



# FY 22 Budget Overview Bureau of Trust Funds Administration

March 2022

# FY 2022 President's Budget Request



# Overview

- ❖ **IA Overview**
- ❖ **BTFA**
  - Budget Overview
  - Highlights

# Indian Affairs Budget Overview

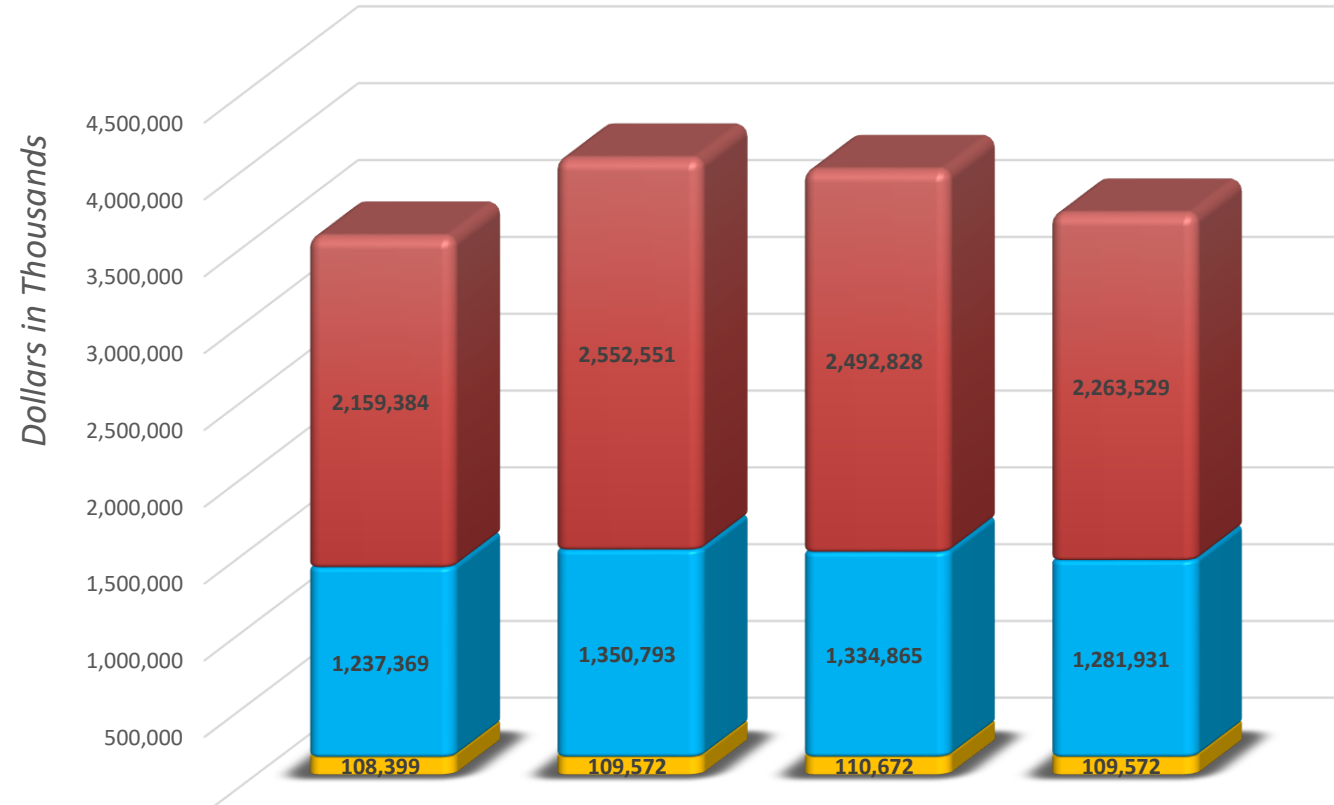


*Indian Affairs assists and supports the Secretary of the Interior in fulfilling the United States' trust responsibility to the Federally recognized American Indian and Alaska Native tribes and villages and individual Indian trust beneficiaries, as well as in maintaining the Federal-Tribal government-to-government relationship.*

