



[Robina Foundation](#)

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ROBINA FOUNDATION

Quarterly Financial Report June 30, 2012

Prepared by:

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Nicole Klein

Mission Statement

The Robina Foundation, a Minnesota-based private grantmaking foundation, seeks to positively impact critical social issues by encouraging innovation and financially supporting transformative projects of its four institutional partners. These partners, selected by the Foundation's founder, James H. Binger, are:

Abbott Northwestern Hospital, Minneapolis, MN; The Council on Foreign Relations, New York, NY;

University of Minnesota Law School, Minneapolis, MN; and Yale University, New Haven, CT.

(<http://www.robinafoundation.org/index.php>)

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ROBINA FOUNDATION
Annual Board Meeting

July 30 – August 1, 2012
Minneapolis, Minnesota

TABLE OF CONTENTS

Table Of Figures	2
Executive Summary	3
Executive Financial Summary	4
Sources of Assets	5
Stacked Bar Chart	8
Sources Of Capital	9
Asset Allocation Report: June 30, 2012	12
Asset Allocation Report: March 31, 2012	13

TABLE OF FIGURES

Figure 1: Total Cash	5
Figure 2: Total US Gov't Bonds	6
Figure 3: Total Market Portfolio	7
Figure 4: Total Sources	8

EXECUTIVE SUMMARY

Quarter 2, 2012

The report includes:

- Detail of USBANK's market portfolio
- Graphic representations of sources of capital and asset allocation
- Changes in these during the recent quarter
- Detailed spreadsheets of sources of capital and asset allocation
- Current and targeted portfolio allocations, and
- My observations.

Observations:

- Cash is still high at \$11.5M vs. strategic target of \$5.0M due to JP Morgan retainage and pending IRS refund, even though JP Morgan distributed \$18.0M in this last quarter. This excess cash should be considered as substitute for US Government Bonds.
- There are no investment is US Government Bonds verses a strategic target of \$54.2M. The historic low returns will likely continue for at least two more years per the Fed FOMC announcements. However, as a limited term foundation we need to invest in the safety of US Governments.
- The Market Portfolio is high at \$76.0M verses the strategic target of \$40.7M. This investment includes \$18.6M in Corporate Bonds, mostly as a substitute for US Government Bonds; the returns are higher, but the risk is greater.
- Interim targets were adjusted \$18.0M from JP Morgan to foundation subsequently to Yale School of Drama.



EXECUTIVE FINANCIAL SUMMARY

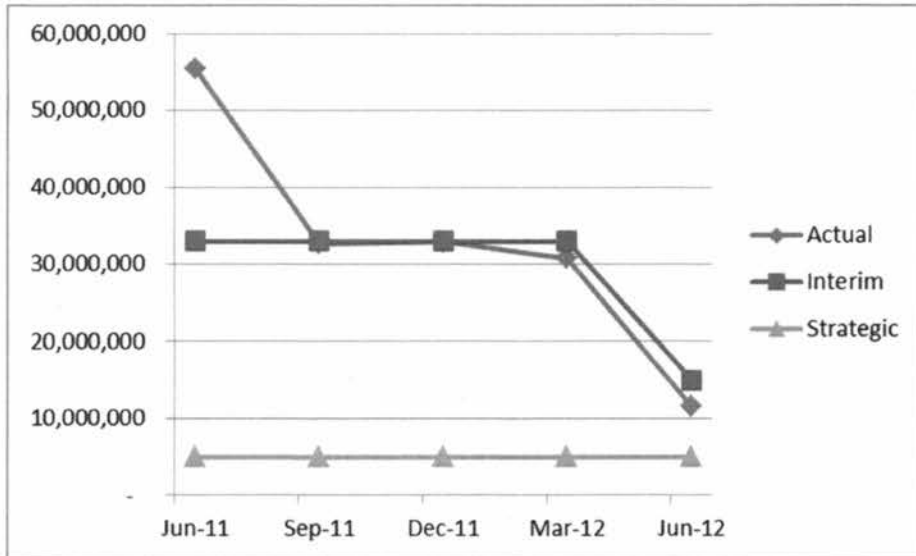
	September 30, 2011	December 31, 2011	March 31, 2012	June 30, 2012
Cash	\$32,693,488	\$32,942,729	\$30,740,303	\$11,516,252
US Gov't Bonds	0	0	0	0
Market Portfolio	80,791,223	75,438,899	78,164,882	76,001,674
Corp Bonds	19,339,807	19,719,039	18,897,774	18,680,513
Equity	39,889,730	33,512,561	36,373,047	34,876,312
(?) Other	22,501,686	22,207,299	22,894,061	22,444,849
IRS Refund	11,662,189	12,445,745	12,445,745	12,445,745
Total	\$125,146,891	\$120,827,373	\$121,350,930	\$99,963,669

