

VETERANS COMMISSION
Tuesday, August 7, 2018, 2:00 p.m.
Room 207C, Douglas County Courthouse,
1313 Belknap Street, Superior, Wisconsin

Meeting called to order by Marvin Finendale.

ROLL CALL: Present – Marvin Finendale, Thomas “Butch” Liebaert, Ron Leino. Others present – John Robinson, Brian Erickson, Kaci Lundgren, Committee Clerk.

APPROVAL OF MINUTES: Motion by Liebaert, second Leino, to approve minutes from the December 14, 2017, meeting. Motion carried.

INFORMATIONAL:

VETERANS SERVICE OFFICER REPORT: Included with agenda. Gift cards presented to veterans in need are donated by local organizations and inventoried quarterly.

SOLIDERS AND SAILORS RELIEF FUND – STATUS: 52.99% decrease in disbursement of funds from 2016 to 2017.

BUDGET: Balance as of July 31, 2018, is \$15,828.94.

FUNDING OPTIONS: Soldiers and Sailors Relief Fund relies primarily on donations; \$1,000 put into fund each year from county levy. Levy could be increased, or other costs could be eliminated to add additional funds.

COMMISSION AUTHORITY: Policies and procedures were adopted in 2016; fund use is guided by the policies. Further details and clarification on authority will be discussed at upcoming convention held by Wisconsin State Association of County Veterans Service Commissions (WSACVSC); all members invited to attend.

ACTION: Motion by Liebaert, second Leino, to approve Veterans Commission to join Wisconsin State Association of County Veterans Service Commissions and pay \$20 membership fee. Motion carried.

FUTURE AGENDA ITEMS: Meeting schedule; WSACVSC convention update.

ADJOURNMENT: Motion by Liebaert, second Leino, to adjourn. Motion carried. Meeting adjourned at 2:46 p.m.

Submitted by,

Kaci Jo Lundgren, Committee Clerk

2019 Revisions Draft

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DOUGLAS COUNTY
SOLDIERS AND SAILORS RELIEF FUND
POLICIES AND PROCEDURES

EFFECTIVE ~~June 1~~ January 1, 2019~~6~~



SOLDIERS AND SAILORS RELIEF FUND – POLICIES AND PROCEDURES

Statement of Purpose

The purpose of the Douglas County Soldiers and Sailors Relief Fund, hereinafter called SSRF, is to provide aid to needy veterans and their families. The SSRF shall provide financial assistance to eligible veterans their family members to assist with basic needs such as rent, food, transportation, utilities and emergency situations.

Funds Generated

The SSRF is generated from a tax levy by the Douglas County Board of Supervisors to provide aid for needy veterans, needy spouses, ~~surviving and surviving~~ spouses, minor and dependent children of such veterans and needy parents of veterans (See Wis. Stat. 45.86 for taxing authority). The SSRF also includes monies collected through fund raisers and donations.

Administration

The Douglas County Veterans Service Commission, which was established under Wis. Stat. 45.81, provides oversight of the SSRF. The Douglas County Veterans Service Officer is responsible for determining the eligibility of applicants and awarding assistance from the fund.

Eligibility

Only eligible veterans and their family members may receive assistance from the SSRF. The determination of eligibility and need for funding from the SSRF is made by the Douglas County Veteran Service Officer. Applications are valid for 90 days. It is the applicant's responsibility to report any changes in status during this 90 day period of time. After 90 days a new application must be completed.

~~Applications-Eligibility status shall be determined using the below listed criteria for assistance-shall include the following:~~

1. The applicant must provide a Certificate of Release or Discharge from Active Duty (DD Form 214) establishing that the veteran earned an honorable discharge.
2. The applicant must complete a Statement of Claim (VA Form 21-4138) along with a Financial Status Report (VA Form 5655) documenting the need for assistance and the requested aid amount.
3. The applicant must have been a resident of the State of Wisconsin for at least six months and have resided in Douglas County for a minimum of 30 days immediately prior to obtaining assistance from the SSRF. Post office boxes shall not be a means of establishing residency.