*The FY 2022 Enacted Appropriation for Indian Affairs are as follows:*

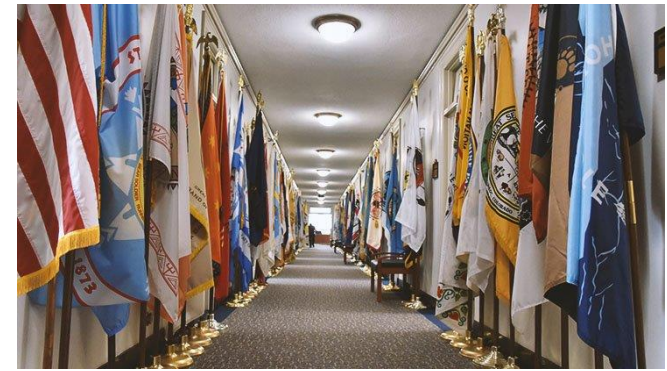
- ❖ *\$2.3B for AS-IA and the Bureau of Indian Affairs (+\$104.1M from FY 21 Enacted)*
- ❖ *\$1.28B for the Bureau of Indian Education (+\$44.6M from FY 21 Enacted)*
- ❖ *\$109.5M for the Bureau of Trust Funds Administration (+\$1.1M from FY 21 Enacted)*

**Indian Affairs FY 2022 Omnibus**



	2021 Enacted	2022 House Mark	2022 Senate Mark	2022 OMNIBUS
■ BUREAU OF INDIAN AFFAIRS	2,159,384	2,552,551	2,492,828	2,263,529
■ BUREAU OF INDIAN EDUCATION	1,237,369	1,350,793	1,334,865	1,281,931
■ BUREAU OF TRUST FUNDS ADMINISTRATION	108,399	109,572	110,672	109,572

# BTFA Budget Overview



*FY 2022 budget for BTFA is **\$109.6 million** in current appropriations, \$1.1 million above the 2021 Enacted level. BTFA estimates the budget will support staffing of 417 full-time equivalents in 2022.*

Bureau of Trust Funds Administration Budget at a Glance Dollars in Thousands (\$000)		
	2021 Enacted	2022 Enacted
Executive Direction	1,494	1,501
Field Operations	23,085	23,471
Accounting Operations	17,670	17,909
Settlement Support	17,911	17,536
Information Resources	8,365	8,430
Trust Records	12,902	13,037
Trust Operations Management	0	0
Business Management	22,268	22,274
Office of Strategic Oversight and Planning	4,704	5,414
TOTAL, Federal Trust Programs	108,399	109,572
TOTAL, Bureau of Trust Funds Administration	108,399	109,572

# What We Do



## ➤ **Mission**

*Manage the Trust Beneficiaries' Financial Assets*

## ➤ **Vision**

*We Excel, Native America Prospers*

# BTFA Daily Beneficiary Services

- *"Beneficiary Services" is BTFA's all-encompassing, customer facing account management service.*
- *Beneficiary account management requires engagement with BTFA staff to make a request for information or completion of a transaction.*
- *IIM account management needs may include:*
  - *Requests for information about: fractional owner interests in trust assets; account balance; status of a probate; lease activity and the status of a requested service.*
  - *Beneficiaries may also request disbursements from, or an update to an IIM account administered by BTFA.*
- *BTFA manages approximately 402,000 IIM accounts.*
- *BTFA Field responds to an average of 200,000 beneficiary requests annually.*
  - *The requests are for information about trust assets or trust income, as well as requests for account updates or a disbursement of funds. Annual summary statistics reveal that beneficiaries inquiries are for the following variety of reasons:*
    - *20% of the annual inquiries are about trust assets and the balance of funds in the IIM account.*
    - *12% of the annual inquiries are for a disbursement of funds.*
    - *10% of the annual requests are for the status of the disbursement.*
    - *17% of the annual requests are for a monthly Oil and Gas Royalty Distribution amount.*

