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Fractionation Update

Excellent progress is being made on the issue of fractionation. Supported by a new grant from the Bureau of Indian Affairs, the InterTribal Monitoring Association (ITMA) continues to move toward creative solutions. Additional consultation sessions with tribes will be held in the fall.

ITMA has met with more than a dozen families from the Blackfeet and Crow tribes. Members of these families voluntarily reviewed estate planning options to ensure the lands they own will no longer have fractionated ownership. ITMA has also produced a brochure about fractionation. It was mailed to tribes and probate offices in July.

Tribal Share Consultations

Tribes have expressed concerns that appraisal program tribal shares calculated in 1995 have not changed. Also, there appear to be funding inequities for tribes that contracted or compacted the appraisal program after the 1995 date. The Office of the Special Trustee for American Indians (OST) is revising how funding shares are calculated and allocated to tribes that contract or compact the appraisal program pursuant to P.L. 93-638, the *Indian Self-Determination and Education Assistance Act of 1975* (referred to as 638) as amended [25 U.S.C. §450j-1(a)].

OST held a series of consultation sessions between June 30 and August 18 to discuss ideas for developing a new tribal share allocation formula that will be used to apportion funds for tribes performing or interested in performing the appraisal program. The new formula will ensure uniformity and transparency in determining tribal shares and residual funding for inherently federal functions.

The original tribal share formulas were developed by Bureau of Indian Affairs (BIA) regions in 1995. As a result, 12 different Tribal Share Allocation Formulas (TSAFs) were developed. When the Indian Lands Valuation program was transferred from the BIA to OST in March 2002, BIA Awarding Officials and OST officials continued the region-by-region TSAF policy to maintain continuity. Some of the TSAFs are very simple. In the Midwest Region, for example, the available regional budget for appraisals is divided by the number of tribes in the region. Other regions' TSAFs incorporate different variables in their formulas, such as land base, population or historical workload. Some regional TSAFs are quite complex, involving five or more weighted components.

OST is reviewing tribal input to options discussed during the consultation process. Findings, recommendations and possible plans for further consultations will be communicated as soon as possible and will be published on the OST website. For the latest information, call either Lee Frazier at 202-208-7587 or Eldred Lesensee at 505-816-1602 or visit www.doi.gov/ost and click on the *2009 Tribal Shares* link.

Greening Indian Trust Processes

Over the summer, the first senior manager meeting was held via webcam. All the managers were able to stay at their desks. This saved travel time and costs! With the nation, and even the world, focused on supporting earth-friendly processes and operations, the Office of the Special Trustee for American Indians (OST) is onboard.

OST's move toward a paperless accounting system means less destruction of natural resources to produce products and less residual paper to dispose of or recycle. For OST, encouraging Indian trust account holders to sign up for a debit card or direct deposit account is key to a paperless system. Disbursing funds electronically eliminates the need for paper checks and envelopes. It also is less expensive for the Treasury to process paperless, electronic transactions.

In the future, online communications is another step OST will take toward saving the environment—and time (for printing and mailing) and money (for paper and postage). OST is working toward secure electronic access for account holder information, which is the norm for most financial businesses today.

Treasury's Pay.gov site will be available to lessees by the end of 2009. This system makes possible online lease and permit payments, instead of mailing paper checks to the lockbox.

Help the environment. Ask your Fiduciary Trust Officer (FTO) about the debit card or direct deposit option. Locate your FTO at www.doi.gov/ost/fto. You can also call the Trust Beneficiary Call Center (TBCC) at 1-888-678-6836, toll free. The TBCC is open from Monday through Friday, 7 a.m. to 6 p.m., and Saturday, 8 a.m. to noon, Mountain time.



Advisory Board Tours AIRR

The Special Trustee's Advisory Board met at the American Indian Records Repository (AIRR) in Lenexa, Kansas, on June 18, 2009. The meeting was chaired by board member Edward Holland.

The day's agenda included a tour of AIRR and of the new facility of the Office of Historical Trust Accounting (OHTA). Board members were impressed with the facilities, preservation and storage of records and the indexing project. They also noted the professionalism and dedication of the records staff.

Fiduciary Trust Officer Henry Ware (Concho Agency, El Reno, Oklahoma) made a presentation about the estate planning project piloted in his area with the Oklahoma City University Law School. The program allows law students to work with individual Indian account holders to write wills under the supervision of law professors. A member of the board, Professor David English, expressed interest in expanding this program throughout Indian country.

The next board meeting will be held in Albuquerque, New Mexico, in September.



"It's a new era of state-tribal relations, and New Mexico is at the forefront."

Alvin Warren

Secretary, New Mexico Indian Affairs Department

Great strides have been made in New Mexico's government to government relations with tribes. The current Secretary of the New Mexico Indian Affairs Department toured the office of the Special Trustee for American Indians (OST) facility in Albuquerque on June 23, 2009. Before touring, Secretary Alvin Warren addressed OST employees about the unique department he heads, which is the only cabinet-level Indian Affairs department in any state.

Reaching Urban Indians



Urban Indians were more than 60 percent of the American Indian and Alaskan Native population, according to the 2000 Census. Urban Indians reside in metropolitan areas and may have different cultural experiences than those who live on reservations or territorial land. This segment of the population may rely, in part, upon Indian centers to stay in touch with their cultures.

