

Trust Matters

Awards Ceremony Commemorates Completion of Cobell Document Production

On March 16, 2001, Special Trustee for American Indians, Tom Slonaker, and Principal Deputy Special Trustee, Tom Thompson, met with staff from the Office of Trust Records, the Office of Trust Funds Management, and the Office of Trust Risk Management who assisted with the Cobell v. Norton litigation Paragraph 19 document production effort.

This production effort concluded in December 2000 and

resulted in the retrieval and imaging of 46,482 responsive documents.

The Special Trustee thanked the assembled group for their tremendous efforts on a difficult job well done, and distributed a letter of appreciation from former Secretary of the Interior, Bruce Babbitt.

Chief Phil

Crazy Bull, a Rosebud Sioux Medicine Man, also attended and provided an inspirational message to the assembled OST personnel and blessed those present.



Chief Phil Crazy Bull and Tom Slonaker at the ceremony

OST Budget Request will Sustain Trust Reform Progress

A total of \$110.2 million is requested by the Bush Administration in its FY 2002 budget to sustain and support continued trust management reforms under the coordination and administration of the Office of the Spe-

cial Trustee for American Indians (OST). The 2002 request for OST of \$110.2 million is \$8.8 million less than was provided in FY 2001. However, including the \$18.8 million of funding retained in 2002 to meet

continuing needs, the 2002 request will be adequate to provide the necessary funding to continue to make significant progress on trust reform efforts.

(continued on page 2 inside cover).

**Department of the Interior—
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Special points of interest:

- **THE FY 2002 DEPARTMENTAL BUDGET REQUEST FOR OST IS ON OUR WEB SITE: WWW.OST.DOI.GOV**
- **OTFM HAS COMPLETED A HISTORICAL IIM DATABASE AND IS NEARING COMPLETION ON THE BIA/OST INTERAGENCY PROCEDURAL HANDBOOK**

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Legislative Update: Special Trustee Testifies before House and Senate on Trust Reform Progress



On March 21 and again on March 27, 2001, Special Trustee Tom Slonaker appeared before the U.S. House of Representatives and U.S. Senate Subcommittees on Interior Appropriations to testify on the status and progress of the Department's trust reform efforts.

Mr. Slonaker began his testimony by providing Committee members with some background information to illustrate the scope and complexity of the Department's trust asset management activities. Mr. Slonaker also provided his views on the progress of trust reform since he was sworn-in to office last June. Among the accomplishments mentioned were:

- ⇒ the conversion of all Tribal and IIM accounts to the Trust Funds Accounting System,
- ⇒ The consolidation of the majority of IIM records to a central location in Albuquerque, New Mexico,
- ⇒ The successful use of a national database to try to locate account holders whose whereabouts are unknown,
- ⇒ The designation of the land title portion

of TAAMS as the system of record in four regions,

- ⇒ Hiring additional staff in BIA and OHA to begin addressing the existing probate backlog,
- ⇒ The publication of a Risk Management Handbook, and
- ⇒ The issuance of new regulations for leasing and grazing, probates and Indian trust funds.

Mr. Slonaker also identified the next steps necessary to achieve sustainable trust reform. He stated that this path requires ensuring that strong management teams and resources are in place to bring trust reform projects to successful conclusions, developing additional regulations so that the Department has uniform trust policies and procedures in place, completing a BIA/OTFM procedural handbook outlining uniform business rules and practices, and determining the long-term workforce planning requirements necessary so that trust asset management positions are filled with qualified personnel.

Mr. Slonaker concluded by thanking the committee members for their past and future commitments to support these reforms.

Read the Special Trustee's full testimony on OST's web site: www.ost.doi.gov

Note from the Special Trustee

Trust Education

Available in locations near you are classes designed to help all of us learn more about our trust responsibilities. Please be sure to participate.

There is an obligation on behalf of all of us who are supervisors to be certain that all those associates who touch the trust process have a thorough understanding of the trust community and the trust obligations of the U. S. Government on behalf of Indian people and Tribes who are beneficiaries.

The education effort is proceeding on several fronts. The "Trust Foundations I: An Introduction to Trust Reform" course has been given in several locations to date, and is designed to help all of us understand the basic trust obligation. Other courses are either underway or being planned to orient associates as needed to more specific topics, e.g., the Trust Procedures Handbook.

Your participation in the training is essential, and I appreciate the support of our trust effort.

FY 2002 Budget Request Submitted to Congress (Continued from cover)

The 2002 request provides funding for the trust management reform activities in OST, the BIA, and the Office of Hearing and Appeals, and reflects a continued emphasis on the implementation of several trust reform initiatives and the funding necessary to sustain the operational and organizational improvements initiated in previous years.

The funds in the FY 2002 budget will support ongoing trust reform efforts including the BIA's testing of the TAAMS system and full implementation of both the title and leasing modules in the Rocky Mountain Region.

Additionally, the funding will support the Department's

continued involvement in ten active trust reform projects outlined in the High Level Implementation Plan (HLIP) and four projects initiated to correct Court-declared breaches of the Department's trust responsibility. The

HLIP describes such ongoing projects as cleaning up trust data throughout OST and BIA, eliminating probate backlogs, curing decades-old records management deficiencies, improving job performance through quality training, and identifying and eliminating internal control weaknesses. Breach projects include determining trust reform workforce requirements and competencies, the development of a computer and business architecture, and the identification of additional, outside sources for IIM account information.

