



SOCIAL SECURITY

Office of the Commissioner

October 23, 2023

The Honorable Neera Tanden
Assistant to the President for Domestic Policy
Eisenhower Executive Office Building, Room 469
1650 Pennsylvania Avenue, NW
Washington, DC 20503

The Honorable Shalanda Young
Director, Office of Management and Budget
Eisenhower Executive Office Building, Room 252
1650 Pennsylvania Avenue, NW
Washington, DC 20503

Dear Ms. Tanden and Ms. Young:

The January 26, 2021, Presidential Memorandum requests a detailed plan of action agencies will take to implement policies and directives under Executive Order 13175 of November 6, 2000, *Consultation and Coordination with Indian Tribal Governments*.

The *2023 Tribal Consultation and Coordination Plan Progress Report* (enclosed) summarizes our multi-prong approach consisting of consultation, outreach, service delivery, and recruitment. Our Office of Native American Partnerships within the Office of the Commissioner elevates and centralizes the administration of efforts to improve our relationship with Tribes and coordinate outreach and support. We are sharing the results based on our commitments in the *2023 Tribal Consultation and Call to Action Plan* published in April of this year, which described our plans for consultation and outreach activities in the American Indian and Alaska Native communities.

For any questions, please contact Senior Advisor Nancy Berryhill at (443) 379-1656 or our office Deputy Director Renee Ferguson at (443) 204-9998.

Sincerely,

Richard O. Litsey
Director

Enclosure

2023 Tribal Consultation and Coordination Plan Progress Report

The January 26, 2021, Presidential Memorandum requests a detailed plan of actions each executive department and agency will take to implement policies and directives of Executive Order (EO) 13175 of November 6, 2000, *Consultation and Coordination with Indian Tribal Governments*.

In response to the Presidential Memorandum, we are pleased to share the *2023 Tribal Consultation and Coordination Plan Progress Report*, which describes our activities and accomplishments for consultation and outreach activities in the American Indian and Alaska Native (AIAN) communities.

Our progress report provides a summary of actions supporting the following initiatives from our FY 2023 Tribal Consultation and Call to Action Plan:

- ✓ Improve Service Delivery and Equitable Access to our Programs
- ✓ Strengthen Tribal Consultation
- ✓ Increase Outreach and Educational Efforts to Tribal Communities
- ✓ Promote Hiring and Retention of Native Students
- ✓ Conduct Data Collection and Analysis
- ✓ Stand Up the Office for Native American Partnerships

Improve Service Delivery and Equitable Access to our Programs

Social Security provides a safety net for millions of people. We recognize people who need our programs the most may experience barriers to accessing our services including people living with disabilities, populations who have limited English proficiency, and Tribal elders who may have to travel a great distance to reach a Social Security field office. Advancing equity involves increasing outreach to Tribal communities, ensuring access to quality services and program benefits for those who speak a primary language other than English, evaluating our policies to remove undue administrative burdens, and ensuring that income security is within the reach of every eligible individual. To further reduce barriers, we completed the following actions:

- Increased awareness of survivors' benefits to workers and families for those who live in AIAN communities. We supported initiatives to simplify the Supplemental Security Income (SSI) program especially for those on reservations.
- Collaborated with the White House Council on Native American Affairs (WHCNA) to support initiatives designed to improve service to AIAN communities. We collaborated to develop strategies to collectively navigate cultural stigmas. For example, we are working to address barriers to services and served on the Education Subcommittee to develop a native language action plan scheduled for release in FY 2024.
- Sought understanding of structural barriers in AIAN communities, including occupational segregation where there is disproportionate representation of women in jobs that are lower

paying and are less likely to provide benefits such as employer-sponsored retirement plans, which leaves women with lower income and fewer retirement resources.

- Collaborated with the USDA Rural Development office in Arizona on an Application Day event in the San Carlos community. Their goal was to help San Carlos community members bring their homes up to date with improvements and we helped members apply for Social Security cards. As a result, we helped provide service to over 100 community members.

As one example of how we address inequities, on February 8, 2023, we co-hosted two sessions of a national webinar with the National Indian Council on Aging (NICOA). Experts answered participants' questions following the webinar. We plan to continue these critically important offerings for AIAN communities in partnership with NICOA. The virtual webinar was well attended. There were two parts to the webinar, which included the following content:

- Part 1 of the webinar included a highlight on *Social Security Benefits Program*, with a special focus for Tribal Elders to provide awareness of all eligibility criteria for retirement and survivor benefits, spouse benefits, divorced spouse benefits, and more. We covered Medicare, available health savings programs and discussed some commonly missed benefits and important factors to consider for eligibility.
- Part 2 of the webinar included a demonstration of the new online protective filing tool. We discussed eligibility criteria for the SSI program. We shared how the tool allows someone to request an appointment to file for benefits for themselves or someone they are helping. Experts guided participants through the entire process.

Additionally, we sought opportunities to clarify for military service members who can receive expedited processing of claims through our Veterans Wounded Warriors Program. We reached out to veterans to provide a clear understanding of our benefits. For example, on April 21, 2023, we participated in the Native American Training Institute (NATI) 2023 Veterans Symposium in Albuquerque, NM. The Director of Native American Partnerships shared with veterans how Social Security programs support veterans, service members and dependents through our retirement, disability, and survivors' benefits programs. Some of the outcomes from this participation include:

- Received feedback directly from veterans on veterans' concerns. As a result, we desire to work together with the Veterans Administration and the Indian Health Services to improve service and focus on equitable access to programs.
- Addressed one of the key barriers to Native Americans and Tribal communities, which is the lack of knowledge that a Tribal member may be eligible for benefits. At an exhibit table, our Public Affairs Specialist shared program eligibility information.
- Discussed disparities in access to broadband that lead to Tribal members more likely to visit an SSA office than file online. Identified locations to install Video Service Delivery Centers (VSD) to help make Social Security services more accessible in reservation communities. Social Security employees provided service to members of the public who are in other locations via video conference equipment.
- The Chicago Region's systems staff successfully installed a VSD unit at the Manistique Tribal Health Center for the Sault Ste Marie Tribe, the largest tribe East of the Mississippi

spanning a 7-county service area in Michigan's Upper Peninsula. Once the system is fully operational in late 2023, we anticipate 44,000 Sault Ste Marie Tribal members will have video access to Social Security services at the Escanaba, MI field office.

- Shared desire to expand video service delivery and utilize the Microsoft Teams video capability and sought guidance from Federal Agencies and Tribal Nations in bridging the distances to improve service delivery for Indian Country with field office and hearing office services, including efforts for improved customer experience in Tribal communities.

During round table discussion and listening sessions, we received recommendations regarding the Tribal General Welfare Exclusion Act of 2014 (TGWEA), as Tribal members believe non-taxable income under the IRS Act equates to a direct SSI exclusion for administrative purposes for the Social Security Administration. We heard concerns based on Tribal Member misunderstanding of TGWEA was to provide an SSI exclusion. In response to concerns, we shared SSA's process to analyze Tribal payments via a streamlined precedent process and discussed strategies to increase awareness to reduce potential overpayments. This is our process to investigate any additional funds an SSI recipient received, as TGWEA only relates to the IRS Act. We stressed the importance to Tribal Benefit Coordinators to communicate any new Tribal payments to reduce improper payments for SSI recipients. Additionally, we completed the following actions:

- Designed a national refresher training for Tribal Benefit Coordinators, Navigators, Social Workers, and other stakeholders who provide support to Tribal members on impact of the TGWEA of 2014. The training material covers the requirements necessary to classify a Tribal income as Assistance Based on Need for income for exclusions under the SSI. Additionally, the content of the training covers specific information about SSI income and resource exclusions, COVID related disaster relief payments, and IGRA trusts.
- Conducted an overview of the [*Native American Precedent Resource Center \(NAPR\)*](#) with Federal partners at Tribal Summits and to service providers in Tribal communities. We highlighted the decision tree feature of the NAPR policy tool to ensure quality and consistent application of SSI policies for income and resource determinations for Tribal members.
- Released video training for our employees highlighting the importance of accurately applying income and resource policy for Tribal members and utilizing the NAPR for centralized information to make consistent determinations for SSI recipients. The training informed employees on how technicians can use the NAPR tool to streamline and correctly classify Tribal income and resources.
- Volunteers from the AIAN workgroup collaborated to create a new NAPR fact sheet for the Native American Community. We will publish to the AIAN website to explain how Tribal programs and trusts affect SSI benefits and how the Tribal community can help SSA build a precedent directory for their Tribe's programs.
- Since the transition to utilizing the NAPR in August 2022, the Seattle region approved and posted 26 precedents decisions on Tribes and Denver has approved and posted 3, making up 40% of precedents nationwide. The Atlanta and Seattle regions worked together to

clarify and resolve discrepancies with a Tribal precedent that involved the Confederated Tribes of the Grand Ronde Community of Oregon.

