



FY 2019 Congressional Justification

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Introduction

The Morris K. Udall Foundation (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 (P.L. 102-259). The 1998 Environmental Policy and Conflict Resolution Act (P.L. 105-156) created the U.S. Institute for Environmental Conflict Resolution as a program of the Udall Foundation to assist parties in resolving environmental, public lands, and natural resources conflicts nationwide that involve Federal agencies or interests. In 2000, Congress authorized the Udall Foundation to conduct management and leadership education and provide assistance and resources for policy analysis for Native American and Alaska Native leaders (P.L. 106-568). In 2009, Congress enacted legislation to honor Stewart L. Udall and add his name to the Udall Foundation (P.L. 111-90). The agency is now known as the Morris K. Udall and Stewart L. Udall Foundation. The Udall Foundation's enabling legislation is codified at 20 U.S.C. 5601-5609. The Udall Foundation is located in Tucson, Arizona, and Washington, D.C. The Udall Foundation accomplishes its mission through four programs:

- ***Education Programs***, including *Native American Congressional Internships*, which award internships annually to deserving and qualified Native American and Alaska Native undergraduate, graduate, and law students in order to provide them with practical experience with the Federal legislative process; *Native American Fellowships*, which award fellowships to outstanding Native American and Alaska Native graduate students who intend to pursue advanced degrees in health care and Tribal public policy, including law and medicine; *Parks in Focus®*, which fosters greater understanding, appreciation, stewardship, and enjoyment of the Nation's public lands and natural resources by connecting youth from underserved communities to nature through photography, positive outdoor experiences, and environmental education; and *Udall Undergraduate Scholarships*, which award scholarships annually to outstanding students who intend to pursue careers related to the environment, Tribal public policy, or Native American health care.
- ***The Native Nations Institute for Leadership, Management, and Policy*** (NNI), a program of the Udall Center for Studies in Public Policy at the University of Arizona, which is a self-determination, governance, and development resource for Native Nations. NNI's programs of policy analysis and research, education, digital resources, and Tribal services are grounded in its research findings called Native Nation Building. The Udall Foundation and the University of Arizona cofounded NNI, building on the research programs of the Harvard Project on American Indian Economic Development and extending the legacy of Morris K. Udall and Stewart L. Udall.
- ***Udall Center for Studies in Public Policy*** (Udall Center), a unit of the University of Arizona under the Senior Vice President for Research, Discovery, and Innovation, which supports policy-relevant, interdisciplinary research, science-policy dialogues, and other endeavors that link scholarship and education with decision-making, particularly in the areas of 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 U.S. Institute for Environmental Conflict Resolution*** (U.S. Institute), which provides impartial collaboration, consensus-building, and conflict resolution services on a wide range of environmental, natural and cultural resources, Tribal, and public lands issues involving the Federal Government. The U.S. Institute's range of services includes consultations, assessments, process design, convening, mediation, facilitation, training, stakeholder engagement, Tribal consultation, and other related collaboration and conflict resolution activities authorized by the Udall Foundation's enabling legislation.

The Udall Foundation's FY 2019 Budget Request of \$5.075 million is 5% below the FY 2018 President's Budget of \$5.341 million.

The requested funding supports the Udall Foundation's principal objectives of promoting the awareness, enjoyment, and understanding of the Nation's environment, natural resources, and public lands, and advancing Tribal public policy and health care. These objectives are reflected in the Udall Foundation's strategic goals:

- 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 FY 2019 Budget Request was developed in accordance with the Udall Foundation's Strategic Plan for FY 2018-2022. The Udall Foundation's FY 2018-2022 strategic goals, strategic objectives, and performance goals are shown in Table 1.

The Udall Foundation receives appropriations that are deposited into two funds, the Environmental Dispute Resolution Fund (EDRF) and the Morris K. Udall and Stewart L. Udall Trust Fund (Trust Fund). Throughout this document, the budgets and performance goals of the EDRF are highlighted in red; those of the Trust Fund are highlighted in blue. The EDRF is used for the U.S. Institute's annual operations. The Trust Fund's annual interest revenue funds the Scholarship and Fellowship Programs and Parks in Focus®. In addition, not less than 20% of the annual interest revenue for the Trust Fund is allocated to the Udall Center. From FY 2001 through FY 2017, appropriations language has allowed a portion of the Trust Fund appropriations to be transferred to NNI each year, at the discretion of the Board of Trustees.

