Today’s Topics:
• FY 2017 Budget
• Tribal Methodology Project
• Facilities
• Strategic Planning
• Financial Education Update

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

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

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
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

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

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

Facilities

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

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
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

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

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

“Spending Frenzy” participants buying a car

Investing 101 Workshop Participants

“Spending Frenzy” participants earning income from investments
Questions?

Thank you!