

**MEETING REPORT
ITMA MONITORING MEETING WITH OST
May 18, 2006**

The Office of Special Trustee (OST), Department of Interior, has approached ITMA to serve as liaison between OST and Indian Tribes on the current reform of trust services to Indian beneficiaries. Specifically, OST's intent is utilize ITMA to facilitate communication between OST and Indian Tribes regarding the recent and on-going reform of processes for management of Individual Indian Money accounts and the disbursement of funds to account holders. Additionally, ITMA will provide comments and concerns from Indian Country back to OST.

As a starting point for this effort, OST invited ITMA representatives to its Albuquerque, New Mexico offices for a tour of the facility and an opportunity to get acquainted with key staff. Mary Zuni, Executive Director and Majel Russell, ITMA Legal Consultant, met with Donna Erwin, Principal Deputy Special Trustee to discuss the ITMA's liaison role and then Majel Russell toured the facility and met with Margaret Williams, Deputy Special Trustee – Accountability; Doug Lords, Deputy Special Trustee – Field Operations and Regional Trust Administrators; Bob McKenna, Chief Information Officer. The Regional Trust Administrators discussed the goal of OST to provide effective beneficiary services at a local level for all trust related questions. Basically, the goal is for the local trust officer to address any trust account or land related question including ownership interests, encumbrances, rental or royalty amounts due and the status of payments.

The initial visit provided an overview of the OST organizational structure and a topical explanation of the reengineering efforts of each department within OST to reform trust management nationwide. Areas discussed included:

- Trust Asset Accounting Management System (TAAMS) for title and leasing information on trust land. All title information for trust lands nationwide has been converted to the TAAMS title system. An aggressive schedule to also implement the TAAMS leasing component is underway and conversion has been completed for the Southern Plains region. The Great Plains regions will be fully converted by July 1 and the Rocky Mountain region by August 1, 2006. The TAAMS title and leasing information will allow trust beneficiaries to access land ownership information including any encumbrances by accessing one system at local offices.

- Beneficiary Call Center to address questions from trust beneficiaries. The call center was deployed on 12/30/04 and has received 114,404 calls as of 5/1/06. Approximately 101,882 calls or 89% of calls were resolved by the first person answering the call. The call center intends to reduce the number of work hours of OST and BIA staff spent answering trust beneficiary questions.
- Use of a commercial lockbox for the collection and processing of lease and asset payments. OST has contracted with a national bank to receive and process payments to trust beneficiaries. The lockbox system is intended to prevent delay in receipt of income into Treasury and disbursement to beneficiaries.
- National training center. OST has developed a national training center to provide in-depth training for all BIA/OST employees who will work with trust assets and income. The training will focus on utilizing the new national TAAMS system and implementing other new processes and procedures to more effectively manage trust assets and income.

The next scheduled events with OST include visiting the records repository at Lenexa, Kansas to view the processes developed to categorize and store trust records.