

**Joint Leadership Council of Veterans Service Organizations**  
**Meeting Minutes**  
**July 17, 2013**

A meeting of the Joint Leadership Council of Veterans Service Organizations (the JLC) was held on July 17, 2013, at the American Legion Building, 1708 Commonwealth Avenue, Richmond.

**Members Present**

- Brett Reistad, American Legion
- Richard Mansfield, AMVETS
- Don Kaiserman, Association of the United States Army
- Allan McCroskey, Disabled American Veterans
- John Edwards, Korean War Veterans Association
- Tom Richards, Legion of Valor of the U.S., Inc.
- John Prendergast, Marine Corps League
- Stu Williams, Military Officers Association of America
- Robert Fairchild, Military Order of the Purple Heart
- William Townsley, Military Order of the World Wars
- Thomas Moran, National Association for Uniformed Services
- Glenn Rodriguez, Navy Seabee Veterans of America
- Matthew Dailey, Non Commissioned Officers Association
- Carmen Gentile, Reserve Officers Association
- Jim Clem, Roanoke Valley Veterans Council
- Thomas Gimble, Veterans of Foreign Wars
- George Corbett, Vietnam Veterans of America
- Bob Huffman, Virginia Army/Air National Guard Enlisted Association
- Thad Jones, Chairman, Board of Veterans Services
- Rich Schollmann, Chairman, Veterans Services Foundation
- Paul Galanti, Commissioner of Veterans Services

**Members Absent**

- Harold Barton, Air Force Association
- George Coker, American Ex-POWs
- Abe Zino, Fleet Reserve Association
- David Coffield, Paralyzed Veterans of America
- Shawn Otto, Virginia National Guard Association
- Jenny Holbert, Women Marines Association

**Alternates Present (representing their VSO)**

- Jeffrey Platte, Air Force Association
- Jeff Gilmartin, Fleet Reserve Association
- John Velleca, Virginia National Guard Association

- Marie Juliano, Women Marines Association

### **Alternates Present (not representing their VSO)**

- John Sabatini, AMVETS
- Vic Pena, Military Officers Association of America
- James Samuel, Military Order of the Purple Heart
- Frank Driscoll, Navy Seabee Veterans of America

### **Commonwealth of Virginia Officials Present**

- Jim Hopper, Deputy Secretary of Veterans Affairs and Homeland Security
- Michael Coleman, Office of the Secretary of Veterans Affairs and Homeland Security
- Steve Jack, Office of the Attorney General
- Al Pianalto, Office of Delegate Kirk Cox
- Steven Combs, Department of Veterans Services
- Jack Hilgers, Department of Veterans Services
- Tina Parlett-Calhoun, Department of Veterans Services
- Judy Reid, Department of Veterans Services
- Andy Schwartz, Department of Veterans Services
- Danielle Weaver, Department of Veterans Services
- Matt Koch, Department of Game and Inland Fisheries

### **Others Present**

- Katie Murphy, Northern Virginia Technology Council
- Bill Whitt, Fleet Reserve Association

### **Items included in the Agenda Packet**

Agenda (Agenda Item II)

Presentations (Agenda Item IV)

- Meeting report/handout from Stu Williams on NVTC (background information)

Reports (Agenda Item VI)

- Board of Veterans Services Report
- Veterans Services Foundation Report
- Department of Veterans Services Report

New Business (Agenda Item VII)

- Review, discuss, adopt, and prioritize 2013-2014 JLC Initiatives
  - Summary of MOAA proposals
  - MOAA-01, Electronic Return of Absentee Ballots by Overseas Uniformed Military Voters;
  - MOAA-02, Educating Employers on the Value of Hiring Veterans;
  - MOAA-03, Hiring and Retention of Benefit Service Agents;
  - MOAA-04, Implementing the Virginia Homeless Veterans Program;
  - MOAA-05, Funding for Virginia Wounded Warrior Program;
  - MOAA-06, Measure if Virginia Veterans are Being Properly Served;

- MOAA-07, Real Property Tax Exemption for Spouses of Military Killed in Action;
- FRA-01, Hunting, Fishing, and Trapping Licenses;
- FRA-02, Veterans Retirement Tax Relief Plan;
- FRA-03, Virginia Military Survivors and Dependents Education Program.
- Other new business and open discussion
  - JLC 2013 Action Plan

### **Opening and Pledge of Allegiance**

Chairman Don Kaiserman called the meeting to order at 10:00 a.m. Vice-Chairman Thomas Moran led the Council in the Pledge of Allegiance.

### **Roll Call of VSOs and Quorum Determination**

The roll was called, and 22 of the 24 Veterans Service Organizations (VSOs) represented on the Joint Leadership Council of Veterans Service Organizations (the JLC) were recorded as being represented and a quorum was determined. Mr. Thad Jones, the Chairman of the Board of Veterans Services (BVS), Mr. Rich Schollmann, the Chairman of the Veterans Services Foundation (VSF), and Commissioner Paul Galanti of Veterans Services, were recorded as present.

### **Introductions of Guests**

Chairman Kaiserman asked Mr. Steven Combs to introduce the state officials and guests. Their names and organizations are recorded above. Chairman Kaiserman welcomed them to the meeting.

### **Approval of the agenda**

Chairman Kaiserman asked for a **motion** to approve the agenda (*Attachment 1*) as presented. Mr. Thad Jones made a **motion, seconded** by Mr. Glenn Rodriguez to approve the agenda as presented.

### **Approve May 22, 2013 Meeting Minutes**

Chairman Kaiserman stated that the minutes of the May 22, 2013 meeting had been distributed electronically and asked for a **motion** to approve the minutes as drafted. Mr. Allan McCroskey made a **motion, seconded** by Mr. Thomas Moran, to approve the minutes as drafted. The May 22, 2013 minutes were approved as drafted by **unanimous** consent.

### **Opening remarks**

Chairman Kaiserman welcomed all new members to the JLC. It was noted that Mr. Harold Barton had been appointed as the representative for the Air Force Association, and that former JLC member Mr. Jeff Platte is now the alternate for Mr. Barton. Chairman Kaiserman reminded the Council that it is important to have an alternate.

Mr. Steven Combs drew the members' attention to the report from Mr. Stu Williams on a meeting of the Northern Virginia Technology Council (*Attachment 2*), noting that it relates to the presentation scheduled for later in the meeting.

## **Presentations**

Ms. Katie Murphy, Manager of Strategic Initiatives, Northern Virginia Technology Council (NVTC) delivered a presentation on the NVTC's veterans employment initiative. Ms. Murphy also distributed handouts on the initiative. The presentation and handouts are not included in these minutes but are available separately.

The Council members asked many questions of Ms. Murphy and made many suggestions on how the NVTC could expand its reach to veterans. Ms. Murphy thanked the Council members for their questions and suggestions.

Chairman Kaiserman thanked Ms. Murphy for her presentation. He then explained that this program is employee-focused, while the Virginia Values Veterans (V3) is employer-focused. Chairman Kaiserman also commented on the success of the V3 program.

Mr. Combs noted that there are materials at the sign-in desk for Ms. Murphy's presentation. He also stated that there was material on the table in reference to services for homeless veterans, as has been requested by the Council members at the May meeting. He noted that the material had been provided by Ms. Brandi Jancaitis, DVS Director of Housing Development for Veterans.

Chairman Kaiserman recognized Mr. George Corbett, JLC Chaplain. Mr. Corbett delivered that sad news that Mr. Allan McCroskey's wife passed away on July 3. He asked everyone to observe a moment of silence in remembering Mr. McCroskey's wife.

## **Reports**

### **Board of Veterans Services**

Board of Veterans Services (BVS) Chairman Thad Jones delivered the BVS report (*Attachment 3*). Mr. Jones invited the Council members to attend the BVS meeting scheduled for July 24, emphasized the excellent partnership between the BVS and JLC, and stated that the BVS will continue to support the work of the JLC.

Chairman Kaiserman thanked Mr. Jones for his report.

### **Veterans Services Foundation**

Veterans Services Foundation (VSF) Chairman Rich Schollmann delivered the VSF report (*Attachment 4*). Mr. Schollmann stated that the next VSF meeting will be August 7.

Chair Kaiserman thanked Mr. Schollmann for his report.

### **Virginia Military Advisory Council**

Mr. Thomas Moran stated that the Virginia Military Advisory Council (VMAC) had not met since the last JLC meeting, and therefore he had no report on its activities.

