

Dear Tribal Leader,

The Department of the Interior (Interior) has been leading efforts to improve the management of the Indian Trust for current and future generations. I am pleased to be able to report to you that the Office of the Special Trustee for American Indians (OST) and the Bureau of Indian Affairs (BIA) reached a tremendous milestone in trust reform. At the Concho and Anadarko BIA pilot agencies in Oklahoma, staff members have completed major reengineering efforts to improve the management of the Indian Trust for the benefit of tribal and individual beneficiaries.

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 conversion is no small feat; to reach this goal, contractors, OST and BIA staff spent over 145,000 hours completing these tasks.

Here is a list of just a few of the improvements:

☑ **New technology improves efficiency.** The implementation and validation of the Trust Asset Accounting Management System (TAAMS) for title and leasing information means that Concho and Anadarko agencies will no longer require multiple non-integrated systems to maintain trust land surface information. These changes expedite the process and time it takes for beneficiaries to receive their trust funds, facilitate automated billing and trust fund distribution capabilities, and provide real-time data readily available for Interior staff to more efficiently carry out their duties.

☑ **New technology improves collections.** The implementation of TAAMS title and leasing modules supports the implementation of a commercial 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 deposited into the U.S. 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.** The 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, trust officers can readily provide current account details to beneficiaries. More than 10,000 account statements that included information on trust asset ownership, encumbrances, account balances, receipts, disbursements, and liabilities were distributed to beneficiaries.

☑ **Training on the new programs creates a more effective workforce.** Staff received training on the new programs and services, including the Trust Fund Accounting System,

Customer StrataStation, TAAMS, Vital Records, lockbox and more, to improve their efficiency and knowledge of the systems and new processes.

Throughout the model agency reengineering process, meetings were held with trust beneficiaries to provide information on the new programs. Beneficiaries served by agency models will notice improvements in the availability of account data and timeliness of service. The recent enhancements to the agency models allow Interior to move forward and implement these changes across Indian Country. OST and BIA have targeted to have all agencies working with the new processes by the end of December 2007.

I am pleased to recognize another milestone in beneficiary services. December 2005 marked the one-year anniversary of the Trust Beneficiary Call Center (888-678-6836). In that year, staff answered 69,285 calls. Of those calls, 90% had a first line resolution (the question or issue was solved on that first call). The average call time was 3:21 minutes. We estimate that in its first year, the Call Center returned more than 3,680 hours of work time to Interior staff to devote to their other responsibilities.

I want to thank all the tribal members, staff, and Interior employees who continually help and support our work to reform the management of the trust for the benefit of all Indian Trust account holders across the nation.

Sincerely,

Ross O. Swimmer
Special Trustee for American Indians