



TRUST MATTERS

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Special Trustee Vincent Logan Confirmed

Vincent Logan, member of the Osage Nation, was confirmed by the U.S. Senate on June 26, 2014, as the Special Trustee for American Indians. The fourth person to lead the Department of the Interior's Office of the Special Trustee for American Indians (OST), he was officially sworn in as the Special Trustee on July 7, 2014.

"I know the issues of Indian Country and I am eager to work with tribal leaders to accomplish the fiduciary goals of the Indian trust and to serve the beneficiaries," said Special Trustee Logan.

Secretary of the Interior Jewell lauded Logan's asset management expertise, his legal experience, and his extensive network of professional relationships in Indian Country. She anticipates a strong and responsive Indian trust management system under his leadership.

For specific account questions or for help, please contact the Trust Beneficiary Call Center at 1-888-678-6836, toll free.

Special Trustee Logan, Jeanine Logan (sister), and Interior Secretary Jewell at the swearing-in ceremony in the Secretary's office.



Native Report Explores OST's Social Media Efforts

Jim James, Deputy Special Trustee – Field Operations, and Fiduciary Trust Officer Jewel VonFang Taber, Great Lakes Agency, were interviewed by *Native Report* for an episode about the Office of the Special Trustee for American Indians' (OST) use of social media to reach Individual Indian Money account owners who do not have current addresses associated with their accounts. The episode aired Thursday, April 24, in the station's local viewing area (Minnesota). Other PBS stations will be airing the episode per their schedules. Check your local listings!

This episode, part of *Native Report's* ninth season, has been added to their website. You can watch the episode online at www.wdse.org/shows/native/watch/season-9-episode-15.

Native Report has produced four episodes about OST. Season six, episodes one and two, were about OST's operations. There was so much information to convey that it was covered in two *consecutive* episodes. Season eight, episode two, included a story about OST's American Indian Records Repository. Previous episodes can be viewed online at www.wdse.org/shows/native/watch.

Native Report is a magazine style series that celebrates Native American culture and heritage. The series is a production of PBS stations WDSE and WRPT in Minnesota.

If you have questions, or for more information, please contact Debby Pafel at 202-208-4289.

Presidential Visit: Standing Rock Reservation

When President Obama visited the Standing Rock Reservation on June 13, 2014, it was all hands on deck to make it a smooth and memorable event. Ed Grant, Standing Rock Reservation Fiduciary Trust Officer with the Office of the Special Trustee for American Indians, asked the Chairman's office how he could help. They made him captain on one of the on-site volunteer teams. He had the honor of seating elders, the handicapped, visiting dignitaries, and other VIPs. He also provided security for the press section. Ed remarked, "It was a truly beautiful event. Assisting the tribe and our beneficiaries is all part of the job. I am happy that I was able to be a small part of it."

Treasury Assumes Lockbox Functions

For the past nine years, the Office of the Special Trustee for American Indians (OST) has used contractors to operate its lockbox for the collection of Indian trust payments. When the lockbox was first instituted, the Department of the Treasury was unable to provide the service because they were connected to the Internet and OST was prohibited from using the Internet.

OST has been working with Treasury since 2013 to have them assume the lockbox functions. Treasury is able to accommodate the unique requirements OST had developed in its lockbox process and still provide the same level of service.

The Treasury lockbox was activated in June 2014. To avoid delays in processing payments, the old lockbox will still process payments for invoices with the old payment address.

The transfer will result in an average savings to OST of approximately \$205,000 per year over the next three fiscal years (through fiscal year 2017). OST was further able to reduce costs by moving the undelivered check cancellation process from the lockbox to Treasury's check cancellation program at the Philadelphia Financial Center.