## **Department of Veterans Services**

Commissioner Galanti delivered the DVS report (*Attachment 5*).

*Chairman Kaiserman called for a break at 10:59 a.m. He called the meeting back to order at 11:15 am.*

## **New Business**

Chairman Kaiserman turned floor over to Mr. Brett Reistad to lead the review, discussion, adoption, and prioritization of the 2013-2014 JLC initiatives.

### **Review, discuss, adopt, and prioritize 2013 – 2014 JLC Initiatives**

Mr. Brett Reistad welcomed everyone to the American Legion building. He then thanked Mr. Abe Zino for filling in for him at the last JLC meeting.

Mr. Reistad stated that 11 initiatives have been proposed for consideration. He called on Mr. Stu Williams (MOAA – seven proposals), Mr. Jeff Gilmartin (Fleet Reserve Association – three proposals), and Mr. Allan McCroskey (Disabled American Veterans – one proposal) to review the proposals made by their VSO. Copies of the supporting positions papers are included as *Attachment 6*.

After extensive discussion by the JLC members, the following decisions were reached by vote of the Council:

<b>Proposal</b>	<b>Decision</b>
MOAA-01, Electronic Return of Absentee Ballots by Overseas Uniformed Military Voters	Adopted as JLC 2014 Initiative
MOAA-02, Educating Employers on the Value of Hiring Veterans	Adopted as JLC 2014 Initiative
MOAA-03, Hiring and Retention of Benefit Service Agents	Adopted as JLC 2014 Initiative
MOAA-04, Implementing the Virginia Homeless Veterans Program	Adopted as JLC 2014 Initiative
MOAA-05, Funding for Virginia Wounded Warrior Program	Adopted as JLC 2014 Initiative
MOAA-06, Measure if Virginia Veterans are Being Properly Served	Adopted as JLC 2014 Initiative
MOAA-07, Real Property Tax Exemption for Spouses of Military Killed in Action	Adopted as JLC 2014 Initiative
FRA-01, Hunting, Fishing, and Trapping Licenses	Postponed to the October meeting at the request of the FRA representative
FRA-02, Veterans Retirement Tax Relief Plan	Tabled at the request of the FRA representative
FRA-03, Virginia Military Survivors and Dependents Education Program	Withdrawn by the FRA representative
DAV-01, Exempt DAV Transportation Vans	Postponed to the October meeting with the

from having to pay tolls on Virginia bridges and highways when transporting veterans	concurrence of the DAV representative – DVS to report to the JLC on potential solutions
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After extensive discussion by the JLC members, the adopted JLC 2014 Initiatives were prioritized by vote of the Council:

<b>Initiative – Number and Priority</b>	<b>Title</b>
JLC 2014-01	Hiring and Retention of Benefit Service Agents
JLC 2014-02	Educating Employers on the Value of Hiring Veterans
JLC 2014-03	Funding for Virginia Wounded Warrior Program
JLC 2014-04	Electronic Return of Absentee Ballots by Overseas Uniformed Military Voters
JLC 2014-05	Implementing the Virginia Homeless Veterans Program
JLC 2014-06	Measure if Virginia Veterans are Being Properly Served
JLC 2014-07	Real Property Tax Exemption for Spouses of Military Killed in Action

*In the midst of the discussion, review, and adoption process, the Council meeting was suspended from 12:05 p.m. to 12:50 p.m. for lunch.*

### **Nominating Committee Report**

Mr. Carmen Gentile reported that both Chairman Kaiserman and Vice-Chairman Moran are eligible for a second term in their current positions, and that both had indicated their willingness to continue to serve in their current positions. Mr. Gentile stated that the Nominating Committee had not received any additional nominations. Mr. Gentile recommended that Chairman Kaiserman and Vice-Chairman Moran be elected for a second year. Mr. Jim Clem made a motion, seconded by Mr. McCroskey, to accept the Committee’s recommendations.

Mr. Townsley stated that the floor must be open to any additional nominations. Hearing none, Chairman Kaiserman closed the nominations.

### **Elect JLC Chairman and Vice Chairman**

Mr. Gentile asked for a vote to approve Chairman Kaiserman and Vice-Chairman Moran to a second term as JLC Chairman and Vice Chairman. Chairman Kaiserman and Vice-Chairman Moran were elected for a second term by unanimous consent.

### **Other new business and open discussion**

Mr. Richard Mansfield requested that DVS prepare a report and/or presentation for the next JLC meeting on the status of veterans courts in the Commonwealth. Mr. Combs agreed to this request on behalf of DVS.

### **Public Comment**

No Public Comments made.

**Closing Remarks**

Chairman Kaiserman asked that everyone review the JLC 2013 Action Plan and carry back to your VSO's what transpired during this meeting.

**Adjournment**

There being no further business, Chairman Kaiserman adjourned the meeting at 2:14 p.m.

**ATTACHMENT 1**  
**Joint Leadership Council of Veterans Service Organizations**  
**American Legion Building**  
**1708 Commonwealth Avenue, Richmond**  
**July 17, 2013**  
**10:00 a.m. – 1:30 p.m.**

**AGENDA**

- I. Opening and Pledge of Allegiance – *Don Kaiserman, JLC Chairman* (10:00 – 10:05)
- II. Roll call of VSOs, quorum determination, approval of agenda and introduction of guests – *Don Kaiserman, JLC Chairman* (10:05 – 10:10)
- III. Approve May 22, 2013 meeting minutes – *Don Kaiserman, JLC Chairman* (10:10 – 10:15)
- IV. Opening remarks – *Don Kaiserman, JLC Chairman* (10:15 – 10:20)
- V. Presentation – *Katie Murphy, Manager of Strategic Initiatives, Northern Virginia Technology Council* (10:20 – 10:35)
- VI. Reports (10:35 – 10:55)
  - a. Board of Veterans Services – *Thad Jones, BVS Chairman* (5 minutes)
  - b. Veterans Services Foundation – *Rich Schollmann, VSF Chairman* (5 minutes)
  - c. Virginia Military Advisory Council – *Chip Moran, JLC Representative* (5 minutes)
  - d. Department of Veterans Services – *Paul Galanti, Commissioner* (5 minutes)

Break (10:55 – 11:00)

- VII. New business (11:00 – 12:00)
  - a. Review, discuss, adopt, and prioritize 2013-2014 JLC Initiatives – *Brett Reistad, Legislative Officer* (60 minutes)

Lunch (12:00 – 12:30)

- New business (continued) (12:30 – 1:20)
  - a. Review, discuss, adopt, and prioritize 2013-2014 JLC Initiatives – *Brett Reistad, Legislative Officer* (30 minutes)
  - b. Nominating Committee Report – *Carmen Gentile, Chairman* (5 minutes)
  - c. Elect JLC Chairman and Vice Chairman – *Don Kaiserman, JLC Chairman* (5 minutes)
  - d. Other new business and open discussion – *Don Kaiserman, JLC Chairman* (10 minutes)

VIII. Public comment period (1:20 – 1:25)

IX. Closing remarks – *Don Kaiserman, JLC Chairman* (1:25 – 1:30)

X. Adjourn (1:30)

## ATTACHMENT 2

To: Chairman, Joint Leadership Council (JLC) of Veterans Service Organizations

From: Stuart Williams, MOAA representative to the JLC

Date: June 18, 2013

Subject: Meeting of the Northern Virginia Technology Council (NVTC)

As requested by JLC leadership I attended a meeting on May 29, 2013 of the NVTC task force shaping a Veterans Employment Initiative. The JLC had been invited to provide a background and overview of the JLC. At the meeting I handed out the attached information sheet covering the JLC and gave a verbal report on JLC activities. I also tied in the Virginia Values Veterans (V3) initiative which was recognized by the NVTC members at the meeting. Also attending the meeting was Mike Coleman (on site) from the office of the Secretary of Veterans Affairs & Homeland Security and Andy Schwartz from DVS by telephone.

The NVTC is the membership and trade association for the technology community in Northern Virginia. As the largest technology council in the nation, NVTC serves about 1,000 companies from all sectors of the technology industry, as well as service providers, universities, foreign embassies, non-profit organizations and governmental agencies. Through its member companies, NVTC represents about 200,000 employees in the region. The NVTC website is: <http://www.nvtc.org/index.php>. NVTC is a member of the Technology Councils of North America (TECNA) with website at [http://www.technologycouncils.org/#bf\\_miniCal\\_100](http://www.technologycouncils.org/#bf_miniCal_100).

