



*Twenty Years of Trust*

*Office of the Special Trustee for American Indians - Since 1995*



# Office of the Special Trustee for American Indians

Briefing Presented by  
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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
- $\approx$  \$4.9 billion invested
- $\approx$  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 benefitting 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?



Thank you!

