

TRUST MATTERS

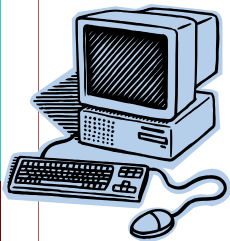
Department of the Interior –
Office of the Special Trustee
for American Indians

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DOI Reaches a Major Milestone in Trust Reform at Concho and Anadarko Model Offices

Recently, the Office of the Special Trustee for American Indians (OST) and the Bureau of Indian Affairs (BIA) reached a major milestone in trust reform. At the Concho and Anadarko model agencies in Oklahoma, staff members tackled a list of more than 740 tasks, and completed major improvements in the processing of the Indian Trust. Today, the Concho and Anadarko agencies represent the future. In the coming months, other field agencies will restructure their services to mirror those at the model agencies. This is no small feat. To reach this goal, contractors, OST and BIA staff spent more than 145,000 hours completing a long list to meet their deadline.



Just a few of the results:

New technology improves efficiency. The implementation and validation of new technology for title and leasing information means that Concho and Anadarko agencies will no longer require multiple non-integrated legacy systems to maintain trust land surface information. The changes expedite the time it takes for beneficiaries to receive their trust funds, provide real time data for staff to carry out their duties more efficiently, and facilitate automated billing and trust fund distribution capabilities.

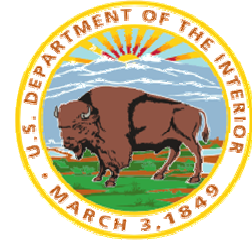
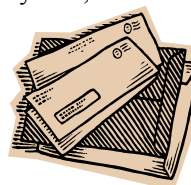
New technology improves collections. The implementation and validation of land title and leasing software supports the implementation of a lockbox for fund collection processing. Today, for Concho and Anadarko agencies, fund receivables are established, payment invoices are automatically generated and sent to lessees in advance of being due, and collections are immediately deposited into the Treasury.

Coordination improves services for beneficiaries. OST and BIA developed new, efficient business processes between the two offices for such things as lease collections, automated fund distributions, communication, and encumbrance information.

Data input leads to new statements. Staff and contractors have encoded and verified information on asset owner interests, encumbrances, and tracts representing 493,549 acres of trust land. The Land Title Records Office processed 2,247 probates, and 1,319 probate modifications (this accounted for backlogged probates at Concho and Anadarko). With this information, current account details can more readily be provided to beneficiaries. More than 10,000 account statements that included information on trust asset ownership, encumbrances, account balances, receipts, disbursements, and liabilities also were distributed.

Training on the new programs creates a more effective workforce. Staff received training on the new programs and services, including the title and leasing software, Customer StrataStation, Trust Asset Accounting Management System, Vital Records, lockbox operations and more to improve their efficiency and knowledge of the systems and new processes.

The recent enhancements to the agency models allow Interior to move forward and implement these changes across Indian Country. OST and BIA have a target date of the end of December of 2007 to have all agencies working with the new processes.



Trust Beneficiary Call Center
Toll-free:
(888) 678-6836 ext. 0
Monday through Friday
7 am to 6 pm, Mountain Time

GSA Awards OST's Call Center!

The U.S. General Services Administration awarded its 2005 *Federal Technology Service (FTS) Award for Cost Effectiveness Excellence* to OST in August. The award recognizes OST "For the planning, design, and implementation of its Trust Beneficiary Call Center (TBCC) in support of improving services and information for Indian trust beneficiaries...and for its significant achievements in improving the cost effectiveness of its systems through the use of FTS services." Employees recognized include Bryan Marozas, Will Honeyestewa, Robert Aguayo, Richard Namm, Helen Riggs, Julia Chavez and Sophia Horse. Honeyestewa states, "We are pleased by this recognition. It is the result of a collaborative effort by OST's Office of the Chief Information Officer and the Field Operations Division. When beneficiaries call and receive prompt answers, it makes our efforts so worthwhile."

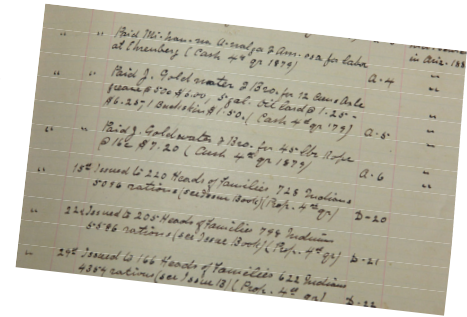




The American Indian Records Repository

Deep under the grassy hills of Lenexa, Kansas, not far from Haskell Indian Nations University, Interior employees, contractors, and staff from the National Archives Records Administration are working together to preserve Indian Affairs records. Each morning, these employees drive down a hill and into the gaping mouth of a limestone cave to get to work at the American Indian Records Repository (AIRR). The walls of their workspace are craggy, bumpy limestone, painted white. There, boxes upon boxes of records are stored in strict compliance with National Archives Records Administration (NARA) standards, on shelving stacked 14 levels high, the length and width of a football field.

These boxes store retired Indian Affairs records from BIA agencies and OST offices all over the nation. Some boxes hold maps from the early part of the last century; some hold children's school records, and many hold trust records. According to Interior's new report, *Historical Accounting for Individual Indian Monies: A Progress Report*, "AIRR provides secure access to records for research by individual Indians, tribes, and historians, with permission from Interior, and for Interior staff conducting the historical accounting of Indian Trust records."



