

## **MEETING REPORT**

**OST Principal Deputy Special Trustee Donna Erwin**  
Albuquerque, New Mexico  
- February 11, 2005 -

(Attendees: Donna Erwin, Mary Zuni, David Harrison, Marcella Giles)

### **Organizational Chart of Trust-Related Offices**

Donna Erwin met ITMA representatives at the OST offices in Albuquerque at 9 a.m. She was pleased a position for liaison had been filled and looked forward to monthly meetings with the liaison for updates.

Ms. Erwin gave a review of the organizational structure of the trust-related offices under the Secretary of the Interior. (See attached chart) It is important to note that Trust Records, Ethel Abeita, Administrator and Information Technology Services, Bob McKenna, Administrator are under line authority of the Assistant Secretary- Policy Management and Budget. However, all of the other positions are under Ross Swimmer, OST and appear to be in place and filled. Ms. Erwin noted a line officers meeting was scheduled in Phoenix.

Ms. Erwin stated \$1.8 million is available for the Great Plains in 2005. Probate financials have been moved to OST and BIA will continue to clean up Special Deposit Accounts and Collections.

OST has in place an ombudsman for resolution of disputes. BIA Realty will continue to lease, conserve and ensure compliance. John Bennet, through CNI, a contracted Chickasaw Nation information company, will oversee "whereabouts unknown", re-engineering, special deposits, and the lock box installation. Special projects related to probate, DQI, policy and regional issues will be under the Deputy Special Trustee – Trust Accountability, Jeff Lord.

### **Initiatives**

There are two Cannon Certification programs , CIFTA and CIFTS, that will offer training for realty subjects and probate. The Indian Probate Act will added to the training as well.

Ms. Erwin noted that while work was moved from BIA to OST, the BIA superintendents now had capacity to do other things with BIA FTE. Two top initiatives for OST is to explain to tribes and IIM accountholders the changes that have occurred under the Fiduciary Trust Model now in place. A second initiative is to explain the role of BIA and OST.

A power-point booklet was shared with ITMA on January 27, 2005 identifying the universal support functions and noting that the primary focus of the FTM is integrated data. OST seemed eager to explain more in future about the integrated data.

## **Tour**

Ms. Erwin spent considerable time leading us on a tour of the three-floor facility. As we moved from floor to floor at least ninety percent of employees appeared to be Indian. There was a quiet, industrious, "busy-beaver" feel to the environment. The configuration of the work stations was open and pleasant.

The furnishings were new. Various places had plasma monitors for information purposes. There were conference rooms and training centers with light interiors.

We spent time at the call center and listened to responses to callers. Apparently all calls are being tracked. They anticipate 1,500 calls a month to a toll free number with hours of operation on Mountain Standard Time. (On page 19 of the information booklet, OST has identified seven categories for the types of calls from beneficiaries. Financial, 56%; Minerals, 15%; Routine File Maintenance, 9%; Land & Realty, 3%; Identity not verified, 2%; Probate, 1%; Other or General 14%)

We viewed the check writing area, secured document storage, lunch rooms, and mail procedures.

An important new product that is to be started shortly is land ownership information attached to each IIM statement.

## **Summary**

The initial first visit was most pleasant. A commitment was made by both parties to share information and keep information flowing both ways. OST was receptive to hearing ITMA's assessments as OST moves through its Phase I – Implementation.

I left the meeting with two thoughts.

- 1) What is the timeline and capability of the Center to respond to any orders of the Court?\* We now know that Judge Lambert re-issued the structural injunction with timelines.
  
- 2) What do we do with data verification if there is no accounts receivable and never has been?

I would like to make a survey of questions the individual board members want answered and make a grid with your very specific questions. I anticipate an in-depth discussion about the Fiduciary Trust Model and its timeline and accomplishments and a look at the tribal response as represented by each Board member and its impact in their areas.

The next monthly meeting with OST is not scheduled but we are looking at a time around March 15, 2005 when OST will issue its schedule of meetings to take place across Indian Country.

The quarterly Board meeting will include time to tour the facility.