

# 2019 3rd Quarter Report (Apr '19 - Jun '19)

## Oneida Trust Enrollment Committee

Approved by official entity action on: August 16, 2019  
Submitted by Brent Truttmann & Venessa Cardish

### Board, Committee, or Commission Members

Name and Title	Oneida Nation Email	Term Expiration Date
Barbara "Bobbi" Webster, Chairwoman	<a href="mailto:Otc-bweb@oneidanation.org">Otc-bweb@oneidanation.org</a>	July 2020
Debra Danforth, Vice Chairwoman	<a href="mailto:Otc-ddan@oneidanation.org">Otc-ddan@oneidanation.org</a>	July 2021
Geraldine Danforth, Secretary	<a href="mailto:Otc-gdan@oneidanation.org">Otc-gdan@oneidanation.org</a>	July 2021
Norbert Hill Jr., Committee Member	<a href="mailto:Nhill@oneidanation.org">Nhill@oneidanation.org</a>	July 2019
Loretta V. Metoxen, Committee Member	<a href="mailto:Otc-lmet@oneidanation.org">Otc-lmet@oneidanation.org</a>	July 2019
Lisa Liggins, Committee Member	<a href="mailto:Otc-llig@oneidanation.org">Otc-llig@oneidanation.org</a>	July 2021
Elaine Skenandore-Cornelius, Committee Member	<a href="mailto:Otc-eske@oneidanation.org">Otc-eske@oneidanation.org</a>	July 2020
Dylan Benton, Committee Member	<a href="mailto:Otc-dben@oneidanation.org">Otc-dben@oneidanation.org</a>	July 2019
Kirby Metoxen, Business Committee Member	<a href="mailto:kmetox@oneidanation.org">kmetox@oneidanation.org</a>	July 2020

### OBC Liaison(s)

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

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### Meetings

Held every 4th Tuesday of the month.

Location: Regular Meetings: Archiquette Building, 210 Elm St. Oneida, WI 54155.

Time: Regular Meetings 5:00 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: Sustain Oneida Community Meetings: 04/24/19, 05/08/19, 06/12 held at the Community Education Center (CEC)

Hosted informational community meetings and created social media posts about current Oneida demographic data to inform the community the current status of Oneida enrollment statistics.

Impact:

Feedback from community is creating insight to how enrollment criteria should be presented to GTC. Additionally, feedback provides perspective on areas Sustain Oneida can focus on for future community engagement.

### ACCOMPLISHMENT #2

Summary:

Received preliminary results from demographer.

Impact:

Preliminary results came with clarification questions of enrollment data. These questions were answered and highlighted where to improve enrollment procedures.

### ACCOMPLISHMENT #3

Summary: Proactively reached out to schools and community to provide more information kiddie tax and new deferral options for minor's trust accounts.

Impact:

Increase of minor's deferring a all or a portion of their Minors Trust Account instead of opting to receive full payment. .

## 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.

Work with membership preferences by gathering feedback at community meetings and combining it with demographer results to create future membership projections conducive to reported data.

#### Update on Goal:

Community meetings have continued and are scheduled for the remaining calendar year. Another meeting is planned before end of FY-19 at S.E.O.T.S. The Project Specialist will begin to modify the presentation to include options that are given as feedback at the community meetings.

### LONG-TERM GOAL #2

Implement new Minors Trust processes with minimal disruption to staff or community.

Unintended tax consequences required changes to the Minors Trust Agreement, and the recent Federal tax changes required Minor Trust procedures to change. These changes directly affect every Minor Trust Beneficiary, and they need to be equipped to make informed decisions.

#### Update on Goal:

Numerous outreach efforts had been made to the community about the new processes and tax consequences. The deadline for Minor Trust Beneficiaries to claim/defer their minor trust accounts passed at the end of the quarter. There has been a notable difference in the memberships' deferral decisions. It is now up to the Trust Enrollment Department to implement these claim/deferrals through new processes effectively.

### QUARTERLY GOAL #1

Schedule a Special Stipend eligible Discussion Only General Tribal Council (GTC) Meeting to provide demographer results to membership.

Establishes and provides current membership demographer data results. Resulting in an open discussion for current membership to provide guidance and how to proceed with the inevitable changes to future membership enrollment.

#### Update on Goal:

Department began process to schedule the Special GTC meeting. Department has intention to increase awareness of "Sustain Oneida" in posters, Kalihwisaks articles, social media posts and will continue to host community meetings. There are (5) more scheduled meetings for rest of the calendar year.

### QUARTERLY GOAL #2

Obtain remaining data results from the demographer and finalize all data for presentation at GTC Meeting

Demographer results will provide predicted population data based on current enrolled members and current blood quantum requirement for enrollment.

#### Update on Goal:

Demographer provided preliminary results with clarification questions. Those questions have been answered, and we anticipate final results this quarter.

## QUARTERLY ACTIVITIES

Staff continued to perform regular working duties in addition to receiving and processing Per Capita payment, Minor Trust Account Distribution and OLIPP forms.

### Update on Activities:

Deadline to claim/defer Minors Trust Accounts has passed. Deadline to claim adult Per Capita is September 3<sup>rd</sup>. 38% of eligible members have claimed their adult per capita as of June 30<sup>th</sup>.

## **Budget**

**Please provide the amount of the entity's budget, the status of the budget at that quarter, the total amount of stipends paid for the quarter, 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 3rd Quarter:	Value B:	\$617,075 spent

<b>Stipend Type</b>	<b>Eligible Stipends</b>	<b>Total Stipend Amounts Received in Quarter</b>
Meeting	\$100	\$1,800
Joint Meetings with the OBC	\$100	\$ 0
Oneida Judiciary Hearings	\$50	\$ 0
Hearings of Boards, Committees, or Commissions	\$50	\$ 300
Conferences and Trainings	\$100	\$ 0
Miscellaneous - Choose an item.	Choose an item.	\$ 0

**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, mailing 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.](#)