

# TWENTY YEARS OF TRUST MANAGEMENT

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The Confederated Salish and Kootenai Tribes of the  
Flathead Reservation

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Consultation Conference – CloAnn Westerman*

# Historical Background

- In the 1960s, the Tribes began administering homesite leases. With the steady acquisition of more lands by purchase, business and other commercial leasing expanded. In 1990, the Tribes implemented a PL 93-638 contract for BIA Agriculture and Real Estate Services, and in 1993, they consolidated services under a Compact as one of the ten original tribes in the Self-Governance Demonstration Project. Today the Tribal Lands Department oversees management of just over 700,000 acres of trust lands. Leasing, range management, acquisition and disposal, probates, fee-to-trust, billing and collections, and land title and records are performed according to Interior's fiduciary trust principles. Trust income from leases, rights-of-way, permits, and fees totaled just over \$1.2 million in FY 2016. In 2015, the Tribes were recognized for accomplishing fee-to-trust on over 80,000 acres, the highest of any tribe in the country. In 2014 the Tribes volunteered to be a pilot tribe in developing and implementing trust evaluation methodology for the Office of the Special Trustee, which is expected to be implemented in 2017.

# Self-Governance, 1993 to present

- In 1993, the CSKT implemented self-governance for all 638 contract programs of BIA
  - 1977 to 1993 - PL 638 contracts for Education and Employment Assistance, Social Services, Law Enforcement, Tribal Court, Rights Protection, Wildlife, Mission Valley Power, Agriculture and Real Estate Services
  - 1995 and 1996 - Additional PFSA's of Forestry, Wildland Fire, Title Plant, and IIM Accounts were assumed.
- FY 2016 annual funding of \$18.4 million; 105 FTE's

- The 1990s would prove very productive for the Tribes in advancing their goals of self-determination and self-governance. In addition to the assumption of BIA land services programs, the Tribes also implemented a Compact for the health care services provided by the Indian Health Service. In 1994, the Tribes included BIA Roads and Safety of Dams in the compact; in 1995, BIA Forestry was transferred; in 1996, IIM Accounts and administrative services were assumed; **and in 1997 the Title Plant function was assumed.** In 1998, the Tribes were one of the first in the country to assume management of a Tribal Assistance to Needy Families (TANF) program under Public Law 102-477.

# Scope of CSKT's Trust Management (FY 2016)

- Flathead Reservation is 1.3 million acres of which 747,427 are Tribal Trust acres
  - 2,175 total trust owners (1,534 CSKT and 641 other tribes)
  - 1,566 total surface leases (business, agricultural, homesite), 40 grazing permits, and 29 mineral permits resulting in just over \$1 million in Treasury receipts and \$217,000 in Tribal receipts
  - 6 MMBF timber harvest and paid permits of \$2 million in receipts
  - 58 new probate cases; 96 cases submitted to ALJ; 74 orders; 70 cases submitted to LTRO for updates
  - 16 appraisals submitted; 8 approved
  - 504 transactions recorded in LTRO
  - 1,762 IIM Accounts

# How does TLD handle this Trust Management

- Recognized from the very beginning that we needed a computer system and program that could manage the workload
- Arvil Hale working with the Anadarko Area had developed a database program on a PC to receipt the monies collected on the leases, at the time the BIA was using a program called LRIS (Land Records Information System)
- We worked with Arvil to implement the 1<sup>st</sup> version of the Tribes Land Management systems.
- This Program has gone through 3 more major upgrades over the last 20 years

Processing of a new lease

Land and Contracts:  
Document Creation  
Setup Payment Terms  
Bond data  
Compliance work

Finance

Invoicing of all non-trust, business, monthly, small permits, administrative fees

Receipting  
Adjustments

Compliance

Compliance techs

Wish List – GIS

The screenshot displays the CS&KT Land Management web application. The main header includes the title "CS&KT Land Management" and navigation tabs for "Land and Contracts", "Finance", "Compliance", "Reports", and "Administration". Below the header, there are buttons for "Management Units", "Tracts", "Contracts", and "Home".

The central content area is titled "Contract" and shows a search bar and a "New Contract" button. A list of contract numbers is displayed, including "2 EL007 91 10", "2 EL009 01 26", "2 EL009 03 20", "2 EL009 10 35", "2 EL012 02 27", "2 EL011", and "2 EL011 02 57".