The NVTC has a Veterans Employment Initiative which is a new program to connect veterans to employment opportunities within Virginia's technology community.

Through this initiative, NVTC plans to provide tools and resources to match veterans with internships, jobs, mentorships and certifications, while also providing support to member companies in their efforts to hire, train and retain qualified veteran employees. In tandem, NVTC is collaborating with state and federal policymakers to expedite legislative and/or regulatory action that enhances companies' ability to hire and train veterans on any federal contract.

More information is available at: [http://www.nvtc.org/resources/vet\\_initiative.php](http://www.nvtc.org/resources/vet_initiative.php).

Suggest that a NVTC representative be invited to brief the status of the Veterans Employment Initiative at a future meeting of the JLC.

**Commonwealth of Virginia**  
**Joint Leadership Council of Veterans Service Organizations**

**Mission Statement**

*The Council provides advice and assistance to the Governor and the Department of Veterans Services (DVS) on matters of concern to the veterans community and provides a conduit of information to and from the veterans service organizations on policy and legislation, pending and enacted, as well as information on existing services.*

**Vision**

*The Council will:*

- *Give DVS a broader understanding of the services needed by veterans.*
- *Give veterans a broader understanding of the services available to them as citizens of Virginia.*
- *Help veterans and veterans' organizations achieve legislation or policy changes needed to improve veterans' services.*
- *Enhance communications between the public, the state government, and the state's veterans.*
- *Help the Governor and DVS develop policies that improve services for Virginia's veterans.*
- *Help the General Assembly develop and pass laws that more clearly respond to veterans' needs.*

**Issue Identification, Development, and Advocacy**

As the voice of Virginia's veterans, the JLC identifies issues of concern to veterans, their spouses, orphans, and dependents and serves in an advisory capacity to DVS. Each year, the JLC presents a list of key initiatives for consideration by the Governor and General Assembly.

**Communication**

The JLC supports DVS by communicating information to veterans about their benefits, events, and issues. JLC members promptly relay information to the members of their respective organizations, amplifying the effectiveness of DVS' communications and initiatives. Additionally, cross-sharing of information has resulted in partnerships and cooperative efforts among the various veterans service organizations.

**Contact**

Colonel Stuart Williams, USA (Ret)  
9158 Rockefeller Lane  
Springfield, Virginia 22153  
(703) 644-4126 (h); (703) 595-3252 (c)  
[shw13@att.net](mailto:shw13@att.net)

## **ATTACHMENT 3**

### **REPORT TO THE JOINT LEADERSHIP COUNCIL (JLC) OF VETERANS SERVICE ORGANIZATIONS July 17, 2013**

The Board of Veterans Services (BVS) has met since the last meeting of the JLC. The BVS report to the JLC of May 22, 2013 remains valid.

The BVS will meet on Wednesday, July 24. At the meeting, the BVS will:

- Review, discuss, adopt, and prioritize BVS 2013-14 Initiatives;
- Receive a presentation on the initiatives adopted by the JLC at its meeting on July 17 so that the BVS may fully support the JLC's initiatives.

The BVS looks forward to continuing its outstanding partnership with the JLC in 2013-14 to serve Virginia's veterans.

Respectfully submitted,

Thad A. Jones  
Chairman

## **ATTACHMENT 4**

### **VETERANS SERVICES FOUNDATION REPORT TO Joint Leadership Council (JLC) of Veterans Service Organizations July 17, 2013**

The Veterans Services Foundation (VSF) Board of Trustees has not held any meetings since last JLC meeting. The VSF Report to the JLC on 22 May remains valid. The end of FY13 VSF Financial Report is not as yet available.

The next Board meeting is scheduled for August 7, 2013 at the American Legion Headquarters on Commonwealth Avenue, Richmond. There will be Development and Finance Committee meetings prior to the Board meeting. Items for the next meeting may include: (1) approval of the Final Quarter FY13 Financial Statement; (2) approval of the review and updates of VSF-DVS Joint Policies #7, 8, and 9, and a possible update to #5; (3) consider a new policy on charitable bequests/planned giving; (4) review VSF FY13 fundraising program and projections for FY14; (5) appointment of committee chairs for FY14; and (6) consideration of budget adjustments for FY14, including requests for funding the V3 Program.

Respectfully submitted,

Richard A. Schollmann  
VSF Chairman

## ATTACHMENT 5



# COMMONWEALTH of VIRGINIA

## Department of Veterans Services

Paul E. Galanti  
Commissioner

Telephone: (804) 786-0286  
Fax: (804) 786-0302

Memorandum for: Chairman Donald Kaiserman  
Members, Joint Leadership Council of Veterans Service Organizations

From: Paul E. Galanti, Commissioner

Date: July 17, 2013

Subject: Department of Veterans Services report

As we begin state Fiscal Year (FY) 2014, I am more pleased than ever about all that the Joint Leadership Council of Veterans Service Organizations (JLC) and the Department of Veterans Services (DVS) has accomplished together to serve Virginia's veterans. The wisdom, guidance, and support of the JLC members, and of the 24 Veterans Service Organizations and the more than 250,000 veterans they represent, has been and will continue to be critical to the successful delivery of veterans programs in the Commonwealth of Virginia.

The JLC has earned my sincere trust and admiration, and I look forward to reporting to you at future meetings on all that the Commonwealth is doing to serve the more than 837,000 Virginians who have worn the uniform of our country. In the next year, we expect to launch new or expanded services to our veterans, including:

- Open a new Benefits Field Office in Henrico County;
- Break ground on the 40-bed addition to the Sitter & Barfoot Veterans Care Center in Richmond;
- Complete the projects to add more than 4,000 pre-installed outer burial containers at the Albert G. Horton, Jr. Memorial Veterans Cemetery (Suffolk) and more than 1,600 at the Virginia Veterans Cemetery (Amelia);
- Break ground on the expansion of the Virginia War Memorial in Richmond;
- Continue the success, begun in FY 2013, of creating employment opportunities for Virginia veterans through the Virginia Values Veterans (V3) Program;
- Develop and deploy a new application and approval system for the Virginia Military Survivors and Dependent Education Program;
- Celebrate the five-year anniversary of the Virginia Wounded Warrior Program, including the expanded focus on housing development and homeless veteran's issues.

## ATTACHMENT 6

MOAA Proposed EO29 Recommendations (FYs 2015 & 2016) for consideration by the JLC

\* For reference only – does not indicate priority

#*	Recommendation	Summary
1.	Provide appropriate legislation to allow electronic return of voted ballot from military overseas voters.	SB 830 as introduced in 2013 and tabled in the House Elections subcommittee of the Privileges and Elections Committee would allow the State Board of Elections to proceed with a process that would permit the secure electronic return of a ballot voted by uniformed service members stationed overseas. A review and preparation of recommendations is now in process by the Cyber Security Advisory Committee of the Virginia Joint Commission on Technology and Science. Cyber Security Advisory Committee at its meeting on 15 July appears to be favorably disposed. Next meeting is 18 September.
2.	Provide appropriate legislation and funding to ensure base funding for the Virginia Values Veterans (V3) Program to enhance employment opportunities for veterans.	The V3 program requires an adequate level of base funding in FY15 and FY16 to continue the program. Various incentives such as tax relief or grants to recognize a company's success in meeting incentives were proposed, but not adopted in 2013. Further study is needed to determine if incentives of this nature are needed.
3.	Provide funds to fully staff, train, and retain claims agents in DVS along with full utilization of the automatic claims processing system to assure the timely development and submission of accurate claims.	837,000 veterans live in Virginia and it is projected that they will increase to 850,000 by 2017. Based on a requirement to have a ratio of one claims agent for every 23,000 veterans, this portends an increase in agents. More importantly, it requires that DVs have the capability to retain claims agents by being able to offer them competitive compensation based on their operational base and qualifications. In recent years there has been a high turnover among claims agents as they move to higher paying positions. The Governor and General Assembly should support competitive compensation authority and funding for DVS claims agents. Also, assure that the automatic claims processing system advances efficiently and rapidly.
4.	Plan, implement, and sustain an effective Homeless Veteran Program (HVP) to eliminate homelessness within our Virginia Veterans population.	Some 2,000 to 3,000 veterans are estimated to have been homeless in Virginia at some point in 2012. VWWP was able to help 157 veterans and family members across the Commonwealth find housing and supportive services in 2012. JLARC completed a significant study in June 2010 documenting a baseline size and nature of issue. Two full time positions to plan a HVP have now