- Management in North Carolina provided guidance to the Eastern Band of Cherokee Tribal Director of Health Care Administration on a program the Tribe was preparing to implement in 2023 and its impact on the SSI program. The guidance assisted the Tribe in re-evaluating the program to minimize adverse impacts to their members who receive SSI.

Strengthen Tribal Consultation

The unique government-to-government relationship that exists between Tribal Nations and the Federal government is grounded in the U.S. Constitution, treaties, Federal case law, statutes, and executive orders. To strengthen those relationships, we participated in strategic discussions at the national level during robust conference agendas facilitated by Tribal Organizations. More specifically, engagements included the Native American Finance Officers Association (NAFOA), National Congress of American Indians (NCAI), NICOA, Society of American Indian Government Employees (SAIGE), and United South and Eastern Tribes, Inc. (USET).

Targeted discussions with Executive Leadership also occurred with the WHCNAA, National Indian Health Board (NIHB) for Alaska activities, and the National Council of Urban Indian Health (NCUIH). Non-profits provided unique perspectives for growing Tribal communities residing in Urban communities and how we must consider equity in customer service for our programs.

Throughout the fiscal year we conducted Tribal affairs with significant engagements listed by events held in each State. We will publish the State level details separately as an addendum for members of the public to be aware of activities near them. To ensure Tribes have access to our programs and services, we engaged with Tribes through meaningful consultation on policies that directly affect Tribes and facilitated several Tribal Listening Sessions.

- On November 30, 2022, we participated in the White House Tribal Nations Summit when the President signed and released the [Presidential Memorandum on Uniform Standards for Tribal Consultation](#), which established uniform minimum standards to be implemented across all agencies regarding how Tribal consultations are to be conducted.
- On April 17th, 2023, we attended a Tribal Consultation hosted by the Department of Interior on the development and delivery of mandatory annual training modules for Federal employees regarding Tribal Consultation as called for in the Presidential Memorandum on Uniform Standards for Tribal Consultation. We learned of deadlines for delivering Training Modules to address concerns shared by Tribal leaders, and steps to share business processes for successful consultations that are proven to work. These training modules are required for each Agency engaging in Tribal Communities once the modules are released.

From May through September, the Acting Commissioner, the Chief of Staff, and the leadership of the Office of Native American Partnerships co-hosted multiple Tribal Listening Sessions in person in Anchorage, AK and Pine Ridge, SD, and in Urban Indian Centers in Kansas City, Chicago, and San Francisco. Some of the outcomes and actions of these engagements include:

- Facilitated discussions on service delivery and shared how to access [my Social Security \(my SSA\)](#) accounts to conduct business online. We received a request for research and future SSA publications on health disparities of American Indian Alaska Natives.
- Listened to strong opinions regarding questionable accuracy of data and received request to assist other agencies in providing accurate information.
- Identified customer-service concerns regarding receipt of partial SSI payments due to COVID-related resources, geographic barriers, lack of Representative Payee Organizations to support SSI recipients, and other issues. The public affairs specialists provided case-specific support following the sessions and covered SSI exclusions.
- On July 6th, we attended the Department of Homeland Security **virtual Tribal Consultation** that allowed Tribal Leaders to raise concerns and submit recommendations to be included in DHS Equity Action Plan. Several members from our Agency Equity Action team attended the meeting as well to observe the consultation process and to gain Tribal insight to inform the development and future revisions of our own agency Equity Action Plan.
- On September 11th, we hosted an **in-person Tribal Consultation** with the Oglala Lakota Tribal Nation on the Pine Ridge Reservation. The consultation was live on their local radio station, allowing Tribal members to connect with their leadership serving one of the nine Districts on the reservation. The Tribal Vice President and fourteen Tribal Leaders held a quorum at the Oglala Lakota College in Kyle, SD. We gave an SSA Benefits Presentation, live on the radio, and answered Tribal members questions. The PowerPoint was posted on a Tribal site to promote awareness of programs and benefits and we provided onsite claims support for eligibility questions. We received numerous recommendations for consideration to improve service to communities across South Dakota.
- On September 26, we hosted an in-person **National Tribal Consultation** in Cherokee, NC. The Acting Commissioner of Social Security provided opening remarks virtually. In person, the Tribal Consultation Official and the Director shared the intention of the Office of Native American Partnerships to support the Agency Equity Action Plan. The thirty-day advance notice was provided with the [invitation for consultation](#) to Tribal Leaders. During consultation, Tribal delegates shared concerns and provided recommendations for action for FY 2024. Written comments were received.

The following actions occurred in response to the concerns, requests and one-on-one follow up meetings for these engagements:

- Shared feedback with our Regional Public Affairs in Denver, Seattle, Kansas City, Chicago, San Francisco, and Dallas.
- Held internal policy discussions with policy experts and the Office of General Counsel to determine strategies for determining SSI exclusions. Provided oversight of the newly implemented streamlined Agency business processes for precedent files designed to eliminate duplicative actions.

- Marketed and referenced the published SSI Policy Spotlight titled, “[Tribal Payment Exclusions under COVID-19 Presidential Disaster Relief Funds](#),” in which we share the conclusions of policy changes due to the COVID-19 Disaster Payments.
- Facilitated internal discussions with the *SSA Equity Action Team* to provide Tribal insight for design of the Agency Equity Action Plan for FY 2024 specifically focused on equitable service to AIAN communities.
- Researched design options with the Office of Communications to provide Tribal insight for lack of awareness of interpreter services policy for AIAN communities. Garnered support for enhancements to the FY 2024 action plan that supports our Limited English Proficiency efforts to promote awareness of services.
- Collaborated with Federal leaders who are members of the Education Committee for the WHCNAA. We discussed feasible actions we could consider supporting Native Language revitalization memorandum of agreement (MOA). We identified a business need for Tribal Consultation to identify native languages that are currently in use in Tribal communities and garner support for an FY 2024 Native Language Action Plan for SSA.
- Provided internal training to employees who support the Agency Tribal Consultation Official (TCO) to ensure they adhere to new Tribal consultation guidelines. Our Agency TCO remains the Agency Point of Contact for Tribal Consultation and has been in this TCO role for over a decade.
- Facilitated internal discussions between Tribal and non-Tribal advocates in Alaska with regional office leadership to provide Tribal insight for design of an in-person rural customer-service option.

Increase Outreach and Educational Efforts to Tribal Communities

We conducted in-person and virtual seminars in nearly every State to improve access to and understanding of our programs, in addition to building and maintaining relationships at the local level with the Public Affairs Specialists. We invited Tribal community members to SSA seminars and helped them create their own *my Social Security* accounts for access to services online. Tribal members received information on our retirement and disability programs, including our Wounded Warrior provisions, SSI, Medicare “Extra Help,” Medicare State Buy-in provisions, online services, and service delivery updates.

In addition, we completed the following actions in 2023 which were not exclusively for Tribal Communities but did involve support to underserved communities inclusive of the SSA Dallas Regional Public Affairs Office coordinated the 2023 **Oklahoma Tribal Summit and Leadership Advocates Meeting** to offer training alongside Federal Agencies and service providers to respond to local Tribal Affairs issues. Staff of the Office of Native American Partnerships and the AI/AN National Policy Workgroup presented an overview of the *Native American Precedent Resource Center* and shared status, of current precedents for participants at the Summit. The workgroup is comprised of a volunteer from each Region, and a volunteer from several components in Headquarters, including the policy component.

- On April 21st, we presented at the **Annual Native American Veterans Summit Conference** in Albuquerque with more than 400 veterans in attendance.
- On May 4th, in Anchorage, Alaska, we hosted an **Advocacy Session** in a local field office. The participants expressed interest in maintaining regular discussions between participant organizations and the Seattle Region Public Affairs Specialist.
- On July 13th, we hosted an **Advocacy Session** in Chicago to discuss access to service and recommendations on how to reach underserved communities. The participants asked about strategies to work closely with field offices and liaisons to assist those facing barriers to accessing our services.
- On Aug. 2nd, we hosted a local **Advocacy Session** in San Francisco to discuss access to service and recommendations for how to reach underserved communities. We highlighted the Tribal Benefits Coordinator Guide as a tool to assist non-Native third party organizations. The Public Affairs Specialists scheduled follow up meetings.
- In September, we completed the **2023 Tribal Benefit Coordinators Guide** scheduled for publication bi-annually to highlight Social Security services. We marketed the Tribal Guide on our public-facing website (www.ssa.gov/people/aian) to inform Tribal members how to apply for benefits and appeal unfavorable decisions.

