



**Office of the Special Trustee
for American Indians**

Briefing Presented by
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Tribal Interior Budget Council Meeting
May 11-12, 2016
Washington, DC

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Today's Topics:

- FY 2017 Budget
- Tribal Methodology Project
- Facilities
- Strategic Planning
- Financial Education Update

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OST Budget

- FY 2017 Budget Request is \$140.4 M
 - \$1.4 million above FY 2016 budget
- Request includes \$1.5 M for probate reform
 - Assistance preparing wills and other estate planning documents
 - Streamlining gift deed process
 - Explore use of Payable upon Death and Transferable upon Death designations

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Tribal Methodology Project

- OST is developing a new web-based application for tribal trust evaluations
- Nine pilot tribes or consortiums are directly involved in the development
- Tribal representatives and the OST team jointly developed the content for the software developers

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Tribal Methodology Project

- Currently 96 tribes and consortiums compact trust programs
- Office of Trust Review and Audit is required to conduct annual evaluations
- Current approach of on-site evaluations limits reviews to an average of 23 annually

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Tribal Methodology Project

Application will leverage technology and:

- Streamline the evaluation process
- Reduce interruption to daily operations of Tribes
- Facilitate more annual evaluations
- Reduce turn-around time in delivery of reports to Tribes

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OST Staff and representatives from the nine pilot tribes/consortiums: Salt River Pima-Maricopa Indian Community, Kawerak, Inc., Native Village of Tanana, Confederated Tribes of Siletz, Confederated Salish and Kootenai Tribes of the Flathead Reservation, Oneida Tribe of Indians of Wisconsin, Bristol Bay Native Association, Tanana Chiefs Conference, Inc. and Muscogee (Creek) Nation of Oklahoma

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Facilities

- Survey of OST facilities conducted in 2014
- Security and habitability issues identified in multiple locations where OST and BIA employees are co-located
- Improving safety and habitability of field offices is a priority of the Special Trustee

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Facilities

- BIA Superintendents and OST staff jointly developed corrective action plans
- Plans addressing safety, security, and habitability
 - Installation of fencing, security doors, surveillance systems, exterior lighting, improving accessibility
 - Improving air quality and functionality of work space

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Facilities

- Anticipate contract for Pine Ridge improvements by mid July
- Yankton improvement project nearing completion

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Strategic Planning

Department of the Interior issued guidance on review and update of Strategic Plan

- Strategic Plans of Bureaus and Offices align and support broad Departmental goals
- OST will conduct review of existing plan in preparation for updated FY 2018-2022 Plan
- Look for opportunities to collaborate and coordinate activities across programs, eliminating duplication or overlap

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Financial Education

Generation Indigenous Native Youth Symposium at the Pueblo of Isleta on April 26, 2016

- Sponsored by FINRA, Pueblo of Isleta, OST, and multiple financial institutions
- Over 200 adults and 104 youth attended
- Focus on approaches to expanding opportunities for native youth
 - Role of financial education

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Financial Education

- Symposium included multiple workshops and panel discussions
- Panel participants from a broad spectrum of backgrounds
- Special Trustee provided opening remarks
- Keynote speaker: William Mendoza

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Financial Education

- Native youth played the *Spending Frenzy* money game
- OST staff moderated panel discussions
 - Educational Opportunities for Native American youth
 - Career opportunities and workforce development
 - Personal credit and lending
- Several Tribes expressed interest in hosting similar events

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“Spending Frenzy” participants buying a car

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Investing 101 Workshop Participants

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“Spending Frenzy” participants earning income from investments

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Questions?



Thank you!