*Please note *grants paid* in the quarter (March 31, 2012): UofM Institute of Criminal Law \$1,097,190, Allina Health System \$2,356,696, Council on Foreign Relations \$377,034, to total \$3,830,920

*Please note *grants paid* in the quarter (June 30, 2012): Council on Foreign Relations \$276,805, Yale Law School \$ 1,000,000, Yale School of Drama \$18,000,000, The Center for Victims of Torture \$1,000, to total \$19,277,805

SOURCES OF ASSETS

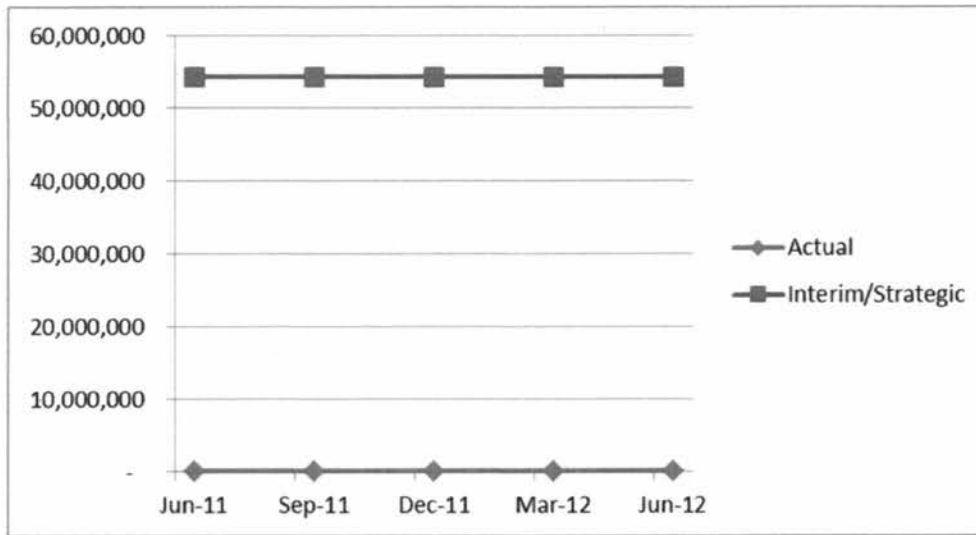
FIGURE 1: TOTAL CASH



- Accounts in Cash: JHB Cash/MM, JHB Income Cash/MM, JHB Revocable Trust, JHB Income Account, US Bank Cash/MM, US Bank Checking
- Interim amount is JHB accounts, checking accounts, rounded \$33.0M through March 2012 adjusted by \$18.0M distribution for quarter ending June 2012 to \$15.0M for quarter ending June 2012
- Strategic amount is six months in cash or \$5.0M

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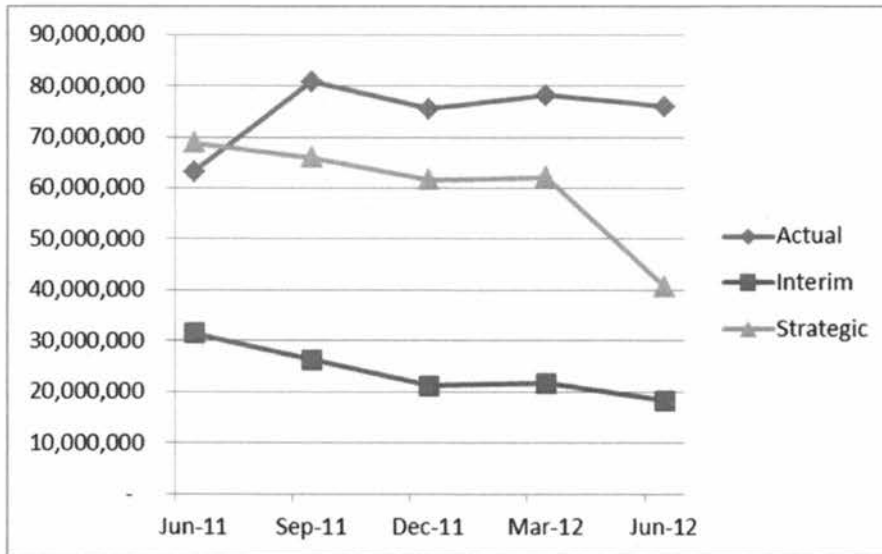
FIGURE 2: TOTAL US GOV'T BONDS