Educational Efforts Specifically for Tribal Communities

We created regional partnerships, with a focus on Urban Indian Centers, and sought opportunities to engage and preserve essential knowledge and resources vital for establishing Tribal relationships. We provided the following educational engagements:

- Guidance to further understanding of benefits eligibility under our Social Security and SSI programs through varied methods of communication, such as blogs, social media, radio, *Dear Colleague Letters*, and newspapers. Guidance included extending education efforts to assist people experiencing homelessness and other Tribal members facing barriers to accessing our programs. These activities will be published separately in an addendum.
- Promoted awareness of the appeals process for individuals who disagree with Social Security or SSI benefits decisions. Understanding the appeals process and the timelines associated with appealing to the next stage is a critical aspect of our outreach program. We included information about the appeals process at seminars and national events to offer detailed informative sessions on how an individual or representative can file an appeal of a disability decision online at www.ssa.gov/benefits/disability/appeal.html.
- Requested feedback in Tribal communities to help increase Tribal representation on the panel for the [SSA's National Disability Forum](#). This forum provides an opportunity for Native professionals to inform SSA Leadership and researchers of the barriers to service and other challenges in the AIAN community.

- Hosted exhibit booths at national conferences hosted by Tribal Community groups and organizations and encouraged participants to share the information with their agencies, family and friends to help promote eligibility awareness.
- Sought opportunities to donate equipment through normal donation procedures, inclusive of AIAN communities. By providing this equipment, our hope is to build a partnership in the community to expand our video capability to reach members of the public for awareness and access of our programs.
- Had local Management and Public Affairs Specialists participate in seminars, roundtable discussions and local listening sessions in localities near Tribal communities within Social Security field office service areas.
- Organized an American Indian Alaska Native Heritage Month presentation from Eric Pinto (Mississippi Band of Choctaw Indians, Zuni), MSW, Center Assistant Director of the Kathryn M. Buder Center of American Indian Studies at Washington University in St. Louis, Missouri, as part of the Federal Executive Board's Diversity, Education, and Cultural Awareness Committee.
- Trained Tribal benefits coordinators from four Tribal communities in the Chicago Region to take SSI applications and/or provide SSA offices with leads and referrals as part of the Third-Party Claims Assistance Initiative:
 - Mille Lacs Band of Ojibwe in Minnesota
 - Red Cliff Native Tribe in Wisconsin
 - Lac Courte Oreilles Native Tribe in Wisconsin
 - Great Lakes Inter Tribal Council in Wisconsin
- Liaised with three Tribal members of the Seminole Indian Tribe in the South Florida Area to follow up weekly on Medicare and retirement claims.

Acting Commissioner Kilolo Kijakazi, the Chief of Staff Scott Frey, and Office of Native American Partnership leadership joined Regional Leadership for the following 2023 Tribal community engagements:

- On May 1st, we hosted the **Alaska Tribal Listening Session** in Anchorage at the NIHB Health Conference. Tribal Leaders and their designees raised customer service concerns regarding receipt of partial SSI payments due to COVID-related resources, geographic barriers, lack of Representative Payee Organizations to support SSI recipients, and other issues. The local public affairs specialist provided case-specific support following the session. Tribal leaders provided recommendations to enhance SSA support for Native Languages in Field Offices along with requests for mobile support to underserved Tribal communities for Tribal members who are not able to afford to travel to apply for SSI benefits. Tribal Leaders shared that it costs Tribal members over \$1500 to travel for an initial appointment to apply for Social Security benefits. This is a known barrier to service.
- On June 5th, we visited the Kansas City Urban Indian Center to conduct the **Kansas City Tribal Listening session**. We facilitated a discussion on service delivery and shared how to access *my Social Security* accounts to conduct business online. The Executive Director

of the Kansas City Indian Center offered to work closely with the local Public Affairs Office to invite service providers and other students from the School of Social Work to upcoming virtual seminars on how to help clients with Social Security benefits. We also promoted SSA's direct hiring authority and encouraged applicants for all job postings.

- On July 13th, we hosted the **Chicago Tribal Listening Session** at the Trickster Cultural Center (TCC). We participated in several preparation sessions for the Chicago Tribal Listening Session both internally and externally. The TCC made many recommendations to the regional leadership for collaborations that would benefit Tribal members in Chicago and surrounding areas.
- On August 1st, we hosted a San Francisco Tribal Listening Session at the Friendship House Association of American Indians of San Francisco. Tribal members and service providers throughout California, Arizona and Nevada joined virtually to hear and share their concerns on service delivery and access to our programs and field offices. The Friendship House is a nonprofit, community-based organization that provides residential substance abuse treatment programs for American Indians. We attended an Advocates Meeting as well.

Engaged in National Opportunities

As members of the **WHCNAA**, we gained insight from the Office of Management and Budget's inter-agency activities. These activities enhanced our knowledge of Tribal sovereignty and self-determination, which are central to working with Tribal governments. Engagements included Directors and national members of Tribal Organizations to share knowledge of programs and procedures through national Tribal meetings.

- We attended the **SAIGE Training Conference**, an annual meeting and Diversity and Inclusion (D&I) training sessions designed for Executives, Directors and EEO Specialists seeking to learn more about Tribal inclusion in agency action plans, including Equity Action Plans. They focused on professional development and complex Federal Indian Trust responsibility. SSA Dallas Regional Public Affairs Office hosted an exhibit table.
- We attended the **TTAC** meetings in March and June of 2023, with Tribal leaders in attendance. U.S. Treasurer Chief Lynn Malerba conveyed a clear message to TTAC and Tribal leaders for Government agencies to be more responsive to the public such as visiting Indian Country rather than asking Tribal leaders and organizations to meet in Washington, DC. The TTAC Chairman Ron Allen submitted a Position Paper requesting that SSA issue guidance to clarify policy for the assistance based on need (ABON) program.
- On March 15th, we gave an interview with the [Federal News Network](#) (FNN). The Director of Native American Partnerships outlined the goals of the Office and highlighted the need for outreach to Tribal leaders and members for access to SSA's programs. He also discussed service delivery strategies to overcome barriers. FNN asked about the Director's Native Heritage and his personal interest in positive outcomes in Indian Country.
- The **Urban Institute (UI)** seeks to support and to better understand how SSA delivers services to those living in Tribal communities across the United States. UI interviewed

experts and advocates on this topic, as well as staff from Federal Government agencies that provide benefits and services to Native communities. On April 24-25th, we **attended NAFOA** specifically to clarify SSA policy for several sessions.

- On May 3, we presented at the **NIHB National Tribal Health Conference** in Anchorage, Alaska. The ACOSS addressed priorities to reduce barriers to service in Indian Country. The ACOSS spoke at the general plenary session highlighting the goals of the Office of Native American Partnerships and held our own Tribal listening session. We attended other Federal partners' Tribal Listening Sessions, including the Office of Management and Budget and the WHCNAA, and participated in the Tribal cultural night.
- On May 16th, we attended the **NCUIH's Annual Conference** in Washington, DC. The Office of Communications hosted an exhibit table, and Public Affairs Specialists provided educational material. The conference began with two listening sessions hosted by the Indian Health Services. Agencies on the agenda included the Veterans Administration, Centers for Disease Control and Prevention, and the Health Resources and Services Administration. We asked NCUIH to consider SSA for the 2024 agenda.
- On July 18th, we attended a **General Services Administration (GSA)** webinar for Tribal Nations. The webinar included an overview of available services and Tribal-specific concerns that impact varied funding sources. GSA announced a new [Personal Property Management](#) online system for Federal agencies to manage excess equipment. The new site will give instructions on how to donate furniture, laptops, or other resources to Tribal communities. This is critical information for SSA after scheduled laptop refreshments, we typically have devices to donate to communities, including Tribal communities.

Promote Hiring and Retention of Native Students

We are committed to recruiting a diverse, qualified pool of applicants at all levels of the agency in accordance with the Agency Human Capital Operating Plan (HCOP). The HCOP aligns with the Government-wide priorities presented in the President's Management Agenda, Federal Workforce Priorities Report, and the Office of Personnel Management's Human Capital Framework. To further these efforts, we relied on distinct connections with the D&I Council, and our Agency Advisory Council Chairs, including the American Indian Alaska Native Advisory Council.

Retention of New Hires who are Native Students

Our engagement with all Advisory Councils throughout the year provided opportunities to educate our employees on the critical role the councils provide, in addition to complementing our Diversity and Inclusion profile.

