



# FY 2024 Congressional Budget Justification

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# Introduction

## Agency Overview

The Morris K. Udall Foundation was established by the U.S. Congress in 1992 as an independent executive branch agency to honor Morris K. Udall's lasting impact on this Nation's environment, public lands, and natural resources, and his support of the rights and self-governance of Native Americans and Alaska Natives. In 2009, Congress enacted legislation to also honor Stewart L. Udall for his half century of distinguished national leadership in environmental and Native American policy. The agency is known today as the Morris K. Udall and Stewart L. Udall Foundation (Udall Foundation) and is headquartered in Tucson, Arizona.

The Udall Foundation is authorized by Congress to:

- Award Scholarships, Fellowships, and Internships for study in fields related to the environment and to Native Americans and Alaska Natives in fields related to health care and Tribal public policy.
- Connect youth to the Nation's public lands and natural resources to foster greater understanding, appreciation, stewardship, and enjoyment of those lands and resources through photography, positive outdoor experiences, and environmental education through the Stewart L. Udall Parks in Focus® Program (Parks in Focus®).
- Provide funding to the Udall Center for Studies in Public Policy (Udall Center) to conduct policy research and outreach on the environment and related themes.
- Provide funding to the Native Nations Institute for Leadership, Management, and Policy (NNI), a program of the Udall Center, for research, education, and outreach on Native American and Alaska Native health care issues and Tribal public policy issues.
- Provide funding through the Udall Center to The University of Arizona Libraries, Special Collections to serve as the repository for the papers of Morris K. Udall and Stewart L. Udall (Udall Archives) and other such public papers as may be appropriate and assure such papers' availability to the public.
- Provide impartial collaboration, consensus-building, training, and conflict resolution services on a wide range of environmental, natural and cultural resources, Tribal, and public lands issues, conflicts, and disputes involving the Federal Government through the John S. McCain III National Center for Environmental Conflict Resolution (National Center).

In FY 2021, the Udall Foundation and The University of Arizona signed an updated cooperative agreement that articulates the benefits of their long-standing partnership and codifies how funds from the Udall Foundation may be used consistent with Congressional intent and authorities provided by the agency's enabling legislation.

The Udall Foundation receives appropriations that are deposited into two funds: the Morris K. Udall and Stewart L. Udall Trust Fund (Trust Fund) and the Environmental Dispute Resolution Fund (EDRF). Annual interest revenues earned on the Trust Fund corpus fund three of the Udall

Foundation's Education Programs: Native American Graduate Fellowship, Parks in Focus®, and Scholarship. In addition, not less than 20% of the annual interest revenues from the Trust Fund are allocated to the Udall Center, which includes funding for the Udall Archives. Interest rates on Treasury securities are closely monitored by Udall Foundation leadership to determine how best to invest the Trust Fund corpus. From FY 2001 through FY 2023, appropriations language has allowed a portion of the annual Trust Fund appropriation to be set aside each year, at the discretion of the Board of Trustees, for reimbursement of NNI expenses and to fund the Native American Congressional Internship and associated programming.

The EDRF is used for the National Center's annual operations and for 85% of Udall Foundation expenses shared with the Education Programs, a formula previously approved by the U.S. Department of the Interior Office of Inspector General (DOI OIG) and consistent with Congressional intent. Congress has authorized the Udall Foundation to accept and retain fees in the EDRF, in addition to its appropriations, for the National Center's environmental collaboration and conflict resolution project and training services. Such reimbursements are processed primarily through interagency funding agreements. Typically, there are one- to three-month delays between the National Center's expenditures and reimbursements from requesting agencies, which necessitates the liquidity of an operating fund in the EDRF to ensure adequate cash flow.

Available balances in both the Trust Fund and EDRF may be invested in Treasury obligations to generate interest revenues; however, the funds differ in how appropriations made to each may be spent. Appropriations made to the EDRF are available for direct expenditure and remain available until expended, while appropriations made to the Trust Fund are added to the Fund's corpus and invested. The Udall Foundation's enabling legislation specifies that only Trust Fund interest revenues are allowed to be used to fund authorized Education and The University of Arizona partner programming, including the Native American Graduate Fellowship, Parks in Focus®, Scholarship, and Udall Center activities including the Udall Archives.

The Udall Foundation is audited during the first quarter of each fiscal year by an independent public accounting firm specializing in audits of small Federal agencies. The FY 2022 independent financial audit conducted in the first quarter of FY 2023 resulted in no findings or recommendations. The FY 2021 independent financial audit conducted in the first quarter of FY 2022 included an assessment of the Udall Foundation's compliance with Federal Information Security Modernization Act (FISMA) requirements; the agency is in the process of addressing the highest priority FISMA deficiencies as part of a broader effort to strengthen its cybersecurity and data infrastructure posture. The Udall Foundation has established a memorandum of agreement with the Department of Homeland Security Cybersecurity and Infrastructure Security Agency (CISA) to implement CISA's Continuous Diagnostics and Mitigation program, which will further strengthen the agency's security posture while managing long-term information technology expenses. A follow up assessment of FISMA compliance will be conducted by the independent financial auditors in FY 2023.

In addition to the annual independent financial audit, the Udall Foundation was recently audited by the DOI OIG as a requirement of the agency's 2019 reauthorization legislation. The DOI OIG audit report was released in May 2022 and found no material weaknesses or significant deficiencies. The auditors made 11 recommendations for improvements to agency internal controls; the Udall Foundation received notice from the DOI OIG in December 2022 that all 11 recommendations had been satisfactorily resolved and implemented. The Udall Foundation's migration to a fully operational in-house contracting program in FY 2022 has already proven to be more cost-effective, efficient, and subject to stronger internal controls than the contracting program previously provided by the DOI Interior Business Center (DOI IBC); these improvements are consistent with the President's Management Agenda goals for Managing the Business of Government.

