



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

TRUST MATTERS

Volume 4, Issue 2

March 2005

Beneficiary Call Center Opens



On Friday, December 3, 2004, the Department of the Interior (DOI) deployed the first phase of the Indian Trust Beneficiary Call Center, which is designed to enhance the delivery of services to trust beneficiaries. The nationwide, toll-free call center will enable beneficiaries to conveniently access a wide variety of information regarding their trust assets. The Call Center also is expected to improve communications between DOI and Indian beneficiaries.

Why is a central Beneficiary Call Center needed?

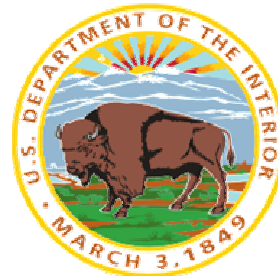
Currently, staff from the Office of the Special Trustee for American Indians (OST), Bureau of Indian Affairs (BIA), Minerals Management Service (MMS) and other offices receive inquiries from Indian trust beneficiaries on a daily basis. To track, coordinate and facilitate our responses to beneficiaries, increase accountability and improve the level of beneficiary service, the Department has begun to consolidate these calls to a central number. The consolidation is expected to provide beneficiaries with timely, accurate responses to their trust inquiries, and relieve some of the workload from DOI staff at the local agencies.

What will happen during the first phase of the Beneficiary Call Center?

During Phase 1, which is the initial testing phase for the Call Center, beneficiary calls normally routed to OST- Field Operations in Albuquerque, NM and beneficiary calls coming into the Concho and Anadarko Agencies and the Shawnee Field Office in Oklahoma will come to the Call Center. The initial testing phase will allow for the development of Standard Operating Procedures, measure call volume and determine the efficiency of the Call Center. Over the next ten months, calls to the remaining OST offices and calls to the Whereabouts Unknown Project are expected to be directed to the Call Center.

What is the toll-free Call Center number?

Beneficiaries can continue to make inquiries using the existing toll-free number **1-888-678-6836 ext. 888**. In the future, as the individual agency locations are consolidated to the Call Center, an IIM accountholder will no longer need to enter the appropriate Tribal Code that is part of the account number.



Beneficiary Call Center
1-888-678-6836
EXT. 888

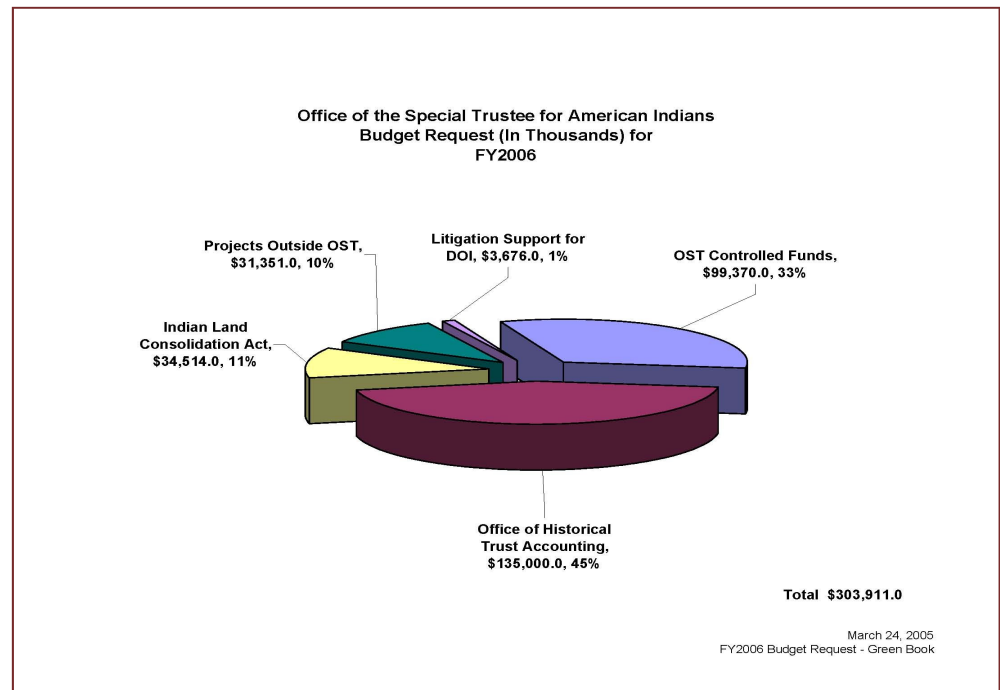
Hours of Operation

Monday-Friday
 7:00am-5:00pm
 (Mountain Time)

- Initial testing phase began December 3, 2004.
- The Call Center received 10,144 calls, as of February 25, 2005.
- **Provided first-call resolution for 94%.**
- The Center anticipates answering 20,000 - 25,000 calls per month by the end of 2005.