Although both funds invest available balances in Treasury obligations, they differ in how they may be spent: U.S. Institute appropriations remain available until expended; the appropriations for the Trust Fund are added to principal and invested, and only the interest revenue may be used to fund the Udall Foundation's Education Programs.

Congress authorized the U.S. Institute to accept and retain fees for conflict resolution services, in addition to its appropriations. Earned revenues are processed primarily through reimbursable interagency funding agreements. Typically, there are one- to three-month delays between the U.S. Institute's expenditures (e.g., contract payments to private-sector providers) and reimbursements from requesting agencies. The delay between expenditures and reimbursements requires a working capital fund to ensure adequate cash flow.

As a result of recommendations from the Office of the Inspector General of the U.S. Department of the Interior (DOI OIG), the Udall Foundation implemented changes that have improved contracting procedures, strengthened management controls, and improved the Board of Trustees' oversight. The Udall Foundation has an interagency agreement with the Interior Business Center

for all contracting except for small goods and services procurements such as hotel and meeting room agreements. During FY 2017, the Udall Foundation continued to make improvements to personnel policies. The Udall Foundation drafted a corrective action plan for FY 2018 and submitted the plan to the DOI OIG for review. During FY 2018 and in FY 2019, the Udall Foundation will work with the DOI OIG on the verification of the implementation of internal controls.

The DOI OIG internal control reports are available online:

Follow-Up on Internal Controls at the Morris K. Udall and Stewart L. Udall Foundation: <https://www.doioig.gov/sites/doioig.gov/files/C-FL-UDL-00041-2014Public.pdf>.

Compliance, Allocated Costs, and Scholarship Awards at the Udall Foundation: https://www.doioig.gov/sites/doioig.gov/files/FinalAudit_UdallAllocatedCosts_Public_0.pdf.

GAO internal control reports are available online:

Corrective Actions Under Way to Address Control Deficiencies at the Morris K. Udall and Stewart L. Udall Foundation: <https://www.gao.gov/assets/660/659504.pdf>.

The Morris K. Udall and Stewart L. Udall Foundation Has Made Significant Progress but Needs to Fully Document Certain Policies and Procedures: <https://www.gao.gov/assets/680/673546.pdf>.

Detailed program budgets are attached as Appendices A-C.

Table 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 interests

1.2

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

1.3

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

Performance Goals

1.1.1

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

1.1.2

Convene and facilitate policy dialogues and forums, and host conferences to further awareness and use of environmental conflict resolution and collaboration

1.1.3

Conduct research that informs environmental policy and natural resources management

1.2.1

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

1.2.2

Provide assessment, mediation, and facilitation services that address environmental, public lands, and natural resources conflicts 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 connecting youth to nature and public lands through photography and outdoor learning

Funding Source: **Red** = Environmental Dispute Resolution Fund; **Blue** = Udall Foundation Trust Fund

Strategic Goal 2

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

Strategic Objectives

2.1

Provide education and training to Native Nations and non-Native entities or individuals who engage with Native Nations

2.2

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 that concern Native Nations

Performance Goals

2.1.1

Provide Native Nations with information resources and tools for leadership and governance that will enable them to achieve their strategic goals

