

# FY-2024 1st (Oct - Dec) Quarter Report

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## Oneida Trust Enrollment Committee (OTEC)

Approved by official entity action on: 02/05/2024

Submitted by: John Danforth/Venessa Cardish

OBC Liaison: Jameson Wilson

OBC Liaison: [Click here to enter OBC Liaison](#)

### PURPOSE

Sustain the Oneida membership and protect our trust assets. To exercise stewardship over tribal enrollment and trust assets while providing leadership to sustain the tribe.

### AUTHORITY

To maintain the official roll of the Oneida Nation and to administer exclusive control of the Oneida Nation trust funds and endowment funds a directed by the GTC. As fiduciaries over the Oneida Nation trust and endowment funds, OTEC is a long- term investor.

### BCC MEMBERS

JERMAINE DELGADO

CHAIR

07/31/2022-07/31/2025

JENNIFER HILL-KELLEY

VICE-CHAIR

07/31/2021-07//31/2024

GERALDINE DANFORTH

SECRETARY

07/31/2021-07/31/2024

PAMELA NINHAM

MEMBER

07/31/2023-07/31/2026

KIRSTEN VAN DYKE

MEMBER

07/21/2022-07/31/2025

NORBERT HILL JR.

MEMBER

07/31/2022-07/31/2025

DYLAN BENTON

MEMBER

07/31/2021-07/31/2024

DOROTHY NINHAM

MEMBER

07/31/2023-07/31/2026

JAMESON WILSON

MEMBER/LIAISON

07/31/2023-07/31/2026

## **MEETINGS**

3<sup>RD</sup> MONDAY OF EACH MONTH.

5 PM

HYBRID: IN-PERSON AT ARCHIQUETTE (ENROLLMENT) BUILDING OR VIA TEAMS

Emergency Meetings:

## **CONTACT INFORMATION**

CONTACT: JOHN DANFORTH

TITLE: INTERIM-DIRECTOR

PHONE NUMBER: 920-869-6200

E-MAIL: [jdanford7@oneidanation.org](mailto:jdanford7@oneidanation.org)

MAIN WEBSITE: [Oneida Nation | Trust Enrollments \(oneida-nsn.gov\)](https://oneida-nation.gov/Trust-Enrollments)

## **ACCOMPLISHMENTS**

### **ACCOMPLISHMENT #1**

Summary:

SUCCESSFUL DISTRIBUTION OF MINOR TRUST FUNDS.

Impact:

AS DIRECTED BY THE PERCAPITA TRUST AGREEMENT, THE TRUST ENROLLMENT DEPARTMENT AND COMMITTEE AIM TO PROVIDE A CLAIM PROCESS THAT INFORMS ELIGIBLE MEMBERS OF ALL THEIR FINANCIAL OPTIONS WHEN CLAIMING FUNDS.

### **ACCOMPLISHMENT #2**

Summary:

PROCESSED 37 LIFE INSURANCE CLAIMS

Impact:

THE ONEIDA LIFE INSURANCE PLAN LAW IS IN FULL EFFECT AND THE PROGRAM IS COMPLETELY IN-HOUSE WITHIN THE ONEIDA NATION.

### **ACCOMPLISHMENT #3**

Summary:

GWA LATE PAYMENT APPLICATION PROCESSING AND CHECK RE-ISSUES

Impact:

GWA PROVIDES AN OPPORTUNITY FOR MEMBERSHIP TO RECEIVE MORE FUNDS WITHOUT IRS OR STATE INCOME TAX IMPLICATIONS. GWA BEING A RELATIVELY NEW PROGRAM ALSO POSES NEW HURDLES FOR DEVELOPING RULES AND PROCESSES TO BETTER SERVE MEMBERS AND THE NATION. CHECKS NOW HAVE DEFINITIVE EXPIRATION DATES AND ENROLLMENT STAFF REACH OUT TO MEMBERS WHO HAVE NOT CASHED THEIRS.

### **GOALS**

#### LONG-TERM GOAL #1

SUSTAIN ONEIDA MEMBERSHIP

TO PROTECT THE SURVIVAL OF THE ONEIDA NATION LONG-TERM AND EXERCISE TRIBAL SOVEREIGN IN SELF-DETERMINATION.

UPDATE ON GOAL:

THE SUSTAIN ONEIDA PROJECT IS SET TO CLOSE OUT BUT EFFORTS TO FIND A SUSTAINABLE ENROLLMENT SOLUTION ARE SHIFTED TO THE BUSINESS COMMITTEE AND THE STANDING COMMITTEE THAT IS BEING DEVELOPED TO RUN THE ON'AYOTE AKA? NI?I PROJECT PLAN. OTEC CONTINUES TO REQUEST A 'SEAT AT THE TABLE' BY HAVING AT LEAST ONE MEMBER OF THE STANDING COMMITTEE BE A LIAISON FROM OTEC.

#### LONG-TERM GOAL #2

DEVELOP ELECTRONIC MEMBERS SERVICES ON MEMBERS ONLY PORTAL

EASE OF ACCESS TO INFORMATION AND DOCUMENT SUBMISSION BETTER SERVES ALL TRIBAL MEMBERS, ESPECIALLY THOSE LIVING FURTHER AWAY.

UPDATE ON GOAL:

DTS IS ASSISTING TRUST ENROLLMENT WITH A DATABASE UPDATE AND CONTINUES TO DEVELOP THE CAPABILITIES OF THE MEMBERS ONLY PORTAL TO INCREASE SUBMISSION RATES OF GWA APPLICATIONS AND OLIP BENEFICIARY SUBMISSIONS.

QUARTERLY GOAL #1

ESTABLISH MINOR TRUST DISTRIBUTIONS AS GWA

PROVIDING ENROLLED YOUNG ADULTS AN OPPORTUNITY TO RECEIVE MORE OF THEIR MINOR TRUST FUNDS AND BUILDING UPON FINANCIAL LITERACY.

Update on Goal:

THIS GOAL IS CURRENTLY BEING REVIEWED BY THE ONEIDA LAW OFFICE AND TREASURERS OFFICE FOR IMPLANTATION AND LEGALITY.

QUARTERLY GOAL #2

SECURE CIP PROJECT FOR NEW ENROLLMENT BUILDING

ALL 17000 MEMBERS OF THE ONEIDA NATION ARE SERVICED BY TRUST ENROLLMENT. AN UPDATED, ADA COMPLIANT BUILDING, IS BEING REQUESTED TO BETTER SERVE THE TRIBES MEMBERS.

Update on Goal:

A CIP REQUEST WAS INITIATED IN SPRING 2023 AND CONTINUES TO FOLLOW CIP PROCESS FOR REVIEW AND APPROVAL.

**STIPENDS**

Per the Boards, Committees, and Commissions law, stipends are set via OBC resolution. BC resolution 04-13-22-B sets the stipend amounts.

	Total dollar amount paid	Number of stipend type		
		Regular Mtg	Emergency Mtg	Hearings/Other
October 2023	\$1,500	X		X
November 2023	\$700	X		
December 2023	\$500	X		

**BUDGET**

FY-2024 BUDGET: Oct-Dec \$298, 305

FY-2024 EXPENDITURES AS OF END OF REPORTING PERIOD: Oct-Dec \$225, 037

VARIANCE REFLECTS UNFILLED BUDGETED POSITION. POSITION IS EXPECTED TO BE POSTED AND FILLED IN FY'24 QUARTER 2.

**REQUESTS**

Enter request(s), if needed.

**OTHER**

Enter other information, if needed.