The Udall Foundation completed the process of relocating its Tucson, Arizona, headquarters office to a smaller, less expensive footprint in February 2023. The new office better supports the agency's mission requirements, workforce profile (Figure 1), and alignment with the Administration's guidance on Preparing for the Future of Work including OMB Memorandum M-21-25. The new office, which is approximately one mile from the agency's previous headquarters location, features LEED certification, ADA compliance, card access entry and security protocols, and on-site electric vehicle charging stations. A Tucson Streetcar station is located adjacent to the office to facilitate mass transit commuting, and the office is within walking distance of the agency's program partners at The University of Arizona. The agency expects to realize approximately \$100,000 in annual base rent savings versus its prior headquarters lease. The Udall Foundation continues to provide Personal Identity Verification (PIV) card credentialing services to Federal employees and contractors in Southern Arizona in its capacity as a shared service PIV provider location.

The Udall Foundation is working to ensure compliance with OMB Memoranda M-22-10 and M-23-07; Executive Order 14058; the Paperwork Reduction Act; and the President's Management Agenda, specifically the goals identified for Evidence, Evaluation, and Capacity-Building to Advance Evidence-Based Policymaking. The Udall Foundation has formed an internal team to update the agency's information collection requests (ICRs) for its National Center and Education Programs, establish a dialogue with the Office of Information and Regulatory Affairs (OIRA), and facilitate ICR submissions to OIRA's ROCIS system as well as submit Federal Register notices regarding agency ICRs. The Udall Foundation provided updated ICR-related information for the National Center Program and a preliminary list of questions to its OIRA desk officer in November 2022 and is awaiting further guidance on how to proceed. In addition, the Udall Foundation has implemented a pilot internal electronic records management system and, in conjunction with its headquarters office relocation, transferred the majority of its remaining analog records to the National Archives and Records Administration. The agency expects to be managing its records in an electronic format and with appropriate metadata by June 2024. Finally, the Udall Foundation will begin assessing its requirements for website modernization in FY 2024 including compliance with Section 508, consistent with the 21<sup>st</sup> Century Integrated Digital Experience Act.

## FY 2024 President's Budget

The FY 2024 President's Budget requests \$6.044 million in appropriations for the Udall Foundation for FY 2024:

- \$4.044 million for the EDRF.
- \$2.000 million for the Trust Fund.

The requested appropriations for FY 2024 represent an increase of \$0.301 million above the FY 2023 enacted amount; the increase will specifically support the following activities:

- Expanding capacity within the National Center to meet the demand for nonpartisan environmental collaboration and conflict resolution (ECCR) services and trainings provided to Federal agencies and other organizations.
- Expanding the Internship Program to include placement opportunities with Congressional committees, Member offices, and Federal agencies outside of the traditional summer programming window.
- Enhancing the agency's cybersecurity and information technology position through data security and systems integrity investments, consistent with the President's Management Agenda goal of Prioritizing Information Technology Modernization and Cybersecurity as well as OMB Memoranda M-21-31 and M-22-16.
- Advancing Diversity, Equity, Inclusion, and Accessibility (DEIA) practices and initiatives within the agency and its programs, consistent with Executive Orders 13985 and 14035, the Government-wide Strategic Plan to Advance DEIA in the Federal Workforce, and the Udall Foundation's Equity Action Plan.
- A government-wide 5.2 percent Federal employee pay raise assumption beginning in January 2024.

In addition, the FY 2024 President's Budget asks Congress to grant the Udall Foundation the ability to spend the FY 2024 Trust Fund appropriation directly in support of authorized Education and The University of Arizona partner programming in lieu of depositing the appropriation into the Trust Fund corpus, as it did in FY 2023. Direct expenditure of the FY 2024 appropriation will allow for continuation of current program activity levels, expand the Internship Program to non-summer placement windows, and allow the Udall Foundation's annual Trust Fund interest revenue earnings to continue recovering from their historic lows.

The FY 2024 President's Budget was developed in accordance with the Udall Foundation's Strategic Plan for fiscal years 2022-2026, the strategic goals, strategic objectives, and performance goals for which are shown in Figure 2.

The requested funding for FY 2024 will specifically support the Udall Foundation's Strategic Goals 1 and 2:

- Strengthen the appreciation, stewardship, and collaborative processes for governance of the environment, public lands, and natural resources.

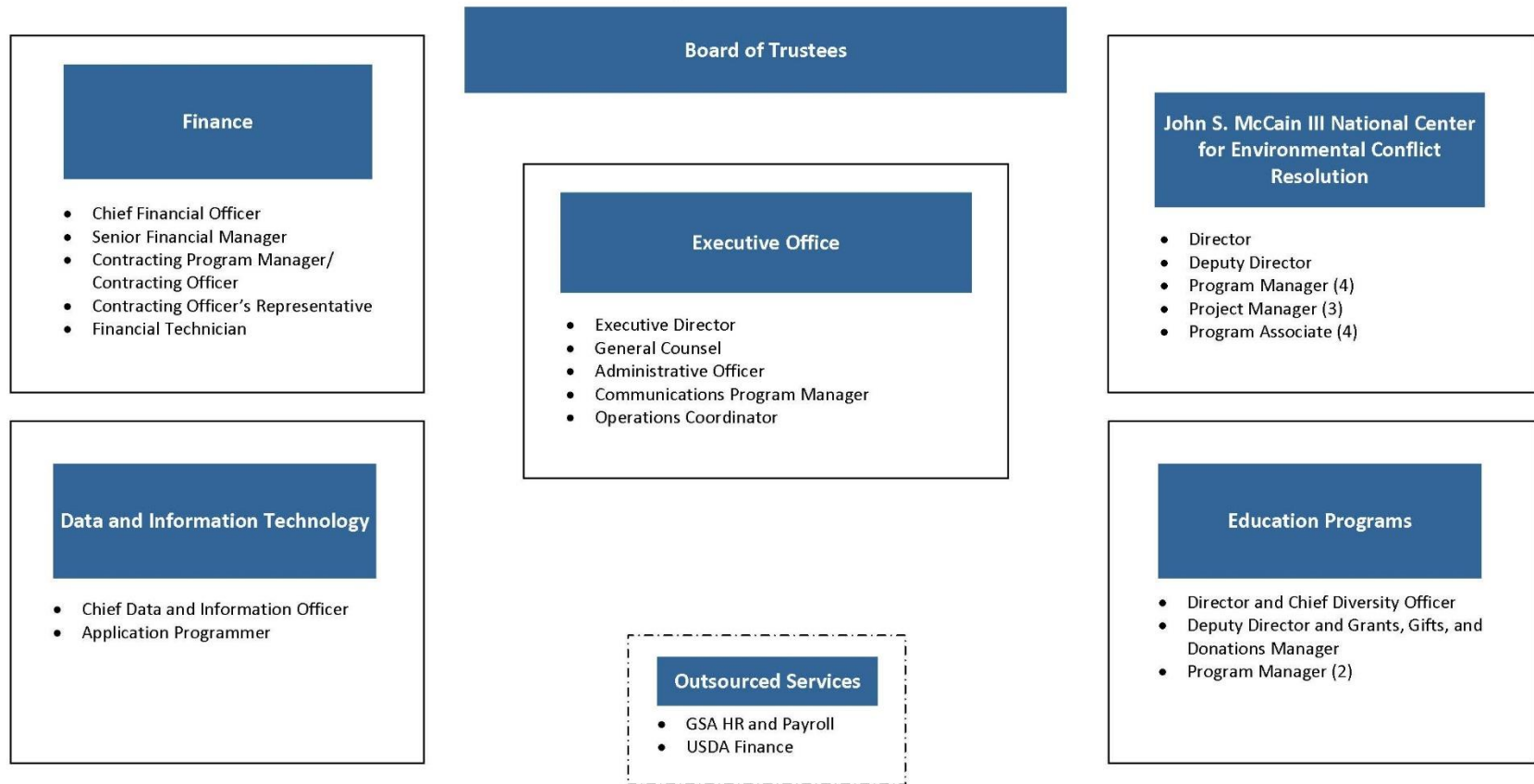
- Strengthen Native Nations to facilitate their self-determination, governance, and human capital goals.