2.1.2

Provide policy analysis and research to support Native Nations

2.1.3

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

2.1.4

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

2.1.5

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

2.2.1

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

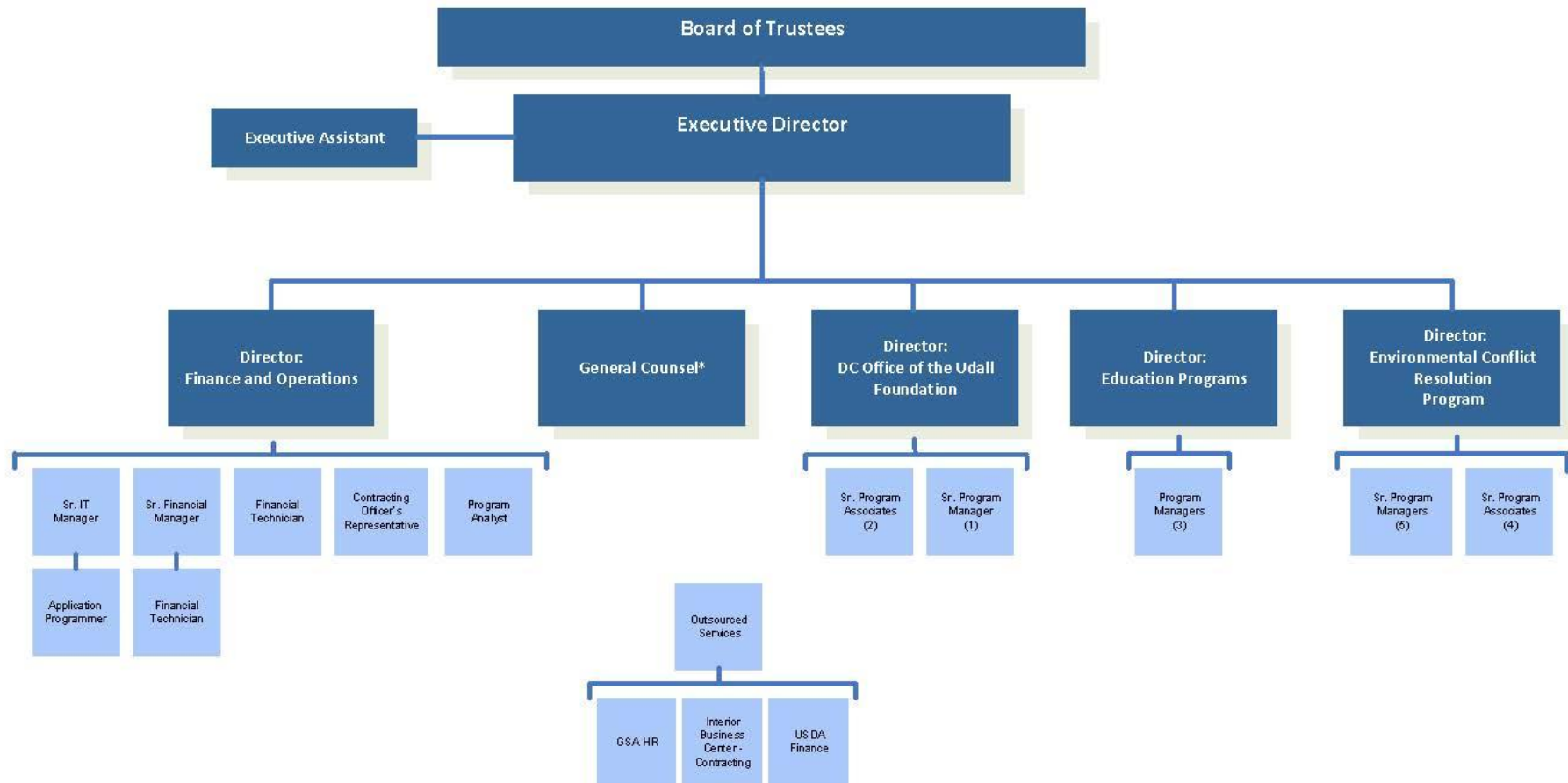
2.2.2

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** = Environmental Dispute Resolution Fund; **Blue** = Udall Foundation Trust Fund

Table 2

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



* Also a direct report to the Board

10/4/16

Environmental Dispute Resolution Fund - the U.S. Institute for Environmental Conflict Resolution Program

The U.S. Institute is dedicated to resolving environmental disputes and conflicts and promoting collaborative decision-making for conflict prevention. It is a centralized resource for environmental conflict resolution (ECR) activities, serving multiple entities and needs.

The U.S. Institute’s services produce cost savings across the Federal Government by working to reduce litigation and appeals, minimize inefficiencies and the waste of agency resources that result from conflict, reduce instances of stalled or delayed projects, streamline project delivery, avoid lost economic opportunities, minimize unnecessary and costly remediation when environmental issues are not dealt with in a timely manner, and avoid public frustration and lost confidence in government. Consequently, reductions in U.S. Institute funding that significantly impact services could result in higher costs for other government agencies, with negative impacts on the broader Federal budget.

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

Congress authorized the U.S. Institute to accept and retain fees for conflict resolution services in addition to its appropriations. The U.S. Institute uses appropriations to support a small professional staff and uses contracted private-sector providers to augment service capacity. The U.S. Institute recovers costs through service fees to mitigate its reliance on appropriations. The U.S. Institute’s business model leverages its appropriation to accomplish a great deal more work—and positive conflict resolution outcomes—than appropriations alone would support. Historically, approximately 70% to 80% of U.S. Institute project work is outsourced to the private sector, largely through work contracted with external service providers.