SOLDIERS AND SAILORS RELIEF FUND – POLICIES AND PROCEDURES

4. The applicant ~~must~~ shall be indigent. One or more of the following definitions shall be used to determine if an applicant is indigent:
- Receiving one of the following types of public assistance: temporary assistance for needy families, general assistance, poverty-related Veteran's benefits, food stamps or food stamp benefits transferred electronically, refugee resettlement benefits, Medicaid, or supplemental security income.
 - Receiving an annual income, after taxes, of one hundred and fifty percent or less of the current federally established poverty level. Income received during the 31 day period prior to the date of application shall be annualized to determine an annual income. **Note:** Income includes all funds received by the applicant and their spouse or domestic partner, and all other individuals in the household who will benefit from the assistance.*

* Examples of included income which must be reported on the financial statement for the purpose of determining income eligibility are as follows:

- Money, wages and salaries after any deductions;
- Net receipts from self-employment;
- Labor and industries payments;
- Savings;
- Workers compensation;
- Alimony;
- Veterans; compensation and disability;
- Military family allotments or other regular support from an absent family member or someone not living in the household;
- Retirement, pension (including veterans' pension) and annuities;
- Insurance payments;
- Dividends, interest, and periodic receipts from estates or trusts;
- Unemployment compensation;
- Child support;
- Social security other than supplemental security income;
- Foster child payments;
- Tax refunds, gifts, loans, lump sum inheritance, one-time insurance payments or compensation for injury or death;
- Dependency and indemnity compensation for service-connected death;
- Educational assistance benefits (including veterans' educational Assistance benefits not paid directly to the school for tuition and books), Vocational rehabilitation subsistence allowance, and work-study benefits (including veterans' work-study benefits

Note: Grants, loans and Veterans' educational assistance for tuition and books paid directly to the training institution are not included as income. Applicants who report no income for the previous 30 days must provide additional documentation showing their means of support and verification showing they have applied for assistance from other government agencies and social services programs deemed appropriate by the Soldiers and Sailors Relief Fund staff of the Douglas County Veterans Service Office.

SOLDIERS AND SAILORS RELIEF FUND – POLICIES AND PROCEDURES

Assistance

Financial assistance may be provided to eligible veterans and their family members to assist with basic needs such as rent, food, transportation, utilities and other emergency situations as deemed appropriate by the Douglas County Veterans Service Officer.

Types of Assistance

A. Rent or Mortgage

Eligible applicants may receive assistance with past due rent, first and last month's rent, past due mortgage payments, or nonrefundable deposits on the applicant's residence.

The applicant must provide a written rental agreement or documents proving ownership of the property. The applicant must provide documentation establishing that he/she will be able to sustain rent or mortgage payments for 3 of months if assistance is provided.

Payments for rental assistance will be paid directly to the property owner, management company or the owner's legal representative. Payments will not be made to an property owners who are family members of the applicant . Rental assistance shall only be available for the applicant's primary residence.

Mortgage payments will be made directly to the mortgage lender and will only be paid for the applicant's primary residence.

B. Utilities

Eligible applicants may receive assistance with delinquent utilities including power, water, propane, oil and wood after utilizing Douglas County fuel assistance resources. No assistance shall be available for cable television ~~or internet services~~..

The applicant must provide a utility bill, a shut-off notice or letter of impending disconnection from the power, water or fuel company showing the current amount owed. Payment shall be made directly to the utility or fuel company and may include shut-off and reconnection fees.

Payment shall be made to the utilities or fuel company for an account in the veteran or eligible family member's name only. Utilities shall only be paid for the residence where the veteran or eligible family member current and primary residence. **Note:** The veteran or eligible family member may be required to first utilize other energy assistance programs prior to the approval of funding from the fund.

SOLDIERS AND SAILORS RELIEF FUND – POLICIES AND PROCEDURES

C. ~~Telephone~~ Voice over Internet Protocol (VoIP)

Eligible applicants may receive assistance for ~~telephone-VoIP to include basic internet~~ services only in circumstances in which a physician has provided written documentation that ~~communication the telephone~~ is required for medical assistance or emergencies.

D. Transportation

Eligible applicants may receive assistance for daily or monthly bus passes within Douglas County and the Twin Ports area when deemed necessary for employment and/or medical purposes. ~~Assistance may also be provided for transportation for documented appointments at the United States Department of Veterans Affairs' Clinics in St. Paul / Minneapolis, Minnesota.~~

E. Care of Graves

Eligible applicants may receive assistance of up to \$500 for the burial or cremation of a eligible veteran or surviving spouse of a an eligible veteran who dies without leaving means sufficient to defray funeral expenses and does not have any known next of kin available.

F. Other Requests

Other requests for financial assistance not listed in these policies and procedures shall be evaluated on a case-by-case basis by the Douglas County Veterans Service Officer and awarded or denied at his/her sole discretion.

