

FY-2024 4th (Jul - Sep) Quarter Report

Oneida Trust Enrollment Committee (OTEC)

Text in orange provides instruction; this text will not be included in the printed report.

Approved by official entity action on: 11/04/2024

Submitted by: Venessa Cardish/John Danforth

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

08/01/2024-07/31/2027

TRACY METOXEN

MEMBER

08/01/2024-07/31/2027

PAMELA NINHAM

MEMBER

07/31/2023-07/31/2026

KIRSTEN VAN DYKE

SECRETARY

07/21/2022-07/31/2025

NORBERT HILL JR.

MEMBER

07/31/2022-07/31/2025

TERESA SCHUMAN

MEMBER

08/01/2024-07/31/2026

DOROTHY NINHAM

MEMBER

07/31/2023-07/31/2026

JAMESON WILSON
MEMBER/LIAISON
07/31/2023-07/31/2026

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: 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

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:

NOTICE OF PROPOSED RULEMAKING FROM IRS WAS BROUGHT FORWARD TO THE OBC AND LRO, HIGHLIGHTING DEFINING RULES OF THE TRIBAL GENERAL WELFARE EXCLUSION LAW.

Impact:

THE GENERAL WELFARE EXCLUSION LAW DIRECTLY IMPACTS HOW THE ONEIDA NATION IS ABLE TO DISTRIBUTE GWA PAYMENTS. EXPANDING ON GWA CAPABILITIES IS CRITICAL FOR PROGRAMS SUCH AS MINOR TRUST DISTRUBITONS. IF THE MINOR TRUST PAYMENTS ARE DISTRIBUTED UNDER GWA, IT CAN BE A FURTHER BENEFIT TO THE MEMBER.

ACCOMPLISHMENT #2

Summary: GENERAL WELFARE ASSISTANCE PAYMENTS PROCESSED AND DISTRIBUTED

Impact: MORE MEMBERS ARE UTILIZING THE MEMBERS ONLY PORTAL TO ACCESS AND SUBMIT THEIR GWA APPLICATION. ADDITIONALLY, MEMBERS ARE UTILIZING THE PORTAL TO UPDATE CRITICAL INFORMATION, SUCH AS ADDRESS AND DIRECT DEPOSIT

ACCOMPLISHMENT #3

Summary:

MINOR TRUST VERIFICATION AND PROCESSING

Impact:

MINOR TRUST DISTRIBUTION HAD SOME DISTRUPTIONS IN OCTOBER 2023 WITH REJECTIONS OF DIRECT DEPOSIT. THE ROOT OF THE ISSUE WAS DIGITAL BANKING INSTITUTIONS HAVING LOW THRESHOLDS FOR DAILY OR WEEKLY DEPOSIT LIMITS. THE SIZE OF MOST MINOR TRUST CLAIMS EXCEED THESE LIMITS BUT WOULD PASS A PENNY-TEST VERIFICATION. TRUST ENROLLMENT ELECTED TO NO LONGER ACCEPT DIGITAL BANKING INSTITUTIONS FOR MINOR TRUST DISTRIBUTION AND EXPERIENCED ONLY ONE DIRECT DEPOSIT REJECTION FOR ALL MINOR TRUST DISTRIBUTIONS.

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

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:

INSTALLATION OF SURVEILLANCE AND SECURITY MEASURES ARE EXPECTED TO OCCUR IN FY25. A POWER ASSIST DOOR OPENER WAS INSTALLED AT THE MAIN ENTRANCE TO HELP MEMBERS WITH PHYSICAL NEEDS ACCESS THE BUILDING MORE EFFICIENTLY.

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: THE MEMBERS ONLY PORTAL CONTINUES TO BE UTILIZED BY MORE MEMBERSHIP TO SUBMIT GWA APPLICATIONS AND UPDATE INFORMATION. THE MEMBERS ONLY PORTAL

CAPABILITIES WILL BE EXPANDED AS ARTIC-IT SOFTWARE IS IMPLEMENTED TO REPLACE POWER8 AND AS/400. THE TRANSITION TO NEW DATA MANAGEMENT SOFTWARE WILL BRING FORWARD FAR MORE CAPABILITIES

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, WITH POSSIBLE IMPLICATIONS FOR THE FY25 MINOR TRUST DISTRIBUTION.

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. SEVERAL LARGE CIP PROJECTS ARE BEING PROPOSED TO GENERAL TRIBAL COUNCIL. LARGER, COMMUNITY BASED CIP PROJECTS WILL LIKELY BE PRIORITIZED BY GENERAL TRIBAL COUNCIL. ADVOCATING FOR UPGRADES TO THE TRUST ENROLLMENT FACILITIES WILL CONTINUE TO TAKE PLACE.

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
July 2024	\$ 1100	1		
August 2024	\$	1		1-New Enrollments Meeting
September 2024	\$	1		

OTEC held meetings in August and September but stipends were not paid out until October.

BUDGET

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

July-Sept \$298, 323

FY-2024 EXPENDITURES AS OF END OF REPORTING PERIOD:

July-Sept \$240,142

List how your BCC is utilizing your budget and projected budgetary uses for the next quarter.

VARIANCE REFLECTS UNFILLED BUDGETED POSITION. POSITION WAS EXPECTED TO BE POSTED AND FILLED IN FY'24 QUARTER 4 BUT WAS NOT. GOAL IS TO HAVE POSITION POSTED AND FILLED IN QUARTER 1 OF FY2025.

REQUESTS

List any requests to the Oneida Business Committee, use the space below.

Enter request(s), if needed.

OTHER

List any other information deemed appropriate by the entity, as well as any other information required by a law or policy of the Nation.

Enter other information, if needed.