- On August 11, we participated in the 2023 *Joint Advisory Council Leadership Development Training*. In support of this national event, the Office of Native American Partnerships hosted two workshops to further develop the SSA employees and share the mission of the Office:

- *Workshop I:* Shared recommendations on how the agency can increase the effectiveness of Tribal Outreach in support of Executive Order 13175 Memorandum on Tribal Consultation and Strengthening Nation-to-Nation Relationships. Presenters demonstrated ways in which Advisory Councils can support the Office of Native American Partnerships.
- *Workshop II:* Provided foundational principles and strategies to actualize the Advisory Council's mission. The Council leadership discussed how it can actively support and be a part of local community hiring initiatives while still serving its communities.
- On September 19th, the Office of Native American Partnerships hosted an *All Hands Call* with the National AIAN Advisory Council (AIANAC), Headquarters AIAN Advisory Council, and each of the 10 Regions AIAN Advisory Councils.
- The D&I Council collected community contacts to market SSA job vacancy announcements on social media to enhance our recruitment initiatives and promoted local assistance efforts through our Regional Advisory Council Activities designed to enhance diverse recruitment.
- The National AIAN Advisory Council released the *Moccasin Tracks newsletter*. Each newsletter is designed to educate employees on the AIAN culture to improve customer service to underserved communities. AIANAC shared articles from Executives to demonstrate outcomes of recent agency-wide efforts supporting Tribal communities.

Recruiting Native Students

We explored ways our programs and services can benefit Tribal Colleges and Universities by communicating and collaborating with our network of non-competitive eligibility contacts, which included:

- SSA's National Veterans Outreach and Selective Placement Coordinators
- Career One Stop Centers
- Vocational Rehabilitation Offices
- Ticket to Work Job Service Providers, and
- University Disability and Career Services

While hosting exhibit tables in Tribal communities, we provided program benefit information and a recruitment platform to reach parents and grandparents of Native students. Additionally, we recruited directly from members of Tribal Youth Groups participating in the conference. For example, we expanded our efforts this year to include Urban Indian Centers and shared our recruitment flyers with their coordinators in direct contact with Native students. We demonstrated the benefits of creating USAJOBS accounts and provided handouts for the Tribal member to share with a family member. We provided recruitment flyers for SSA vacancies on USAJOBS and demonstrated how to locate SSA vacancies on the site.

- The SSA field office in Green Bay conducts routinely promotes SSA recruitment and hiring opportunities to Oneida, Stockbridge and Menominee Tribal Staff and College of Menominee Nation as well as Mille Lacs and White Earth reservations.

- In the Chicago Region, the Center for Human Resources coordinated with 9 AIAN institutions to conduct outreach and recruitment. Their efforts resulted in 20 AIAN new employees out of 633 New Hires (3.15%) and estimated the AIAN hiring retention rate for FY 2022 and FY 2023 at 89.65%.

The Deputy Commissioner for the Office of Analytics, Review and Oversight (DCARO) formed a recruitment cadre to review marketing opportunities across multiple platforms to post Direct Hiring Authority flyers for various positions nationwide. The cadre tested access to the [NativeHire.org](https://www.nativehire.org) database of Native students. In our research, we identified other Federal agencies who utilized the platform to market vacancies posted on USAJOBS. DCARO Leadership became a sponsor to access the *NativeHire.org* database, giving DCARO the opportunity to post flyers throughout the year to recruit for positions as they became available. DCARO provided database access to their Executive Officers. We researched other platforms such as [Native People's Recruit](https://www.nativepeople.com). The combined recruitment efforts provided the following:

- Targeted area of focus on employment in underserved communities, connecting outstanding employers with viable candidates from urban and rural communities; universities, colleges, trade and vocational schools; and military and veteran communities.
- Built relationships with the administrators. We planned strategies to expand future efforts to support hiring opportunities and, through SSA recruitment coordinators, to use platforms that automate communications and job announcements to Tribal communities.

Throughout the year, we sought opportunities to promote SSA positions to Native students at national conferences. For example, the SAIGE and NAFOA organizations host youth groups. While attending SAIGE and NAFOA events, we promoted to their youth groups the benefits of working for SSA, including for a Native to help another Native with their disability application and support through other family benefits.

- Emailed SSA vacancy announcement with recruitment links to the Cayuga, Oneida, Onondaga, St. Regis Mohawk, Seneca, Shinnecock, Tonawanda, and Tuscarora Nations, and multiple AIAN-serving institutions throughout the Region.
- Discussed job opportunities and shared recruitment materials with attendees during the NIHB national conference in Anchorage, AK.
- Shared recruitment flyers with the Fort Peck, Fort Belknap, Blackfeet, and Rocky Boy's Reservation, and the Little Shell Chippewa Tribe.

Accessing the Ticket to Work (TTW) Program

During our outreach efforts, the Public Affairs Specialists made aware the opportunities for engaging in work activity while receiving benefits. They shared how the TTW program is designed for persons with disabilities who want to work and participate in planning their employment. We sought opportunities to provide information on employment support, to assist our disabled beneficiaries with returning to work, including the following:

- Informed Tribal Benefit Coordinators of the availability of the TTW program and ways to establish **Tribal Employment Networks** in their community. Distributed the [Ticket to Work Program and Becoming a Tribal Employment Network](#) publication.
- Provided education on Unsuccessful Work Attempts and Impairment-Related Work Expenses, and Special Conditions, through a detailed Tribal benefits guide published on our public-facing website.

Conduct Data Collection and Analysis

The Mission of the Social Security Administration is to ensure equity and accessibility in delivering Social Security services by improving the customer experience and addressing systemic barriers to participation in our programs. To do so requires a better understanding of our customers' evolving needs, advancing inclusive policies, and ensuring equity throughout our programs (e.g., targeted outreach to communities of color and underserved communities). It also requires that we examine our current policies and procedures to ensure they are as efficient and equitable as possible.

We have focused FY 2023 on increasing awareness and referrals to our SSI program. One of the goals in the [SSA Strategic Plan Fiscal Years 2022-2026](#) was to measure progress in accessing the SSI program through increased outreach and improved benefit delivery, including to communities of color and underserved communities. Therefore, we focused our efforts on increasing the number of SSI applications from underserved communities.

Our collaborations focused in support of the strategic objective to identify and address barriers to accessing services. We delivered on the following strategies:

- Engaged with Tribal Nation stakeholders to discuss service delivery methods and how we can achieve efficiencies. We extended our Tribal outreach campaigns to national Tribal organizations to reach underserved communities across the country, and specifically in AIAN communities.
- Conducted data analysis with newly developed heat maps resulting from a combination of claims data, demographics and Tribal communities that helped us further develop our network of advocates and community-based organizations. The information we gathered manually through outreach allowed us to collectively develop solutions to address the needs of people facing barriers.

Based on the increased collection of data by race and ethnicity, we employed the data to help discern whether there are differences in the rate of participation in our SSI program, in the following ways:

- Identified declines in applications for SSI and sought feedback from Urban Indian Centers and through Tribal Listening sessions to assess the potential factors contributing to these differences and worked to address them.

- Hosted subsequent meetings for feedback on designed solutions prior to implementation. We promoted the solutions through marketing our efforts with those organizations that provided their local analysis, feedback and helped develop solutions for their community.

We built partnerships to improve equity and benefit delivery in our programs through increased outreach and the detection of disparities using data collection and analysis. The data analysis conducted by both the Offices of the Deputy Commissioner for Retirement and Disability Policy and the Deputy Commissioner for Analytics, Review and Oversight proved beneficial for monitoring progress in SSI claims receipts following our Tribal outreach.

Based on the internal analysis, we completed the following actions:

- Expanded our knowledge of the Tribal Communities we serve and monitored trends in SSI claims outcomes.
- Identified underserved Tribal communities to target communities for listening sessions so that SSA employees can learn ways to improve services in our local offices, as well as share published material and information on service delivery channels.
- Strategized opportunities for FYs 2024-2026 to align our commitment with the agency’s vision to “ensure equity in delivering Social Security services and improve the accessibility of our services to all,” as outlined in the Social Security Administration Agency Strategic Plan.
- On August 3, 2023, the SSA Dallas Regional Commissioner signed the Computer Matching and Privacy Protection Act and Information Exchange Agreement with Cherokee Nation Indian Child Welfare (CNICW). The CNICW in Oklahoma is a Tribal entity approved to run Title IV-E of the Social Security Act foster care and prevention services for children and families. CNICW is approved to receive benefit information to determine eligibility of clients under specific guidelines.

Stand Up the Office of Native American Partnerships

On September 27, 2022, we established the Office of Native American Partnerships (Office) reporting to the Commissioner. In FY 2023 we developed strategic work plans for the office, including staffing; considered options to support governance; designed standard operating procedures; and incorporated the new office into internal controls.