		<p>been filled in DVS</p> <p>The Governor and the General Assembly should approve adequate funding in the FY 2015/ FY 2016 Biennial Budget for the Homeless Veteran Program in amounts to permit moving the HVP forward. Up to \$450,000 and \$970,000 respectively.</p>
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MOAA Proposed EO29 Recommendations (FYs 2015 & 2016) for consideration by the JLC

\* For reference only – does not indicate priority

#*	Recommendation	Summary
5	Fund Virginia Wounded Warrior Program	<p>The Virginia Wounded Warrior Program (VWWP) was established in law<sup>1</sup> by the 2008 Virginia General Assembly to ensure that services to veterans and their families are readily available in all areas of the Commonwealth.</p> <p>The Virginia Wounded Warrior Program’s vision for the future is <i>“Enhancing the quality of life for Virginia’s veterans, service members and their families.”</i></p>
6.	Provide one time funding to commission an update the 2010 Virginia Tech report “Assessing the Experiences, Supportive Service Needs and Service Gaps of Veterans in the Commonwealth of Virginia” to measure veterans health care status and needs.	<p>The Virginia Wounded Warrior program has made laudable progress since it was created by the 2008 Virginia General Assembly. The 2010 Virginia Tech Report provided a baseline status report for organization, staffing, and goal establishment for the VWWP. An update of the report would serve to determine if Virginia veterans being properly and adequately served by the VWWP.</p>
7.	Support passage of a resolution by the 2014 General Assembly to enable a referendum to be placed on the ballot in the November 2014 election to amend the Constitution of Virginia to provide a real property tax exemption for spouses of military killed in action	<p>House Joint Resolution (HJ) 551 passed the 2013 General Assembly. This was Step 1 of a four-step process to amend Virginia’s constitution. Passage of an identical resolution by the 2014 General Assembly is Step 2. Step 3 would be the ballot referendum, followed by Step 4 (if approved by the voters) of enabling legislation by the General Assembly.</p>

MOAA Proposed "Watch Items"

#*	Background	Comment
A.	<p>JLC review Compact with Virginia's Veterans as presented in the 2012 DVS Commissioners Report and approved by the JLC on 19 December 2012.</p> <p>The JLC is scheduled to ratify a compact at its October meeting.</p>	<p>Compact is addressed but not fully defined in: DVS Commissioner's 2012 Report page 4 and in Virginia Code at § 2.2-2004. Additional powers and duties of Commissioner. 17. Establish and implement a compact with Virginia's veterans, which shall have a goal of making Virginia America's most veteran-friendly state. The compact shall be established in conjunction with the Board of Veterans Services----. § 2.2-2454. Powers and duties of Board [of Veterans Services] 2. Investigate issues related to the provision of care and services to veterans, upon request of the Commissioner of Veterans Services or the Governor;</p> <p>3. Study all matters affecting the welfare of Virginia citizens who are veterans or dependents or survivors of such veterans, and make recommendations to the Commissioner of the Department of Veterans Services.</p>
B.	<p>JLC review its status and determine if it desires to amend, or revoke and substitute, Virginia Code 2.2-2681 (Joint Leadership Council of Veterans Service Organizations) which established the JLC as an advisory council within the executive branch of the state government.</p>	<p>Virginia Code at § 2.2-2681 states:            "A. The Joint Leadership Council of Veterans Service Organizations (the Council) is established as an advisory council, within the meaning of § <a href="#">2.2-2100</a>, in the executive branch of state government."            In the past the JLC advocated issues not necessarily on the Governor's agenda. In the current administration this is not entirely the case.</p>
C.	<p>Provide an Alternate Reliable Revenue Source (ARRS)</p>	<p>Issue was last introduced for the 2011 GA (HB2323 +)            Prior to proceeding, there is a need to develop substantiating information that a revenue source outside the normal budgeting process is needed to allow the Department of Veterans Services to consistently meet the needs of Virginia's veterans as part its Compact with Veterans, and how the funds generated would be used.</p>
D.	<p>Northern Virginia Veterans Care Center</p>	<p>Periodic review of progress.</p>

# Proposed JLC 2013-14 Initiatives

## Proposed Initiative

### Military Officers Association of America (MOAA) 01 Electronic Return of Absentee Ballots by Overseas Uniformed Military Voters

1. **Objective:** To allow for electronic return of absentee ballots by Overseas Uniformed Military voters.

2. **Background:**

- Overseas uniformed service personnel and their dependents often experience difficulties in casting absentee ballots due to a number of factors, including the timely return of a voted ballot.
- Currently an overseas voter can electronically register and receive an absentee ballot per the Uniformed & Overseas Absentee Voter Act (UOCAVA). By Virginia Code the ballot must be returned via “snail” mail.

Election	Total Votes*	Total Absentee*	UOCAVA**
2008 – Nov. Gen.	3,752,858	506,672	14,107 (0.4% of Total Vote)
2010 – Nov. Gen.	2,214,503	106,888	1,785 (0.08% of Total Vote)
2012 – Nov. Gen.	3,896,846	447,907	Not yet available

\*Per Virginia State Board of Elections – Election Results

\*\*Ballots Submitted by Domestic & Overseas Uniformed Military (Election Assistance Commission report)

- SB830 as passed by the Senate in the 2013 General Assembly would allow the State Board of Elections to provide instructions and procedures to enable uniformed-service voters outside the United States to return voted military overseas ballots securely by electronic format. As defined in subsections 9 and 10 of §24.2-452a “Uniformed-service voter” means an individual who is qualified to vote and is:
  - a) A member of the active or reserve components of the Army, Navy, Air Force, Marine Corps, or Coast Guard of the United States who is on active duty;
  - b) A member of the Merchant Marine, the commissioned corps of the Public Health Service, or the commissioned corps of the National Oceanic and Atmospheric Administration of the United States;
  - c) A member on activated status of the National Guard; or
  - d) A spouse or dependent of a member referred to in this definition.and. “United State,” used in the territorial sense, means the several states, the District of Columbia, Puerto Rico, the United States Virgin Islands, and any territory or insular possession subject to the jurisdiction of the United States.
- The Impact Statement for SB830 states that there is no material fiscal impact on SBE. However there may be localities may experience increased costs

3. Discussion:

- The State Board of Elections has expressed confidence in developing procedures that address privacy and security concerns relative to the electronic transmission, management, and counting absentee ballots from uniformed military personnel serving overseas.
- Legislation is required to permit electronic return of the voted ballot from uniformed military personnel serving overseas.

4. Recommendation: That the Governor and General Assembly enact legislation to permit the electronic return of absentee ballot by overseas uniformed military voters.

**Proposed Initiative**  
**MOAA-02**

**Educating Employers on the Value of Hiring Veterans**

**1. Objective:**

To encourage businesses to hire and retain veterans to both take them off of unemployment and have jobs ready for veterans when they leave the military or return from deployment.

**2. Background:**

- a. The jobless rate for veterans who were in the service following September 11, 2001 was 9.9 percent last year, according to the Bureau of Labor Statistics for veterans of all ages. However, for veterans in the age group 18 to 24 the percentage is 20.4 percent. This far exceeds the employment rate for nonveterans for the same periods.
- b. The very successful Virginia Values Veterans (V3) Program, under the Department of Veterans Services (DVS), educates employers and their human relations staff regarding the advantages in hiring veterans. Base funding will continue to be required for the V3 Program, however, the success of any program of this nature is retention of hired veteran employees.
- c. One new approach offered in the 2013 General Assembly Session under SB831 was to offer a Gold-Certified Veterans Employment status which focused on employee hiring and retention. It passed the Senate unanimously. Concern in the House focused around the perpetual nature of the grants rather than a one-time payment and the high annual salary (\$50,000) required to qualify. This indicates the need to further develop the program before suggesting that incentives be established.

**3. Discussion:**

- a. The V3 Program has proven to be successful and base funding in the 2015-2016 biennial budget should continue funding at levels to permit its success to grow.
- b. The Gold-Certified Veterans Employment Grant Fund program should be further investigated by the Virginia Values Veterans Program and revisited in advance of the 2015 General Assembly Session to ensure that:
  - 1.) A clear advantage is achieved through an incentive award program; and
  - 2.) The minimum annual salary level of the employee is realistic (e.g., at least \$30,000).

