Office of the Special Trustee for American Indians

Briefing Presented by
Deb DuMontier,
Deputy Special Trustee

Tribal Interior Budget Council Meeting
November 18-19, 2015
Washington, DC

Today’s Topics:
• Status of Budget
• Functions Unique to OST

FY 2015 Milestones
• FY 2015 - Unqualified opinion on IIM trust Fund financial statements for third year in a row
• Clean-audit generates confidence by IIM account holders that their accounts are properly handled

2015 Milestones
Trust Services:
• $1.7 billion received and disbursed
• 892,000 periodic performance statements provided
• ≈ $4.9 billion invested
• ≈ 10.7 million transactions processed with 99.99% accuracy

Status of FY 2016 Budget
• Operating under a Continuing Resolution (CR) through December 11, 2015
• Funding during C.R. at FY 2015 level of $139 M
• Both House and Senate committee bills would fund OST in the amount of $139 M, level with FY 2015 funding
Shared Commitment to Beneficiaries

- BIA Mission: “...is to enhance the quality of life, promote economic opportunity, and carry out the responsibility to protect and improve the trust assets of American Indians, Indian Tribes, and Alaska Natives.”
- OST Mission: “To honor our trust responsibilities by incorporating a beneficiary focus and participation while providing superior stewardship of assets.”

Segregated Duties

Advantages to beneficiaries:
- Segregation facilitates specialization
  - Specialization and focus — improved efficiency benefiting Native Americans
  - Avoids perception of conflicts of interest

Segregation of duties

- Improved accountability and services
- Deters dilution of resources dedicated to Trust functions from competing needs
- Independence provides validity to reviews

Complimentary Activities

OST Field Office staff respond to beneficiary inquiries
- OST’s Trust Beneficiary Call Center (TBCC)
  - First-line resolution for 98% of call requests
  - To date, TBCC staff have responded to 1.7 million calls
  - Received DOI Award for Promoting Exceptional Customer Service

Information Technology

OST’s Office of Information Resources (OIR) is a leader within the Department.
- In 2010, OST was first to implement an automated patch management solution — “BigFix”
- OST’s success lead DOI to adopt BigFix product

Questions?