

# FY-2025 2nd (Jan - Mar) Quarter Report

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*Text in **orange** provides instruction in accordance with the Boards, Committees, and Commissions law section 105.12-3. Quarterly Reports to the Oneida Business Committee.*

*Provide the name of the entity, the member submitting the report, and the Oneida Business Committee liaison.*

## Oneida Trust Enrollment Committee (OTEC)

Approved by official entity action on: [Click here to enter approval date](#)

Submitted by: Jermaine Delgado

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 as directed by the GTC. As fiduciaries over the Oneida Nation trust and endowment funds, OTEC is a long-term investor.

### BCC MEMBERS

*Provide a list of the members and their titles, term expiration dates and contact information.*

Jermaine Delgado  
Chair  
[otc-jdel@oneidanation.org](mailto:otc-jdel@oneidanation.org)  
07/31/2022-07/31/2025

Jennifer Hill-Kelley  
Vice-Chair  
[otc-jhil@oneidanation.org](mailto:otc-jhil@oneidanation.org)  
08/01/2024-07/31/2027

Tracy Metoxen  
Member  
[otc-tmet@oneidanation.org](mailto:otc-tmet@oneidanation.org)  
08/01/2024-07/31/2027

Kirsten Van Dyke  
Secretary  
[otc-kvan@oneidanation.org](mailto:otc-kvan@oneidanation.org)  
07/21/2022-07/31/2025

Norbert Hill Jr.  
Member  
[otc-nhil@oneidanation.org](mailto:otc-nhil@oneidanation.org)  
07/31/2022-07/31/2025

Teresa Schuman  
Member  
[otc-tschan@oneidanation.org](mailto:otc-tschan@oneidanation.org)  
07/31/2023-07/31/2026

Pamela Ninham  
Member  
otc-prin@oneidanation.org  
07/31/2023-07/31/2026

Dorothy Ninham  
Member  
otc-dnin@oneidanation.org  
07/31/2023-07/31/2026

Jameson Wilson  
Member/Liaison  
jwilson@oneidanation.org  
07/31/2023-07/31/2026

## CONTACT INFORMATION

*Provide contact information for the entity.*

CONTACT: John Danforth  
TITLE: Trust Enrollment Director  
PHONE NUMBER: 920-869-6200  
E-MAIL: jdanfor7@oneidanation.org  
MAIN WEBSITE: [Oneida Nation | Trust Enrollments \(oneida-nsn.gov\)](https://oneida-nation.gov/trust-enrollments)

## MEETINGS

*List when and how often the entity is holding meetings and whether any emergency meetings have been held. If an emergency meeting was held, indicate the basis of the emergency meeting for each meeting.*

3<sup>rd</sup> Monday of each month.

5pm.

Hybrid: In-person at Archiquette (Enrollment) Building or via Teams

Emergency Meetings: N/A

## **ACCOMPLISHMENTS**

*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:

A MINOR TRUST GENERAL WELFARE ASSISTANCE DISTRIBUTION LAW IS IN MOTION

Impact:

THE GENERAL WELFARE EXCLUSION LAW CAN DIRECTLY IMPACT HOW THE ONEIDA NATION IS ABLE TO DISTRIBUTE MINOR TRUST FUNDS. IF AMENDED AND APPROVED, TRUST ENROLLMENT MAY BE ABLE TO DISTRIBUTE MINOR TRUST FUNDS TO THE MEMBER AS A NON-TAXABLE EVENT UNDER GWE LAW

### **ACCOMPLISHMENT #2**

Summary:

BEGAN USING ARTIC-IT SOFTWARE, SCHEDULED TO REPLACE AS/400 FOR DATA MANAGEMENT

Impact:

ARTIC-IT STAFF HAVE BEEN ON SITE TO TRAIN STAFF ON NEW SOFTWARE AND TO MAKE ADJUSTMENTS TO SOFTWARE CAPABILITIES TAILORED TO TRUST ENROLLMENT NEEDS

### **ACCOMPLISHMENT #3**

Summary:

MINOR TRUST APPLICATIONS DISTRIBUTED AND MINOR TRUST ACCOUNTANT SELECTED

Impact:

MINOR TRUST FUND DISTRIBUTION APPLICATIONS WERE MAILED TO ALL ELIGIBLE MEMBERS. ADDITIONALLY, A NEW ACCOUNTANT HAS BEEN SELECTED FOR THE MINOR TRUST FUNDS. THIS WILL PROVIDE MORE ACCESS TO DAILY VALUATIONS OF MINOR TRUST FUNDS RATHER THAN QUARTERLY PAPER UPDATES.

## GOALS

*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 FY26. Vital Records are being moved to fireproof cabinets.

### 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:

Artic-IT is currently developing a new members-only portal. This transition is expected to occur in Fall 2025

### 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. The GWA law will go through the amendment process to consider minor trust distribution changes for FY26. A sample financial literacy questionnaire was developed and distributed to our local high schools through our YES advocates. This will help shape OTEC's understanding of financial literacy needs.

### QUARTERLY GOAL #2

#### SECURE CIP PROJECT FOR NEW ENROLLMENT BUILDING

All 17,000 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 cased CIP projects will likely be prioritized by GTC. Advocating for upgrades to the Trust Enrollment facilities will continue to take place.

## BUDGET

*Provide the amount of the entities budget and the status of the budget at that quarter.*

FY-2025 BUDGET: \$1,223,619

FY-2025 EXPENDITURES AS OF END OF REPORTING PERIOD: \$466,316

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

Variance reflects a previously vacant position, Executive Assistant. The vacant position was filled the end of January 2025. The Project Specialist position was downgraded to Records Tech and was filled in February 2025.

## Stipends

*List the amount of each stipend a member may be eligible to receive.*

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
January 2025	\$900.00	1		
February 2025	\$1400.00	1		1
March 2025	\$700.00	1		

## REQUESTS

*List details of any requests to the Oneida Business Committee.*

Prioritize the Trust Enrollment CIP project for a new building to better serve the needs of all members. REAL ID's cannot be made in the current building. Members with physical restrictions deserve a more dignified experience at Trust Enrollment than what is currently available.

## 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.