**4. Recommendation:**

That the Governor and General Assembly adopt budgeting/legislation that will allow the continuance of base funding for the Virginia Values Veterans Program to support hiring and retention of veterans, particularly those who have served during the past decade, and those returning from deployment.

**Proposed Initiative**  
**MOAA-03**

**Hiring and Retention of Benefit Services Agents**

1. **OBJECTIVE:**

Provide funds to fully staff, train, and retain Department of Veterans Services claims agents along with full utilization of the automatic claims processing system to assure the timely development and submission of accurate veterans claims to the U.S. Department of Veterans Affairs.

2. **BACKGROUND:**

- a. Veterans are entitled to disability compensation from the federal government for injuries or illnesses resulting from military service. To obtain this compensation, Veterans must file claims with the U.S. Department of Veterans Affairs (USDVA).
- b. Filing a claim is a long, complex process – most Veterans seek assistance to file a claim.
- c. To assist Virginia Veterans, the Virginia Department of Veterans Services (DVS) operates 22 Benefits Field Offices that provide free assistance to Virginia Veterans in developing and filing claims for compensation and pension benefits with the USDVA.
- d. Virginia receives a considerable return on investment for helping Virginia Veterans. In FY10, DVS filed 26,431 claims on behalf of Virginia Veterans, resulting in an estimated \$122 million in new disability compensation payments. In FY11 the number of claims increased to 28,541 with an estimated in new payments impact of \$154 million.
- e. DVS Benefit Field Offices are staffed by trained claims agents, particularly in using the automatic claims processing system, who provide direct, one-on-one assistance to veterans in developing and filing claims with the USDVA.
- f. Knowledgeable trained and experienced claims agents are in high demand and many DVS agents leave for higher paying jobs that DVS cannot match.
- g. DVS has had a 70 percent claims agent turnover during the past five years.
- h. DVS does not have the authority and financial resources to retain trained and experienced claims agents by being able to offer them competitive salaries based on their operational base.

3. **DISCUSSION:**

The solution is to provide sufficient authorization and appropriation of funding so that DVS can offer competitive salaries based on each agent's operational base and qualifications.

4. **RECOMMENDATION:**

That the Governor and General Assembly support competitive compensation authority and funding for DVS claims agents.

**Proposed Initiative**  
**MOAA-04**

**Implementing the Virginia Homeless Veterans Program**

1. **OBJECTIVE:** To plan, implement, and sustain an effective program to eliminate homelessness within our Virginia Veterans population.
2. **BACKGROUND:**
  - a. Homelessness within the Virginia Veterans population has been a long-term issue predating the War in Vietnam. JLARC completed a significant study<sup>1</sup> in June 2010 documenting a baseline size and nature of issue. That study also stated that significant long-term funding and a dedicated program would be required to solve the problem. Recent studies by the VA, Veterans Advocacy Groups, and some localities fully support the urgent need to implement the JLARC study recommendations
  - b. Those recent studies also establish that there have been significant increases in the number and percentage of women veterans and the children of veterans among the homeless.
  - c. Governor McDonnell specifically addressed Homeless Veterans in two major policy statements, his Executive Order 29 which directs the establishment of a Veterans Compact and in the establishment of a Homeless Working Group which includes the homeless veterans' population.
  - d. The General Assembly approved two full time positions within the Department of Veterans Services to plan and coordinate an intensive program to dramatically reduce homelessness among veterans and their families. A HVP Director has been hired and the development of policies and procedures has begun.
3. **DISCUSSION:**
  - a. Elimination of homelessness among Virginia's Veterans requires a long-term effort. During the first year (FY 2015) an effective Homeless Veterans Program (HVP) will require an operating budget of about \$450,000<sup>2</sup>. The HVP should continue development of a targeted program incorporating the resources of the VA and the Virginia's Wounded Warrior Program which have established unique resources for assisting veterans. The HVP should coordinate with community resources, identify grants which are available to reduce homelessness. Identify locales to establish pilot programs, and, and field test pilot outreach efforts (1 and multi-day Stand-downs) in at least 2 urban areas and 4 multi-county rural areas. Also, form partnerships with emergency shelter providers, and transition housing in proximity to the Virginia VA Centers.
  - b. The second year of the HPV (FY 2016) should be, based upon lessons learned with a goal to implement specific programs that effectively serve urban, suburban, and rural areas. These programs, in addition to immediately reducing veteran homelessness, should continue to explore, test, and refine methods to enhance services throughout the Commonwealth. A budget of about \$970,000<sup>2</sup> may be required to implement the comprehensive statewide HVP.
  - c. The goal for the out-years should be to provide an intensive and extensive delivery of services to eliminate homeless among Virginia's Veteran population. Future budget requests should be based upon the refined procedures developed to increase private/local government

partnerships, to provide all levels of housing thru grants and local organizations, work with Virginia's Community Colleges to provide skilled job training, and providing counseling and health care using the Veterans Administration, Virginia's Community Service Boards, and local Free Health Clinics.

**RECOMMENDATION:** That the Governor and the General Assembly approve adequate funding in the FY 2015/ FY 2016 Biennial Budget for the Homeless Veteran Program in amounts to permit moving the Homeless Veterans Program forward. Up to \$450,000 and \$970,000 respectively<sup>2</sup>.

1. JLARC Study #402 *Reducing Veteran Homelessness in Virginia* issued in September 2010
2. JLARC cost estimates are found in Table 16 (page 93) in items 3), 4), and 12).

**Proposed Initiative**  
**MOAA-5**

**Funding for Virginia Wounded Warrior Program**

**Objective:** Provide funding to ensure that veterans and their families especially those affected by stress related conditions and traumatic brain injuries have access to a network of community-based services for healthcare, behavioral healthcare, rehabilitative services and other critical support.

**2. Background:**

- a. The Virginia Wounded Warrior Program (VWWP) was established in law<sup>2</sup> by the 2008 Virginia General Assembly to ensure that services to veterans and their families are readily available in all areas of the Commonwealth. It is operated by the Virginia Department of Veterans Services in cooperation with the Virginia Departments of Behavioral Health and Developmental Services and Aging and Rehabilitative Services. Benefitting from the support of the Governor and his Cabinet Secretaries for Veterans Affairs and Homeland Security, Health and Human Resources, and Public Safety, the VWWP is guided by a state-level Interagency Executive Strategy Committee that comprises the agency heads of many of the health and human services agencies, the Adjutant General of the Virginia National Guard, and the Director of the Veterans Integrated Services Network (VISN 6) that serves Virginia. The program monitors and coordinates behavioral health, rehabilitative, and support services for veterans and their families and addresses a myriad of health and wellness issues such as housing, financial assistance, employment, primary healthcare and other community services.
- b. Virginia is home to approximately 837,000 veterans and is expected to grow to 850,000 in 2017. Included in this population are over 300,000 who served since September 11, 2001. The Virginia National Guard and Reserve components have been called upon as never before to deploy to combat zones.
- c. The challenges of the current conflicts are enormous. Data indicate that 38% of Soldiers and 31% of Marines report psychological symptoms. Among members of the National Guard, the figure rises to 49%. Psychological symptoms are significantly higher among those with repeated deployments.
- d. Funding for the VWWP comes from the General Fund, private donations through the Virginia Veterans Services Foundation and grants.

**3. Discussion:**

- a. Virginia should do everything in its power to attend to those who have been defending our liberties and who may need services and community support because of stress related injuries and/or traumatic brain injuries resulting from military service.
- b. The Virginia Wounded Warrior Program's vision for the future is "*Enhancing the quality of life for Virginia's veterans, service members and their families.*" This simple yet powerful statement is intended to provide guidance for the continued success and expansion of the Virginia Wounded Warrior Program, ensuring that the on-going focus is always Virginia's

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<sup>2</sup> §2.2-2001.1 of the *Code of Virginia*.

service members, veterans and families who have sacrificed their personal safety and needs to ensure freedom and liberty for all.

- c. In FY 2012 VWWP increased by 220% the number of veterans and family members served (from 1650 to 5283) since it first started serving veterans and families in Virginia's communities in FY 2010. The success of the program ensures that demand for services will continue to rise, especially as the population of service members from Iraq and Afghanistan and their families return from deployment and renew their daily lives, employment, activities and community participation. It is expected that the impact of the wars will continue to be felt for decades, just as previous wars have affected the health and well being of service members and their families. It is critical that the Commonwealth continue to recognize and address these concerns.

