

2019 2nd Quarter Report (Jan '19 - Mar '19)

Oneida Trust Enrollment Committee

Approved by official entity action on: April 25, 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, Member	Dbenton1@oneidanation.org	July 2019
Kirby Metoxen, Member	kmetox@oneidanation.org	July 2020

OBC Liaison(s)

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

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Meetings

OTEC Regular Meetings are 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: Regular Meetings 5:00 PM

Time: Quarterly Joint Meetings 3:00 PM

[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:

Successfully processed the Supplemental FY-2018 Per Capita Distribution.

Impact:

A Per Capita Distribution is one of the most notable functions of the Trust Enrollment Department. The annual adult distribution happens twice a year and consume most of staffs focus during these times. Therefore, a successful distribution will always be considered a departmental accomplishment.

ACCOMPLISHMENT #2

Summary:

Revisions were made to the Minors Trust Distribution forms and processes. The revisions will provide beneficiaries more control in their deferral and voluntary tax withholding options.

Impact:

Minor Trust Distributions have become a particular area of interest due to the 2017 Tax Cuts and Jobs Act. Giving the Minor Trust beneficiaries more control on the claim allows them to create a distribution that better fits their personal finances. Revising the forms and processes required considerable review from staff, fund accountant, and attorney on retainer with the Oneida Nation.

ACCOMPLISHMENT #3

Summary:

Community awareness and input towards future enrollment criteria has notably increased.

Impact:

With increased dialogue through community meetings and social media, we are beginning to hear common themes and attitudes towards Oneida belonging, identity, and citizenship.

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 gain an understanding of the membership's preference on alternative enrollment criteria.

By documenting majority of the membership's preferences, we may be able to achieve a consensus on sustainable enrollment criteria.

Update on Goal:

Community meetings and social media conversations have continued. Community meetings have focused on enrollment data, identity, belonging and the process to amend the Oneida Nation's Constitution. Social media conversations have explored thoughts from the community mixed with enrollment data. The Project Specialist is reaching out to a wider audience including S.E.O.T.S. and high schoolers via the Y.E.S. program.

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:

Aside from social media posts, mailers, and articles in the Kalihwisaks, the Trust Enrollment Department is trying to reach the community through other Oneida entities. The department has hosted community discussion about Enrollment at the Community Education Center, S.E.O.T.S., Y.E.S., and several high schools. The Department is also using these channels to make the community aware of the Minors Trust deadlines, processes and tax implications.

QUARTERLY GOAL #1

Establish a communication plan to solicit community input on the Disability Fund.

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 the Nation's resources.

Update on Goal:

One post was made on the Trust Enrollment Department's Facebook page soliciting input for the Disability Fund with minimal response. An article for the Kalihwisaks has been drafted soliciting input for the Disability Fund. The tentative publishing date in the Kalihwisaks is May 2, 2019. Depending on responses to social media and Kalihwisaks, community meetings is also a possibility.

QUARTERLY GOAL #2

Establish an agenda and materials for a proposed Special GTC Meeting focusing on Sustain Oneida and Demographer results.

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:

The demographer has shared preliminary results with the Trust Enrollment Committee for initial feedback. The next step will be to share with the Oneida Business Committee for further feedback and to help establish the talking points for a potential Special GTC meeting.

QUARTERLY ACTIVITIES

Aside from regular working duties, this next quarter will consist of processing Per Capita and Minors Trust forms, hosting community meetings on Sustain Oneida and Minors Trust fund processes and working with the Demographer to finalize preliminary data.

Update on Activities:

FY2019 Per capita forms are currently under legal review as is standard practice. Projected mailout is to take place in May 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 2nd Quarter:	Value B:	\$414,228 spent

Stipend Type	Stipend Amount
Meeting	\$2,600
Joint Meeting	\$1,200
Judiciary Hearings	
Hearings of Boards, Committees, or Commissions	
Conferences and Trainings	
Miscellaneous	

Budget Utilization

The budget is being used to pay for staff, mailings to the Oneida membership, demographer, and other regular administrative expenses.

Projected budgetary uses for the next quarter

Next quarter expenses will be used to pay for staff, mailings to the Oneida membership, training opportunities, and other regular administrative expenses.

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.](#)