

TRUST MATTERS



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Your Email Address

In today's world of instant messages, email addresses and mobile phone numbers (not to mention, social media sites), being informed quickly and easily is possible and often preferable. It's time for OST to better use these tools to communicate with individual and tribal beneficiaries.

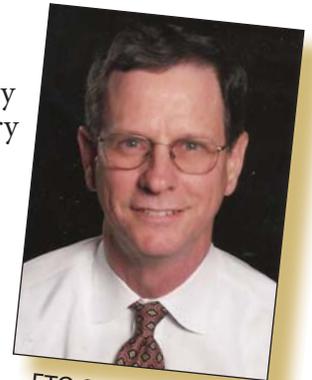
OST is asking each beneficiary to provide an email address. (It's voluntary, of course.) Contact either your FTO or the Trust Beneficiary Call Center, toll free, at 1-888-678-6836. TBCC hours are Monday through Friday 7 a.m. to 6 p.m. and Saturday 8 a.m. to noon, Mountain time. Or just email debby_pafel@ost.doi.gov.



High Recognition for Exceptional Service

Sometimes people do the right thing just because they know it is the right thing. Often, one's contribution to the good is just part of the day's activities.

There are also those times when doing right is not only noticed but is the impetus for positive actions by others. That is exactly what happened when Fiduciary Trust Officer Stephen Coit (Pawnee Agency) was recognized "for his exceptional service not only to [a client] but to our system of justice." Those words are part of a letter about FTO Coit's "vigilance in ensuring proper disposition of Indian property."



FTO Stephen Coit

The letter explains that FTO Coit's steadfast research and perseverance brought about bestowal of an inheritance. Ultimately, *that* led to someone donating significant funds for the establishment of the Jodi Marquette American Indian Wills Clinic in Oklahoma (see *Trust Matters* article, 2010 winter issue, page 2).

FTO Coit makes all of OST proud. His everyday attention to work and matter-of-fact approach to "attending faithfully to his responsibilities" is highly commendable. Again, as expressed in the letter, he is "an example of government service performing at its very best. This country [is] lucky to have government employees of his caliber."

Some would say FTO Coit's actions are not exceptional — not for him or most of his coworkers. He is the first to declare that other FTOs with the Office of the Special Trustee for American Indians (OST) were instrumental in the concept and establishment of the clinic. This does not diminish FTO Coit's superb efforts. Rather, it highlights how fortunate OST is to have many FTOs and other employees of his caliber. Like him, they are doing the right thing because they care about the effects of their work on the beneficiaries they serve.

Beyond the Reservation

"We are constantly making efforts to expand our beneficiary services to all parts, including large urban areas where beneficiaries may reside. For example, the Concho Agency is going outside its historical, geographical reservation boundaries and into Oklahoma City to reach our accountholders," said Fiduciary Trust Officer Henry Ware. "We serve them all, regardless of tribal affiliation."

Clinics, post offices, urban Indian centers and other venues — outreach efforts by Office of the Special Trustee for American Indians (OST) personnel all over the country happen wherever beneficiaries may be. Without doubt, OST is taking trust services beyond the reservation.

You Will Get a Statement

A little quiz: You are receiving your trust disbursements electronically — that is, either by direct deposit to your bank account or to your debit card. Will a statement still be mailed to you?

Answer: Yes. You will receive a paper statement in the mail. Account statements are generally mailed to Indian trust beneficiaries on a quarterly basis. These statements include account activity for the past quarter. If you receive income from an oil or gas asset, you will also receive an explanation of payment. (Note: If you have an account with a \$15 or less and it has had no activity for the last eighteen months, you will receive a statement once a year.)

Why is this important? Your account could be added to the *Whereabouts Unknown* list if the Office of the Special Trustee for American Indians (OST) doesn't have your current mailing address. A mailed statement that is returned as undeliverable puts a stop on the account and moves the account to whereabouts unknown status. Even disbursements going out electronically are affected.

What should you do? Be sure your mailing address is current! If there is any disruption in your mail or to your electronic disbursements, check with your FTO. Inform your FTO promptly if your mailing address changes. Locate your FTO online at www.doi.gov/ost/fto.