**4. Recommendation:** That the JLC recommend continued and increased funding for the Virginia Wounded Warrior Program as a priority in the development and approval of the 2015-2016 biennial budget.

**Proposed Initiative**  
**MOAA-06**

**Measure if Virginia Veterans are Being Properly Served**

. **Objective:** Provide funding in the 2014-2016 biennial budget to commission an update to the 2010 Virginia Tech report “*Assessing the Experiences, Supportive Service Needs and Service Gaps of Veterans in the Commonwealth of Virginia*” to measure progress in access to health care, behavioral healthcare and supportive community services, including employment, housing and financial assistance, for veterans, members of the National Guard and Reserves not in active federal service and their families in the Commonwealth.

**2. Background:**

- a. The Virginia Wounded Warrior Program (VWWP) was established in law<sup>3</sup> by the 2008 Virginia General Assembly to ensure that services to veterans and their families are readily available in all areas of the Commonwealth. It is operated by the Virginia Department of Veterans Services in cooperation with the Virginia Departments of Behavioral Health and Developmental Services and Aging and Rehabilitative Services. Benefitting from the support of the Governor and his Cabinet Secretaries for Veterans Affairs and Homeland Security, Health and Human Resources, and Public Safety, the VWWP is guided by a state-level Interagency Executive Strategy Committee that comprises the agency heads of many of the health and human services agencies, the Adjutant General of the Virginia National Guard, and the Director of the Veterans Integrated Services Network (VISN 6) that serves Virginia. The program monitors and coordinates behavioral health, rehabilitative, and support services for veterans and their families and addresses a myriad of health and wellness issues such as housing, financial assistance, employment, primary healthcare and other community services.
- b. Virginia is home to approximately 837,000 veterans and is expected to grow to 850,000 in 2017. Included in this population are over 300,000 who served since September 11, 2001. The Virginia National Guard and Reserve components have been called upon as never before to deploy to combat zones.
- c. The challenges of the current conflicts are enormous. Data indicate that 38% of Soldiers and 31% of Marines report psychological symptoms. Among members of the National Guard, the figure rises to 49%. Psychological symptoms are significantly higher among those with repeated deployments.
- d. To determine the target populations and its needs VWWP contracted for a study with the Virginia Tech Institute for Policy and Governance (VTIPG) in 2009. The VTIPG study assessed the current service experiences (consumer satisfaction), emerging and unserved needs and service gaps within the range of veteran’s services available in the Commonwealth of Virginia. While all veteran experiences and needs were assessed, particular consideration was given to the behavioral health and traumatic brain injury service needs of the veterans of Operation Enduring Freedom (OEF) and Operation Iraqi Freedom (OIF). This study served as the foundation for confirming the infrastructure of the VWWP, and has been instrumental in accessing funds through grant approval.

**3. Discussion:** Continued evolution and support of the VWWP would be enhanced by measuring the needs of the current veterans population and those of their families and the measurement of

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<sup>3</sup> §2.2-2001.1 of the *Code of Virginia*.

progress achieved in addressing those needs. The updated Needs Assessment will provide critical demographic data for continual quality and process improvement of the VWWP and its partner agencies and organizations.

**4. Recommendation:** That the JLC promote one time funding in the 2015 budget to commission an update to the 2010 Virginia Tech report “*Assessing the Experiences, Supportive Service Needs and Service Gaps of Veterans in the Commonwealth of Virginia*” to measure progress in access to health care, behavioral healthcare and supportive community services, including employment, housing and financial assistance, for veterans, members of the National Guard and Reserves not in active federal service and their families in the Commonwealth.

**Proposed Initiative**  
**MOAA-07**

**Real Property Tax Exemption for Spouses of Military Killed in Actions**

**1. Objective:** To provide a real property tax exemption for the primary residence of surviving spouses of members of the military who are killed in action. Such tax exemption may not be claimed by a surviving spouse who has remarried.

**2. Background:**

- Current law only covers disabled veterans and their surviving spouses.
- HJ 551 Constitutional amendment would allow exemption of real property of spouses of soldiers killed in action was introduced in the 2013 General Assembly by Delegate David I. Ramadan.
- HJ 551 Passed in both the House and Senate by unanimous vote.
- It must be passed again in the 2014 General Assembly prior to being placed on the ballot and voted during the November 2014 general election.

**3. Discussion:**

Language as passed in 2013:

Amend Section 6-A of Article X of the Constitution of Virginia as follows:

*(b) Notwithstanding the provisions of Section 6, the General Assembly by general law, and within the restrictions and conditions prescribed therein, may exempt from taxation the real property of the surviving spouse of any member of the armed forces of the United States who was killed in action as determined by the United States Department of Defense, who occupies the real property as his or her principal place of residence. The exemption under this subdivision shall cease if the surviving spouse remarries and shall not be claimed thereafter. This exemption applies regardless of whether the spouse was killed in action prior to the effective date of this subdivision, but the exemption shall not be applicable for any period of time prior to the effective date. This exemption applies to the surviving spouse's principal place of residence without any restriction on the spouse's moving to a different principal place of residence and without any requirement that the spouse reside in the Commonwealth at the time of death of the member of the armed forces.*

**4. Recommendation:**

That the JLC support passage in the 2014 General Assembly.

**Proposed Initiative**  
**Fleet Reserve Association (FRA) 01**

**Hunting, Fishing, and Trapping Licenses**

1. **Objective:** To ensure that all Virginia Veterans have the ability to obtain a basic hunting and fishing license at no cost for those service members who have a 70% or greater military service disability.

2. **Background:**

- The Virginia Department of Game and Inland Fisheries (VDGIF) offers a lifetime freshwater fishing license, hunting license, or combined hunting and freshwater fishing license to resident veterans with a permanent and total service-connected disability at no cost.
- VDGIF also offers a life-time trapping license to resident veterans with a permanent and total service-connected disability for \$15.
- Virginia veterans with a 70% or greater service-connected disability may purchase an annual state resident basic hunting license at half price (\$12 in FY13). Veterans with a 70% or greater service-connected disability who reside out of state may purchase an annual non-resident basic hunting license at half price (\$56 in FY13).

3. **Discussion:**

- Currently this entitlement only applies to service members that have a 70% or greater service-connected disability and there is a fee associated with this benefit.

4. **Recommendation:**

This entitlement should be for “All” Virginia Military Service Members that have a 70% or greater military service disability at no charge for the basic hunting and fishing license.

**Proposed Initiative**  
**FRA-02**

**Veterans Retirement Tax Relief Plan**

1. **OBJECTIVE:** The purpose of this position paper is to introduce a plan for the Commonwealth of Virginia to provide a tax relief for all Military Veterans when they retire at age 65 or older.
  
2. **BACKGROUND:** An exemption for military retired pay has been proposed several times in recent years, including House Bill 981 from the 2010 General Assembly, which was left in committee. The Department of Taxation estimated that the bill would reduce state General Fund revenue by \$242 million the first year and \$160 to \$170 million a year after that. Of course, any reduced revenue would have to be made up for by:
  - a) Reducing services or funding less expensive way to provide those services.
  - b) Eliminating services, agencies, or by consolidating positions to be more efficient.
  - c) Raising taxes or finding other sources of revenue such as the lottery or hot lanes on I - 95.
  - d) Increasing the number of Virginia State Residents and businesses.

For comparison, the General Fund portion of the DVS budget is approximately \$8.5 million a year and 100 positions. If the Department of Taxation calculations are correct, you'd have to eliminate 20 agencies the size of DVS to offset the reduced revenue. However, when the big picture was reviewed, there will be a positive cash flow for the Commonwealth of Virginia instead of a negative one. Based on the Department of Taxation initial finding, the Joint Leadership Council of Veterans Service Organizations (JLC) considered, and rejected, making this one of their legislative objectives a last year. The JLC has tried to focus on objectives that it considers to: "need to have, rather than nice to have," and this proposal was eliminated from consideration for that reason. Given the current real-time environment and because many other states are taking the lead on the issue, the FRA is recommending that the JLC revisit this legislative objective and join our **SIX** other neighboring states and the **40** other states in reducing or eliminating the state income tax which is currently being withheld or the Commonwealth could lose potential residents and businesses which will result in **a loss of millions of dollars income for the state.**

3. **DISCUSSION:** The one thing that may have been overlooked in the initial findings is that more Veterans would select Virginia as their home state instead of living in Maryland, Pennsylvania, Tennessee, North Carolina, Delaware and DC if there was more tax relief for military veterans. With the DoD cuts on the raise for CY 2014, a proposed benefit such this, could help keep Military Veterans in Virginia and that would have a profound effect on the Commonwealth. With 46 out of 50 having these benefits for military personnel and veterans, it's time of the Commonwealth of Virginia to lead the pack and be the most Veteran friendly state in the country or we will lose valuable resources that men and women bring to the table after years of defending our great nation.