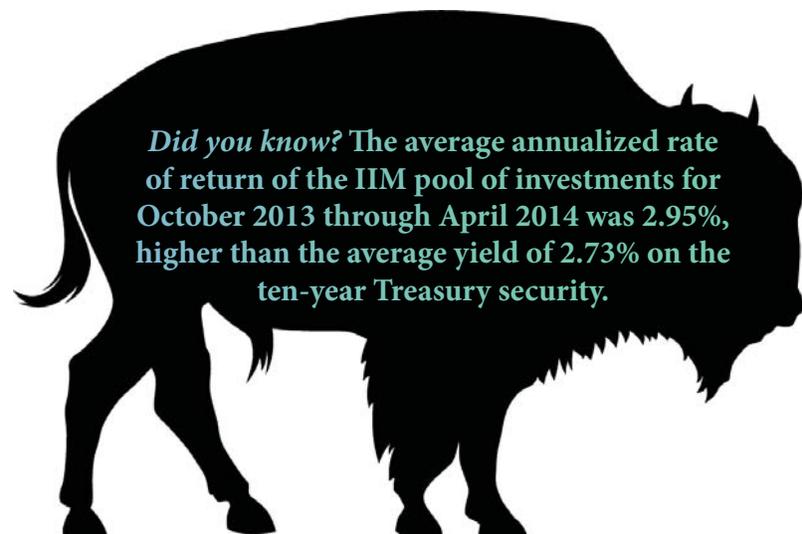
OST Supports 2014 Self-Governance Conference

Roberson (Bob) Becenti, Program Analyst with the Office of the Special Trustee for American Indians (OST), attended this year's Tribal Self Governance Consultation Conference in May 2014. Bob, and his coworker Lee Frazier, administer OST's Public Law 93-638 program, working with tribes that have either contracted or compacted the Appraisals Services or the Beneficiary Processes programs. At the conference, Bob moderated a panel that introduced a new annual trust evaluations methodology for the OST Office of Trust Review and Audit (see story on the right). For more information about compacting or contracting OST programs, contact Bob at 505-816-1413 or email him at roberson_becenti@ost.doi.gov.

Panel below, left to right: John White, OST Deputy Special Trustee - Program Management; Robert Scabby, Confederated Salish and Kootenai Tribes; Ruth Swaney, Salt River Pima Maricopa Indian Community; Nolan Solomon, OST Management Analyst



Did you know? The average annualized rate of return of the IIM pool of investments for October 2013 through April 2014 was 2.95%, higher than the average yield of 2.73% on the ten-year Treasury security.



Proposed Audit Methodology Introduced at Self-Governance Conference

There are 105 tribes that currently compact trust programs. In accordance with 25 CFR (Code of Federal Regulations), Parts 1000.354 and 1000.355, each of these tribes should be evaluated annually to ensure functions are performed in accordance with trust standards defined in the regulations. The Office of Trust Review and Audit (OTRA), within the Office of the Special Trustee for American Indians (OST), is responsible for conducting annual trust evaluations (ATE) of tribes that compact trust programs.

Using the present methodology, a trust evaluation starts on site at the tribe's location. OTRA determines which tribes will be evaluated during a year and prepares a schedule. OTRA notifies each tribe of the schedule. An OTRA auditor travels from Albuquerque to the tribe's location to conduct interviews and scan documentation. Upon returning to Albuquerque, the auditor analyzes the data collected from the tribe and prepares a draft evaluation. The tribe reviews the draft and provides comments. The auditor creates a final report that includes a corrective action plan, if needed. The auditor follows up with the tribe to ensure steps in the CAP are completed so that the tribe is in full compliance with the regulations.

During the 2014 Annual Self-Governance Conference that took place May 4-8, OTRA made a presentation to introduce a new ATE methodology. This methodology takes into consideration the requirement that each tribe is to be audited annually and that constrained government resources will continue to impact the ability to do that using the current methodology. It also employs information technology to support a more effective and efficient ATE process.

The proposed methodology would be a web-based process. All tribes that compact trust programs would use an online application to respond to evaluation questions and to upload documentation. Tribes would certify that their responses and uploaded data are accurate. The auditor, in Albuquerque, would analyze the data and prepare the draft report, as in the current process. A select number

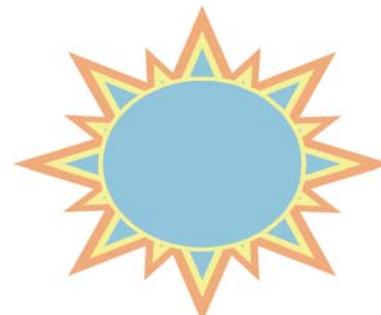
of on-site reviews would still be conducted based upon an analysis of the data application completed and uploaded online. The final report and follow up process would remain unchanged.