# Beneficiary Services (Continued)

- *BTFA is an OMB designated High Impact Service Provider (HISP) of Federal government services, due to the importance of our role in managing the financial assets of Indian trust beneficiaries.*
- *As a HISP, BTFA is continually improving our understanding of the beneficiaries we serve and what matters most to them according to the requirements found in:*
  - *E.O. 14058 – “Transforming Federal Customer Experience and Service Delivery to Rebuild Trust in Government”.*
  - *PMA Priority 2 – “Delivering excellent, equitable, and secure Federal services and customer experience”.*
  - *OMB Circular A-11, Section 280.*





# Beneficiary Services (Continued)

- *BTFA is also producing the following customer experience improvement products:*
  - *IIM Journey Map. (An end to end visual representation of how Indian trust beneficiaries navigate BTFA's beneficiary services).*
  - *Annual Assessment of Customer Experience Capacity and Improvements.*
  - *Annual Action Plan.*
  - *BTFA Priority Service Designation which includes the identification of access barriers for underserved Native American communities.*
  - *Quarterly beneficiary feedback data.*
  - *Improving the Digital Customer Experience by developing on-line access, for trust beneficiaries, to their IIM accounts.*
  - *The Beneficiary Services Council is BTFA's mechanism for assessing risks and prioritizing decisions which impact the beneficiary experience.*

# Amount Invested



- *BTFA is responsible for the financial management of Indian trust funds, including receipting, investing, disbursing, and reporting of trust funds on behalf of individual Indians and Tribes.*
- *BTFA manages more than \$6 billion, held in roughly 3,800 trust accounts for more than 250 Indian Tribes and about 402,000 open IIM accounts. In addition, BTFA provides litigation and document production support for lawsuits related to those accounts.*
- *Anticipating approximately an additional \$1.5 billion from Bipartisan Infrastructure Law*

# Reducing Land Fractionation in Tribal Communities

- *The Land Buy-Back Program for Tribal Nations is responsible for the expenditure of the \$1.9 billion Trust Land Consolidation Fund. The program ends in November 2022.*
- *Recognizing the importance to maintain the momentum of the Consolidated Appropriations Act of 2022 includes \$7 million for this program to further reduce land ownership fractionation in Indian Country.*
- *Transfers from Administrative to Land Purchase Account*
  - *Transfer #1 -\$45,000,000*
  - *Transfer #2 -\$45,000,000*
  - *Transfer #3 -\$30,000,000*
  - *Transfer #4 -\$13,400,000*
  - *Transfer #5 June, 2022, Amount TBD*
  - *Transfer #6 September, 2022, Amount TBD*
  - ***Total Transfers to Date: \$133,400,000***



# Reducing Land Fractionation in Tribal Communities (Continued)

- *Upcoming offers\**
  - *Ft. Belknap, April – June (Offers mailed April 11)*
  - *Lower Brule, April – June (Offers mailed April 18)*
  - *Crow Creek, May – June (Offers mailed April 25)*
  - *Ft. Belknap Wave 2, May – July (Offers mailed May 23)*
  - *Pine Ridge and Rosebud, August – September (Offers mailed August 22)*
- *Close Out Report: October*
- *Program Close Out: November 24*

*\*Offer schedule dates are tentative and subject to availability of funds.*



# Digitizing Trust Records

- *The budget provides \$2.7 million to modernize the records management system via the Electronic Records Management Program (ERMP).*
- *As part of the ERMP, BTFA will digitize and upload paper records into the cloud for storage for increased operational efficiencies and compliance with NARA guidance.*
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- *AIRR employees are gradually returning to work in-person*



# Boarding School Initiative



- *June 22, 2021, Secretary Haaland issued a Memorandum on Federal Indian Boarding School Initiative.*
- *As part of the BSI, the Assistant Secretary Indian Affairs is providing a report to the Secretary on April 1, 2022.*
- *BTFA assisted in the phase related to collection of relevant information for the report.*



THANK  
YOU!