The Udall Foundation maintains a third, nonreported internal management strategic goal to guide the professional development, growth, and abilities of Udall Foundation employees within the broader organization. Strategic Goal 3 provides a framework for the agency's commitment to equal employment opportunity (EEO) and diversity, equity, inclusion, and accessibility (DEIA) principles both internally and through its mission delivery, for example, to Tribes and minority-serving educational institutions.

The following program discussions provide additional specificity on how the requested FY 2024 appropriations to the EDRF and Trust Fund will be utilized. Program-specific budgets for FY 2022 through FY 2024, including a consolidated budget representing the full suite of The University of Arizona partner programming, are provided in Appendices A through C. The Udall Foundation's expenditures on cybersecurity requirements are detailed in Appendix D, consistent with the National Institute of Standards and Technology categories of Identify, Protect, Detect, Respond, and Recover.

Figure 1

Morris K. Udall and Stewart L. Udall Foundation  
Organizational Chart



Organizational Chart effective September 1, 2022



Figure 2-1

## Udall Foundation Strategic Goals, Strategic Objectives, and Performance Goals

### Strategic Goal 1

Strengthen the appreciation, stewardship, and collaborative processes for governance of the environment, public lands, and natural resources

### Strategic Objectives

#### 1.1

Provide organizational assistance and information resources to build capacity for collaborative decision-making and public participation related to environmental conflicts and natural resources issues involving Federal agencies and related interests

#### 1.2

Provide services and information resources to enhance collaboration and resolve environmental, public lands, and natural resources issues, conflicts, and disputes among governmental and nongovernmental stakeholders

#### 1.3

Provide educational opportunities and programs to promote understanding and appreciation of the environment and natural resources

### Performance Goals

#### 1.1.1

Convene and facilitate an annual meeting of experts and promote dialogues on environmental, natural resources, and public lands issues

#### 1.1.2

Conduct research that informs environmental policy and natural resources management and provide broad dissemination including of archival material

#### 1.2.1

Provide a training program to further the use of environmental conflict resolution, collaborative decision-making, and consensus building

#### 1.2.2

Provide case consultation services and resources to increase the use of environmental collaboration and conflict resolution involving Federal agencies and affected stakeholders

#### 1.2.3

Provide assessment, mediation, and facilitation services that address environmental, public lands, and natural resources issues, conflicts, and disputes involving Federal agencies and affected stakeholders

#### 1.3.1

Award Scholarships to outstanding undergraduate students who intend to pursue careers related to the environment

#### 1.3.2

Provide educational programs, training, and resources with the purpose of supporting opportunities for youth to learn about and experience the Nation's parks and wilderness and other outdoor areas

Funding Source: **Red** = EDF; **Blue** = Trust Fund

Figure 2-2

## Udall Foundation Strategic Goals, Strategic Objectives, and Performance Goals

### Strategic Goal 2

Strengthen Native Nations to facilitate their self-determination, governance, and human capital goals

#### Strategic Objectives

##### 2.1

Provide research, education, and services to Native Nations and non-Native entities or individuals who engage with Native Nations

##### 2.2

Provide educational opportunities and programs to Native Nations in the areas of Tribal public policy or health care

##### 2.3

Provide information resources, assist to build capacity, and deliver services to support the resolution of environmental, environmental public health, public lands, cultural resources, and natural resources issues, conflicts, and disputes that concern Native Nations

#### Performance Goals

##### 2.1.1

Provide Native Nations and others with education, resources, and services for leadership and governance that will enable Native Nations to achieve their strategic goals

##### 2.1.2

Provide policy analysis and research to support Native Nations

##### 2.2.1

Award Scholarships to outstanding Native American and Alaska Native undergraduate students who intend to pursue careers in Tribal public policy or health care

##### 2.2.2

Award Internships to deserving and qualified Native American and Alaska Native undergraduate, graduate, and law students in the areas of Tribal public policy or health care

##### 2.2.3

Award Fellowships to outstanding Native American and Alaska Native graduate students in the areas of Tribal public policy and health care, including law and medicine

##### 2.3.1

Provide assessment, mediation, facilitation, and related services on issues, conflicts, and disputes that concern Native Nations

##### 2.3.2

Develop communities of practice and provide training to build capacity and enhance collaboration and conflict resolution between Federal agencies and Native Nations

Funding Source: **Red** = EDF; **Blue** = Trust Fund

# EDRF Program – John S. McCain III National Center for Environmental Conflict Resolution (National Center)

The National Center is a nonpartisan Federal resource for environmental collaboration and conflict resolution (ECCR) activities. It is dedicated to resolving environmental disputes and conflicts involving the Federal Government and promoting collaborative decision-making among Federal, State, and Tribal governments and other organizations.