- Accounts in Bonds: US Gov't Bonds Only
- Interim and strategic amount is five years of grants or \$54.2M

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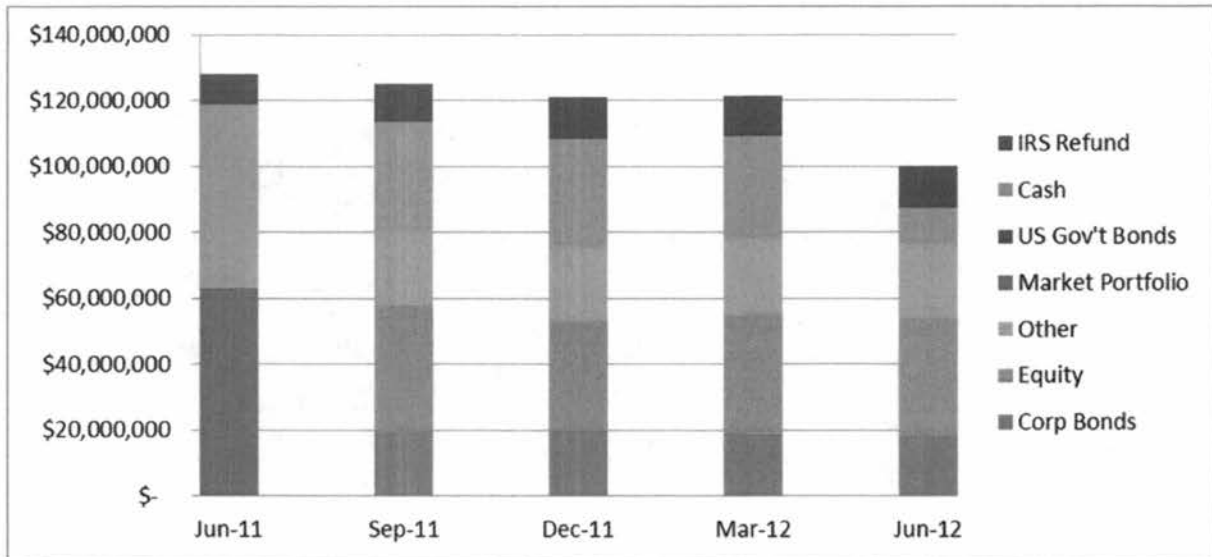
FIGURE 3: TOTAL MARKET PORTFOLIO



- Accounts in Market Portfolio: All other accounts
- Interim target is remaining amount
- Strategic target is remaining amount

STACKED BAR CHART

FIGURE 4: TOTAL SOURCES



SOURCES OF CAPITAL

	9/30/2011	12/31/2011	3/31/2012	6/30/2012
JP Morgan				
JHB Cash/MM	\$ 15,293,671	\$ 15,214,829	\$ 15,145,986	\$ 100,042
JHB-Income Cash/MM	449,127	449,593	449,594	449,596
Total	\$ 15,742,798	\$ 15,664,422	\$ 15,595,580	\$ 549,638
Revocable Trust				
JHB Revocable Trust	5,526,532	5,690,067	5,690,067	2,687,279
JHB Income Account	7,230,756	7,232,432	7,235,859	7,210,446
Tartan I LP	84,654	84,635	84,635	82,328
Total	\$ 12,841,942	\$ 13,007,134	\$ 13,010,561	\$ 9,980,053
Other Securities				
Venture Capital	1,184,802	1,184,802	1,184,802	1,184,802
All Other Securities	849,112	849,112	849,112	577,112
Total	\$ 2,033,914	\$ 2,033,914	\$ 2,033,914	\$ 1,761,914
Total Estate of JHB	\$ 30,618,654	\$ 30,705,470	\$ 30,640,055	\$ 12,291,604

