

2019 1st Quarter Report (Oct '18 - Dec '18)

Oneida Trust Enrollment Committee

Approved by official entity action on: January 22, 2019
Submitted by Brent Truttman

Board, Committee, or Commission Members

Name and Title	Oneida Nation Email	Term Expiration Date
Bobbi Webster, Chairwoman	To be determined	July 2020
Debra Danforth, Vice-Chairwoman	To be determined	July 2021
Geraldine Danforth, Secretary	To be determined	July 2021
Norbert Hill Jr., Member	nhill@oneidanation.org	July 2019
Loretta V. Metoxen, Member	Lmetoxe1@oneidanation.org	July 2019
Lisa Liggins, Member	Lliffin2@oneidanation.org	July 2021
Elaine Skenandore-Cornelius, Member	To be determined	July 2020
Dylan Benton	dbenton1@oneidanation.org	July 2019
Kirby Metoxen	kmetox@oneidanation.org	July 2020

OBC Liaison(s)

[Click here to enter OBC Liaison name.](#)

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Meetings

Regular held every 4th Tuesday of the month. Joint OTEC-OBC Meetings held Quarterly as schedule allows.

Location: Regular Meetings: Archiquette Building, 210 Elm St. Oneida, WI 54155. Joint OTEC-OBC Meetings: Norbert Hill Center – Business Committee Conference Room, N7210 Seminary Rd. Oneida, WI 54155

Time: 5:00 PM

Time: 3:00 PM for Joint

[Click here to list any Emergency Meetings that were held including the date, time, and the basis of the emergency for each meeting](#)

Accomplishments

Please provide details of what the entity has accomplished that quarter, including any special events held during the reporting period and any travel by the members and/or staff.

ACCOMPLISHMENT #1

Summary:

Released Sustain Oneida Community Survey results to the public. Shared raw survey data with Demographer to begin analysis.

Impact:

Survey results have renewed community conversations. We have seen an increase in dialogue through the Trust Enrollment Department's Facebook page as well as other Facebook groups. The survey results and conversations on social media will help create a theme towards enrollment criteria.

ACCOMPLISHMENT #2

Summary:

Project Specialist renewed community engagement by presenting general enrollment data and survey results in public forums.

Impact:

Sharing general enrollment trends educates the community the status of Oneida Nation's population as well as creates a sense of transparency with the Trust Enrollment Department. With a better understanding of the Oneida Nation's population, the community may develop well-informed opinions on enrollment criteria, identity, belonging, and citizenship.

ACCOMPLISHMENT #3

Summary:

Reviewed the FY2018 Per Capita & Minors Trust Distribution; highlighted procedural changes for greater efficiency and established a FY2019 Distribution Timeline which is shared with other departments involved with the distributions process.

Impact:

The payment administrators had a fresh perspective to note any procedural inefficiencies in the per capita and Minors Trust distributions. The FY2019 Distribution Timeline serves as a tool for transparency between other Oneida entities involved in the distributions process. The timeline opened communication between departments to notice one another if there is a conflict with their internal procedures.

Goals

Please provide details of the entity's long-term goals, the entity's goals for the next quarter, and projected quarterly activities.

LONG-TERM GOAL #1

To understand the membership's preference on alternative enrollment criteria. We feel this would best be accomplished through community surveys, analysis of results, and presentations to the community.

By understanding a majority of the membership's preference, we may be able to present recommended amendments to the Oneida Nation's Constitution.

Update on Goal:

We have shared the raw data from the Sustain Oneida Community Survey with the Demographer for their analysis. We have posted the survey results on the Trust Enrollment website and social media outlets. We are also using the results as conversation tools for community meetings. The community dialogue has already generated insight to community preferences.

LONG-TERM GOAL #2

Establish a communication plan to engage the community on Sustain Oneida efforts which may result in policy changes that affects membership enrollment applications, per capita distributions, and other services provided by the Trust Enrollment Department.

Establishing an effective communication plan will make the membership aware of relevant policy changes that may affect their lives, create positive relations with the Trust Enrollment Department, and hopefully inspire the membership to think critically of their Oneida identity.

Update on Goal:

Our new Project Specialist has begun meeting with members of the community and other entities on the Community Survey results and general enrollment data.

QUARTERLY GOAL #1

To achieve the demographer's initial analysis and determine if other forms of analysis is necessary.

The demographer's analysis is crucial for the membership to understand the population trends and the state of the Nation's citizenship.

Update on Goal:

We are currently organizing enrollment data, so that the demographer can project future population trends and the impact if continuing to use blood quantum. The membership's raw data will exclude names, social security numbers, and mask the enrollment numbers to protect the membership's confidentiality. From the initial analysis we may be able to identify other areas for analysis such as relocation trends, birth rates, death rates, etc.

QUARTERLY GOAL #2

Establish the appropriate message to the community on how the Tax Cuts and Jobs Act of 2017 may impact the Minors Trust Distributions.

The Minors Trust Distribution is considered taxable income. It is imperative Minor Trust Beneficiaries understand they will be taxed when they receive the distribution. How the Tax Cuts and Jobs Act of 2017 may impose a greater tax, and why they should consult with a tax professional before submitting their "Payment/Deferral" form.

Update on Goal:

The Trust Enrollment Department has identified various avenues to engage the community on the Tax Cuts and Jobs Act of 2017 i.e. mailers, notices in the Kalihwisaks, social media, and public forums and through the YES program. We are always open to other platform suggestions. We are also reviewing our ability to adjust the deferral options to help Minor Trust Beneficiaries avoid excessive taxes. In the meantime, our message needs to be vetted through the tax attorney on retainer with the Oneida Nation.

QUARTERLY ACTIVITIES

Aside from regular working duties, this next quarter will consist of developing a communication plan to the community about the new tax implications to the Minors Trust Distribution; hosting community forums to discuss the Sustain Oneida Community survey and processing the FY2018 Adult Supplemental Per Capita distribution for those who missed the 9/4/2018 deadline.

Update on Activities:

A conference call has been scheduled with the tax attorney on retainer with the Oneida Nation to establish the appropriate message on the Minor Trust tax matter. Oneida entities have been identified to the Project Specialist, so he may provide a presentation of enrollment data and community survey results. The deadline to submit a Late FY2018 Per Capita form is March 1, 2019.

Budget

Please provide the amount of the entity's budget, the status of the budget at that quarter, the amount of each stipend a member may be eligible to receive, how the budget is being utilized by the entity and projected budgetary uses for the next quarter.

Total Budget for FY-2019:	Value A:	\$985,629
Status of Budget at 1st Quarter:	Value B:	\$188,902

Stipend Type	Stipend Amount
Meeting	\$3,100 spent
Joint Meeting	\$0 (No Quorum. Rescheduled to Jan. 8, 2019)
Judiciary Hearings	N/A
Hearings of Boards, Committees, or Commissions	\$300 spent
Conferences and Trainings	N/A
Miscellaneous	N/A

Budget Utilization

Budget used for Trust Enrollment Committee stipends, Trust Enrollment Department operations, Sustain Oneida activities, and first invoice paid to demographer.

Projected budgetary uses for the next quarter

Aside from normal Trust Enrollment Department operations, next quarters budget expenses will include potential expenses in hosting community events, mailings of Minors Trust Distribution and Per Capita forms, and approved travel for Trust Enrollment Director and one Trust Enrollment Committee member to the Investing in Reconciliation Conference in Ottawa, Canada on February 21, 2019.

Requests

[Click here to provide details of any requests to the Oneida Business Committee.](#)

Other

[Click here to provide any other information deemed appropriate by the entity, as well as any other information required by a law or policy of the Nation.](#)