Federal agencies request assistance from the National Center when impartiality and process expertise are needed to lead complex conflict resolution and collaborative problem-solving efforts, especially for interagency, cross-jurisdictional issues. Through its work, the National Center helps Federal agencies better understand and respond to public and private interests, leading to more informed, timely, and workable Federal decisions related to public lands, natural resources, and the environment.

The National Center’s services produce cost savings across the Federal Government by reducing litigation and appeals, minimizing inefficiencies and the waste of agency resources that result from conflict, reducing instances of stalled or delayed environmental projects, avoiding lost economic opportunities, minimizing unnecessary and costly remediation when environmental issues are not dealt with in a timely manner, and avoiding public frustration and lost confidence in the Federal Government. Via Congressionally approved cost recovery from service fees and the use of contracted private-sector providers, the National Center facilitates many additional positive conflict resolution outcomes for the Nation beyond those possible solely from appropriated funding.

With the Udall Foundation’s implementation of in-house contracting beginning in FY 2022, more effective and efficient utilization of ECCR contracting services is anticipated in future fiscal years. The National Center’s management of contracts for ECCR project and training services provided by third-party neutrals has a net zero cost to the Udall Foundation due to the recouping of administrative fees from originating agencies.

Environmental Dispute Resolution Fund	FY 2022 Enacted		FY 2023 Enacted		FY 2024 President’s Budget	
	FTEs	\$(Millions)	FTEs	\$(Millions)	FTEs	\$(Millions)
Appropriations	25	\$3.296	26	\$3.943	27	\$4.044
Cost Recovery Revenue*		\$1.000		\$0.900		\$0.900

\*Fees for ECCR project and training services provided directly by National Center Program employees.

## FY 2022

The Udall Foundation received a \$3.296 million appropriation to the EDRF in FY 2022. The National Center continued to provide nonpartisan collaboration, conflict resolution, and capacity-building services in existing high priority areas of expertise, including as Federal agencies implemented requirements associated with H.R. 3684 (Infrastructure Investment and Jobs Act). Additionally, the National Center and Udall Center partnered in FY 2022 to enhance the role of technology in public participation for environmental and natural resources governance and to pilot data sovereignty initiatives for Native Nations engaged in Federal decision-making processes. The Udall Foundation also utilized its FY 2022 EDRF appropriation to strengthen the agency's cybersecurity and information technology posture, consistent with the President's Management Agenda goal of Prioritizing Information Technology Modernization and Cybersecurity and OMB Memorandum M-21-31.

## FY 2023

The Udall Foundation received a \$3.943 million appropriation to the EDRF in FY 2023, an increase of \$0.647 million above the enacted FY 2022 amount. This increase allows the National Center to continue providing nonpartisan collaboration, conflict resolution, and capacity-building services in existing high priority areas of expertise, including to meet the requirements of Executive Orders 13985, 13990, and 14008 and to address the President's Management Agenda goal of Tackling the Climate Crisis. It also enables the Udall Foundation to invest in additional information technology and cybersecurity needs to meet the requirements of Executive Order 14028 and OMB Memorandum M-21-31. Finally, the appropriation incorporated a government-wide 4.6 percent pay increase that went into effect in January 2023.

## FY 2024

The FY 2024 President's Budget requests an appropriation of \$4.044 million to the EDRF, an increase of \$0.101 million above the FY 2023 enacted amount. This request will expand capacity within the National Center to enhance collaboration and conflict resolution services that strengthen climate resiliency, including through ECCR-based assessment of climate risks in accordance with the goals of Executive Order 14030 where appropriate. The request will also help build climate capacity for the use of ECCR tools and techniques among Federal agencies and Tribes and add environmental justice equities to conflict resolution and Tribal capacity training efforts. This request will further the Udall Foundation's FY 2023 investments in information technology and cybersecurity requirements, such as implementation of zero trust architecture, and advance DEIA practices and equity initiatives within the agency and its programs. Finally, this request incorporates a planned, government-wide 5.2 percent pay increase beginning in January 2024.

Strategic Goal 1: EDRF Program – John S. McCain III National Center for Environmental Conflict Resolution (National Center)

Performance Goals based on FY 2024 President’s Budget Request of \$4.044 million.

**Strategic Goal 1: Strengthen the appreciation, stewardship, and collaborative processes for governance of the environment, public lands, and natural resources.**

**Strategic Objective 1.2:** Provide services and information resources to enhance collaboration and resolve environmental, public lands, and natural resources issues, conflicts, and disputes among governmental and nongovernmental stakeholders.

<p><b>Performance Goal 1.2.1:</b> Provide a training program to further the use of environmental conflict resolution, collaborative decision-making, and consensus building.</p>	<p>Annual Target</p>
<p><b>Measure 1:</b> Number of trainings provided.</p>	<p>9</p>
<p><b>Measure 2:</b> Percent of ECCR training participants who report what they take away from the training will have a very positive impact on their effectiveness in the future.</p>	<p>87%</p>

<p><b>Performance Goal 1.2.2:</b> Provide case consultation services and resources to increase the use of environmental collaboration and conflict resolution involving Federal agencies and affected stakeholders.</p>	<p>Annual Target</p>
<p><b>Measure 1:</b> Number of case consultations.</p>	<p>30</p>
<p><b>Measure 2:</b> Number of initiatives that support or promote the increased use of ECCR by Federal agencies and affected stakeholders.</p>	<p>3</p>

<p><b>Performance Goal 1.2.3:</b> Provide assessment, mediation, and facilitation services that address environmental, public lands, and natural resources issues, conflicts, and disputes involving Federal agencies and affected stakeholders.</p>	Annual Target
<p><b>Measure 1:</b> Number of assessments, facilitations, mediations, and other ECCR processes.</p>	30
<p><b>Measure 2:</b> Percentage of respondents who report that the National Center provided services that supported progress toward prevention or resolution of environmental issues, conflicts, and disputes.</p>	85%

Strategic Goal 2: EDRF Program – John S. McCain III National Center for Environmental Conflict Resolution (National Center)

**Strategic Goal 2: Strengthen Native Nations to facilitate their self-determination, governance, and human capital goals.**

**Strategic Objective 2.3:** Provide information resources, assist to build capacity, and deliver services to support the resolution of environmental, environmental public health, public lands, cultural resources, and natural resources issues, conflicts, and disputes that concern Native Nations.

