

# TRUST MATTERS

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## OST Supports Financial Empowerment on the Navajo Nation

The Navajo Region of the Office of the Special Trustee for American Indians (OST) supported the Department of the Interior's Federal Indian Minerals Office (FIMO) and First Nations Development Institute's presentation of **three financial education workshops** in July to members of the Navajo Nation. Workshop topics included budgeting, credit, and investing. Online resources were also covered. The training took place at San Juan Community College in Farmington, New Mexico.

Navajo Region Fiduciary Trust Officer Virginia Moore had previously conducted **seven trust asset outreach sessions** for FIMO between May and July 2013. These meetings informed beneficiaries of their estate planning options, enabling them to make informed decisions about their trust assets. Sessions covered estate planning options and tools, such as wills, gift deed, joint tenancy, and selling to co-owners. Explanations of intestate succession, fractionation, and highlights of the American Indian Probate Reform Act were also part of the presentations. When helpful, topics were presented in the Diné language.

Due to increased oil drilling leases and signing bonuses, Navajo Indian trust beneficiaries are among those receiving payments that may total millions of dollars. Financial empowerment through financial skills and trust asset training are important to beneficiaries. They support a sound understanding of finances for building and protecting personal wealth.

OST holds financial skills and trust asset training in many locations. To find out what is being offered near you, contact your local Fiduciary Trust Officer (FTO). Visit [www.doi.gov/ost/fto](http://www.doi.gov/ost/fto) to locate your FTO. Most FTOs are also on Facebook.



Navajo Region Fiduciary Trust Officer Virginia Moore presented financial concepts at a trust asset outreach session for Navajo Indian trust beneficiaries.



## OST Finalizes a Five-Year Strategic Plan



With development of the first strategic plan for the Office of the Special Trustee for American Indians (OST), Principal Deputy Special Trustee Michele F. Singer thanked everyone throughout the organization for providing feedback and ideas that contributed to the final product. A recent employee survey revealed that 85 percent agreed the plan will move OST in the right direction to achieve its mission, and 71 percent agreed the plan will help guide day-to-day activities as they relate to OST's mission.

The next step is implementation of the strategic plan. Each program office completed templates that identified

operating plans — part of the Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis — to develop goals, objectives, and strategies. Program offices are now positioned to execute their action plans. Communication and collaboration will be key to the success of the plan.

The strategic plan provides an opportunity for OST to strengthen services across the board for American Indian beneficiaries. The plan becomes a model for best practices and a “best place to work” in the federal government.

Finally, OST has a new vision and a revised mission statement. These powerful statements convey the message OST wants to send to all its stakeholders.

**Vision:** *To be the premier public service organization dedicated to the Indian fiduciary trust.*

**Mission:** *To honor our trust responsibilities by incorporating a beneficiary focus and participation while providing superior stewardship of trust assets.*

For more information about OST's strategic plan, please contact Chief of Staff Helen Riggs at 505-816-1131.

## Consolidating OST Office Space in Albuquerque

In an effort to consolidate space and save resources, the Office of the Special Trustee for American Indians' (OST) workplace located in Albuquerque, New Mexico, is planning to downsize. Employees are vacating about one half of the current space and will be consolidating into tighter quarters within their current location, the building on Masthead Street.

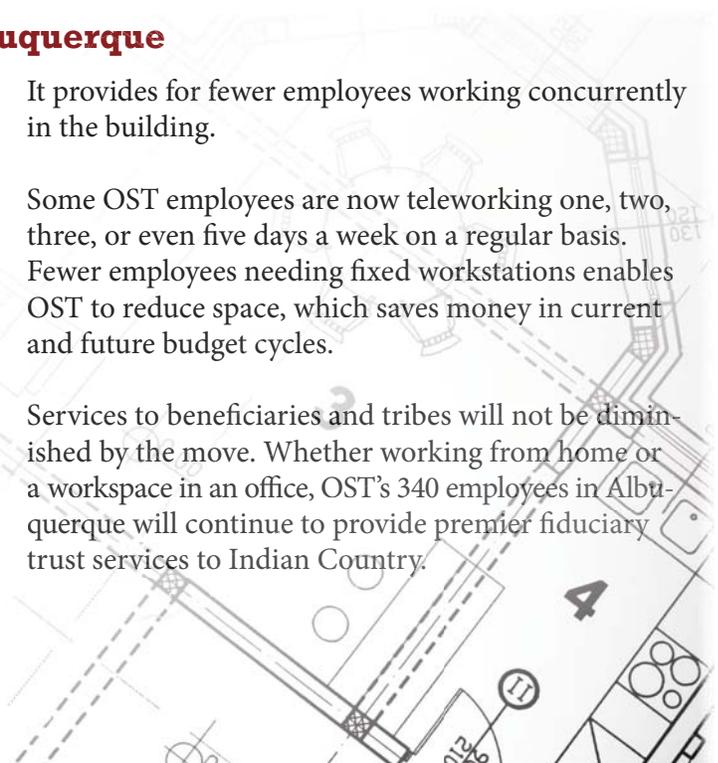
Renovations to downsize the current space are scheduled to begin mid November 2013 and will continue into early February 2014. The move, designed to accommodate another tenant in the same building, provides OST an opportunity to reduce its budget by eliminating inessential space.