4. **RECOMMENDATION**: The FRA is proposing a plan that will provide all military veterans with a tax credit of \$5,000 when veterans retire at age 65 or older. Let's make Virginia the best Veteran friendly state in the **Nation**.

**Proposed Initiative**

**FRA-02**

**Veterans Retirement Tax Relief Plan**

<b>State</b>	<b>Military Retirement Pension Exempt from State Taxation</b>	<b>Amount of Exemption or Exclusion</b>
Alabama	Yes	exemption (Alabama Department of Revenue at <a href="http://www.ador.state.al.us/">http://www.ador.state.al.us/</a> )
Alaska	No state income tax	NA
Arizona	Income exclusion	Up to \$2,500 exclusion (Ariz. Rev. Stat. § 43-1022) (additional information at <a href="http://usmilitary.about.com/gi/dynamic/offsite.htm?site=http://www.revenue.state.az.us/">http://usmilitary.about.com/gi/dynamic/offsite.htm?site=http://www.revenue.state.az.us/</a> )
Arkansas	Income exclusion *	Up to \$6,000 (Ark. Code Ann. § 26-51-307) <a href="http://usmilitary.about.com/gi/dynamic/offsite.htm?site=http://www.ark.org/dfa/">http://usmilitary.about.com/gi/dynamic/offsite.htm?site=http://www.ark.org/dfa/</a>
Colorado	Income exclusion *	Up to \$20,000 for those age 55 to 65; up to \$24,000 for those age 65 or older (Colo. Rev. Stat. § 39-22-104)
Connecticut	Income exclusion *	Connecticut exempts 50% of federally taxable military retirement pay from the state income tax. The exemption applies to federal retirement pay to members of the U.S. Army, Navy, Air Force, Marines, Coast Guard, and Army and Air National Guard (CGS § 12-701(20)(B)(xvii)).
Delaware	Income exclusion *	Up to \$2,000 of any pension income for people under age 60; up to \$12, 500 for people age 60 or older. <a href="http://www.state.de.us/revenue/PIT_FAQ.shtml">http://www.state.de.us/revenue/PIT_FAQ.shtml</a>
District of Columbia	Income exclusion	The lesser of \$3,000 or the military retirement pay for people age 62 or older (D.C. Code Ann. § 47-1803.02)
Florida	No state income tax	NA
Georgia	Income exclusion *	Up to \$15,000 for those age 62 or older and are totally disabled (GA. Code Ann. § 48-7-27)
Hawaii	Yes	Full exemption (Hawaii Rev. Stat. § 235-7(a)(3))

Idaho	Income exclusion	Taxpayers age 65 and older or age 62 and disabled may exclude \$19,920 (single filers) or \$29,880 (joint filers) (Idaho State Tax Commission at <a href="http://www.tax.idaho.gov/Conformity_to_%20IRC_%202004.htm">http://www.tax.idaho.gov/Conformity_to_%20IRC_%202004.htm</a> )
Illinois	Yes	Full exemption (35 ILCS 5/203) additional information at <a href="http://www.iltax.com/LegalInformation/letter/rulings/it/2000/ig000073.pdf">http://www.iltax.com/LegalInformation/letter/rulings/it/2000/ig000073.pdf</a>
Indiana	Income exclusion	Up to \$2,000 for retirees age 60 or over (single filers) and up to \$4,000 for joint Filers (additional information at <a href="http://www.in.gov/dor/individual/deductions.html#lottery">http://www.in.gov/dor/individual/deductions.html#lottery</a> )
Iowa	Income exclusion *	Exclusion of up to \$12,000 (joint returns), and up to \$6,000 (other returns) of military retired pay (Iowa Department of Revenue at <a href="http://www.state.ia.us/tax/educate/faqinc.html#13">http://www.state.ia.us/tax/educate/faqinc.html#13</a> )
Kansas	Yes	exemption (Kansas Department of Revenue at <a href="http://usmilitary.about.com/gi/dynamic/offsite.htm?site=http://www.ink.org/public/kdor/">http://usmilitary.about.com/gi/dynamic/offsite.htm?site=http://www.ink.org/public/kdor/</a> )
Kentucky	Yes/Income exclusion *	Full exemption for people who retire before January 1,1998 ; for those who retire after this date, partial exemption
Louisiana	Yes	Full exemption (Louisiana Department of Revenue at <a href="http://www.rev.state.la.us/forms/publications/20162(6_04).pdf">http://www.rev.state.la.us/forms/publications/20162(6_04).pdf</a> )
Maine	Income exclusion *	Up to \$6,000 exclusion; amount reduced by Social Security benefits and railroad retirement benefits (Me. Rev. Stat. Ann. Tit. 36 § 5122(2)(M)) (Additional information at <a href="http://mainegovimages">http://mainegovimages</a> ).
Maryland	Income exclusion *	Up to \$5,000; must be at least age 55 on last day of taxable year and an enlistee at time of retirement. Amount is reduced by 50% of the amount by which federal adjusted gross income exceeds \$17,500 (Md. Code Ann. Tit. 10 § 207) (additional information from Department of Revenue at <a href="http://usmilitary.about.com/gi/dynamic/offsite.htm?site=http://www.marylandtaxes.com/">http://usmilitary.about.com/gi/dynamic/offsite.htm?site=http://www.marylandtaxes.com/</a> Maryland raised their subtraction modification on all military retirees and their spouses receiving SBP, a \$5000 reduction in 2006. This was signed into law by Governor Erlich.
Massachusetts	Yes	Full exemption (Mass. Gen. Laws Ann. Tit. 62 § 2(a)(2)(E) (additional information from Massachusetts Department of Revenue at <a href="http://www.dor.state.ma.us/">http://www.dor.state.ma.us/</a> )
Michigan	Yes	Full exemption (Mich. Stat. Ann. 206 § 30) (additional information from Department of Treasury at <a href="http://www.michigan.gov/treasury/0,1607,7-121-24321-6440--F,00.html">http://www.michigan.gov/treasury/0,1607,7-121-24321-6440--F,00.html</a> )
Minnesota	Income	\$14,500 (single filers) and \$18,000 (joint filers); taxpayer must be age 65 or older

	Exclusion *	
Mississippi	Yes	Full exemption (Miss. Code Ann. § 27-7-15)(additional information from Mississippi State Tax Commission at <a href="http://www.mstc.state.ms.us/taxareas/individ/rules/ireg704.pdf">http://www.mstc.state.ms.us/taxareas/individ/rules/ireg704.pdf</a> )
Missouri	Income exclusion	A \$6,000 pension exclusion for single filers and \$12,000 for joint filers is allowed for people earning below certain income limits (Missouri Department of Revenue at <a href="http://dor.mo.gov/tax/personal/faq/individ.htm#q11">http://dor.mo.gov/tax/personal/faq/individ.htm#q11</a> )
State	Military Retirement Pension Exempt from State Taxation	Amount of Exemption or Exclusion
Montana	Income exclusion *	There is a \$3,600 exclusion, if adjusted gross income is less than \$30,000. (Montana Department of Revenue at <a href="http://discoveringmontana.com/revenue/forindividuals/individualincome/calculationiit.asp">http://discoveringmontana.com/revenue/forindividuals/individualincome/calculationiit.asp</a> )
Nevada	No state income tax	NA
New Hampshire	No state income	NA
New Jersey	Yes	Full exemption (N.J. Stat. Ann § 54A:6-26)
New Mexico	Income exclusion*	Taxpayers age 65 or older may exclude up to \$8,000 of income from any source (\$16,000 for joint filers), if they earn less than \$28,000 in any year)
New York	Yes	Full exemption (Tax Law § 612)
North Carolina	Yes/Income exclusion *	Full exemption for persons with five years of creditable service as of August 12, 1989; otherwise a deduction of up to \$4,000 (\$8,000 for joint filers) is allowed (N.C. Gen Stat. § 105-134.6 and North Carolina Department of Revenue at <a href="http://www.dor.state.nc.us/taxes/individual/benefits.html">http://www.dor.state.nc.us/taxes/individual/benefits.html</a> )
North Dakota	Income	exclusion An exclusion of up to \$5,000 is allowed for people at least age 50; the amount must be reduced by any Social Security benefits the person gets (North Dakota state tax commissioner at <a href="http://www.state.nd.us/taxdpt/misc/faq/indincome/#mp4">http://www.state.nd.us/taxdpt/misc/faq/indincome/#mp4</a> )
Ohio	No	\$200 retirement credit available (Ohio Department of Taxation at <a href="http://tax.ohio.gov/">http://tax.ohio.gov/</a> ) Oklahoma Income exclusion Up to \$5,500 (Okla. Stat. Ann. Tit. 68 § 2358)
Oregon	Yes	Pre 1991 retirees fully exempt; post October 1, 1991 retirees may exclude a portion of their income using a specified formula (additional information from