Environmental Dispute Resolution Fund	FY 2017 Actual		FY 2018 President’s Budget		FY 2019 President’s Budget	
	FTEs	\$ (Millions)	FTEs	\$ (Millions)	FTEs	\$ (Millions)
Appropriations	25	\$3.249	25	\$3.366	25	\$3.20
Gross fee revenue*		\$3.05		\$3.28		\$3.63

*Gross fee revenue includes fees and cost reimbursements for ECR services provided.

FY 2017.

An appropriation of \$3.249 million received in FY 2017 represents a 4.4% reduction from FY 2016. Earned revenue from services was \$3.05 million, approximately 2.6% less than FY 2016. With this level of funding, the U.S. Institute continued to help Federal agencies and the public address conflicts involving land management, water resources, and transportation, among other areas.

FY 2018.

An appropriation of \$3.366 million will enable the U.S. Institute to maintain service levels in strategic areas of emphasis and to continue to revive the Native American Alaska Native (NAAN) program in FY 2018. This will allow the U.S. Institute to diversify its agency partners, which should result in further earned revenue opportunities in FY 2019. Earned revenue from services is estimated to be approximately \$3.3 million, an increase of nearly 7.6% from FY 2017. The requested appropriation also provides for improvements to cybersecurity in accordance with M-17-25.

FY 2019.

The Udall Foundation requests an appropriation of \$3.2 million for FY 2019. This level of funding will enable the U.S. Institute to maintain service levels in strategic areas of emphasis. The NAAN program will be a priority as is further diversification of agency partners. Diversification of partner agencies, and an improved NAAN program, are expected to increase earned revenue by nearly 11%.

Strategic Goal 1: Environmental Dispute Resolution Fund - the U.S. Institute for Environmental Conflict Resolution Program

Performance Goals based on FY 2019 Budget Request of \$3.2 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 interests.

Performance Goal 1.1.1: Provide a training program to further the use of environmental conflict resolution, collaborative decision-making, and consensus building.	Annual Target
▪ Measure 1: Number of trainings provided.	9
▪ Measure 2: Percent of ECR training participants who report what they take away from the training will have a very positive impact on their effectiveness in the future.	87%

Performance Goal 1.1.2: Convene and facilitate policy dialogues and forums, and host conferences to further awareness and use of environmental conflict resolution and collaboration.	Annual Target
<ul style="list-style-type: none"> ▪ Measure 1: Number of initiatives. 	At least 3

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

Performance Goal 1.2.1: Provide case consultation services and mediator referrals to increase the use of environmental conflict resolution and collaboration involving Federal agencies and affected stakeholders.	Annual Target
<ul style="list-style-type: none"> ▪ Measure 1: Number of case consultations. ▪ Measure 2: Number of ECR Roster searches 	30 370

Performance Goal 1.2.2: Provide assessment, mediation, and facilitation services that address environmental, public lands, and natural resources conflicts involving Federal agencies and affected stakeholders.	Annual Target
<ul style="list-style-type: none"> ▪ Measure 1: Number of assessments, facilitations, and mediations. ▪ Measure 2: Percent of assessments for which the majority of responding stakeholders strongly agree that the U.S. Institute helped them determine how best to proceed to resolve their conflict. ▪ Measure 3: Percent of mediations/facilitations for which the majority of responding stakeholders report full or partial agreement was reached or progress was made toward addressing the issues or resolving the conflict. 	35 88% 91%

Strategic Goal 2: Environmental Dispute Resolution Fund - the U.S. Institute for Environmental Conflict Resolution Program

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

Strategic Objective 2.2: 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 that concern Native Nations.

Performance Goal 2.2.1: Provide assessment, mediation, facilitation, and related services on issues that concern Native Nations.*	Annual Target
<ul style="list-style-type: none"> ▪ Measure 1: Number of assessments, facilitations, and mediations that involve Native Nations or Tribal issues. 	15
<ul style="list-style-type: none"> ▪ Measure 2: Percent of assessments for which the majority of responding stakeholders strongly agree that the U.S. Institute helped them determine how best to proceed to resolve their conflict. 	88%
<ul style="list-style-type: none"> ▪ Measure 3: Percent of mediations/facilitations for which the majority of responding stakeholders report full or partial agreement was reached or progress was made toward addressing the issues or resolving the conflict. 	91%

*Subset of Performance Goal 1.2.2.