An important function of the Office is outreach to leadership in Tribal communities, reservations, rancherias, and Alaskan villages to address language barriers, promote AIAN hiring, and raise awareness of our program’s disability appeals, survivorship issues, and service channels (including VSD and online methods). To elevate and centralize these efforts, the Acting Commissioner built a small Tribally focused office with the following staff:

- Director,
- Acting Deputy Director,
- Public Affairs Specialist, and
- Management Analyst.

To meet the goals of the *Agency Tribal Action Plan* we used our limited resources to recruit a diverse candidate pool for hiring at all levels of the agency. In addition to appointing new leadership, we reassigned leadership from within the Agency with detailed knowledge of our Agency Tribal Affairs and offered part-time details for staff with national scope.

We coordinated internal Native American efforts, including starting the groundwork for analysis of data to identify underserved Tribal communities and set up listening sessions to improve services in our field offices and hearing offices. Our centralized efforts increased external program awareness to the Tribal community through participation with panels on national conferences to provide SSA updates in Indian Country and attend local meetings with Tribal leaders and their delegates.

Elevated and Centralized Efforts to Administer Programs and Policies

The Office of Native American Partnership is designed to elevate and centralize efforts. It resides in the Office of the Commissioner and receives the Executive-level support the office needs to fulfill its functions. The Acting Commissioner set the direction of the Office of Native American Partnerships for the initial outreach to concentrate on Urban Indian Centers and the Pine Ridge Oglala Reservation in South Dakota. The Acting Commissioner tasked the Office to visit the following Urban Indian Centers:

- Kansas City, Missouri.
- Chicago, Illinois. and
- San Francisco, California.

The ACOSS and Chief of Staff accompanied the Office's Director and Acting Deputy Director to each site visit. On September 11, 2023, the Oglala Lakota College provided space for us to meet with the Tribal Council. We conducted a Tribal Consultation, a Social Security Benefits presentation live on the local radio station and offered one-on-one sessions with Rapid City Field Office employees onsite to assist with claims related questions. While in Pine Ridge, we visited the Pine Ridge Hospital and observed the VSD system to connect the public to staff in the Rapid City Field Office. The visit included employees of the Denver Regional Office, the Regional Communication Director, and Rapid City field office management and public affairs specialists.

During our visits, we conducted listening sessions and advocacy sessions. We spoke with the Executive Directors of the Indian Centers on a one-to-one basis and spoke to the Tribal members in attendance. These meetings generated action items for review and resolution. The Office laid the foundation for ongoing working relationships with the Indian centers and the local PASs. Rapport building is the most significant feature of visiting Indian centers and reservations aside from the personalization of the SSA employees for the Tribal Leaders and Members.

- For example, the Office Director and Deputy Director traveled to the Eastern Band of Cherokee Indians in Cherokee, North Carolina for the NICOA Elders Conference in September. In addition to hosting in-person Tribal Consultation, we conducted a two-hour benefits workshop at the Conference. We hosted an exhibit table to answer questions and provide pamphlets to approximately 2,000 elders in attendance at the Conference.

After the NIHB Conference in Anchorage, we worked to address the concerns regarding service delivery due to the remoteness of Alaska. We heard many of the conferees suggest SSA go to the Alaskan Villages and meet one-on-one. We encountered the same issues and questions in Kansas City, Chicago, and San Francisco. Our solution to this issue is to host visits on designated dates to answer questions, take applications, and meet face-to-face.

- The team established in-person outreach and services in three locations in Alaska (Napasiak, Katzabue, and Utqiagvik) on three days in September 2023. Planning for the outreach took place in August 2023 to make sure the designated locations met the needs of the community.
- We also planned marketing methods to announce the planned arrivals of the teams. This was accomplished with flyers and radio public service announcements.

Attendance at conferences during FY 2023 provided engagements with Tribal Leaders and Program Managers, such as the Native American Financial Officer's Association and the National Congress of American Indians. At each of those conferences the Office's Director and Deputy Director spoke with the Executive Directors for focus areas to join next year's agenda.

- While attending the National Council on Urban Indian Housing Conference, we hosted an exhibit table and staff answered benefit eligibility questions. We also requested an invitation to participate as speakers at their next conference.
- The National Gathering of Nations in Albuquerque, New Mexico is the largest conference in the United States. The Gathering has a large indoor building dedicated to organizations such as SSA to provide information. We are researching the agenda to determine if SSA can offer an exhibit table for the Gathering in FY24.

In March 2023 and monthly thereafter, we issued the Office newsletter detailing our accomplishments of our visits to Indian Country. We issued the newsletters to the executive leadership of the agency to bring awareness how our office operates. The Office of the Commissioner also receives the monthly newsletter as we demonstrate each month how our office adheres to the Tribal Action Plan. The newsletters are then shared with each of the ten regions, for their awareness in their local Public Affairs Offices. This provides a platform to stay connected across the country.

Enhanced Relationship with Tribes

In the past, most engagements the Tribes have had with SSA was at the staff level through a visit to the local field office to conduct personal business transactions. To enhance our relationship with Tribes we have met with Tribal leaders and members through listening sessions, conference participation, and face-to-face. The Office is working with PASs to visit reservations, Alaskan villages, rancherias, and urban centers to meet AIANs on a one-on-one basis to establish a good working relationship and to build trust. Good relationship building with SSA and AIANs has proven noteworthy in San Francisco and Chicago, and it is improving in Kansas City due to increased connectivity in the weeks and months that followed our engagements. The local offices were invited to participate in AIAN events to continue to spread the word of SSA programs and

services. As the Office meets with every SSA Regional Office, these relationships will continue to improve.

Establishing the Office of Native American Partnerships directly supports President Biden's 2021 Executive Order (EO) 13985: *Advancing Racial Equity and Support for Underserved Communities*, as well as other Federal guidance on coordination and collaboration with Tribal Governments.

Managing the Plan

To monitor compliance with EO 13175 and President Biden's Memorandum dated January 26, 2021, the Commissioner established three executive leads:

- Richard Litsey—Director
- Renee Ferguson—Acting Deputy Director
- Nancy Berryhill—Tribal Consultation Official

The three executives effectively managed the plan through coordinated discussions on policy compliance, served as the initial contact for Tribes to request or inquire about Tribal consultations, improved access to benefits, and actively worked to enhance ongoing relationships with Tribes.

**Social Security Administration
Tribal Consultation Plan
2023 Progress Report Template**

Per the Agency Tribal Consultation and Coordination Action plan, we conducted numerous outreach educational workshops and distribution efforts to bring awareness to our programs in the following locations:

Alaska

- 85 participants – Hosted Tribal Listening Session during the National Indian Health Board Conference (NIHB) with acting SSA Commissioner and Office of Native American Partnerships.
- 2500 participants – National Indian Health Board (NIHB) Conference – Staffed an informational booth offering AIAN-focused SSA programmatic services and Q & A.
- 25 participants — Conducted formal Community Advocate and Outreach Session sharing information and feedback between SSA executives and community advocates from agencies and organizations serving Alaska.
- 47 participants - Alaska Reentry Partnership Social Security Disability Benefits Presentation – Provided information on SSDI and SSI programs including reentry documentation requirements for Alaska State Department of Corrections case workers.
- 7 participants - Alaska Native Language Preservation and Advisory Council Public Meeting – Shared OASDI and SSI programmatic information
- 25 participants – Conducted disability and SSI seminar for Alaska Working Interdisciplinary Networks of Guardianship Stakeholders (WINGS) state guardians and conservator’s program.
- 210 participants - Alaska Connectivity Pilot Projects – Offered in-person services and assistance completing Social Security Number Card applications in rural and Tribal communities experiencing decreases in SSI applications in boroughs of Utqiagvik (Barrow), Kotzebue, and Bethel.
- 130 participants – Anchorage Senior Activity Center – Conducted a benefits presentation for community members including online services that may be accessed on the Activity Center’s computers.
- Met with Tribal leader of Native Village of Kongiganak after SSA Tribal Consultation suggestion for obtaining and expanding interpretation and translation services to support native languages spoken in the western boroughs of Alaska.
- Coordinated Mat-Su Valley Video Services expansion with Aging and Disability Resources Center in Wasilla, AK to establish a new virtual services connection via MS Teams with the Anchorage District Offices.