FY06 OST Budget Proposed

The President's FY2006 request for the Office of the Special Trustee for American Indians (OST) is \$303.9 million, an increase of \$75.9 million above the FY 2005 appropriated level. The increase for the Office of Historical Trust Accounting, managed by the Office of the Secretary, but funded through OST, is \$77.8 million. The request provides funding for the implementation of key components of the Fiduciary Trust Model, improves beneficiary services and encourages Indian land consolidation efforts. When combined with other departmental spending on Indian trust management, the Unified Trust Budget is \$591.4 million, an increase of about 17 percent over FY2005.



FTOs Plan Outreach Meetings Across Indian Country

OST Fiduciary Trust Officers (FTOs) are hard at work planning outreach meetings for beneficiaries throughout Indian Country. At these meetings, FTOs will be able to introduce themselves to tribal and individual beneficiaries, explain the role of a trust officer, answer questions, and outline many OST plans and programs. In the past, outreach meetings have proved helpful to both FTOs and beneficiaries. Because of information gathered at outreach meetings on the Rosebud reservation, one trust officer successfully located nearly 200 account holders who had trust account funds, and whose whereabouts were previously unknown.

The following is a partial list of outreach meetings planned in the coming months.

Dates and locations may change. More information will be available from OST FTOs and Regional Trust Administrators.



Southwest:

Albuquerque, New Mexico, Gathering of Nations Pow Wow, April 28-30

Navajo:

Tohaajilee, New Mexico, April (date to be determined)
Mescalero, New Mexico, April (TBD)
Houck/Lupton, Arizona, May (TBD)

Great Plains:

Rapid City, South Dakota, April 2
Rosebud Sioux, South Dakota, April 20
Rosebud Sioux, South Dakota, May 25

Southern Plains:

Watonga, Oklahoma, April 19
Concho, Oklahoma, April 26
Clinton, Oklahoma, May 3
Hammon, Oklahoma, May 10
Seiling, Oklahoma, May 17
Geary, Oklahoma, May 27

Eastern Oklahoma:

Muskogee, Oklahoma, April 2-3

Cherokee Nation, Oklahoma, April 3

Wewoka, Oklahoma, April (date to be determined)

Chickasaw, Ada, Oklahoma, May (TBD)

Rocky Mountain:

Wind River, Wyoming, April 4-8
Blackfeet, Montana, ITMA Tribal Listening Conference, April 5-6
Northern Cheyenne, Montana, April 20
Fort Peck, Montana, May 10

Eastern Region:

Seminole & Miccosukee, Florida, April 11-15

Alaska:

Bethel, April 12
Anchorage, April 14
Homer, April 19-20
Nome, April 26
Kotzebue, April 28
Fairbanks, May 10
Juneau, May 12

**Contact local FTOs or
Regional Trust
Administrator (RTAs)
for more information
on date, time, and
specific location.**

Staff Changes at OST

On February 13, 2005, Assistant Secretary-Indian Affairs David W. Anderson announced **W. Patrick Ragsdale** as the



Pat Ragsdale

new Director of BIA. Ragsdale, who is a member of the Cherokee Nation of Oklahoma, has been serving for the last year as Director, OST Office of Trust Review and Audit in Albuquerque, New Mexico.

“Mr. Ragsdale comes to this position with a wealth of experience in

Indian Affairs,” said Anderson. “I have every confidence in his management abilities and his dedication to meet the needs of Indian people.”

The Director of BIA directly oversees the day-to-day activities of the Bureau, administers all laws governing non-education portions of Indian Affairs, provides leadership and direction of BIA employees, and oversees and monitors the work of the BIA regional offices, agencies, and field offices.