Performance Goal 2.2.2: Develop communities of practice and provide training to build capacity and enhance collaboration and conflict resolution between Federal agencies and Native Nations.	Annual Target
<ul style="list-style-type: none"> ▪ Once the vacant position of Senior Program Manager for the Native American Alaska Native (NAAN) program is filled, this program will be developed, measures will be created, and targets selected. 	

Trust Fund - Udall Foundation Education Programs

The Trust Fund programs consist of the Udall Undergraduate Scholarship, the Native American Congressional Internship, the Native American Fellowship, Parks in Focus®, the Udall Center, and NNI.

The scholarship program identifies future leaders in environmental, Tribal public policy, and health care fields. It is highly competitive; in 2017, 492 students, who had already participated in their schools' internal competition with a larger pool of applicants, competed for 50 scholarships. Scholars attend a four-day symposium that enhances professional skills, fosters career development, and encourages networking.

The Udall Foundation's summer internship program identifies future leaders in Indian country and places them in congressional and Federal agency offices to learn firsthand how the Federal Government impacts their Tribes and communities. The internship provides professional development for up to 12 deserving and qualified students annually, connecting them to a network of leaders and policy-makers in Indian affairs.

Parks in Focus® fosters appreciation for the environment and natural resources for disadvantaged youth through photography-centered visits to public lands. Participants learn the fundamentals of photography, ecology, and conservation.

The Udall Foundation also supports NNI and provides funding to the Udall Center. NNI assists Tribes engaged in constitutional and community reforms, and provides executive education to Tribal leaders. Through NNI, these leaders have the opportunity to learn from each other and share best practices in governance and development. NNI also provides policy research and analysis in such areas as intergovernmental relations, natural resources management, development strategy, health care, law enforcement, and social services. The Udall Center sponsors policy-relevant, interdisciplinary research and forums on issues concerning environmental policy, primarily in the Southwest and U.S.-Mexico border region.

The scholarship and Tucson-based Parks in Focus® programs are primarily funded by the interest earned on the Trust Fund by investing in Treasury obligations. The Parks in Focus® program in California is funded completely by external grants.

The internship program and NNI are funded by appropriations. Since FY 2001, Congress has authorized the Udall Foundation to transfer a portion of its Trust Fund appropriations each year for the purposes of NNI. In addition to the Trust Fund corpus, \$14 million has been appropriated from FY 2001 through FY 2017 and transferred to NNI's leadership and management training and policy analysis programs in connection with Native American and Alaska Native public policy and health care. In addition, the Udall Foundation's enabling legislation mandates that not less than 20% of annual interest revenues shall be appropriated to the Udall Center to fund policy research and education related to environmental issues.

The Education programs that are funded by the interest on Treasury investments have been adversely affected by declining Treasury rates since FY 2007; however, during FY 2017, interest rates began to rise and the Udall Foundation purchased two \$3 million long-term bonds with different maturities. As a result, interest revenue increased in FY 2017 from one semi-annual interest payment and will increase further from a full year of interest payments in FY 2018.

Udall Foundation Education Programs	FY 2017 Actual		FY 2018 President's Budget		FY 2019 President's Budget	
	FTEs	\$ (Millions)	FTEs	\$ (Millions)	FTEs	\$ (Millions)
<i>Appropriations</i>						
Trust Fund		\$0.895		\$0.975		\$0.875
NNI		\$1.0		\$1.0		\$1.0
<i>Program Budgets</i>						
Education programs	4	\$1.47	4	\$1.57	4	\$1.59
NNI*		\$1.47		\$1.71		\$1.61

**NNI program budget includes all available funds, including grants and carry forward balances. NNI staff are not Federal employees and therefore are not shown.*

Trust Fund Programs

FY 2017.

The Udall Foundation received an appropriation of \$1.895 million in FY 2017. Since appropriations were uncertain during the planning phase of the scholarships and internships, the Udall Foundation reduced the number of scholarships to 50 from 60 and the number of internships to 10 from 12. The Ph.D. fellowship continued in hiatus. During FY 2017, interest rates began to rise and the Udall Foundation purchased two \$3 million long-term bonds with different maturities. Given the timing of the purchases, the Udall Foundation received one semi-annual interest payment for each bond during FY 2017.

FY 2018.

An appropriation of \$1.975 million for FY 2018 will allow the Udall Foundation to maintain its programs. It is expected that \$1 million will be transferred to NNI, as described in the next section. The Udall Foundation will receive two semi-annual interest payments in FY 2018 from both long-term bonds purchased in FY 2017. The Udall Foundation will continue to monitor interest rates to identify bonds with maturity dates different from the current holdings.