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	9/30/2011	12/31/2011	3/31/2012	6/30/2012
US Bank				
Total Cash/MM	\$ 951,124	\$ 1,248,046	\$ 664,203	\$ 530,116
US Gov't Bonds	0	0	0	0
Corporate Issues	15,334,835	15,563,407	14,602,314	14,427,921
Ontario Province	162,305	161,181	161,463	160,044
Bp Capital Plc	742,154	747,467	750,743	750,127
Total Capital Sa	530,805	529,510	522,755	530,680
NuVeen High Income Bond Fd Cl I	2,629,708	2,717,474	2,860,499	2,811,740
Total non- Gov't	19,399,807	19,719,039	18,897,774	18,680,513
Total Corp Bonds	\$ 19,399,807	\$ 19,719,039	\$ 18,897,774	\$ 18,680,513
Stock Funds	22,251,641	23,856,658	26,705,101	25,150,107
Common Sense Offshore Ltd	2,064,466	2,105,161	2,035,497	2,089,137
Flag Private Equity LP	2,500,000	1,195,695	1,195,695	1,195,695
Flag Venture Partners III LP	5,000,000	1,009,145	1,009,145	1,009,145
Flag Venture Partners IV LP	2,125,000	1,244,759	1,244,759	1,244,759
Pfingsten Partners III LP	2,000,000	1,174,952	1,174,952	1,174,952
Pointer Offshore Ltd	2,948,623	2,926,191	3,007,898	3,012,518
Total Hedge Equities	16,638,089	9,655,903	9,667,946	9,726,206
Total Equities	\$ 38,889,730	\$ 33,512,561	\$ 36,373,047	\$ 34,876,312

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	9/30/2011	12/31/2011	3/31/2012	6/30/2012
US Bank, continued				
Barclays Bank Plc	\$ 512,515	\$ 510,805	\$ 509,370	\$ 504,420
Ontario Province	225,717	223,761	223,385	221,695
T Rowe Price Intl Bond Fund	1,972,496	1,921,211	1,946,853	1,925,156
Total non-US	2,710,728	2,655,777	2,679,608	2,651,271
Gam Absolute Return Bond Fund	3,087,532	3,056,933	3,263,992	3,220,334
Gca Credit Opportunities Offshore	3,881,166	3,920,421	3,982,227	4,021,968
Marathon Credit Opportunity Fund Ltd	2,929,891	2,808,318	2,932,559	2,988,483
Total Hedge	9,898,589	9,785,672	10,178,778	10,230,784
IDR Core Equity Re Strategy 2010	4,798,615	5,964,561	6,102,963	6,102,966
Barclays Bank Plc	665,700	0	0	0
Barclays Bank Plc	674,475	0	0	0
Inv Balance Risk Comm Str Y	826,076	859,052	948,677	860,743
Oppenheimer Com Str Tr Fd Y	808,935	823,688	865,486	754,842
Total Commodities	2,975,186	1,682,740	1,814,163	1,615,585
Total Other Bonds, Real Estate, Commodities	\$ 20,383,118	\$ 20,088,750	\$ 20,775,512	\$ 20,600,607
US Bank Total	\$ 79,623,779	\$ 74,568,396	\$ 76,710,536	\$ 74,687,548
US Bank Checking	3,242,278	3,107,762	1,554,594	538,773
IRS Refund	11,662,180	12,445,745	12,445,745	12,445,745
Gross Total	\$ 125,146,891	\$ 120,827,373	\$ 121,350,930	\$ 99,963,669
Grants Paid				
UofM Institute of Criminal Law			1,097,190	0
Allina Health System			2,356,696	0
Council on Foreign Relations			377,034	276,805
Yale Law School			0	1,000,000
Yale School of Drama			0	18,000,000
The Center for Victims of Torture			0	1,000
Total Grants Paid			\$ 3,830,920	\$ 19,277,805

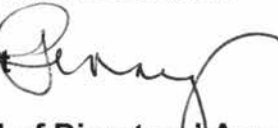
ASSET ALLOCATION REPORT: JUNE 30, 2012

	6/30/2012						
		Actual %	Interim \$	Int %	Strategic \$	Strat %	
Cash							
JHB Cash/MM	100,042						
JHB-Income Cash/MM	449,596						
JHB Revocable Trust	2,687,279						
JHB Income Account	7,210,446						
US Bank Cash/MM	530,116						
US Bank Checking	538,773						
Total Cash	\$ 11,516,252	12%	\$ 15,000,000	15%	\$ 5,000,000	5%	
US Gov't Bonds	\$0	0%	\$ 54,200,000	54%	\$ 54,200,000	54%	
Market Portfolio							
Corp Bonds	18,680,513						
Equity (US & non-US)	34,876,312						
Other	22,444,849						
Total Market Portfolio	\$ 76,001,674	76%	\$ 18,317,924	18%	\$ 40,763,669	41%	
IRS Refund	\$ 12,445,745	12%	\$ 12,445,745	10%	\$0	0%	
Gross Total	\$ 99,963,669	100%	\$ 99,963,669	100%	\$ 99,963,669	100%	
*Please note Other includes: Tartan I LP, Venture Capital, All Other Securities, Other Bonds, Real Estate, Commodities							