Assistance Allocation

Eligible applicants may receive up to \$800 in financial assistance in a ~~twelve month~~ twelve month period of time. Additional assistance may be awarded at the discretion of the Douglas County Veterans Service Officer for cases of extreme need. There is no automatic annual entitlement to assistance.

All awards of assistance are subject to the availability of funds.

Eligible applicants who receive financial assistance for two consecutive years shall not be eligible for further funding for a period of twelve months.

Application Certification

All applicants by filing an application authorize the Douglas County Veterans Service Officer to verify the accuracy of the information provided by the applicant.

SOLDIERS AND SAILORS RELIEF FUND – POLICIES AND PROCEDURES

The applicant acknowledges that providing fraudulent information in the application or to the Douglas County Veterans Service Officer shall be grounds for denial as well as prosecution under the law. Any assistance provided based upon fraudulent information shall be repaid by the veteran and/or family member. Lost or stolen payments may not be reissued.

If the Veterans Service Commission and Douglas County Veterans Service Officer determine that the applicant provided false information or the misuse of assistance funds has occurred, the recipient shall be ineligible for assistance from the SSRF for a period of up to ten years.

Appeal

Applicants who have been denied assistance may request a review of the denial by the chairman of the Douglas County Veterans Service Commission. Said appeals must be filed within twenty days of denial of assistance. The chairman or the designee may request additional information in order to make an informed decision and shall issue a decision within ten days of receiving the information. The chairman's or designee's decision is final.



Soldiers & Sailors Relief Fund

December 2018

Veterans Service Office
Douglas County, WI

Veterans Service Officer
Brian L. Erickson
1316 N. 14th Street, Suite 385
Phone (715) 395-1332
Fax (715) 395-1373

Prepared Nov 27, 2018

Douglas County Veteran Service Office (VSO) – 2018 Review Soldiers & Sailors Relief Fund



	Owner:	Brian Erickson	Objective	The Douglas County VSO: Provide for the relief of indigent Veterans & their families by means of the SSRF and manage such funds as set forth within the SSRF Douglas County Policy & Procedures.
	Measure:	Annual Fund Statistics	Key Initiatives:	Identify the Gains/Losses compared to previous year funds raised and funds disbursed

35.5 % increase in SSRF funds in 2018

2016 Carry Over	\$8085.36	2017 Carry Over	\$15346.20
2017 General Donations	\$8750.00	2018 General Donations	\$6388.66
2017 Profits from 5K Run	\$326.97	2018 Profits from 5K Run	\$2812.02
2017 Profits from Vet Ball	<u>\$1691.80</u>	2018 Interest Earned	<u>\$0.44</u>
Total	\$18,854.13	Total	\$24,547.32


71.4% increase in SSRF funds Disbursed in 2018 from 2017

2017 Donation Disbursements \$3867.34 2018 Donation Disbursements \$6,627.74

Nov 27, 2018 SSRF Balance \$17,919.58

- Includes disbursement of \$2812.02 to UWS-VNSC for share of 5k Run Proceeds

Douglas County Veteran Service Office (VSO) – 2018 Review Soldiers & Sailors Relief Fund

	Owner:	Brian Erickson	Objective	The Douglas County VSO: Provide for the relief of indigent Veterans & their families by means of the SSRF. Manage such funds as set forth within the SSRF Douglas County Policy & Procedures.
	Measure:	Fund Revenue Expenditures	Key Initiatives:	Provide necessary revenues and distributions in support of indigent Veterans

The VSO goal is to ensure that the Soldiers & Sailors Relief Fund (SSRF) is distributed to those eligible Veterans which demonstrate the need for emergency funds in accordance with the procedures stated in the Douglas County SSRF Policy & Procedures.

Current Plan Revenue/Distribution:

- 2017 Reserve Balance \$15,346.20**
- 2018 Revenues \$11,199.10
- 2018 Total Expenditures \$1997.98*
- 2018 SSRF Disbursement \$6627.74

**Includes 2018 Tax Levy of \$1000.00

November 27, 2018 SSRF Balance \$17,919.58

includes \$2812.02 disbursement to UWS-VNSC

2017 Revenue Sources:

- ❖ Eldorado Bar Donation= \$2000.00
- ❖ General Public Donation= \$335.00
- ❖ Private Donation=320.00
- ❖ Private Donation= \$100.00
- ❖ DAV State Auxiliary= \$261.66
- ❖ UWS 5k Running for our Heroes = \$2812.02
- ❖ Eldorado Bar Fundraiser= \$3372.00
- ❖ Interest= 0.44