<p><b>Performance Goal 2.3.1:</b> Provide assessment, mediation, facilitation, and related services on issues, conflicts, and disputes that concern Native Nations.</p>	Annual Target
<p><b>Measure 1:</b> Number of assessments, facilitations, mediations, and other ECCR processes that involve Native Nations or Tribal issues.</p>	15

<p><b>Performance Goal 2.3.2:</b> Develop communities of practice and provide training to build capacity and enhance collaboration and conflict resolution between Federal agencies and Native Nations.</p>	Annual Target
<p><b>Measure 1:</b> Number of trainings, presentations, webinars, facilitated forums, and other initiatives that build capacity and enhance collaboration and conflict resolution between Federal agencies and Native Nations.</p>	3

## Trust Fund Programs – Education and The University of Arizona Partner Programs

The Trust Fund programs consist of the Morris K. Udall and John S. McCain III Native American Graduate Fellowship in Tribal Policy (Native American Graduate Fellowship); Native American Congressional Internship (Internship); Stewart L. Udall Parks in Focus® Program (Parks in Focus®); Udall Undergraduate Scholarship (Scholarship); and Udall Center for Studies in Public Policy (Udall Center), which includes the Native Nations Institute for Leadership, Management, and Policy (NNI) and funding for the Udall Archives at The University of Arizona Libraries, Special Collections (Udall Archives).

The Native American Graduate Fellowship Program supports outstanding Native American and Alaska Native graduate students who intend to pursue advanced degrees in Tribal public policy and health care, including law and medicine. The Udall Foundation established the Native American Graduate Fellowship Program in FY 2021 and awarded three Fellowships for both the 2021–2022 and 2022–2023 academic years. Fellowships are funded by interest revenues earned on Trust Fund investments.

The Internship Program identifies future leaders in Indian Country and places them in Congressional and Federal agency offices in Washington, D.C., to learn firsthand how the Federal Government works with and impacts Tribes and Tribal communities. The Internship provides professional development for up to 12 deserving and qualified students annually, connecting them to a network of leaders and policymakers in Indian affairs. The Internship Program, comanaged by the Udall Foundation and NNI, is funded through annual appropriations via the NNI set-aside, a portion of which is retained by the Udall Foundation for its direct expenditures on Internship programming.

Parks in Focus® fosters in youth an appreciation for the environment and natural resources through photography-centered visits to public lands during which participants learn the fundamentals of photography, ecology, and conservation. In response to the COVID-19 pandemic, the Program has also developed new digital curricula and hosted virtual learning experiences for area youth. Tucson-based Parks in Focus® activities are primarily funded by interest revenues earned on Trust Fund investments, while Parks in Focus® activities outside of Arizona, such as in Yosemite National Park, are primarily funded by external grants, donations, and program partners including through the Western National Parks Association.

The Scholarship Program identifies future leaders in environmental, Tribal public policy, and health care fields. It is highly competitive; in FY 2022, 382 students, many of whom had already participated in their schools' internal competitions with a larger pool of applicants, competed for 55 scholarship awards. As a condition of their award, Scholars attend a multiday, in-person Scholar Orientation experience in Tucson, Arizona. In FY 2022, the Udall Foundation initiated efforts to reduce equity barriers and grow participation from Minority Serving Institutions

(MSIs) in the Scholarship Program, consistent with the requirements of Executive Order 13985. Scholarships are funded by interest revenues earned on Trust Fund investments.

The Udall Center supports policy-relevant interdisciplinary research, science-policy dialogues, and other endeavors that link scholarship and education with decision-making. Areas of particular focus include water security and management, climate change adaptation and planning, and ecosystem services valuation and protection, primarily in the Southwest and U.S.-Mexico border region. The Udall Foundation’s enabling legislation mandates that not less than 20% of annual interest revenues from the Trust Fund be allocated to the Udall Center to fund such programs and initiatives as well as activities specific to the Udall Archives. Since FY 2020, the Udall Foundation has made additional, strategic investments in the Udall Center’s work from the EDRF totaling \$0.425 million to enhance its ECCR research and services portfolio and strengthen its ECCR-based partnership with the National Center.

NNI, a program of the Udall Center, is a resource for self-determination, governance, and economic development for Native Nations that assists Tribes engaged in constitutional and governance reforms and provides education to Tribal leaders. NNI also conducts research and policy analysis in the areas of intergovernmental relations, natural resources management, development strategy, health care, law enforcement, data governance, and social services. Since FY 2001, Congress has authorized the Udall Foundation to set aside up to \$1 million of its annual Trust Fund appropriation, at the discretion of the Board of Trustees, for reimbursement of NNI programming expenses and comanaging the Internship Program. The total of such set-asides to NNI through FY 2023 is \$18.925 million.

The University of Arizona Libraries, Special Collections serves as the repository for the Udall Archives, which includes the papers of Morris K. Udall and Stewart L. Udall. The University of Arizona Libraries assures public access to such papers, including books, manuscripts, photographs, maps, and audio-visual holdings, and curates public displays and events highlighting the impact and legacy of Morris K. Udall and Stewart L. Udall. The Udall Foundation supports an annual graduate research assistant position with the Special Collections program through its allocation of funds to the Udall Center.

Udall Foundation Education Programs	FY 2022 Enacted		FY 2023 Enacted		FY 2024 President’s Budget	
	FTEs	\$ (Millions)	FTEs	\$ (Millions)	FTEs	\$ (Millions)
<b>Appropriations</b>						
Trust Fund Deposit*	4	\$0.800	4	\$0.800	4	\$1.000
NNI Set-Aside		\$1.000		\$1.000		\$1.000

\*The Udall Foundation received the ability from Congress to spend the FY 2023 appropriation directly on authorized Education and The University of Arizona partner programming, in lieu of depositing the appropriation into the Trust Fund corpus. The FY 2024 President’s Budget requests the same ability.