FY 2019.

The Udall Foundation requests an appropriation of \$1.875 million for FY 2019. It is expected that \$1 million will be transferred to NNI, as described in the next section. This level of funding will allow the Udall Foundation to maintain its programs. During FY 2019, if interest rates are favorable, the Udall Foundation may invest in long-term Treasuries in order to fund a Native American Fellowship in FY 2020. During FY 2019, the Native American Fellowship will be developed by following the Board and staff working group's suggestions that were made during the strategic planning process.

Native Nations Institute

FY 2017.

The Udall Foundation transferred \$1 million to NNI in FY 2017. NNI is a self-determination, development, and self-governance resource for Native American and Alaska Native Nations and organizations. NNI fulfills its mission by conducting research into the driving factors of Native Nation community development success, creating curricular resources for teaching Native populations and for institutions that serve Indian country, and providing education to Tribal leaders. NNI provides policy research and analysis in such areas as intergovernmental relations, child welfare, access to credit and capital for development, natural resources management, development strategy, health care, law enforcement, data sovereignty, and social services—topics that are critically important to successful self-determination and self-governance. It assists Tribes engaged in constitutional reform and provides executive education to Tribal leaders who have few of the educational opportunities available to members of Congress, governors, Fortune 500 executives, and others. Through NNI, these leaders have the opportunity to learn from each other and share best practices in governance and development.

FY 2018.

A \$1 million appropriation will continue to support NNI's cutting-edge governance and development work with Native Nations as well as the Udall Foundation's Native American Congressional Internship Program. In addition, NNI will continue to collaborate with providers from Tribes and other organizations to restore youth leadership programs and outreach to include Alaska Native Nations. It will continue to support the design and development of programming for Tribal government professionals, building on and complementing the work funded by the Native Governance Center's Native Nation Rebuilders program. Funding will also support collaborative efforts within the University of Arizona to identify how NNI might assist Native Nations as they address the challenges of policies that impact environmental and natural resources.

FY 2019.

Funding of \$1 million in FY 2019 will support the following actions:

- *Research and Policy Analysis:* NNI's credibility with Native Nations is rooted in systematic research on why some nations are successfully addressing community issues while others are not. NNI also examines issues of policy significance to Native Nations and provides those nations with usable information for decision-making. Work that is expanding in FY 2019 focuses on Tribal ethics codes and water policy (especially Tribal efforts to infuse their views into multijurisdictional water management).
- *Educational Programs and Resources:* NNI's educational services help Tribal leaders address issues related to constitutional reform, governmental design, policy analysis, and development systems in the lower-48, with new partners among Alaska Native Nations. NNI will continue to expand its educational resources for Native Nations, including online noncredit courses, nation-building curricula, the Indigenous Governance Database, and the Constitutions Resource Center.
- *Collaboration with the Indigenous People's Law and Policy Program (IPLP) at the University of Arizona:* This allows NNI faculty to engage with the College of Law in

offering the joint NNI-IPLP Continuing Education Certificate in Indigenous Governance and in continued efforts to develop a Masters of Professional Studies in Indigenous Governance. Appropriations help support the salary of the Indigenous Governance Program director and key staff and the education programs for the Tribal Professionals Cohort.

- *Native American Congressional Internship Program:* Appropriations allow placement of up to 12 Native Americans or Alaska Natives in 10-week summer internships in Washington, D.C., and will support recruitment, selection, placement, work activities, and living expenses for interns.

Strategic Goal 1: Trust Fund - Udall Foundation Education Programs

Performance Goals based on FY 2019 Budget Request of \$1.875 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 interests.

Performance Goal 1.1.3: Conduct research that informs environmental policy and natural resources management.	Annual Target
▪ Measure 1: Number of environmental policy presentations or briefings.	30
▪ Measure 2: Number of collaborating agencies and institutions (not including internal institutions at University of Arizona).	30
▪ Measure 3: Number of environmental policy publications.	40

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

Performance Goal 1.3.1: Award scholarships to outstanding undergraduate students who intend to pursue careers related to the environment.	Annual Target
▪ Measure 1: Number of Scholarships.	50
▪ Measure 2: Percent of recipients who report they received a quality educational experience in their interactions and program activities with the Udall Foundation.	96%