The new methodology would offer several benefits:

- » Provide tribes with greater autonomy and control regarding the quality and management of their trust programs and reporting
- » Leverage modern information technology to provide a more efficient and effective web-based application, which would also memorialize records for future reference
- » Provide a less intrusive approach that allows tribes the flexibility to complete the assessment and communicate with trust program subject matter experts over a period of time (to be determined), with an expected date of completion
- » Enable compliance with the annual requirement to evaluate all tribes annually

The introduction at the conference of this proposed methodology gave tribes a chance to ask questions and provided OTRA staff with valuable feedback. Over the next few years, the online application process will be developed. OST envisions more opportunities during that time to collaborate with tribes on the concept, development, and implementation, including tribal participation in a workgroup that is to be established. Upon completion of the application, tribes would be solicited to pilot test it.

To learn more about this effort, please contact Elizabeth Wells Shollenberger, Director of OTRA, at 505-816-1286, or Nolan Solomon, Management and Program Analyst, at 505-816-1257. You may also email questions and comments to nolan_solomon@ost.doi.gov.



Walker Sisters Purchase and Return Historic Ancestral Land to the Tribe

Austin Gillette, a Fiduciary Trust Officer (FTO) with the Office of the Special Trustee for American Indians, was honored to be part of the ancestral lands home-coming procession of the Three Affiliated Tribes. The procession, which took place June 6, 2014, in Stanton, North Dakota, celebrated the return of ancestral Knife River land.

The land was purchased and donated by Tillie Walker and Reba Walker, to honor their late father, Hans Young Bird Walker Sr. The land ownership has been signed over to the tribes and a fee to trust application will be submitted to place the land into trust. The tribes have stated that the land will be used for an interpretive center for the history of the tribes and will be governed by a board of directors to be appointed in the near future. The donated land is located adjacent to the Knife River Historical Site. Three Hidatsa villages were located here from 1525 until 1845. Historically,

surviving members of the Hidatsa fled the area following a small pox epidemic in 1837.

“The Walker sisters, Tillie and Reba, have set a new standard in the tradition of giving,” reflected FTO Gillette. “They have honored their father and the memory of our ancestors who once lived at Knife River. They have left a legacy that will stand the test of time.”



Austin Gillette (left), Kermit Heart in buggy, Laithan Smith, and MHA Nation Tribal Chairman Tex Hall lead the procession. Photo by James Brugh and used by permission of *MHA Times*

Land Buy-Back Program Holds Listening Session Following Announcement of Two-Year Implementation Schedule

The Land Buy-Back Program for Tribal Nations (Buy-Back Program) implements the land consolidation component of the *Cobell Settlement*, which provided \$1.9 billion to purchase fractionated interests in trust or restricted land from willing sellers at fair market value. Program personnel know that it is critical to exhaust all efforts to reach individual landowners and communicate the importance of reducing fractionation, the advantages of selling their land, and the resources for them to gather more information and understand their options. The Program has been working in concert with tribes and tribal organizations to make sure that landowners know the facts about the unique opportunity before them.

On May 29, the Program held a Listening Session in Portland, Oregon. Deputy Secretary Mike Connor, Assistant Secretary-Indian Affairs Kevin Washburn, and program staff heard from audience members on a number of issues. A question heard most often is: *When will the Program come to my reservation?* In mid-May, the Interior Department announced a schedule

through 2015 for continued implementation of the Program. The schedule identifies locations representing more than half of all the fractional interests and unique owners across Indian Country where land consolidation activities are expected to take place through the end of 2015. A full list of locations can be found at <http://on.doi.gov/1ybQlrc>. The Program hopes to schedule additional locations to purchase land, including the Midwest and Pacific Regions, and those locations where tribes have expressed interest, as capacity and resources allow.

If you own fractionated and undivided land on a reservation that is eligible for the Program, call the Trust Beneficiary Call Center at 888-678-6836 to ensure your contact information is accurate and to register as an interested seller. This will enable you to receive program information and will expedite the opportunity to present you with a purchase offer as the Program is implemented. Additional information is available at www.doi.gov/buybackprogram/landowners.