## FY 2022

The Udall Foundation received an appropriation to its Trust Fund of \$1.800 million in FY 2022. Trust Fund interest revenues, the FY 2022 appropriation, and unspent interest revenues from prior fiscal years were sufficient to maintain existing Parks in Focus® activities and Scholarship, Internship, and Fellowship baseline award levels. In-person Scholar Orientation and Washington, D.C.-based Internship programming were conducted, the first iterations of each since the start of the COVID-19 pandemic. The Udall Foundation addressed the requirements of Executive Order 13985 by developing an internal tracking system for applicants to the Scholarship Program from MSIs, conducting stakeholder meetings with MSIs to identify access barriers to Scholarship Program information, and increasing accessibility to the online Scholarship application. FY 2022 funding of \$0.303 million to the Udall Center, allocated from Trust Fund interest revenues, enabled continued policy-relevant interdisciplinary research, science-policy dialogues, and other endeavors including scholarly research at the intersection of environmental conflict resolution and environmental justice; this funding also supported the work of the Udall Archives for curation of political affairs materials. A \$1.000 million set-aside of FY 2022 appropriations supported NNI's work in research and policy analysis, educational programs and resources, and collaboration with the Indigenous People's Law and Policy Program at The University of Arizona, in addition to its role comanaging the Internship Program. The Udall Foundation continued its practice of retaining a portion of the set-aside for expenses associated with the Internship Program; for FY 2022, the Udall Foundation retained \$0.100 million.

## FY 2023

The Udall Foundation received an appropriation to its Trust Fund of \$1.800 million in FY 2023. In addition, the Udall Foundation received the ability from Congress to spend the FY 2023 appropriation directly on authorized Education and The University of Arizona partner programming in lieu of depositing the appropriation into the Trust Fund corpus. Trust Fund interest revenues and the FY 2023 appropriation are sufficient to maintain existing Parks in Focus® activities and Scholarship, Internship, and Fellowship award levels. To the extent available, the FY 2023 appropriation and Trust Fund interest revenues will be used to continue meeting the requirements of Executive Order 13985, including providing enhanced Scholarship Program support to MSIs, increasing representation from MSIs on the Scholarship selection panel, and conducting an agency equity assessment. The Udall Foundation continues to establish an internal grants, gifts, and donations program and expects the program's pilot activities in support of Parks in Focus® and the agency's Native-focused programming to accrue an initial \$0.001 million in grants, gifts, and donations revenues in FY 2023. Not less than 20% of FY 2023 interest revenues from the Trust Fund will be allocated to the Udall Center to continue its policy-relevant interdisciplinary research, science-policy dialogues, and other endeavors and for continued curation of political affairs materials by the Udall Archives. A \$1.000 million set-aside of FY 2023 appropriations will support NNI's work in research and policy analysis, educational programs and resources, and collaborations across The University of Arizona and with the Udall Foundation, such as an emerging partnership with the National Center in the areas of Tribal sovereignty and ECCR, in addition to its role comanaging the Internship Program.

The Udall Foundation will continue its practice of retaining a portion of the set-aside for expenses associated with the Internship Program; for FY 2023, the Udall Foundation expects to retain \$0.125 million. Finally, the appropriation incorporated a government-wide 4.6 percent pay increase that went into effect in January 2023.

## FY 2024

The FY 2024 President's Budget requests an appropriation of \$2.000 million to the Trust Fund, an increase of \$0.200 million above the FY 2023 enacted amount. In addition, the Udall Foundation again requests from Congress direct spend authority for the FY 2024 appropriation on authorized Education and The University of Arizona partner programming in lieu of depositing the appropriation into the Trust Fund corpus. Direct expenditure of the FY 2024 appropriation will ensure continuation of existing Parks in Focus® activities and Scholarship, Internship, and Fellowship award levels, support an in-person Scholar Orientation, and allow the Udall Foundation's annual Trust Fund interest revenue earnings to continue recovering from their historic lows. It will also enable the Udall Foundation to expand the Internship Program to non-summer placement windows, consistent with the Justice40 initiative goal of benefiting disadvantaged communities through training and workforce development, and to continue meeting the requirements of Executive Order 13985 by promoting equity for underserved communities. The request also incorporates a planned, government-wide 5.2 percent pay increase beginning in January 2024. The Udall Foundation will continue its grants, gifts, and donations activities and expects to accrue \$0.005 million in grants, gifts, and donations revenues in FY 2024. Not less than 20% of FY 2024 interest revenues from the Trust Fund will be allocated to the Udall Center to continue its policy-relevant interdisciplinary research, science-policy dialogues, and other endeavors, and for continued curation of political affairs materials by the Udall Archives. With Congressional authorization and concurrence of the Board of Trustees, up to a \$1.000 million set-aside of FY 2024 appropriations will be used to support NNI's work in research and policy analysis; educational and direct services programs, resources, and collaborations across The University of Arizona and with the Udall Foundation and Native Nations; and its role comanaging the Internship Program. The Udall Foundation will continue its practice of retaining a portion of the set-aside for expenses associated with the Internship Program; for FY 2024, the Udall Foundation expects to retain \$0.125 million, identical to the FY 2023 amount. Finally, the Udall Foundation and Udall Center will undertake a review of the Internship Program in FY 2024 to assess the challenge of rising program costs and identify potential mechanisms to mitigate that challenge.

Strategic Goal 1: Trust Fund Programs – Education and The University of Arizona Partner Programs

**Performance Goals based on FY 2024 President’s Budget Request of \$2.000 million.**

**Strategic Goal 1: Strengthen the appreciation, stewardship, and collaborative processes for governance of the environment, public lands, and natural resources.**

**Strategic Objective 1.1:** Provide organizational assistance and information resources to build capacity for collaborative decision-making and public participation related to environmental conflicts and natural resources issues involving Federal agencies and related interests.