Performance Goal 1.3.2: Provide educational programs, training, and resources with the purpose of connecting youth to nature and public lands through photography and outdoor learning.	Annual Target
<ul style="list-style-type: none"> ▪ Measure 1: Number of youth reached through direct programs. ▪ Measure 2: Number of individuals trained. ▪ Measure 3: Number of hours of direct programming provided. ▪ Measure 4: Number of hours of training services provided. ▪ Measure 5: Percent of youth participants who report they received a quality educational experience during Parks in Focus® activities. ▪ Measure 6: Percent of training participants who report they received a quality educational experience during Parks in Focus® training activities. 	300 30 500 50 90% 90%

Strategic Goal 2: Trust Fund – Udall Foundation Education Programs

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

Strategic Objective 2.1: Provide education and training to Native Nations and non-Native entities or individuals who engage with Native Nations.

Performance Goal 2.1.1: Provide Native Nations with information resources and tools for leadership and governance that will enable them to achieve their strategic goals.	Annual Target
<ul style="list-style-type: none"> ▪ Measure 1: Percent of respondents who report NNI is an important resource for them in carrying out their nation-building work. ▪ Measure 2: Number of Rebuilding Native Nations distance-learning modules completed. ▪ Measure 3: Number of Indigenous Governance Database account holders. 	86% 130 1,400

Performance Goal 2.1.2: Provide policy analysis and research to support Native Nations.	Annual Target
<ul style="list-style-type: none"> ▪ Measure 1: Number of Native Nations Institute presentations or briefings. ▪ Measure 2: Number of collaborating agencies and institutions (not including internal institutions at University of Arizona). ▪ Measure 3: Number of Native Nations Institute publications and/or case studies. 	25 25 5

Performance Goal 2.1.3: Award scholarships to outstanding Native American and Alaska Native undergraduate students who intend to pursue careers in Tribal public policy or health care.*	Annual Target
<ul style="list-style-type: none"> ▪ Measure 1: Number of Scholarships. ▪ Measure 2: Percent of recipients who report they received a quality educational experience in their interactions and program activities with the Udall Foundation. 	16 96%

*Subset of Performance Goal 1.3.1

Performance Goal 2.1.4: 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.	Annual Target
<ul style="list-style-type: none"> ▪ Measure 1: Number of Internships. ▪ Measure 2: Percent of recipients who report they received a quality educational experience through the Native American Congressional Internship Program. 	12 92%

Performance Goal 2.1.5: 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.*	Annual Target
<ul style="list-style-type: none"> ▪ Measure 1: Number of Fellowships. ▪ Measure 2: Percent of recipients who report they received a quality educational experience in their interactions and program activities with the Udall Foundation. 	* *

*During FY 2019, the Native American Fellowship will be developed and recruitment will take place for a FY 2020 Native American Fellow, if sufficient funds are available.

Appendices A–C: Detailed Program Budgets

THE MORRIS K. UDALL AND STEWART L. UDALL FOUNDATION

Budget Summary: U.S. Institute

	FY17 <u>Actual</u>	FY18 <u>President's Budget</u>	FY19 <u>President's Budget</u>	<u>Notes</u>
Revenues				
Earned Revenue	3,050,573	3,282,210	3,632,210	
Operating Appropriation	3,249,000	3,366,000	3,200,000	
Interest Income	25,366	17,000	17,000	
TOTAL REVENUES	<u><u>6,324,939</u></u>	<u><u>6,665,210</u></u>	<u><u>6,849,210</u></u>	
Expenses				
<u>Personnel</u>				
Salaries	1,888,688	2,215,198	2,279,187	A
Fringe Benefits	624,839	739,575	751,501	
Total Personnel	2,513,527	2,954,773	3,030,688	
<u>Other Operating</u>				
Computers & Equipment	72,396	109,000	93,800	B
Conferences & Meetings	123,402	130,800	145,250	C
External Service Providers	2,411,199	2,527,302	2,674,763	
Furniture	0	2,000	1,500	
Postage, Printing, Publications	22,778	30,000	30,233	
Rent & Facilities	351,733	336,482	336,392	
Development & Training	18,234	40,000	40,000	
Supplies	13,518	20,000	20,000	
Telephones	48,198	50,000	50,000	
Travel: staff outreach	81,883	95,000	95,000	
Travel: project related	341,570	300,000	300,000	
Miscellaneous	21,133	69,853	31,584	D
Total Other Operating	3,506,044	3,710,437	3,818,522	
TOTAL EXPENSES	<u><u>6,019,571</u></u>	<u><u>6,665,210</u></u>	<u><u>6,849,210</u></u>	
	305,368	(0)	0	

NOTES:

Budget stated on cash basis.

