



**U.S. Department of the Interior**  
**"To-Be" Trust Business Model**  
**Process Template**

<b>Title: Understand the Beneficiary's Intent</b> <i>Identify the process in the "Verb Noun" format. (Ex: Maintain Ownership)</i>	<b>Process Number</b> <b>___P.2.2.1___</b>
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**1. Process Definition** *Provide an overview of the process and define its starting and ending points*

<b>1.1 Starts With</b>	Review the beneficiary's intended land and natural resource use and objectives for the plan.
<b>1.2 Process Overview</b>	<p>An attempt is made to contact all the beneficiaries and other interested parties represented within the plan's boundaries to solicit input. The intended use of the land and natural resources is then communicated to the planning team. However, beneficiary consent is not required to proceed with wide-area planning.</p> <p>When the team is sure they understand the intended use and the beneficiary's reasons for selecting the use, the team compares the intent with the historical use of the land and natural resources. The team then compares the value of the current use with the intended use.</p> <p>The result of the analysis is included in the determination of the land and natural resources alternative uses.</p>
<b>1.3 Stops With</b>	Beneficiary input is included in the development of the plan.

**2. Trust Business Objectives** *Identify the Comprehensive Trust Model strategic goals and business objectives to which this process contributes.*

<b>Goal/Objective</b>
Goal 2: Tribal self-governance and self-determination that increase participation in managing assets
Goal 4: Land and natural resources management that maximizes return while meeting beneficiary desires
Objective 4.2 Preservation and protection of land and natural resource assets: Preserve and protect the long-term viability of land and natural resource assets consistent with fiduciary duties and with the beneficiaries' intended use of the assets.
Objective 4.3 Land and natural resource asset business management: Manage land and natural resource assets effectively and proactively to obtain fair market value for beneficiaries and to incorporate beneficiary requirements.
Objective 4.5 Fractionation strategies: Develop and implement a resolution which reduces or eliminates the exponential increase in the number of ownership interests in land.



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**3. How should Beneficiaries be involved in this process?**

<b>Beneficiary Involvement</b>
Beneficiaries are involved in defining the scope of the plan and the land and natural resources uses described in the plan, and reviewing draft versions of the plan. Their representatives may be part of the planning team.

**4. Organizations, Offices and Roles.** *Identify the DOI organizations and related roles that should be involved in performing the process.*

**4.1 DOI Organizations.** *Identify the DOI organizations, offices and individual roles that contribute to this process. DOI organizations include the Office of the Secretary, BIA, OST, BLM, MMS, OHA, OSM among others. Offices include Central Offices, Regional Offices, Agency (Field) Offices, etc. All individual roles that contribute, in a significant manner, should be identified.*

Organization	Office	Role	Contribution
Tribes	Tribal Office		Provide their objectives for the plan and the intended use for the land and natural resources to be encompassed in the plan.
DOI	Regional Office Agency/Field Office		Understand the beneficiary's intended use of the land and natural resources and their objectives for the plan.

**4.2 External Organizations.** *Identify the non-DOI organizations that support the execution or control of this process.*

External Organization	Contribution
None	



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**5. Event(s)** *Identify the events or conditions that start the process. Describe each event and indicate the frequency (daily, monthly, quarterly, etc.) in which each event is expected to occur. An event may be an external interaction (a beneficiary submits an application), the expiration of a period of time (a lease is due to expire in 90 days), or the realization of some pre-defined threshold (an IIM account reaches the automatic disbursement threshold).*

Event	Description	Estimated Frequency
Resources (personnel and budget) are committed to the planning team.	The planning team staff has been assembled and the budget has been approved. Resources committed have been synchronized with the work plan and schedule.	

**6. Inputs and Outputs.** *Identify and describe all inputs and outputs related to this process. Inputs are information or materials used during the execution of the process; outputs are materials or information produced by the process.*

**6.1 Inputs**

Input	Description
Tribes or tribal/allottee consortium input	The composite opinion of land and natural resources ownership interests within the plan's boundaries.
Individual beneficiary input.	Any testimony taken from public hearings, tribal resolution(s) or notes from consultations, or interview with Owner Use Operator(s) and/or Lessees/Permittees.
Allottee associations	Any testimony taken from public hearings, association resolutions or notes from consultations.
Cattlemen's associations	Any testimony taken from public hearings, tribal resolution(s) or notes from consultations.
Other interested parties	Any testimony taken from public hearings, tribal resolution(s) or notes from consultations.

**6.2 Outputs**

Output	Description
Information and opinions to be included in the plan's development.	



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**7. Fiduciary and Legal Obligations and Controls**

**7.1 Obligations**

*Identify and describe the legal and fiduciary obligations that impact this process. For each obligation, indicate the document or commitment that defines the obligation and the citation (paragraph or section) within the document that pertains to this process.*

Obligation	Source	Business Impact
See Schedule 1 Attached		

**7.2 Controls**

*Identify and describe any controls (enforcement mechanisms) that may be used to ensure that the process adheres to obligations and internal process requirements. Controls may be reviews, audits, segregated duties, etc. Indicate the reason that each control should be introduced (name the obligation that a control is intended to enforce; indicate any controls required to ensure consistency or reliability).*

Control	Reason	Description
None		

**8. Mechanisms (Systems of Record)** *Identify the mechanisms, or systems, that are needed to support the process (ex: Ownership, Leasing, Workflow Management, Office Filing System, etc.). Indicate the information and activities, relevant to the process that each system supports.*

System Name	Support
Integrated data	Easy access to pertinent, accurate information is critical to the development of the plan.

**9. Inter-Process Relationships** *Identify other trust processes that are related to this process (either predecessors or successors). If applicable, indicate the condition under which the processes are related.*

**9.1 Predecessors.** *Predecessors are processes that either produce information required by this process or that result in the need to execute this process.*

Process No.	Name	Condition of Relationship
B.6.2.2	BRDM: Beneficiary Involvement in Planning	Provide the beneficiary's intended use of the land and natural resources to the planning team.
P.2.1.2	Develop & Maintain the Project Plan & Schedule	When the project plan and schedule have been synchronized with the committed resources, the planning team is ready to begin work.



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**9.2 Successors.** *Successors are processes that either use information produced by this process or that must be executed as a result of performing this process.*

<b>Process No.</b>	<b>Name</b>	<b>Condition of Relationship</b>
P.2.2.2	Collect Pertinent Data	When the beneficiary's intended use of the resources is understood, the planning team also needs to collect all pertinent data about the resources encompassed within the plan's boundaries.

**10. Comments** *Summarize any discussion, problems, issues or recommendations that should be considered when reviewing process performance. Category Values (Note, Best Practice, Decision, Problem, Issue, Recommendation)*

<b>Category</b>	<b>Comment</b>
	None