10 Quick Facts That Paint the Monumental Picture

- ❶ For **more than 100 years**, miners worked under the rolling hills of Kansas chipping out limestone for uses such as construction and road-building. In the 1950s, workers began to mine limestone with the aim of leaving behind useable subterranean space.
- ❷ There is an estimated **20 million square feet** of business and industrial space underground in the greater Kansas City area. This is about 10% of the business space in the area. In Lenexa, Kansas—a half hour from Kansas City—more than a dozen organizations operate their businesses 80 to 100 feet underground in old limestone mines.
- ❸ NARA has **1.3 million cubic feet** of storage space available for federal records underground in Lenexa.
- ❹ AIRR is a product of a partnership between NARA and the Department of the Interior. **This is the first** such partnership in history. AIRR meets the National Archives' 2009 standards for records storage and is on par with the best archival facilities in the world.
- ❺ More than **125 contractors** and Interior staff members work at AIRR.
- ❻ Students from nearby Haskell Indian Nations University attend a **portion of their records management coursework** at AIRR, and Interior staff help facilitate their studies.
- ❼ In about two years **more than 120,000 boxes** of Indian Affairs records have been indexed and deposited at AIRR.
- ❸ Approximately **1,000 boxes of Indian records** are delivered to AIRR annex and facilities each month.
- ❹ The air inside AIRR is filtered **repeatedly throughout the day** for airborne particulates, dust, and filaments.
- ❺ Ink pens, gum, candy, food, and **liquids are not allowed** in the records storage facility at AIRR.





All Aboard! FTO Station

Your One Stop Outreach Shop

Fiduciary Trust Officers (FTOs) seeking information on news articles, promotional brochures, or presentations, can now find these resources, and more, on OST's Information Network (InfoNet) page, *FTO Station – Your One Stop Outreach Shop*. The station, located beneath InfoNet's *Library* heading, serves as a resource center for field operations staff seeking information and materials for outreach activities. Now employees can obtain the information they need in a centralized and convenient location—saving time and effort in searching for the information elsewhere or developing the materials on their own.

Other examples of available items include copies of editorials, talking points, and press releases that provide information on relevant issues in the news media; event announcements, presentations, and sample letters that assist with outreach activities; and contacts for ordering brochures, newsletters, and display banners for informational events. The Office of External Affairs developed the station to provide outreach support to Field Operations staff. To fuel your knowledge of outreach resources, visit the FTO station today.



Just a few of the informational items available at FTO Station on OST's Infonet

OST's David Pradt Receives "Outstanding Member Award"

David Pradt, Senior Property Management Officer in OST's Office of Budget Finance and Administration, recently received an "Outstanding Member Award" from the National Property Management Association. Pradt is currently the Vice President of the nonprofit organization that works to advance the profession of personal property and fixed-asset management. According to Pradt, "My goal is to give 110 percent support through property, lease vehicles, and art and artifacts. I was very proud to accept the award on behalf of OST and Interior." The Outstanding Member Award is given for exceptional service at the chapter level, and is for the lifetime of the member. Congratulations David.



Pradt (right) with NPMA National President David Hay.



Whereabouts Known! By the end of November 2005 staff found 17,317 people on the WAU list with a total of \$23.7 million.

Fiduciary Trust Officers, Making a Difference

Every day, OST's Fiduciary Trust Officers (FTOs) across the nation are making an impact in the lives of trust beneficiaries. Here are just a few examples:



FTO Karen Whitenton works with a trust beneficiary on his account questions and issues.

Karen Whitenton, FTO—Western Nevada Agency:

FTO helps beneficiary with WAU trust funds.

Whitenton located a beneficiary whose whereabouts had been unknown, and who had more than \$16,000 in an Individual Indian Money trust account. The beneficiary had been involved in an automobile accident, and did not have the means to travel to Nevada to request the necessary birth certificate for identification. OST

obtained the forms to request a birth certificate and forwarded them to the beneficiary who returned them, and was able to receive all of his funds.

Tom Young, FTO—Rapid City, SD:

Elderly beneficiary gets help with correcting the spelling of her name.

In a matter of moments, Young assisted an elderly beneficiary by making a correction to the misspelling of her name on the mailing address of her trust statement. This beneficiary had previously spent significant time and energy trying to get the change made.

Warren Austin, FTO—Umatilla Agency, OR:

FTO assists beneficiary in 12 year effort to correct blood quantum

A beneficiary had attempted to correct records of her Indian blood quantum with her tribe for over 12 years—an issue that is important because tribal membership can be based on a person's Indian blood quantum. Austin coordinated with OST, BIA, and the tribe to review historical enrollment and tribal records and determined the beneficiary's correct Indian blood quantum. Original records were found to be in error, and were corrected. The beneficiary's 12 grandchildren, several of whom had been denied enrollment because of their blood quantum, can now reapply for tribal enrollment.

Jim Folsom, FTO—Fort Duchesne, UT:

Collaboration helps FTO find beneficiary with over \$100,000 in a Whereabouts Unknown account.

Early in the year, Folsom received a list of the trust beneficiaries with Individual Indian Money accounts and whose whereabouts were unknown. He began asking locals, BIA staff and tribal members if they knew anyone on the list. Locals were able to help him identify one beneficiary who had more than \$100,000 in an account. The beneficiary was living in a state-run group home. Folsom is now working with local aid agencies to make sure the money gets used properly for the beneficiary's care. "I'm determined to make sure it improves the quality of his life," Folsom says.



FTO Jim Folsom



Department of the Interior
Office of the Special Trustee
for American Indians



Happy Birthday! The Trust Beneficiary Call Center turns One

December 3, 2005 marked the first anniversary of the TBCC, and what a year it was:

**Calls answered =
69,285.**

**First Line Resolution =
90.23%.**

**Average Call Time =
3:21 minutes.**

**Staff hours saved for
other program work =
3,868.**

Congratulations!

*The Trust Beneficiary
Call Center; (888) 678-
6836 ext. 0.*