<p><b>Performance Goal 1.1.1:</b> Convene and facilitate an annual meeting of experts and promote dialogues on environmental, natural resources, and public lands issues.</p>	<p>Annual Target</p>
<p><b>Measure 1:</b> Number of meetings of experts on environmental, natural resources, and public lands issues.</p>	<p>1</p>
<p><b>Measure 2:</b> Number of dialogues on environmental, natural resources, and public lands issues.</p>	<p>1</p>

<p><b>Performance Goal 1.1.2:</b> Conduct research that informs environmental policy and natural resources management and provide broad dissemination including of archival material.</p>	<p>Annual Target</p>
<p><b>Measure 1:</b> Number of environmental policy presentations or briefings.</p>	<p>40</p>
<p><b>Measure 2:</b> Number of collaborating agencies and institutions.</p>	<p>30</p>
<p><b>Measure 3:</b> Number of environmental policy publications.</p>	<p>30</p>

**Strategic Objective 1.3:** Provide educational opportunities and programs to promote understanding and appreciation of the environment and natural resources.

<p><b>Performance Goal 1.3.1:</b> Award Scholarships to outstanding undergraduate students who intend to pursue careers related to the environment.</p>	<p>Annual Target</p>
<p><b>Measure 1:</b> Number of Scholarships.</p>	<p>38</p>
<p><b>Measure 2:</b> Percent of recipients who report they received a quality educational experience in their interactions and program activities with the Udall Foundation.</p>	<p>96%</p>

<p><b>Performance Goal 1.3.2:</b> Provide educational programs, training, and resources with the purpose of supporting opportunities for youth to learn about and experience the Nation’s parks and wilderness and other outdoor areas.</p>	<p>Annual Target</p>
<p><b>Measure 1:</b> Number of individuals reached through direct Parks in Focus® programs and trainings.</p>	<p>250</p>
<p><b>Measure 2:</b> Number of hours of direct Parks in Focus® programming and training services provided.</p>	<p>250</p>
<p><b>Measure 3:</b> Percent of participants who report they received a quality educational experience during Parks in Focus® activities and trainings.</p>	<p>90%</p>

Strategic Goal 2: Trust Fund Programs – Education and The University of Arizona Partner Programs

**Strategic Goal 2: Strengthen Native Nations to facilitate their self-determination, governance, and human capital goals.**

**Strategic Objective 2.1:** Provide research, education, and services to Native Nations and non-Native entities or individuals who engage with Native Nations.

<p><b>Performance Goal 2.1.1:</b> Provide Native Nations and others with education, resources, and services for leadership and governance that will enable Native Nations to achieve their strategic goals.</p>	<p>Annual Target</p>
<p><b>Measure 1:</b> Number of Tribes served.</p>	<p>50</p>
<p><b>Measure 2:</b> Number of participants who complete NNI educational seminars and courses.</p>	<p>75</p>
<p><b>Measure 3:</b> Number of visitors to the Indigenous Governance Database website.</p>	<p>20,000</p>

<p><b>Performance Goal 2.1.2:</b> Provide policy analysis and research to support Native Nations.</p>	<p>Annual Target</p>
<p><b>Measure 1:</b> Number of Indigenous policy publications and briefings.</p>	<p>10</p>
<p><b>Measure 2:</b> Number of presentations.</p>	<p>25</p>
<p><b>Measure 3:</b> Number of collaborating agencies and institutions.</p>	<p>25</p>

**Strategic Objective 2.2:** Provide educational opportunities and programs to Native Nations in the areas of Tribal public policy or health care.

<p><b>Performance Goal 2.2.1:</b> Award Scholarships to outstanding Native American and Alaska Native undergraduate students who intend to pursue careers in Tribal public policy or health care.</p>	<p>Annual Target</p>
<p><b>Measure 1:</b> Number of Scholarships.</p> <p><b>Measure 2:</b> Percent of recipients who report they received a quality educational experience in their interactions and program activities with the Udall Foundation.</p>	<p>17</p> <p>96%</p>

<p><b>Performance Goal 2.2.2:</b> Award Internships to deserving and qualified Native American and Alaska Native undergraduate, graduate, and law students in the areas of Tribal public policy or health care.</p>	<p>Annual Target</p>
<p><b>Measure 1:</b> Number of Internships.</p> <p><b>Measure 2:</b> Percent of recipients who report they received a quality educational experience through the Native American Congressional Internship Program.</p>	<p>12</p> <p>92%</p>

<p><b>Performance Goal 2.2.3:</b> Award Fellowships to outstanding Native American and Alaska Native graduate students in the areas of Tribal public policy and health care, including law and medicine.</p>	<p>Annual Target</p>
<p><b>Measure 1:</b> Number of Fellowships.</p> <p><b>Measure 2:</b> Percent of recipients who report they received a quality educational experience in their interactions and program activities with the Udall Foundation.</p>	<p>1</p> <p>100%</p>

## Appendices A – C: Detailed Program Budgets

<b>APPENDIX A</b>					
<b>THE MORRIS K. UDALL AND STEWART L. UDALL FOUNDATION</b>					<b>Notes</b>
Budget Summary: John S. McCain III National Center for Environmental Conflict Resolution					
		<b>FY 2022</b>	<b>FY 2023</b>	<b>FY 2024</b>	
		<b>Enacted</b>	<b>Enacted</b>	<b>President's Budget</b>	
<b>REVENUE</b>					
Earned Revenues		1,870,993	2,000,000	2,200,000	A
Operating Appropriation		3,296,000	3,943,000	4,044,000	
Interest Revenues from Investments		35,861	110,000	200,000	
<b>TOTAL REVENUE</b>		<b>5,202,854</b>	<b>6,053,000</b>	<b>6,444,000</b>	
<b>EXPENSES</b>					
<b>PERSONNEL</b>					
Personnel Compensation (Salaries)		2,857,051	2,931,499	3,022,302	
Personnel Compensation (Assumed Pay Raise Effective Jan. 1, 2024)		n/a	n/a	209,985	
Personnel Benefits (Fringe Benefits)		1,049,266	1,079,045	1,114,277	
<b>TOTAL PERSONNEL</b>		<b>3,906,318</b>	<b>4,010,544</b>	<b>4,346,564</b>	
<b>OTHER OPERATING</b>					
Travel, Training, and Transportation of Persons		111,887	139,845	142,624	
Rent, Communications, and Utilities		1,021,459	251,760	448,318	B
Printing and Reproduction		5,953	28,800	6,905	
Contract Services		1,050,025	1,371,214	1,291,688	
Supplies and Materials		24,126	15,000	33,000	
Equipment (Software and Hardware)		97,424	172,218	162,898	
Grants, Subsidies, and Contributions		17,000	0	0	C
<b>TOTAL OTHER OPERATING</b>		<b>2,327,874</b>	<b>1,978,838</b>	<b>2,085,433</b>	
<b>TOTAL EXPENSES</b>		<b>6,234,192</b>	<b>5,989,381</b>	<b>6,431,998</b>	
<b>Notes</b>					
A -	Earned revenues for FY 2023 and FY 2024 is estimated.				
B -	FY 2022 expenditures on rent include obligations for build out and furnishing costs for the agency's new headquarters office.				
C -	FY 2022 expenditures on grants, subsidies, and contributions were for a collaborative Udall Foundation-Udall Center ECCR project.				



