

FY-2024 3rd (Apr - Jun) Quarter Report

Oneida Trust Enrollment Committee (OTEC)

Approved by official entity action on: 08/02/2024

Submitted by: Venessa Cardish/John Danforth

OBC Liaison: Jameson Wilson

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 as 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

Norbert Hill Jr.

Member

07/31/2022-07/31/2025

Jennifer Hill-Kelley

Vice-Chair

07/31/2021-07/31/2024

Dylan Benton

Member

07/31/2021-07/31/2024

Geraldine Danforth

Secretary

07/31/2021-07/31/2024

Dorothy Ninham

Member

07/31/2023-07/31/2026

Pamela Ninham

Member

07/31/2023-07/31/2026

Jameson Wilson

Member/Liaison

07/31/2023-07/31/2026

Kirsten Van Dyke

Member

07/21/2022-07/31/2025

MEETINGS

3rd Monday of each month.

5 PM

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

Emergency Meetings: N/A

CONTACT INFORMATION

CONTACT: John Danforth

TITLE: Interim-Director

PHONE NUMBER: 920-869-6200

E-MAIL: jdanford7@oneidanation.org

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

ACCOMPLISHMENTS

ACCOMPLISHMENT #1

Summary:

Staff attorney, Carl Artman brought forth a draft of the bcc law with the areas revised that OTEC identified as issues. OTEC approved the draft as presented at their regular meeting on June 27, 2024.

Impact:

the current OTEC committee has made it an ongoing commitment to find a resolution to the issues that previous committee members have identified with the inception of the BCC Law. this will assist in OTEC's full compliance with the bcc law.

ACCOMPLISHMENT #2

Summary: year 2 of GWA & food assistance application online in members only portal. additionally, option to update direct deposit (ACH) and contact information.

GWA Applications:

Impact: tribal-wide impact. acceptance of the hard copy applications assists with members who do not have access to technology. however, it assists with members who are not within reservation boundaries or live out-of-state and allows them to still apply for the benefit, update their address and direct deposit information.

the Trust Enrollment department strives to assist the membership with more accessible ways to deliver the services they provide. after the initial year of the online application for FY2023 GWA & food assistance application, the department worked in conjunction with Digital Technology Services (DTS) to improve on the online rollout of the program this year.

ACCOMPLISHMENT #3

Summary:

GWA late payment application processing, check re-issues, and ACH updates

Impact:

GWA provides an opportunity for membership to receive their 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. Additionally, Trust Enrollment no longer accepts digital banking institutions for ACH/direct deposit. These institutions generally have lower daily or weekly deposit limits and create additional work for Trust Enrollment and Central Accounting when a payment is rejected. All digital banking institutions were removed from the database and members are encouraged to use national, regional, or local banks.

GOALS

LONG-TERM GOAL #1

Security cameras, update Archiquette building locks.

Provide indoor and outdoor surveillance for the trust enrollment department. Additionally provide updated, automatic, keyless, locking mechanisms for doors for staff.

Update on Goal:

a walkthrough with Digital Technology Services (DTS), was completed in May, identifying the optimal location for indoor and outdoor camera placement. commencement of both the cameras and transition to keyless, locked doors expected in FY2025.

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:

Digital Technology Services (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

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. Staff Attorney and Trust Enrollment Director brought forth recommendations and provisions for a transition in the distribution method. This is based on the parameters of needs and not to exceed what could be considered an extravagant threshold, therefore, it can be considered non-taxable income.

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. The current CIP project was intended to be brought forth for FY2025. however, the trust enrollment director is also researching other cost-effective options. such as, relocation and utilization of other tribal buildings that may have adequate space to house (8) eight trust enrollment staff, records, and sufficient space for high traffic customer base and members with disabilities to take pictures for their Tribal ID's.

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
April 2024	\$ 500	X		
May 2024	\$ 700	X		
June 2024	\$ 400	X		

BUDGET

FY-2024 BUDGET: \$1,193,292

April-June \$298, 323

FY-2024 EXPENDITURES AS OF END OF REPORTING PERIOD:

April-June \$236, 999

Variance reflects unfilled budgeted position. Position was expected to be posted and filled in FY'24 quarter 3 but was not. Goal is to have position posted and filled in Quarter 4.

REQUESTS

Enter request(s), if needed.

OTHER

Enter other information, if needed.