Arizona

- 35 service organizations – Page Area Resource Network - Provided information on Access to Service and on the benefits of creating a *my* Social Security account. Network includes Navajo Nation, White Mountain Apache, Kaibab Paiute, Yavapai Apache and others.
- 200 participants - Salt River Pima Maricopa Indian Community and Senior Benefits Fair- Conduct benefits overview and promote how to establish a *my* Social Security account.
- 50 participants - Tohono O'dham Nation Quarterly Service Delivery Collaborative Provided information on Access to Service and on the benefits of creating a *my* Social Security account.
- 100 participants - CMS/IHS Phoenix Training Conference - Conducted workshop and provided updates on general programs.
- 20 participants - Conducted workshop and provided updates on general programs to the Phoenix Indian Health Center Staff.
- 60 participants - 14th Annual Gathering of American Indian Veterans - Provided information on Access to Service and on the benefits of creating a *my* Social Security account.
- 45 participants - Tucson Indian Health Center Elder Health Education- Provided information on Access to Service and on the benefits of creating a *my* Social Security account.

California

- 100 participants – Provided collaborative CMS/IHS/Tribal/Urban training with a benefits overview and SSI application training.
- 40 participants - Tribal Listening Session at the Friendship House in San Francisco with acting SSA Commissioner and staff of Office of Native American Partnerships. Provided information on Access to Service and on general program updates.
- 25 Participants – Conducted workshop and provided updates on general programs to Native American Health Center staff.
- 20 participants – Northern Circle Indian Housing Authority – provided benefit overview, covered potential SSI application training.

Colorado

- 425 participants - Denver Indian Center Elders Luncheon - Provided benefit overview, promoted the use of online services, and answered questions from attendees.
- 250 participants - Hosted a booth to share SSA programmatic information and answer questions at the Building Relationships, Inclusion, and Diversity for Greater Equity in Behavioral Health Event

Connecticut

- 5 participants — Mashantucket Pequot Tribal Nation Leaders – Conducted ongoing educational series for Tribal members on SSI application training, access to service, and general program updates.
- 20 participants — Mohegan Tribal Nation members – Conducted overview of disability process and SSI application training. Provided information on Access to Service and on the benefits of creating a *my* Social Security account.
- 25 Participants -- Mashantucket Pequot Tribal Nation members – Conducted overview of disability process and SSI application training. Provided information on Access to Service and on the benefits of creating a *my* Social Security account.
- 19 Participants –Mashantucket Pequot Tribal Nation members – Conducted overview of disability process and SSI application training. Provided information on Access to Service and on the benefits of creating a *my* Social Security account.

Florida

- 50 participants - Health Fair for the Miccosukee Indian Tribe – Provided benefit information, covered potential DIB, RIB, SSI and Medicare application news and information. Provided answers to their questions and concerns.
- 15 participants – Health Fair for the Miccosukee Indian Tribe - Provided presentation and updates on the Medicare Premiums and Medicare applications.
- Conducted weekly follow up on claims and other inquiry members of the Seminole Indian Tribe that serve as liaisons in South Florida Area.

Idaho

- 100 participants - Shoshone Bannock Tribe– Conducted retirement presentation webinar for Tribal employees and members covering OASDI and SSI benefits.
- 3 participants - Coeur D’ Alene Tribe – Conducted retirement presentation for Tribal employees and members covering OASDI and SSI benefits.

Illinois

- 12 participants – SSA Tribal Listening Session at the Trickster Cultural Center in Chicago with acting SSA Commissioner and Office of Native American Partnership. Tribal leaders shared concerns and suggestions for improved service delivery to the urban tribal community.
- 500 participants – Provided information answered questions at resource table for the 9th Annual Gathering of American Indian Veterans AIAN Veterans in suburban Chicago.
- 20 participants - Collaborated with the American Indian Center of Chicago to conduct a Lunch-and-Learn workshop for 20 tribal elders on the Fairness Act and ABON exclusions.

- 100 participants - Distributed Social Security, Medicare, and Online Service publications at a Health Resource Fair at the American Indian Health Center in Chicago.

Kansas

- 5 participants –. Conducted weekly follow up on claims, inquiry members of the *Prairie Band Potawatomi Nation's* Social Work Department in Topeka, KS.
- 5 participants – Set up presentation on MS Teams 2nd Tenant Expansion with *Prairie Band Potawatomi Nation* in August 2023.
- Conducted quarterly recruitment at Haskell Indian Nation University in Lawrence, KS.

Louisiana

- 75 participants – Conducted virtual retirement seminar for the Institute for Indian Development Native American Elder's Conference.
- Shared Medicaid renewal information to over 50+ AIAN communities.

Maryland

- 700 participants - Provided information on Access to Service and on the benefits of creating a *my* Social Security account at the Whispering Winds Pow-Wow in West Friendship, MD.

Massachusetts

- 20 participants – Chappaquiddick Wampanoag Tribal Leaders – Conducted ongoing educational series for Tribal members on access to service, SSI application training and general program updates.
- 50 participants – Chappaquiddick Wampanoag Tribal Members – Conducted an SSI application training and general program overview to Tribal members across the United States. Continued discussions for an imminent laptop donation to the Mashpee Wampanoag Tribe.
- 50 participants – Wampanoag Tribe of Gay Head – Conducted a benefits workshop on retirement benefits, spousal benefits, survivor benefits, and Medicare. During the workshop, our staff promoted filing online and other eServices, including setting up my Social Security accounts.

Michigan

- Installed a Video Service Delivery (VSD) unit at the Manistique Tribal Health Center for the Sault Ste Marie Tribe, the largest tribe East of the Mississippi spanning a 7-county service area in Michigan's Upper Peninsula.

- 44,000 Sault Ste Marie Tribal members will have additional access to Social Security services as this VSD equipment will enable customers to conduct business with the Escanaba, MI SSA office.
- 250 participants – Staffed an information table at the Grand Traverse Band of Ottawa and Chippewa Indians Health Fair with Tribal members and elders in attendance in Traverse City, Michigan.
- Published monthly Social Security articles in the Win Awenen Nisitotung Newspaper by the Sault Ste. Marie Tribe of Chippewa Indians. Reaches elders and Tribal households; an estimated audience size of 44,000.
- Regional Public Affairs and Policy staff conducted a follow up meeting with Tribal leader from the Sault St. Marie Tribe to ensure payments from the Tribe’s Self Sufficiency Fund were being properly excluded for Supplemental Security Income (SSI) purposes.

Minnesota

- 300 participants – Conducted benefit workshop with the Administration for Community Living (ACL), the Centers for Medicare & Medicaid Services (CMS) and Indian Health Services, to AIAN benefit specialists, staff, beneficiaries, and community members in the Bemidji Region.
- 1500 participants – Provided updates on general programs at the National Council for American Indians’ Conference in Shakopee MN at the Sioux reservation.
- 1500 participants – Provided updates on general programs at the Bureau of Indian Affairs’ Regional Conference in St. Paul.
- 700 participants - Provided updates on general programs at the Red Lake Reservation Health Fair.
- Conducted outreach to Mille Lacs and White Earth reservations to promote SSA recruitment and hiring opportunities.
- Conducted monthly check-in calls with Tribal staff from Red Lake, Mille Lacs, White Earth, and Leech Lake to share benefit information and resolve case issues.

Mississippi

- Shared the Medicaid or CHIP Gap Poster and the Medicaid Renewal Website link with the Payee Administrator for the Mississippi Band of Choctaw Indians Tribe.
- Shared the Social Security Administration Establishing National Native American Office News Release with the Mississippi Band of Choctaw Indians Tribe.

Missouri

- 12 participants - Tribal Listening Session at the Kansas City Indian Center in Kansas City, MO with acting SSA Commissioner and staff of Office of Native American Partnerships. Provided information on a variety of topics related to SSA benefits, and services, including access and awareness throughout Indian Country.

- Reached out to the Kansas City Indian Center to discuss outreach opportunities and provide benefit information.

Montana

- 9 participants - Tribal Benefit Coordinator Training - Provided a Retirement and Disability presentation to Tribal Benefit Coordinators from the Crow, Northern Cheyenne, A'aninin, and Nakoda Tribe.
- 36 participants - CMS Tribal Benefit Coordinator Training - Conducted webinar discussing Supplemental Security Income and Social Security Disability Insurance benefits to Tribal Benefit Coordinators from Montana.
- 10 participants - Provided a disability presentation to Crow Tribal Benefit Coordinators, Finance and Records Directors at Crow Agency Indian Health Services.
- 40 participants - Polson School Transition Fair - Hosted a booth to answer questions and provided 3 Supplemental Security Income and Social Security Disability Insurance benefit presentations to Tribal members on the Flathead Reservation.
- 20 participants - Provided benefit information and VSD equipment overview for Great Falls Indian Community Center Healthcare Staff.
- 4 participants - Provided disability and online application training for benefit coordinators at the Rocky Boy's Health Clinic.
- Worked with the Little Shell Tribe to determine acceptance of their Tribal ID for enumeration transactions.
- Partnered with the Crow Agency to reach community of Lodge Grass, MT through scheduled appointments at the IHS clinic.
- Partnered with the Crow Agency, the Northern Cheyenne Tribe, and the Blackfeet Tribe of the Blackfeet Indian Reservation of Montana in providing services via Video Service Delivery (VSD).