Joining the staff of OST in January, 2005, is **Malcom Shorter**, the new Director of Budget, Finance and Administration.

Shorter previously served as the Assistant Director for Programming and Budget, United States Department of Homeland Security (DHS), Counternarcotics Office, where he collaborated with key counter-drug resource managers in all DHS components, and assisted in the oversight of the drug interdiction budgets of multiple federal agencies.



Malcom Shorter

As the Director of Budget, Finance and Administration, Shorter is responsible for the OST budget formulation. He provides budget, planning and analysis support; and oversees the administration of the personnel, acquisition, finance, and Government Services Administration space contracts. He also coordinates required reporting to the DOI, the Office of Management and Budget (OMB), and to the United States Congress.

Upcoming Cannon Certification Courses

DOI and tribal trust employees are invited to sign up now for the following training courses:

Trust Accounting

- April 4-6 Sacramento
- April 13-15 Oklahoma City

Fiduciary Behaviors

- April 18-20 Phoenix
- May 4-6 Minneapolis

Asset Management

- April 4-6 Tulsa
- April 20-22 Phoenix

Guardianships

- April 6-8 Tulsa
- May 2-4 Minneapolis

For more information or to sign up for classes, call 505-816-1023.

Message from the Special Trustee



We are beginning to implement several new trust business processes which will streamline and improve services we offer to Indian trust beneficiaries. I am confident that in the months ahead, beneficiaries will enjoy the results of the trust reform effort as well as the new resources OST is making available to assist them.

I am pleased with the progress being made in the hiring and placement of Fiduciary Trust Officers nationwide. With the addition of these new OST employees, beneficiaries have, for the first time, a federal employee who is dedicated to finding and providing answers to their questions about their trust assets. This improves the level of service we provide to beneficiaries, and enables other Departmental trust employees to focus on their primary responsibilities without the competing interest of assisting beneficiaries with their inquiries.

The successful launch of the initial phase of the Beneficiary Call Center last December also represents our commitment to increasing accessibility to respond to beneficiary questions. The nearly 8,500 calls fielded in the first two months of the call center indicate the need to which this service is responding. To date, the vast majority of the questions posed by callers were answered immediately, without the need for additional research or escalation within the organization.

DOI employees are encouraged to continue to inform Indian trust beneficiaries about the Trust Officer and Call Center resources that OST is making available to them.

Probate Reform Bill Enacted

On October 27, 2004, the President signed the American Indian Probate Reform Act of 2004, which amends the Indian Land Consolidation Act to provide important tools to reduce fractionation of individual Indian land interests and establishes a uniform probate code for Indians. The Act changes the way trust estates are probated. Additionally, the Act:

- * Increases the importance and benefits of writing a will or preparing an estate plan.
- * Ensures that tribal probate laws are consistent with Federal probate laws.
- * Improves individuals' ability to consolidate interests in trust or restricted land.
- * Improves individuals' ability to manage parcels of land in which an interest is owned.
- * Limits inheritance without a will when ownership is

less than five percent of the total.

These and other provisions of the law will enhance Indian land consolidation efforts by providing useful tools to individuals, tribes, and Interior. The law requires the Secretary to send a notification to tribes and individuals who might be affected by the law, and to certify that such notice was sent. Most of the provisions of the law will take effect one year from the date of the certification.

Official notification of the new law will be mailed to all owners of trust land and published in the Federal Register on April 1, 2005. A National Video Teleconference, produced by the National Indian Programs Training Center and designed to provide DOI and tribal trust employees with information about the law, will be broadcast to the 12 BIA regional offices and 87 agencies nationwide

Department of the Interior
Office of the Special Trustee —
* Office of External Affairs
18th and C Street, NW
Room 5140
Washington, DC 20240
(202) 208-4866

Coming to a Mailbox Near You!

During the first quarter of 2005, OST is including an insert (*see below*) in every beneficiary's quarterly account statement. The insert outlines the benefits of receiving trust fund disbursements through **Direct Deposit**.

Beneficiaries interested in participating in OST's Direct Deposit program, can contact their local servicing agency or call the Beneficiary Call Center at **1-888-678-6836 ext. 888**. There is no charge to participate.