Recognizing the communication value of urban Indian centers, Office of the Special Trustee for American Indians (OST) Fiduciary Trust Officers (FTOs) establish relationships with centers in their areas to optimize communications with Individual Indian Money (IIM) account holders.

One example is the outreach by Fiduciary Trust Officers Margie Hutchinson, Colville Agency, and Dan Vis, Northern Idaho Agency, to urban Indians living in Spokane, Washington. They collaborate with the American Indian Community Center in Spokane to provide beneficiary services to individual Indians and Alaska Natives not living on reservations.

OST would like to expand its communications with Indian centers. If you are aware of a center that does not know about OST, please call OST's Office of External Affairs at 202-208-4289 or email debby_pafel@ost.doi.gov.

Let's Go Find 'Em!

Detectives, databases, and dogged determination!

Employees and contractors with the Office of the Special Trustee for American Indians (OST) have used these means, and others, to locate Whereabouts Unknown (WAUs). That is what OST calls Individual Indian Money (IIM) account holders who don't have current address information on file.

There is a lot of money—over **\$73 million** total—being held for WAUs.



Some accounts have tens of thousands of dollars in them!

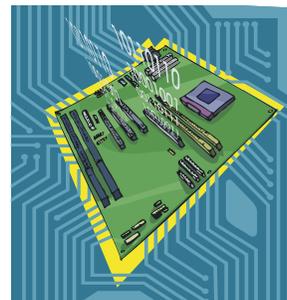
Recently in Washington's Puget Sound area, four WAUs were identified. The total of their four accounts was almost \$200,000. One Puget Sound Agency Accounts Maintenance Technician was responsible for trying all sorts of approaches to find these account holders. Big results, although this activity is just a small part of a technician's assigned duties!

Meanwhile, down south, the first general population outreach effort in the Eastern region took place in Florida during the Self-Governance Conference in May. Results of the effort exceeded the modest expectations of OST staff. More than 130 individuals provided WAU contact information



and nine tribal organization representatives requested WAU information specific to their tribes.

Do you know anyone on the WAU list? Bring out your inner detective and check out the WAU listing at www.doi.gov/ost/wau. You may also follow up or provide leads by calling the Trust Beneficiary Call Center (TBCC) at 1-888-678-6836, toll free. The TBCC is open Monday through Friday from 7 a.m. to 6 p.m. and on Saturday from 8:00 a.m. to noon, Mountain time.



Cartoon credit: Jeff Bucchino, "The Wizard of Draws" www.wizardofdraws.com

Haskell and Records Management

It just seemed a natural fit. When the American Indian Records Repository (AIRR) opened in May 2004 at a location close to Haskell Indian Nations University, part of the plan was to foster a relationship among Haskell, the Office of the Special Trustee for American Indians (OST) and the National Archives and Records Administration (NARA).

OST partnered with NARA to provide archival quality storage space at NARA's Lenexa, Kansas, facility. Centralizing all inactive Indian Affairs records was the first consideration. In addition, they also planned to:

- Preserve the integrity of the records collection;
- Make records available in accordance with applicable federal law and regulations;
- Work jointly with Haskell University to identify and create a series of programs and

projects involving the study of records management; and

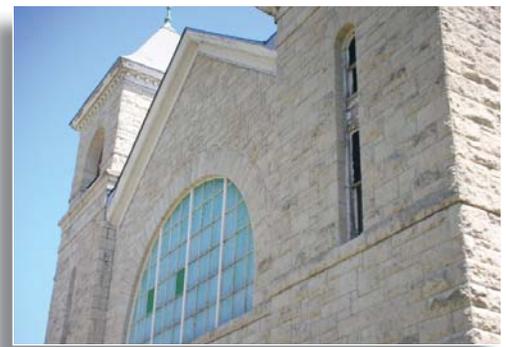
- Support work-study employment, internships and similar opportunities for Haskell students at AIRR.

Since the spring semester of 2005, 361 Haskell students have participated in Level One and Level Two records management courses offered within Haskell's business curriculum. Instructed by OST staff from AIRR, 126 students have earned a certificate in trust records management. As a result of this program, OST has hired Haskell alumni. As of April 16, 2009, twelve members of OST's staff at AIRR are Haskell graduates.

The Student Employment Program (STEP) is an opportunity for students to be exposed to the responsibilities at AIRR for a semester. Starting in the

summer of 2006, five students took advantage of the program. Since then, dozens of students have participated. Four currently-employed AIRR staff are former STEP students. Perhaps you know a future student who is interested in records management training. Haskell may be a good choice to investigate.

This year Haskell University celebrates its 125th anniversary. OST congratulates Haskell staff, students and alumni on the history of this icon of education in Indian country.



Beautiful Hiawatha Hall, built in 1898.



Staff at the Northwest Regional Office (L-R): Tom McCorquodale, Laura Manion, Rena Sanford, Dawn Cordts-Buendia, Philip Graf, Ernest Flechsig

Remember this star?

When you saw it on the cover of the spring issue of Trust Matters, the gold star was covered with paper. The Northwest Regional Office staff peeled off portions of the paper covering as appraisal backlogs were eliminated for each agency.

As of June 30, 93 percent of the appraisal backlog had been completed.

This gold star is just a symbol of the great job done across the country by all staff members of the Office of Appraisal Services. They continue to work toward a zero backlog by the end of the fiscal year.