Nebraska

- Provided benefit information and emailed invitation to SSI application training to: Winnebago Tribe of Nebraska, Winnebago Public Schools, St. Augustine Indian Mission, Educare Winnebago, Winnebago Boys & Girls Club of Hocak, Little Priest Tribal College.

New Mexico

- 40 participants – Conducted Tribal Summit along with other federal agencies and state partners to educate Tribal staff on SSA processes including online filing and eligibility requirements.
- 100 participants- Laguna and Acoma Pueblo- Hosted and presented benefit information at an IHS Medicare Seminar.

- Emailed Dear Colleague Letters on the SSI online protective filing tool to over 200 AIAN contacts.
- Emailed press release of Social Security Administration establishing National Native American Partnerships to over 400 NM media outlets.
- 65 participants - Navajo Nation - Presented at the annual collaborative CMS/IHS Tribal/Urban training to Benefit Coordinators who work for various Tribal entities. Presented on Retirement, Disability, Solvency and Access to services.
- 150 individuals - National Indian Council on Aging (NICOA) Webinar – Conducted virtual benefits presentation and answered general questions with members of the SSA AIAN National Policy Workgroup.
- 70 participants - Presented at the annual collaborative CMS/IHS Tribal/Urban training to Benefit Coordinators on Retirement, Disability, Solvency and Access to services.
- Over 1000 participants – Staffed an exhibit table at American Indian Day at the NM State Capital.
- 300 participants - Staffed an exhibit table at the Pueblo of Sandia/Sandia Resort & Casino Employee wellness fair.
- 150 participants - Staffed an exhibit table, answered questions, and assisted individuals at the Taos Pueblo Community Outreach event.
- 50 participants - Pueblo of Laguna - Staffed an exhibit table at the Pueblo of Laguna Benefits Fair.

New York

- Conducted monthly virtual support between Dunkirk Social Security office via a contact station with the Seneca Nation of Indians for the Allegany Territory. Dunkirk staff answered questions from Tribal community members regarding Social Security, SSI, and Medicare, and requests for Benefit Verification Letters.
- Conducted monthly virtual support between the Olean Social Security Office via a contact station with the Seneca Nation of Indians for the Cattaraugus Territory. Olean staff answered questions from Tribal community members regarding Social Security, SSI, and Medicare, and requests for BEVEs.
- Established support between the community service liaisons for the Shinnecock Nation of Indians of Long Island the Riverhead Social Security Office.
- Shared Dear Colleague Letters, press releases, and the monthly SSA newsletter, *The Social Security Star*, with the Tuscarora, Saint Regis, Oneida, Onondaga, and Cayuga tribes in the Niagara Falls, Plattsburgh, Utica, Syracuse, and Geneva service area.
- Shared the national press release announcing the creation of the national Office of Native American Partnerships and announcing new Director with all media, and the eight federally recognized tribes in the NY Region.
- Connected with Veterans Administration’s regional manager of Behavioral Health Rehabilitation Programs to discuss outreach to federally recognized tribes. The RCD provided the VA manager information about the Bureau of Indian Affairs’ Tribal Leaders Directory and the potential for joint outreach.

- Shared an announcement of Health and Human Services' 2023 HRSA IEA National Tribal Learning Session announcement with the eight federally recognized tribes in the region.
- Provided virtual guidance on Social Security and SSI to staff at the Shinnecock Nation and later referred to IRS to staff for further assistance.

North Carolina

- 150 participants – Lumbee Tribe Veterans Stand down Event – Staffed an exhibit table to distribute publications and answer questions. The one-day Stand down event provided supplies and services to homeless Veterans, such as food, shelter, clothing, health screenings and VA/Social Security benefits counseling.
- 45 participants -Conducted in-person support at a Per Capita Day event at the Eastern Band of the Cherokee Indians Supplemental Health office Cherokee Reservation in Cherokee, NC. Promoted SSA online services and answered various non-per capita related questions.
- Worked directly with Eastern Band of Cherokee Tribe (EBCI) EBCI's Director of Health Care Administration and their jurisdictional Franklin, NC field office in establishing a new Tribal income precedent. Explained the Achieving a Better Life Experience (ABLE) program.
- Responded to inquiries from the NC Department of Health and Human Services on this EBCI NC tribe, and provided guidance and further understanding on how the SSI program is treating their new tribal income program implemented in the Spring 2023.
- 100 participants - Conducted National Tribal Consultation at the Native Indian Council on Aging Elders Conference in Cherokee, NC, to get direct input into SSA policies, procedures, and priorities.
- 80 participants - National Indian Council on Aging, Inc. (NICOA) Elders Conference - Conducted a benefits overview presentation at the Elders Conference in Cherokee, North Carolina. Staffed exhibit table during the 4-day conference of over 2000 participants. Promoted online services, warned about Social Security scams, and addressed questions on entitlement and highlighted commonly missed benefits for widows, grandparents, and former spouses.

North Dakota

- 90 participants - Standing Rock Community Fair - Hosted an exhibit booth to share programmatic brochures and to answer questions from attendees.
- 3 participants - Native American Development Center - Provided a prisoner and pre-release training to staff.
- 10 participants - Native American Development Center - Provided a Retirement and Disability presentation to Mandan, Hidatsa, and Arikara Nation Tribal Health Insurance employees.

- Partnered with the Turtle Mountain Band of Chippewa in providing services via Video Service Delivery (VSD).

Oklahoma

- 68 participants - Conducted Oklahoma Tribal Summit along with other federal agencies and state partners to educate Tribal staff on SSA processes including online filing and eligibility requirements.
- Presented information on SSA's disability and SSI programs to Choctaw Social Workers in 10 counties in Oklahoma. Included a community-based Q & A session focusing on the transient and needs based Tribal members. Shared SSA's online services including *my* Social Security account and the SSI online protective filing tool.
- Spoke with a representative with the OKC County Health Department to discuss the needs of community partners and community members. Working with the representative to organize presentations to help the community organizations.
- Established the Computer Matching and Privacy Protection Act (CMPPA) and Information Exchange Agreement (IEA) with Cherokee Nation Indian Child Welfare (CNICW) in Oklahoma to review for benefit eligibility of clients under AFDC guidelines.
- Established two Tribal precedents for the Cheyenne and Arapahoe Tribes, Oklahoma.
- Donated laptops to the Comanche Tribe in Lawton, Oklahoma.
- 667 participants – Staffed an exhibit table for the Tribal Health Fair for the Sac and Fox Nation of Oklahoma.
- 10 participants – Conducted a benefits presentation with benefit coordinators and members of the Absentee Shawnee Tribe of Oklahoma Health Center to discuss online filing of retirement, disability, and SSI applications.
- 50 participants - VA and Cherokee Nation Event – Staffed an exhibit table and distributed information regarding Retirement, Survivors, Medicare, Disability, and online services such as the SSI Filing tool and setting up a My Social Security account.
- 20 participants - Attended the Muskogee Nation Joint PACT Act Presumptive Event-Homeless Veteran Stand Down Event.
- 100 participants - Participated in the Absentee Tribe Health Fair located in Shawnee, OK. Answered questions, promoted online services/access to service.
- 1500 participants – Staffed an exhibit table to share resources for aged individuals, distributed SSA publications on various topics, and promoted online services along with the SSI online protective filing tool.
- 300 participants – Staffed an exhibit table at the Society for American Indian Government Employee "SAIGE" event in Tulsa, OK. Provided publications on retirement, disability, and survivor's benefits and shared recruitment information on how to find SSA job openings and how to apply.
- Over 10 vendors – Staffed an exhibit table at the IHS/VA event at the Clinton Indian Health Services. This event is for the PACT ACT which screen veterans for potential VA benefits.

Ohio

- Staffed an exhibit table at the 38th annual Great Mohican Pow-Wow in Glenmont, Ohio. Shared on retirement, disability, and survivor's benefits to Tribal members.