You may also use the Trust Beneficiary Call Center (TBCC) to update your address. Call the TBCC, toll free, at 1-888-678-6836. The hours are Monday through Friday 7 a.m. to 6 p.m. and Saturday 8 a.m. to noon, Mountain time.

Pacific Region Appraisers *Move It*

Yes, the Pacific Region Office of Appraisal Services (OAS) moved to new office space on Saturday, June 26. Please make a note of the address:

1751 Howe Avenue, Suite 210
Sacramento, CA 95825

OAS staff members are pleased with the change. The layout helps them work more efficiently and, therefore, provide better service. You can contact them at their new phone numbers.

Delmar (Will) Armstrong, Regional Supervisory Appraiser:

916-566-7022

Cheryl Noonan, Review Appraiser:

916-566-7025

Linda Wise, Appraisal Program

Specialist: 916-566-7028

Fax: 916-566-7021

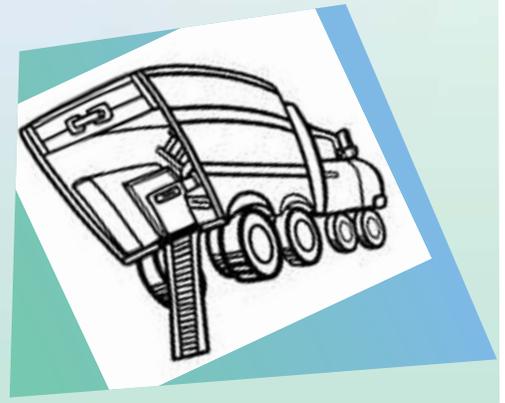
No change to email addresses, which remain:

delmar_armstrong@ost.doi.gov

cheryl_noonan@ost.doi.gov

linda_wise@ost.doi.gov

To access current phone numbers of any Regional Supervisory Appraiser, visit the Office of the Special Trustee for American Indians website at http://www.doi.gov/ost/oas/contact_oas.html.



Special Trustee's Advisory Board Met June 24, 2010

Principal Deputy Special Trustee Donna Erwin met with members of the Special Trustee's Advisory Board late in June in Washington, D.C. The agenda included a conference with Department of the Interior's Deputy Secretary David Hayes. He made several points, including mention of a potential nominee for Special Trustee. He described the nominee as someone with strong financial and management skills as well as government experience. The Deputy Secretary expressed his appreciation for the patience of the Board's members and thanked them for their ongoing service.

Some topics covered by the members during the Board's meeting included:

- Department of the Treasury effort to disburse all federal payments electronically
- Whereabouts Unknown (account holders who do not have current address information on file) status
- DOI government-to-government consultation team, which includes designee Ethel Abeita, Director of the Office of Trust Records, and alternate Pat Gerard, Management Analyst with the Office of the Principal Deputy Special Trustee
- Tribal shares allocation formula tribal-federal workgroup (see article in this issue)
- Pay.gov implementation

For more information, contact your Fiduciary Trust Officer (FTO). Locate your FTO online at www.doi.gov/ost/fto.

Regional Trust Administrators Assigned New Regions

When Deputy Special Trustee Doug Lords was asked to take over Field Operations back in fiscal year 2003, he envisioned a rotation among Regional Trust Administrators (RTAs). He saw a stronger and more knowledgeable organization resulting from such a move. He also believed it would enhance services all Office of the Special Trustee for American Indians (OST) staff members provide to beneficiaries — tribal and individual Indians.

Effective **October 1, 2010**, OST will implement the following realignment:

RTA Rob Craff will be responsible for **Southern Plains, Southwest and Eastern Oklahoma Regions.**

RTA Jim James will be responsible for **Navajo, Western and Pacific Regions.**

RTA Cathy Rugen will be responsible for **Great Plains and Eastern Regions.**

RTA Tom Reynolds will be responsible for **Rocky Mountain and Midwest Regions.**

RTA Melvin Burch will be responsible for **Northwest and Alaska Regions.**

The Fiduciary Trust Officers (FTOs), who are local points of contact for beneficiaries, will remain unchanged.

Visit the OST website for RTA and FTO contact information. Go to: <http://www.doi.gov/ost/information/individual/finder.html>.

Remember, after October 1, the website will reflect the *new* RTA assignments.