		the Department of Revenue at <a href="http://egov.oregon.gov/DOR/PERTAX/faq-military.shtml">http://egov.oregon.gov/DOR/PERTAX/faq-military.shtml</a> )
Pennsylvania	Yes	Full exemption (72 P.S. § 7301(d)(i) & (iii). 72 P.S. § 7301(d)(iii); additional information at (more information at Department of Revenue at <a href="http://www.revnuce.state.pa.us/revenue/cwp/view.asp?a=238&amp;q=171013">http://www.revnuce.state.pa.us/revenue/cwp/view.asp?a=238&amp;q=171013</a> )
South Carolina	Yes/ Income exclusion	Military retirement for service in the National Guard and Reserves for state or federal service is fully exempt; up to \$10,000 is exempt for service in any other military component for taxpayer over age 65 and \$3000 for tax payers under age 65 (South Carolina Department of Revenue at <a href="http://www.sctax.org/default.htm">http://www.sctax.org/default.htm</a> <b>ATTACHMENT</b> <b><u>12</u></b> )
South Dakota	No	state income tax NA
Tennessee	No	Income NA (State income tax only for dividends and interest income) (Tennessee Department of Revenue at <a href="http://www.state.tn.us/revenue/misc/hallfaq.htm#hall6">http://www.state.tn.us/revenue/misc/hallfaq.htm#hall6</a> )
Texas	No	state income tax NA
Utah	Income exclusion	Up to \$7,500 for single filers and \$15,000 (joint filers) over age 65; \$4,800 for single filers and \$9,600 for joint filers under age 65, depending on age (Utah Code Ann. § 59-10-114))
Vermont	No	Follows federal tax rules
Virginia	Income Exclusion *	\$6,000 for taxpayer age 62 – 64; \$12,000 for tax payer age 65 or older
Washington	No	state income tax NA
West Virginia	Income exclusion	\$2,000 or more depending on years of service (W. VA. Code § 11-21-12) Wisconsin Yes Full exemption (Wisconsin Department of Revenue, Publication 126 (11/04)). <a href="http://www.dor.state.wi.us/pubs/pb126.pdf">http://www.dor.state.wi.us/pubs/pb126.pdf</a>
Wisconsin	Yes	Yes Full exemption (Wisconsin Department of Revenue, Publication 126 (11/04)). <a href="http://www.dor.state.wi.us/pubs/pb126.pdf">http://www.dor.state.wi.us/pubs/pb126.pdf</a>
Wyoming	No	state income tax NA
		Source: State statutes, state tax department websites, and NCSL State Personal Income Taxes on Pensions and Retirement Income: Tax Year 2003 <a href="http://www.cga.ct.gov/2005/rpt/2005-R-0131.htm">http://www.cga.ct.gov/2005/rpt/2005-R-0131.htm</a>

**Proposed Initiative**  
**FRA-03**

**Virginia Military Survivors and Dependents Education Program**

1. **Objective:** To ensure that students attending a Virginia public college or university as part of the Virginia Military Survivors and Dependents Education Program (VMSDEP) have the resources necessary to pursue their education.

2. **Background:**

- The VMSDEP, formally known as the War Orphans Education Program, provides education benefits to spouses and children of military service members killed, missing in action, taken prisoner, or who became at least 90 percent disabled as a result of military service in an armed conflict.
- Military service includes service in the United States Armed Forces, United States Armed Forces Reserves, the Virginia National Guard, or the Virginia National Guard Reserves. Armed conflict includes military operations against terrorism or as the result of a terrorist act, a peace-keeping mission, or any armed conflict after December 6, 1941.
- Under VMSDEP, tuition and required fees are waived.
- Students may also receive a stipend – currently capped at \$1,500 per year – toward room, board, books, and supplies. The amount of the stipend is dependent on the amount of annual state funding for the program (currently \$1,250,000 per year), the number of enrolled students, and enrollment status.
- Benefits are available for up to four years or the equivalent.
- The State Council of Higher Education for Virginia (SCHEV) reports that the cost of room, board, books, and supplies increased \$1,590 between 2007-08 and 2011-12 – from \$7,839 to \$9,429. This represents a 20% increase.
  - During this same period, the number of students using VMSDEP benefits rose from 696 to 994, a 43% increase.

3. **Discussion:**

- An increase in the stipend cap from \$1,500 to \$2,000 per year would account for past increases in the cost of room, board, books, and supplies, as well as for allowing for increases expected in the 2013-14 and future school years.
- The number of VMSDEP students is expected to continue to rise.
- An increase of \$600,000 (GF) per fiscal year would provide adequate resources to cover both past and expected near-term growth in program costs.

4. **Recommendation:**

1. That the Governor and General Assembly should increase the per-student annual stipend cap to \$2,000, and appropriate an additional \$600,000 (GF) per year for the Virginia Military Survivors and Dependents Education Program.
2. This entitlement is for “All” Virginia Military Survivors and Dependents of military service members who are 90% disabled as a result of military service.

## Proposed Initiative

DAV-01  
Disabled American Veterans  
Department of Virginia  
2014 Position Paper

To Exempt DAV Transportation Vans from Having to Pay Tolls on Virginia Bridges and Highways When transporting Veterans to Their VA Medical Appointments and Have No Alternative Means for Transport.

1. Objective: To allow DAV Transportation Vans access to bridges and toll roads at no cost to the DAV for transportation of their VA Clinical appointments and return home.
2. Background:

Since 1987 the National Disable American Veterans (DAV) has assisted the VA by managing a nationwide DAV volunteer-based Transportation Network. In Virginia the DAV Department and Chapters have donated vehicles to the VA Medical facilities for this use and have stepped forward to provide necessary transportation to veterans who have no alternate means to get to their Veterans Affairs Medical appointments.

The DAV has established and funded the position of Hospital Service Coordinators (HSCs), an individual who assumes the responsibility for the coordination of the DAV Transportation network.

The HSC coordinates with the VA staff to ensure availability and utilization, of the full ranges of community transportation resources to meet the needs of the local facility.

Here in Virginia the DAV has managed the transportation needs of the Hampton, Salem and Richmond VA Medical Center's transportation Programs.

The Volunteer Transportation network services veterans seeking benefits at VA facilities, including the Veterans Benefits Administration (VBA) Offices, and for those who have no other means of transportation.

At present there are more than 30 vans in use donated by the DAV supported by a cadre of more than 75 volunteer drivers who on the average transport for more than 6,000 patients and drive more than 375,000 miles per year.

As time has gone on more and more highway and bridge tolls, primarily in the Tidewater and Northern Virginia areas have required solicitation of funds from the public to defray the cost of these tolls. These funds could be productively used in other areas more effectively than paying highway and bridge tolls.

3. Discussion:
  - a. The VA Medical Center clinics establish specific times for veteran patients to be present at the appropriate clinic and any delay in their arrival time has an adverse impact to the veteran.
  - b. The veterans who reside in the Virginia Eastern Shore area who use the Hampton VAMC must use the bridge to get to and from their residence to the

Hampton VAMC. Often, the patients are picked up before 6 AM and travel with commuters across the bridge. If they were provided a pass so that they could pass through the toll gates without having to sit in line waiting to pay tolls and at the risk of missing appointments.

4. Recommendations:

That the Governor and General Assembly; grant the DAV Transportation Exception from paying highway and bridge tolls when transportation veterans to and from their medical appointments or allocate a vehicle pass to each DAV donated van managed by the DAV Hospital Service Coordinators.