Oregon

- 71 participants – IHS Portland Regional Office and Field Sites – Conducted webinar highlighting retirement, disability, and survivor's benefits, and explained SSI program criteria for employees of IHS and facilities.
- 250 participants – Native Caring Conference for Oregon Tribes – conducted benefit presentations and staffed resource and assistance booth for federally recognized Oregon Tribes
- 50+ participants - Conducted programmatic benefits presentation and online services demo for Confederated Tribes of Siletz Tribal benefit navigators and case managers.
- 15 participants - Conducted programmatic benefits presentation for Confederated Tribes of Grand Ronde benefits office case managers.
- 400 participants – Confederated Tribes of Warm Springs Indians Tribal Health Fair – Staffed exhibit booth and shared resources and provided in-person assistance to attendees of annual health and benefits service event.
- 38 participants – Conducted webinar for Tribal members and advocates highlighting retirement, disability, and survivor's benefits, and explained SSI program criteria Confederated Tribes of the Umatilla Indians.
- Partnered with the Confederated Tribe of Siletz Indians in providing services via Video Service Delivery (VSD) donated five excess laptop computers.

Rhode Island

- 40 participants – Conducted a benefits presentation for the Narragansett Indian Tribe on online services, setting up my Social Security accounts and using QR codes.
- 25 participants – Conducted a disability seminar for the Narragansett Indian Tribe Health Center Staff on the disability process and promoted online services and setting up my Social Security accounts.
- 20 participants – Conducted a benefits presentation for the Narragansett Indian Tribe Health Center on access to service, the disability application process and promoted online services, setting up my Social Security accounts and using QR codes.

South Carolina

- Provided general overview to the South Carolina Commission for Minority Affairs Tribal Coordinator and 21 other organizations on Social Security benefits and SSI application training for third party groups. Shared information about expanded VSD and MS Teams services.

- Developed precedents for two income programs for SSI purposes for the Catawba Indian Nation. Will use the opportunity to strengthen relationship and discuss expanded VSD/MS Teams services.

South Dakota

- 37 participants - Rosebud Sioux Veterans Administration Stand Down - Hosted a booth to share programmatic information and answer questions from attendees with the Rosebud Sioux Tribe.
- 103 participants - Centers for Medicare and Medicaid Services Presentation Great Plains Area Outreach and Education Event - Provided a Retirement benefit overview to tribal community leaders from Standing Rock, Spirit Lake, Mandan, Hidatsa, and Arikara Nations.
- 3 participants - Pine Ridge Reservation Outreach - Conducted meetings with the Indian Health Services staff and Video Service Delivery location operators. Answered questions from tribal members regarding appeals process.
- 5 participants - Rosebud Indian Health Services Training - Conducted meetings with Rosebud Indian Health Services Benefit Coordinator, Business Manager, and Case Workers on the reservation. Answered questions regarding SSN acceptance of Tribal ID's.
- 10 participants - Pine Ridge Reservation Outreach - Provided a Retirement and Disability presentation to the Oglala Sioux Tribal Council and health service providers.
- 30 participants - Pine Ridge Reservation Tribal Consultation – with Acting Commissioner of Social Security and Office of Native American Partnerships, engaged in formal consultation with the Oglala Sioux Tribal Council.
- 100 participants - Provided SSA overview presentation to community members via radio broadcast throughout multiple areas covered by KILI radio on the Pine Ridge Indian Reservation.
- Partnered with the Oglala Sioux Tribe of the Pine Ridge Indian Reservation, Rosebud Sioux Tribe of the Rosebud Sioux Indian Reservation, and the Crow Creek Agency in providing services via Video Service Delivery (VSD).

Texas

- Shared information on how to Apply for SSI with leadership of the Shawnee Tribe. The information included how to apply online, how to make an appointment and marketed SSA's "Request an Appointment Online" tool to over 2000 Tribal members.
- Emailed press release and Dear Colleague letter on a variety of topics to over 500 AI/AN recipients.
- Emailed Press Release on Social Security and OIG Annual Slam the Scam Day to local attorney's, homeless advocates, hospitals, funeral homes, VA, financial institutions, and congressman in the DFW area to over 40 AI/AN recipients.
- 500 participants - Co-presented at the CMS and IHS Virtual training. Shared information regarding benefits, Medicare enrollment, Online services, and my Social Security.

Utah

- 12 participants – Conducted an SSI income and resource policy discussion with Ute Indian Tribe of the Uintah and Ouray Reservation.
- Partnered with the Crossroads Senior Center to assist members of the Ute Indian Tribe of the Uintah and Ouray Reservation via Video Service Delivery (VSD).

Virginia

- 2000 participants - Nanesmond Indian Nation American Indian Festival – Staffed an exhibit table to share Retirement, Disability, SSI, Medicare, and auxiliary benefits to Tribal members, Native American veterans, and the public.
- Shared Dear Colleague Letters, press releases, and the monthly information packets containing shareable articles about Social Security’s benefits, programs and services.

Washington

- 36 participants – Affiliated Tribes of Northwest Indians – Conducted webinar highlighting Wounded Warrior and disability program criteria for Tribal Veteran Representatives of over 50 Tribes of the Pacific Northwest.
- 14 participants - Quinault Tribal Services – Conducted webinar for department representatives covering disability programs and my Social Security accounts.
- 200 participants - Muckleshoot Veterans Summit & Resource Event – Conducted benefit presentation for Wounded Warriors and disability programs. Staffed a resource booth at this annual event for Tribal members.
- 10 participants - Lower Elwha Klallam Tribe – Conducted presentation on general Social Security benefits and SSI to Tribal members.
- 35 participants - Jamestown S'Klallam Tribe – Conducted presentation on general Social Security benefits and SSI to Tribal members and employees.
- 15 participants - Port Gamble S'Klallam Tribe– Conducted presentation on general Social Security benefits and SSI to Tribal members.
- 29 participants - Makah Tribe – Conducted benefits overview presentation for Tribal elders and employees.
- Makah Tribe Video Services expansion – Coordinated with Tribal Senior/Veterans Program in Neah Bay, WA to establish a new virtual services connection via MS Teams which will be served by the Port Angeles, WA field office beginning in October 2023.

Wisconsin

- National “Tribal Voice” Initiative - Worked with Tribal benefits personnel in Wisconsin to schedule one-on-one interviews to better understand the customer experience during the disability application process.
- Led a discussion with 10 Oneida Tribal leaders regarding legal changes to per capita payments and how those payments would be counted for SSI.
- Provided a benefits overview during the monthly Elders Lunch and Learn session at Oneida Nation SE’s Tribal Services in Wisconsin.
- Staffed an exhibit table at the Gerald Ignace Community Health Fair in Milwaukee and shared information and answered questions about the Social Security and SSI programs. Provided fact sheets and training on Medicare enrollment periods with social workers.
- Met with the Director and staff at the Congregation of the Great Spirit in Milwaukee. Shared information about SSI, disability programs, and my Social Security.
- Participated in quarterly meetings of the *Milwaukee Area Indian Resource Network* to collaborate and meet with community partners and organizations to better serve the urban Tribal community.
- 5 participants - Met with managers of the Oneida Nation VA Division to discuss Medicare enrollment periods and answered questions about Medicare and premium costs.
- 40 participants - Conducted a virtual webinar for AIAN staff serving American Indian Veterans. Shared resources and information on SSA’s Wounded Warriors Program.
- 100 participants - Conducted a presentation for 75 Tribal executives and staffed an exhibit table at the GLITC bi-annual executive meeting in Bowler, Wisconsin on the Oneida reservation. Met with 5 Tribal managers and 20 Tribal Disability Specialists of the Great Lakes Intertribal Council (GLITC) to discuss ways SSA can better serve the seven native reservations.
- 50 participants - Conducted a virtual presentation to Tribal members at a joint conference with Bad River and Red Cliff Nations and discussed SSA programs and benefits, including Medicare enrollment.
- 25 – participants - Conducted an educational session/meet and greet with Stockbridge Reservation Tribal healthcare staff. The team provided a benefits overview and explored potential SSI application training for their healthcare staff.
- 200 participants - Staffed an exhibit and discussed Social Security and SSI benefits to Tribal members who attended the Menominee Tribal Elder Picnic. Conducted a benefits overview for 25 Menominee Tribal benefits staff and members.
- 100 participants - Conducted an in-person presentation Tribal benefits coordinators and staffed an exhibit table at the Great Lakes Elders Health and Benefits conference at the Ho Chunk reservation.
- 250 – participants - Conducted an in-person presentation for the St. Croix Ojibwe Nation, which includes communities that are homeless, children with disabilities, veterans, and recently released prisoners. Staffed a resource exhibit, took Extra Help applications, and set up SSI protective filing leads.
- Conducted routine outreach and services via VSD to Oneida, Stockbridge and Menominee Tribal Staff and College of Menominee Nation to promote SSA recruitment and hiring opportunities in the Green Bay service area.

Wyoming

- 5 participants – Conducted Tribal SOAR Coordinator Training at Wind River Family and Community Health Care. Provided online disability application training and referral procedures for representatives of Tribal Medical Center.
- Partnered with the Wind River Indian Reservation in providing services via Video Service Delivery (VSD)