Your Trust: Priceless

Fiduciary Trust Officers (FTOs) help resolve all sorts of issues faced by beneficiaries. The following success stories, submitted by two FTOs, represent and demonstrate how FTOs work locally to earn the trust and respect of the beneficiaries they support.

Story #1

I worked with a beneficiary regarding a land exchange that was approved by the tribe in 1998. Although there was compliance with all requirements, the exchange was cancelled later when a moratorium was issued on all tribal exchanges. In the meantime, the beneficiary had completed building a home on the property. Unfamiliar with the process, the beneficiary was not successful when she challenged the cancellation of approval. When she came to me for assistance, my office staff helped her complete a new application and then we worked with the new tribal administration to obtain approval. Ultimately, the request for the exchange was approved by the Chairman *and* he asked BIA to process the transaction quickly. You can only imagine how this beneficiary felt! She was very thankful for the assistance we provided.



Story #2

I travelled to a community to visit an 81 year old tribal elder. For two weeks, she had been carrying around a check for \$69,000. She informed me she did not trust government staff or anyone at the bank (the person with whom she always conducted business had passed away). I explained how her account works and told her that she would be receiving monthly



checks. When she asked how I handle my funds and I told her I left mine in my IIM account, she stated, "That is what I will do." She decided to have a voluntary hold on her funds until she requests them. Then they will be direct-deposited into her bank account. This solution took place because she "trusts me." I consider that priceless!

Your FTO is ready to help you. Locate your FTO online at www.doi.gov/ost/fto or call the Trust Beneficiary Call Center (TBCC), toll free, at 1-888-678-6836. The TBCC hours are Monday through Friday from 7 a.m. to 6 p.m. and Saturday from 8 a.m. to noon, Mountain time.

(Storyteller artwork from www.firstpeople.us.)

TRIBAL SHARES ALLOCATION FORMULAS WORKGROUP

During the summer of 2009, the Office of the Special Trustee for American Indians (OST) sponsored a series of six tribal consultation meetings to explore the development of a *uniform* tribal shares allocation formula. Currently, tribes that choose to compact or contract the Real Estate Appraisals Program (pursuant to P.L. 93-638, the *Indian Self-Determination and Education Assistance Act of 1975*) receive federal funds to operate the program based on regional allocation formulas that, in some cases, were developed in the 1990s.

OST's tribal shares team reviewed the comments received at the consultation meetings and additional post-consultation comments/suggestions. Using these comments, the team recommended a workload-based formula, averaging tribal workload over the most recent five years.

In a letter issued to tribal leaders on June 28, 2010, OST sought nominations for individuals knowledgeable about appraisals to serve on a small tribal-federal workgroup to help shape the final decision. The workgroup's recommendations, scheduled for September 2010 completion, will be reported when available. OST also plans to publish the results in the fall issue of *Trust Matters*.

For more information, contact Office of Appraisal Services Deputy Director Iris Crisman at 505-816-1127 or iris_crisman@ost.doi.gov.

Indian Specific Medicaid Provisions *American Recovery and Reinvestment Act*

Your trust property has new Medicaid-eligibility protection. The *American Recovery and Reinvestment Act of 2009* (ARRA), Section 5006, lists resources that states shall disregard when determining an Indian's eligibility for medical assistance. These resources include "...real property and improvements,...held in trust...[o]wnership interests in rents, leases, royalties, or usage rights related to natural resources...."

Regional Trust Administrators and Fiduciary Trust Officers (FTOs) with the Office of the Special Trustee for American Indians (OST) are working with the federal Centers for Medicare and Medicaid Services (CMS) and state personnel to help implement Medicaid eligibility changes that apply to trust beneficiaries. OST is coordinating tribal personnel training with CMS to insure that tribes that contract or compact social service programs are aware of these provisions as well. Along with Bureau of Indian Affairs staff, FTOs are reviewing detailed guidance from the federal Center for Medicaid and State Operations so regulations are applied consistently and accurately in every state.

If you have concerns about the application of ARRA regarding Medicaid eligibility, contact your FTO. Locate your FTO online at www.doi.gov/ost/fto or call the Trust Beneficiary Call Center (TBCC), toll free, at 1-888-678-6836. TBCC is open Monday through Friday from 7 a.m. to 6 p.m. and Saturday from 8 a.m. to noon, Mountain time.