*2018 Total Expenditures includes expenses for
5k Run Total =\$1997.98

Douglas County VSO Soldiers & Sailors Relief Fund – 2018 Expenditures

Amount	Purpose	Circumstances
\$117.00	Temporary Lodging	Motel Lodging, Homeless Veteran
\$517.00	Utilities	SWL&P – Excessive Cold weather & Veh Repair put him behind
\$260.00	Utilities	SWL&P – Off work due to disability
\$800.00	Utilities	SWL&P – partial payment to keep utilities on.
Denied	Replace Water Pump	Excess Income for Program, did not meet eligibility
\$180.00	Temporary Lodging	Homeless Vet & Wife – waiting for SSVF funding
\$596.16	Utilities	Child care issues and unemployment
\$78.00	Temporary Lodging	Homeless Vet & wife – waiting for SSVF Funding
\$393.00	Utilities	SWL&P –Child in house, vehicle repair, prop taxes
\$89.00	Temporary Lodging	Homeless Vet
\$128.00	Temporary Lodging	Homeless Vet
\$401.00	Utilities	Dahlberg Light & Power – delinquent utilities, prevent shutoff
\$785.00	Rent Assistance	Husband Died, widow needed help with rent

Douglas County VSO Soldiers & Sailors Relief Fund – 2018 Expenditures

Amount	Purpose	Circumstances
\$500.48	Car Pymt, etc.	Vet between jobs, extreme financial Hardship
\$0.00	Canceled Request	Veteran entered Chippewa program Sep 2018
\$489.00	Utilities	SWL&P – Off work
\$613.00	Utilities	SWL&P – Vet caring for 5 dep grandchildren, ran low on funds
\$525.00	Rent Assistance	Vet behind in Rent due to family deaths
\$156.00	Temporary Lodging	Vet suffering from MH temp separated from spouse
\$6,627.64	Total Expenditure as of Nov 27, 2018	Account Balance = \$17,919.58

Douglas County VSO Soldiers & Sailors Relief Fund – 2018 Gift Card Box

As of: Nov 27, 2018

Office Donation Box for Miscl. Non-Cash Donations				
Donated Item	Date In	Donated BY	Date Out	Awarded
\$25.00 Kwik Trip Gas Card # XX8653	1-Mar-17	AL Post 435	3/23/2018	Awarded
\$25.00 Kwik Trip Gas Card # XX61067	20-Dec-17	AL Post 435 Ladies Auxillary	7/30/2018	Awarded
\$25.00 Kwik Trip Gas Card # XX11093	20-Dec-17	AL Post 435 Ladies Auxillary	7/30/2018	Awarded
\$25.00 Kwik Trip Gas Card # XX11105	20-Dec-17	AL Post 435 Ladies Auxillary	11/2/2018	Awarded
\$25.00 Kwik Trip Gas Card # XX11116	20-Dec-17	AL Post 435 Ladies Auxillary	7/12/2018	Awarded
\$25.00 Kwik Trip Gas Card # XX11128	20-Dec-17	AL Post 435 Ladies Auxillary	7/12/2018	Awarded
\$25.00 Super One Gift Certificate #033377	20-Dec-17	AL Post 435 Ladies Auxillary	2/9/2018	Awarded
\$25.00 Super One Gift Certificate #033376	20-Dec-17	AL Post 435 Ladies Auxillary	3/23/2018	Awarded
\$25.00 Super One Gift Certificate #033375	20-Dec-17	AL Post 435 Ladies Auxillary	6/15/2018	Awarded
\$25.00 Super One Gift Certificate #033373	20-Dec-17	AL Post 435 Ladies Auxillary	6/8/2018	Awarded
\$25.00 Super One Gift Certificate #033372	20-Dec-17	AL Post 435 Ladies Auxillary	6/8/2018	Awarded
\$100.00 Kwik Trip Gift Card #XX47007	23-Aug-18	Jeff Foster Trucking	11/12/2018	Awarded
\$100.00 Kwik Trip Gift Card #XX32596	23-Aug-18	Jeff Foster Trucking	9/13/2018	Awarded

\$475.00 worth of gift cards were distributed in 2018 to veterans in need.

Note: Gift Card Box is comprised of random gift cards which are donated to the VSO to help out Veterans. These cards are handed out on an as needed basis and inventoried at least quarterly.