According to Leon Craig, OST's move coordinator located in Washington, D.C., the realignment of space meets the Department of the Interior's requirements, with direction from the Administration.

It provides for fewer employees working concurrently in the building.

Some OST employees are now teleworking one, two, three, or even five days a week on a regular basis. Fewer employees needing fixed workstations enables OST to reduce space, which saves money in current and future budget cycles.

Services to beneficiaries and tribes will not be diminished by the move. Whether working from home or a workspace in an office, OST's 340 employees in Albuquerque will continue to provide premier fiduciary trust services to Indian Country.



## Indian Trust Commission Concludes

The Secretarial Commission on Indian Trust Administration and Reform (Commission) will transmit its report to the Secretary of the Interior in December 2013. The report was delayed due to the government shutdown. The Commission held two administrative working sessions in November to finalize their recommendations. Their work will conclude with a public webinar on December 10 to present their recommendations. Please visit [www.doi.gov/cobell/commission](http://www.doi.gov/cobell/commission) for details on how to participate in the public webinar or, after December 10, to view the Commission's recommendations.

The Commission was tasked by the Secretary of the Interior with conducting a comprehensive evaluation of the entire trust administration system. That system includes more than \$4 billion in financial assets, management of Indian trust land and resources of approximately 56 million surface acres and 57 million acres of subsurface mineral estates, and approximately 109,000 leases on lands. The Secretary named five

prominent American Indians to the Commission in November 2011. Selected were **Chairwoman Fawn Sharp**, Quinault Indian Nation (Commission Chair); **Chairman Tex G. Hall**, Three Affiliated Tribes; **Dr. Peterson Zah**, former President of the Navajo Nation; **Robert Anderson**, Minnesota Chippewa Tribe-Boise Forte Band; and **Stacy Leeds**, Cherokee Tribe of Oklahoma.

Over its two-year term, the Commission conducted an outreach campaign to give American Indians and Alaska Natives an opportunity to provide input. Prior to December 2013, the Commission held seven public meetings across the country and four webinars. Additional events geared to youth were conducted at three meeting locations. Summaries and transcripts from public and webinar sessions are available on the website. The Commission would have expired November 28, 2013. An extension was necessary due to the government shutdown.

## Sim-Wing Gohard Receives Federal Manager Award

Sim-Wing Gohard, Supervisory Accountant with the Office of the Special Trustee for American Indians (OST) Office of Trust Funds Management (OTFM), received the 2012 New Mexico Federal Employee of the Year Medal from the New Mexico Federal Executive Board (NMFEB). Annually, the organization recognizes a federal employee whose professional contributions exemplify the highest attributes of public service. She received the award at the annual NMFEB awards ceremony on May 8, 2013, in Albuquerque, New Mexico.

Gohard was recognized for being an exceptional federal manager based on the following accomplishments: accountability to beneficiaries, dedication to employees, and outstanding customer service during 2012. She created an overall change plan, which included a reorganization of OTFM and automation efforts in order to reduce expenditures; specifically, elimination of a personnel contract for \$750,000. When her plan was approved by management, there was a small window of opportunity to reorganize, train employees, and assume the accounting duties that had been handled under the contract. The plan also provided advancement opportunities for employees, increased morale, and improved accuracy of the work.

For more information, contact the NMFEB at [www.newmexico.feb.gov](http://www.newmexico.feb.gov).



## New Tribal Relations Advisors

The **Land Buy-Back Program for Tribal Nations** has announced a small team of advisors dedicated to tribal relations that are committed to working collaboratively with tribal governments to guide Program implementation on each reservation in accordance with the tribe's unique needs and priorities.



**Genevieve L. Giaccardo (GG)** came to the Interior Department two years ago after having worked in Indian Country for more than 15 years. Her services to tribes and other American Indian organizations primarily focused on comprehensive planning, where she emphasized consensus building and culturally relevant strategies. Her work addresses key issues such as education, economic development, and land-use. She is a member of the Pueblo of San Felipe in New Mexico.



**Andrea Patton** joins the Program after working as a Policy Analyst within the Indian Health Service Office of Tribal Self-Governance, where her focus included the first Tribal Self-Governance Report to Congress; Affordable Care Act regulation reviews; tribal-federal workgroup initiatives; tribal consultation; and tribal delegation meetings. Ms. Patton is a member of the Sac and Fox Nation and a descendant of the Citizen Potawatomi Nation, Cherokee Nation, and Choctaw Nation of Oklahoma.



**Anthony Morgan Rodman** comes to the Program after working nearly four years at the Office of the Special Trustee for American Indians. Mr. Rodman has dedicated most of his career to working with tribes and tribal members, including his work on the recruitment and retention of Native American students at Harvard University and later, the University of Arizona. Mr. Rodman is a citizen of the Cherokee Nation and Osage Nation in Oklahoma.

Full bios and other information, including updated cooperative agreement documents, outreach tools, answers to frequent questions, and potential steps that your reservation might pursue to get ready for the Program are available at the newly relaunched website.

[www.doi.gov/buybackprogram](http://www.doi.gov/buybackprogram).

