Title: Post Outreach Activity	**Process Number**
Identify the process in the "Verb Noun" format. (Ex: Maintain Ownership)	______**B.5.2**__________

1. Process Definition *Provide an overview of the process and define its starting and ending points*

1.1 Starts With	Completed outreach program
1.2 Process Overview	Completion of an outreach activity includes assessing the results of the survey that was distributed and following up on any actions identified during the activity. First, the survey results are summarized and evaluated. If a survey form is returned with feedback, the submitter may be contacted to clarify the concern. The results of the survey are shared with the appropriate office participating in the outreach activity. Any action items that were identified during the outreach activity, including requests from beneficiaries, are compiled and annotated in the tracking system. Next, an owner is assigned to each action item and / or request and the assignment annotated in the tracking system. An action item may be assigned to a subject matter expert in another office that either participated in, or supported the outreach activity. Lessons learned from the outreach activity are also compiled and annotated in the tracking system.
1.3 Stops With	

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

Goal/Objective
Develop and maintain effective communications with beneficiaries to facilitate their involvement in improving trust management, acquisition and disposal, and conveyances of trust assets, consistent with DOI's fiduciary duties.

3. How should Beneficiaries be involved in this process?

Beneficiary Involvement
Beneficiaries may be contacted to discuss the survey results for additional clarification.

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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
BIA	Agency (Integrated Servicing Office)		Primary lead for conducting the post outreach activity.
OST	Agency (Integrated Servicing Office)		Primary lead for conducting the post outreach activity.
BLM	Field Office		Primary lead for conducting the post outreach activity or participate in conducting the post outreach activity.
MMS	Field Office		Primary lead for conducting the post outreach activity or participate in conducting the post outreach activity.
OHA	Regional Office		Participate in conducting the post outreach activity.
Compacted / Contracted Tribes	Tribal / Consortium Office		Primary lead for conducting the post outreach activity or participate in conducting the post outreach activity.

4.2 External Organizations. *Identify the non-DOI organizations that support the execution of or contribute to 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
Completion of outreach	The outreach program may have been supported by multiple offices / bureaus within the DOI, as well as compacted / contracted tribes.	

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
Outreach survey results	Beneficiaries who attended the outreach program provide input concerning the program.
Lessons Learned	Subject matter experts who conducted the outreach program provide lessons learned.

6.2 Outputs

Output	Description
Action items	Action items result from beneficiary requests during outreach, and evaluation of the survey results and lessons learned. The action items are assigned to DOI personnel to implement. An action item may indicate the need for counseling and may be implemented as part of the "Provide Counsel on Asset Options (B.6.1).

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

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Obligation	Source	Business Impact
Secretary's Trust Principles		Provides guidance on responsibility for the management of the Indian trust assets, information and records.

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 this process, that each system supports.

System Name	Support
Tracking System	Tracking data is annotated with the action items and lessons learned.

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.5.1	Conduct Outreach Activity	Actions items and lessons learned may result from the outreach activities.
FO.5	Reporting and Statements	Participate in the analysis of the outreach lessons learned and action items. May be responsible for specific action items.

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Identify the process in the "Verb Noun" format. (Ex: Maintain Ownership)

Process No.	**Name**	**Condition of Relationship**
O.1.1	Receive and Review Application Request (F-T, On-Reservation, Undivided Interest) and Receive and Review Application Request (T-T & T-F)	Participate in the analysis of the outreach lessons learned and action items. May be responsible for specific action items.
O.1.1a	Serve 30-Day Notices (F-T, On-Reservation, Undivided Interest)	Participate in the analysis of the outreach lessons learned and action items. May be responsible for specific action items.
O.1.2	Complete Application Package (F-T, On-Reservation, Undivided Interest) and Complete Application Package (T-T & T-F)	Participate in the analysis of the outreach lessons learned and action items. May be responsible for specific action items.
O.2.1	Assess Customer Needs	Participate in the analysis of the outreach lessons learned and action items. May be responsible for specific action items.
O.3.1	Prepare Probate Case	Participate in the analysis of the outreach lessons learned and action items. May be responsible for specific action items.
O.3.2.1	Review of Probate File	Participate in the analysis of the outreach lessons learned and action items. May be responsible for specific action items.
O.3.2.2	Mail Proposed Decision	Participate in the analysis of the outreach lessons learned and action items. May be responsible for specific action items.
O.3.2.3	Hold Hearing	Participate in the analysis of the outreach lessons learned and action items. May be responsible for specific action items.

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Process No.	Name	Condition of Relationship
O.3.2.4	Finalize Decision	Participate in the analysis of the outreach lessons learned and action items. May be responsible for specific action items.
O.3.2.5	Consider Appeals	Participate in the analysis of the outreach lessons learned and action items. May be responsible for specific action items.
O.3.3	Close Probate Case	Participate in the analysis of the outreach lessons learned and action items. May be responsible for specific action items.
P.3.1	Coordinate and Deliver Assistance	Participate in the analysis of the outreach lessons learned and action items. May be responsible for specific action items.
UM.3.4	Provide Land Use Technical Assistance	Participate in the analysis of the outreach lessons learned and action items. May be responsible for specific action items.

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.*

Process No.	Name	Condition of Relationship
None		

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)

Category	Comment
Note	Lessons learned and survey results are used as input for the planning of the future outreach programs.
Note	Data storage needs to be available for the action items and lesson learned.