the Defense Personnel Records Information System (DPRIS) where we would have access to the Department of Defense database of veteran information such as the DD214 and military records. We propose CVSOs as subpartners who are also able to use it.
4. CVSOs could improve the quality of claims they submit if they had access to the USDVA claims database that also waives the power of attorney for the claims. This idea has been formalized by the recent introduction of H.R. 733, Access to Veterans Benefits Improvement Act. This bill would amend title 38, United States Code, to provide certain employees of Members of Congress and certain employees of State or local governmental agencies with access to case-tracking information of the VA.

Training

1. CVSOs conduct CVSO Orientation classes that train the staff of the CVSO on all of their duties, including administration such as subvention requirements, other processes and forms.
2. The VetRep Academy will provide continuing education and specialized training for veteran claims representatives.
3. CalVet and CVSOs share current benefit information, training events, and updates to enhance Veteran Service Organization (VSO) and other stakeholder services for veterans.
4. Outreach and education about veteran benefits could be given to people in the community on how to identify veterans and who to refer them to (first responders training)—nursing programs, teachers in schools to identify children of military families and refer them, faith based organizations.

Claims processing

1. In light of the claims backlog, CalVet and CVSOs focus on submitting Fully Developed Claims (FDC) to maximize the USDVA initiative for expeditious awards. CalVet and CVSO leadership communicate the USDVA criteria for FDC to all CVSOs.
2. CalVet and CVSOs will coordinate strategies to ensure private and VA physicians have the information they need to complete Disability Benefits Questionnaires (DBQ) successfully and timely.
3. CVSOs use a benefits checklist to evaluate other benefits the veteran might qualify for in order to maximize benefit utilization. This checklist should be updated with recent changes to legislation. Post the updated version on the CalVet and CVSO websites.

Providing services

1. The individual advocacy conducted by CalVet and CVSOs is a critical and valuable function. We receive "crisis calls" on a regular basis—veterans or loved ones calling for help. We show great compassion in these situations by helping to connect the dots with service providers, making phone calls and investigating occurrences on behalf of the veteran or family member. CalVet may be able to take a role in better tracking efforts made in individual advocacy in the future.
2. CalVet and CVSOs should develop partnerships with diverse veteran service providers to form a network of providers for each local area. Referral agreements or MOUs could be put in place to solidify the partnerships and clarify each stakeholder's role.
3. In responding to inquiries from elected officials and government agencies concerning veteran issues, CVSOs may implement a referral process to track the referrals made.
4. CVSOs ensure that forms such as the College Fee Waivers are submitted fully developed. CalVet will update and enhance the instructions included with the form.
5. Increase transparency and open communication between partners to make sure stakeholders are updated with the information they need to connect veterans.

Tracked Data

1. Number of referrals made.
2. Number of claims awarded
3. Federal VA dollars coming into each county
4. Compensation and pension participation rate

Performance Metrics

Ways we can measure success in connecting veterans and their families with benefits and services (targets to be determined):

1. Number of claims submitted by California veterans
2. Amount of Compensation and Pension dollars brought into California
3. Number of Fully Developed Claims submitted
4. Number of certified DVBEs

Continuous Communication

After we help our veterans and their families to obtain the benefits and services they need, we can't ignore their future needs. Through continuous communication methods such as benefit reviews, events, surveys, and marketing, CalVet and the CVSOs will ensure that they continue to live the highest quality life possible.

Best Practices

CalVet Connect

1. CalVet Connect will play a large role in the communication to veterans and their families because it will provide current veteran information on a continuous basis.
2. Surveys and focus groups can be conducted by CVSOs and CalVet to assess the needs of veterans and their families because they change over the years.

Communication with veterans

1. Increase public presence. As in the area of contacting veterans, we should look at ways to increase the public presence and awareness such as PSAs and press releases.
   - CalVet can look into having a PSA produced by another agency and distributed through local public broadcasting stations.
   - Press releases should inform veterans about up-to-date USDVA and legislation changes.
2. Awards review. After a USDVA benefit award is made, the CVSO sits down with the veteran to go over other possible benefits using a standard checklist.
3. Periodic benefits review. Over time, veterans change along with the federal and state rules that govern benefit eligibility.
   - CVSOs conduct a periodic benefits review every five years to review these changes and see if the veteran qualifies for additional benefits, such as the College Fee Waiver if they have added dependents.
   - When the USDVA presumptive service connected disability list is changed, CVSOs find and investigate claims that were denied for those conditions in VetPro.
4. When possible, it is beneficial for CVSOs to call the veteran after a referral is made. They can find out if the referral was helpful or if they need another one. CalVet will explore the enhancement of VetPro to enable CalVet to conduct similar follow up.
5. CVSOs hold events for veterans and their families focused on preventive measures and education on benefits. This is a way to keep ongoing contact with them.

Communication with stakeholders and community partners

1. VetRep Academy – This veteran claims representative training is an ongoing, joint effort between CalVet and CVSOs. Calvet will develop the VetRep Academy curriculum and then provides specialized training to the CVSOs and some VSOs. The CVSOs will then follow up and assist with training and updates in the local communities to VSOs and other community partners.
2. CalVet and CVSOs foster relationships with community partners. This ongoing relationship increases information sharing and improves outreach to veterans at all stages of their lives.

Performance Metrics for Continuous Communication

Ways we can measure success in continuing to communicate with veterans and their families (targets to be determined):

1. Number of new claims or benefits received from reviewed claims.
2. Number of referrals/touches by CalVet Connect.
3. Rating of providers
4. Dashboard posted on CalVet Connect