The main section is titled "HomeSite contract 2-EL009-10-35 on Management Unit EL009". It contains a form with the following fields:

- Contract Number: 2-EL009-10-35
- Field Number: [Empty]
- Contractor: [Redacted]
- Award Date: 4/1/2010
- Begin Date: 4/1/2010
- Contract Date: 4/1/2010
- Expiration Date: 6/31/2055
- Cancel Date: [Empty]
- Next CM Adjustment Date: [Empty]
- Term Description: 25 years
- Annual Rental Amount: 1.25.00
- Tax: Flathead Field Office - 314, Department C124
- Comments: SETUP IN TEAMS

On the right side, there is a "Management Unit" section with a "Edit" button and a "Tracts" section with a "Tract Number" field and an "Acres" field. Below that is a "Locator" section with a table of financial data:

Item	Balance
Rem. Balance	\$0.00
Invoice Balance	\$0.00
Pre-Balance	\$0.00
Total balance	\$0.00

At the bottom of the form, there is a "Save" button.

# CS&KT Land Management

Land and Contracts **Finance** Compliance Reports Administration

Management Units Tracts Contracts **Notes**

**Contract**

Contract Number:

[2-SAD04-02-52](#) [2-SAD05-02-52](#) [2-SAD06-02-52](#) **[2-SAD06-10-35](#)** [2-SAD07-02-52](#) [2-SAD09-05-20](#) [2-SAD13-02-52](#)

[Contract](#) [HomeSite](#) [Terms](#) [Bond](#) **[Documents](#)** [Compliance](#) [Administration](#) [Print Letter](#)

Document Format

Word  PDF

Document Template

- HomeSite Tribal Template
- HomeSite Allotment Template
- HomeSite Allotment Signature Pages
- SKHA Loans
- SKHA Subleases
- SKHA Master Cover Sheet
- HomeSite Negotiated Allotment Form
- HomeSite Cover Sheet
- HomeSite Contested Ejectment Checklist
- HomeSite Designation Of Successor (File)
- HomeSite Designation Of Successor
- HomeSite Lease Lot Boundary Location

Print Letter

Letter Template

- [Administrative Compliance Letter](#)**
- [Compliance Notice](#)
- [HomeSite 10 Day Violation Letter](#)
- [HomeSite Friendly Letter](#)
- [HomeSite Compliance Inspection](#)
- [Air Noise or Construction Inspection Followup \(Form\)](#)
- [Lease and Inspection Form](#)
- [Photo Compliance Violation](#)
- [Air Compliance Inspection Form](#)

[Print Letter](#)

## Processing of a new lease

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Compliance work

## Finance

Invoicing of all non-trust, business, monthly, small permits, administrative fees  
Receipting  
Adjustments

Compliance  
Compliance techs

Wish List – GIS

The screenshot displays the CS&KT Land Management software interface. The main title is "CS&KT Land Management". Below the title, there are navigation tabs: "Land and Contracts", "Finance", "Compliance", "Reports", and "Administration". The "Finance" tab is currently selected. The interface shows a "Contract" form for contract number "2-EL009-10-35". The form includes fields for "Contract Number", "FH Number", "Contractor", "Award Date", "Begin Date", "Contract Date", "Expiration Date", "Cancel Date", "Next CHL Adjustment Date", "Term Description", "Annual Rental Amount", "Favcc", and "Comments". The "Comments" field contains the text "SFTIP IN TRAMS". On the right side, there is a "Management Unit" section with a "Edit" button and a "Tracts" table. The "Tracts" table has columns for "Tract Number" and "Acres". Below the "Tracts" table is a "Ledger" section with a "Total Balance" field. The "Total Balance" field shows a value of "0.00".

Tract Number	Acres
2-EL009-10-35	9.00

Item	Balance
Rem. Balance	\$0.00
Interest Balance	\$0.00
Favcc Balance	\$0.00
Total Balance	\$0.00

# TAAMS IMPLEMENTATION

- **In 2008 the Tribes agreed to moving their leasing data to the system, we were able to electronically transfer the 1300+ homesites, 450 Ag leases, 50 Range Units and some business leases.**
- **Worked with CNI to hire 3 employees to come on-site and help us work on getting the leases setup for billing, approval and recording.**
- **Creates a duplicate process for us-encoding, rental terms, approval and recording**
- **Pros – Allottee payment distribution, recordation, images**
- **Cons-Background checks, computer systems, training for access, program changes without consultation**

# Contact Information

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