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★ The OST FY 2002
★ Budget Justification
★ is posted on our web
★ site. Check it out!
★ ★ ★ ★ ★ ★ ★ ★ ★ ★

OTR All-Employee Training Generates Unity and a Cooperative Spirit

Office of Trust Records (OTR) personnel recently took time out of their regular duties for professional development training. Mr. Clayton J. Small, Ph.D., an Indian educator and facilitator for community change, conducted two half-day sessions for OTR staff on January 17-18, 2001 in Albuquerque. The training included a focus on team building, wellness and leader-

ship issues, in addition to customer service.

Ken Rossman, the Director of OTR stated, "these seminars provided employees time to discuss challenges in

the work place, focus on the OST mission to achieve and sustain meaningful trust reform, as well as to mingle and get to know each other better."

All three office divisions within OTR participated in the training sessions, including the Records Management, Electronic Records, and the Research, Litigation and Settlement Divisions.



The Office of Trust Records Team

OTFM Develops IIM Historical Transactions Database

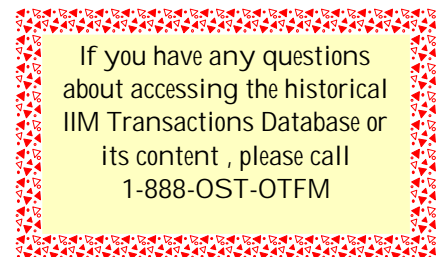
The Division of Trust Funds Systems within the Office of Trust Funds Management (OTFM) recently completed the development of a historical IIM account transactions database.

This database is composed of all IIM transaction information dating back to 1985 that was previously stored on the Legacy system. Providing this information on a centralized, electronic database means that it can be queried by OTFM and BIA personnel located in regional and field offices.

(TFAS) is capable of storing information about account transactions for up to 17 months. Once information on the TFAS system reaches an age in which it can no longer be stored, this information will now automatically be moved to the new database.

When OTFM staff need access to information that is older than 17 months, they can simply log onto the new historical transaction database. For staff who do not have access yet to the database, but would like to, please call 1-888-OST-OTFM and enter tribal code 399.

Don Chambellan for the development of the prototype, Mr. Stan Pettengill for the development of the html query, and Mr. J Lente and Mr. Michael Pond for the creation of the databases. Your hard work and commitment to this effort is appreciated.



If you have any questions about accessing the historical IIM Transactions Database or its content, please call 1-888-OST-OTFM

The Trust Funds Accounting System

Thanks particularly to the efforts of Mr.



OST/BIA Handbook Nearing Completion

Coming soon to your desk is the eagerly anticipated Interagency Procedures Handbook between the BIA and OST on the Management of Trust Accounts, Assets and Resources on Indian Lands.

When completed, this Handbook will provide employees with the procedures for cooperation and coordination between the two bureaus for various aspects of the management of Indian trust assets. The Handbook will detail

the appropriate procedures to follow for the trust functions for which the BIA and OST share responsibility. It can be used as a reference for the procedures by which the management, regulation and accounting functions will be carried out within and between bureaus.

The functions discussed in the Handbook are limited to those areas where coordination and consultation are necessary—the Handbook does not discuss every function for which either BIA or

OST is responsible.

The development of the Handbook is in its final stages and currently is circulating among a cadre of reviewing officials for comments. When comments are received and edits determined, the Handbook will be approved for use, and disseminated among OST and BIA staff.

Training on the specific components of the Handbook will be offered to ensure that employees reap all of its benefits.

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Photos of the Cobell Document Production Award Ceremony



Left: Special Trustee Tom Slonaker addresses attendees at the awards ceremony, as Ken Rossman and Tom Thompson look on.
Above: This Acoma bowl was presented to the Special Trustee by the OTR staff.



Left: Chief Phil Crazy Bull watches the ceremony.

Right: OST staff are honored for their exceptional document production efforts.



Congressional Staff visit OST Offices in Albuquerque

On April 9, 2001, staff from the U.S. House of Representatives Committee on Resources visited the OST offices in Albuquerque, New Mexico to gain first hand information about the programs and operations provided by OTFM, OTR and the Office of Trust Risk Management (OTRM).

The Congressional staff began their day at OTFM meeting with Director Donna Erwin for an overview of OTFM functions. A meeting with all the Division Chiefs followed to discuss the responsibilities and challenges each Division faces. A tour of the office and a demonstration of the TFAS system was very informative.

The staff then visited with Ken Moyers, Director of the

Office of Trust Risk Management to learn about this new office and its mission. Discussion also focused on the Risk Management Handbook that has been developed.

The Office of Trust Records was the destination for the afternoon, where the staff received a presentation from Director Ken Rossman on the records management responsibilities and operations and the Indian Affairs Records Management Program. A guided tour of the Renaissance Records Center by Jean Tuggle completed the day.

Feedback from the Congressional staff on their day with OST was very positive. Thanks to all who participated.