A - Fully staffed in FY19.

B - Additional cybersecurity costs in FY18.

C- project-related meetings.

D - Includes relocation costs.

Budget Summary: Education Programs

	FY17 <u>Actual</u>	FY18 <u>President's Budget</u>	FY19 <u>President's Budget</u>	<u>Notes</u>
Revenues				
Interest from Investments	1,462,637	1,538,400	1,538,400	
Grants/Contributions	330,000	42,000	40,000	A
Carry forward	<u>1,295,972</u>	<u>1,289,089</u>	<u>1,256,685</u>	
TOTAL REVENUES	<u><u>3,088,610</u></u>	<u><u>2,869,490</u></u>	<u><u>2,835,085</u></u>	
Expenses				
Personnel				
Salaries	431,233	434,206	450,928	
Fringe Benefits	131,632	129,078	130,999	
Education Support	<u>(419,898)</u>	<u>(346,366)</u>	<u>(357,829)</u>	
	142,968	216,918	224,097	
Other Administrative				
Travel	7,853	8,000	8,000	
Communications	5,092	5,000	5,000	
Printing/Photography	806	1,000	1,000	
Rent and facilities	52,640	48,000	49,440	
GSA Financial Activities	36,615	52,000	55,120	
Consultants	7,045	3,200	3,200	
Supplies/Publications	2,495	2,500	2,500	
Computers/Furniture	12,909	17,200	17,200	B
Professional Development	0	1,500	1,500	C
Miscellaneous	<u>(31)</u>	<u>500</u>	<u>500</u>	
Administration Total	268,393	355,818	367,557	
Education				
Education Support	419,898	346,366	357,829	
Program Support	47,606	55,000	55,000	
Scholarship-related:				
Payments	320,355	350,000	350,000	
Orientation	111,354	122,000	122,000	
Fellows	0	0		
Parks in Focus	21,006	25,000	25,000	
20% Udall Center	<u>280,909</u>	<u>316,621</u>	<u>307,680</u>	
Education Total	<u>1,201,128</u>	<u>1,214,987</u>	<u>1,217,509</u>	
TOTAL EXPENSES	<u><u>1,469,520</u></u>	<u><u>1,570,805</u></u>	<u><u>1,585,067</u></u>	
	1,289,089	1,256,685	1,210,018	

Notes:

A - FY17 includes Moore Foundation grant, which has concluded.

B - includes funding for additional cybersecurity

C - includes supervisory training

Budget Summary: Native Nations Institute

	<u>FY17</u>	<u>FY18</u>	<u>FY19</u>	<u>Notes</u>
	Actual	President's Budget	President's Budget	
Revenues				
Carry forward	709,966	744,470	744,470	A
Grants	509,062	710,075	608,822	B
Annual Appropriation	<u>1,000,000</u>	<u>1,000,000</u>	<u>1,000,000</u>	
TOTAL REVENUES	<u><u>2,219,028</u></u>	<u><u>2,454,544</u></u>	<u><u>2,353,292</u></u>	
Personnel				
Grants	509,062	710,075	608,822	
Appropriation	<u>639,190</u>	<u>486,816</u>	<u>577,455</u>	
Total Personnel	<u><u>1,148,252</u></u>	<u><u>1,196,891</u></u>	<u><u>1,186,277</u></u>	
Operations				
Tribal Services	591	12,500	13,355	
NNI Operations	29,720	100,908	65,180	
Indigenous Governance Program	40,777	78,231	54,760	C
Digital Resources	25,684	45,120	31,080	
Research & Policy Analysis	29,534	76,425	58,170	
Interdepartmental Transfers	0	0	0	
Native American DC Internship	200,000	200,000	200,000	
TOTAL Operations	<u><u>326,306</u></u>	<u><u>513,184</u></u>	<u><u>422,545</u></u>	
TOTAL EXPENSES	<u><u>1,474,558</u></u>	<u><u>1,710,075</u></u>	<u><u>1,608,822</u></u>	
Balance	744,470	744,470	744,470	

NOTES:

Budget and actuals stated on cash basis.

A - Carry forward from allocation to NNI from Udall Foundation's appropriations.

B - Grants from Native Governance Center, Bush Foundation, state programs and others.

C - Includes distance learning capabilities.