<b>APPENDIX B</b>					
<b>THE MORRIS K. UDALL AND STEWART L. UDALL FOUNDATION</b>					<b>Notes</b>
Budget Summary: Education Programs					
		<b>FY 2022</b>	<b>FY 2023</b>	<b>FY 2024</b>	
		<b>Enacted</b>	<b>Enacted</b>	<b>President's Budget</b>	
<b>REVENUE</b>					
Appropriation Available for Direct Expenditure		n/a	1,675,000	1,875,000	
Interest Revenues from Investments		1,517,689	1,997,689	2,000,000	A
NNI Set-Aside Retained from Appropriation		100,000	125,000	125,000	
Grants, Gifts, and Donations		600	1,000	5,000	
<b>TOTAL REVENUE</b>		<b>1,618,289</b>	<b>3,798,689</b>	<b>4,005,000</b>	
<b>EXPENSES</b>					
<b>PERSONNEL</b>					
Personnel Compensation (Salaries)		758,648	620,332	822,977	
Personnel Compensation (Assumed Pay Raise Effective Jan. 1, 2024)		n/a	n/a	43,465	
Personnel Benefits (Fringe Benefits)		186,252	209,289	196,252	
Education Support		(863,261)	(757,941)	(970,878)	
<b>TOTAL PERSONNEL</b>		<b>81,639</b>	<b>71,679</b>	<b>91,817</b>	
<b>OTHER OPERATING</b>					
Admin Travel, Training, and Transportation of Persons		3,802	16,000	5,000	
Rent, Communications, and Utilities		27,461	35,235	40,000	
Printing and Reproduction		0	500	0	
Contract Services		62,159	73,242	75,000	
Supplies and Materials		0	2,500	0	
Equipment (Software and Hardware)		16,693	10,000	22,932	
<b>TOTAL OTHER OPERATING</b>		<b>110,115</b>	<b>137,477</b>	<b>142,932</b>	
<b>PROGRAM OPERATIONS</b>					
Education Support		863,261	757,941	970,878	
Travel, Training, and Transportation of Persons		50,000	55,000	60,000	
Parks in Focus®		35,000	60,000	60,000	
Internship Program		84,063	125,000	125,000	
Scholarship Program		595,000	595,000	575,000	
Native American Graduate Fellowship		75,000	75,000	75,000	
Native Nations Institute Set-Aside		n/a	875,000	875,000	B
Trust Fund Interest Revenues Allocation to Udall Center		303,538	399,538	400,000	
<b>TOTAL PROGRAM OPERATIONS</b>		<b>2,005,861</b>	<b>2,942,479</b>	<b>3,140,878</b>	
<b>TOTAL EXPENSES</b>		<b>2,197,616</b>	<b>3,151,635</b>	<b>3,375,626</b>	C
<b>Notes</b>					
A -	FY 2024 interest revenues from Trust Fund investments and the FY 2024 Udall Center allocation are estimated.				
B -	A set-aside of \$0.900 million from the FY 2022 appropriation was made to NNI, with the remainder deposited into the Trust Fund corpus.				
C -	Unspent interest revenues from prior fiscal years were utilized in FY 2022.				

<b>APPENDIX C</b>					
<b>THE MORRIS K. UDALL AND STEWART L. UDALL FOUNDATION</b>					<b>Notes</b>
Budget Summary: The University of Arizona Partner Programs					A
		<b>FY 2022</b>	<b>FY 2023</b>	<b>FY 2024</b>	
		<b>Enacted</b>	<b>Enacted</b>	<b>President's Budget</b>	
<b>REVENUE</b>					
Trust Fund Interest Revenues Allocation to Udall Center		303,538	399,538	400,000	B
Annual Appropriation Set-Aside to NNI		900,000	875,000	875,000	
<b>TOTAL REVENUE</b>		<b>1,203,538</b>	<b>1,274,538</b>	<b>1,275,000</b>	
<b>EXPENSES</b>					
<b>PERSONNEL</b>					
Udall Center - Environmental Policy Program		238,765	251,714	324,999	
Udall Center - Native Nations Institute		770,623	769,200	757,200	
Congressional Internship - NNI		29,993	26,397	22,800	
UA Special Collections		30,000	30,000	30,000	C
<b>TOTAL PERSONNEL</b>		<b>1,069,381</b>	<b>1,077,311</b>	<b>1,134,999</b>	
<b>OTHER OPERATING</b>					
Udall Center - Environmental Policy Program					
Supplies		34,773	38,286	44,539	
Udall Center - Native Nations Institute					
Supplies		19,697	4,403	10,000	
Travel		3,364	0	5,000	
Student Support		6,357	0	5,000	
Congressional Internship - NNI		69,966	75,000	75,000	
<b>TOTAL OTHER OPERATING</b>		<b>134,157</b>	<b>117,689</b>	<b>139,539</b>	
<b>TOTAL EXPENSES</b>		<b>1,203,538</b>	<b>1,195,000</b>	<b>1,274,538</b>	
<b>Notes</b>					
A -	Appendix C reflects revenue and expenses associated with the full suite of The University of Arizona Partner Programs.				
B -	FY 2024 interest revenues from Trust Fund investments and the FY 2024 Udall Center allocation are estimated.				
C -	The Udall Center provides funding from its annual Trust Fund allocation to UA Special Collections to support a graduate research assistant.				

# Appendix D: Cybersecurity Expenditures