ASSET ALLOCATION REPORT: MARCH 31, 2012

	3/31/2012						
		Actual %	Interim \$	Int %	Strategic \$	Strat %	
Cash							
JHB Cash/MM	15,145,986						
JHB-Income Cash/MM	449,594						
JHB Revocable Trust	5,690,067						
JHB Income Account	7,235,859						
US Bank Cash/MM	664,203						
US Bank Checking	1,554,594						
Total Cash	\$ 30,740,303	25%	\$ 33,000,000	27%	\$ 5,000,000	4%	
US Gov't Bonds	\$0	0%	\$ 54,200,000	45%	\$ 54,200,000	45%	
Market Portfolio							
Corp Bonds	18,897,774						
Equity (US & non-US)	36,373,047						
Other	22,894,061						
Total Market Portfolio	\$ 78,164,882	64%	\$ 21,705,185	18%	\$ 62,150,930	51%	
IRS Refund	\$ 12,445,745	10%	\$ 12,445,745	10%	\$0	0%	
Gross Total	\$ 121,350,930	100%	\$ 121,350,930	100%	\$ 121,350,930	100%	
*Please note Other includes: Tartan I LP, Venture Capital, All Other Securities, Other Bonds, Real Estate, Commodities							

ROBINA FOUNDATION

TO: Robina Board of Directors
FROM: Penny Hunt 
RE: 2012 Board of Directors' Annual Meeting
DATE: July 24, 2012

The agenda for the Board meeting is less crammed than usual, which will permit Board Members to discuss thoroughly the Foundation's Grant Program and opportunities for convening Robina Grantees, as well as spend time with representatives of the two Minneapolis-based Robina Grantees.

Note in particular:

- With the change in reporting requirements for Robina Grantees, the Board will review fewer reports, but those contained in the Board Book should keep the Board abreast of activities of the Foundation's grantees.
- In addition to discussing the *Robina Institute on Criminal Law and Criminal Justice* with key leaders of the Institute, the Board will learn about the University of Minnesota Law School's ideas for the *Binger Center for New Americans* from David Wippman.
- Tab 6 includes ideas I discussed with each of you recently. Note that there are no direct quotes – I couldn't write fast enough to write your comments word-for-word! I hope this summary will stimulate your discussion of important topics related to Robina's Grant Program.
- We'll be joined on Wednesday by representatives of USbank, as well as Mike Sullivan to discuss the Foundation's finances.
- Since this is the Foundation's annual meeting, the agenda includes discussion of various aspects of governance, as well as election of Board Members and Officers.

Our Tuesday evening dinner at The Bachelor Farmer restaurant will give Board Members the chance to visit the restaurant named the Twin Cities' restaurant of the year. President Obama ate there during a recent visit. You may want to Google it to learn more about the people behind the restaurant (our governor's sons) and the building where it is located, as well as the food!

As always, let me know if you have questions or concerns about plans for the Board Meeting or other work of Robina.

ROBINA FOUNDATION BOARD OF DIRECTORS' ANNUAL MEETING
July 30, 31, and August 1, 2012

MONDAY, July 30

6:00 p.m. Dinner at the Minneapolis Club, 612-332-2292

Lodging: The Minneapolis Club, 729 2nd Avenue South, Minneapolis, MN
55402, Phone: 612-332-2292
Susan Berresford, Peter and Marty Karoff, Steve Schroeder

TUESDAY, July 31

8:00 a.m. Board of Directors' Meeting at Faegre – see Agenda

5:30 p.m. Berresford, Karoff (2), Schroeder picked up for ride to *The Bachelor Farmer*, 50 North 2nd Avenue, 612-206-3920

6:00 p.m. Board Social at *The Bachelor Farmer*

8:30/9:00 p.m. Berresford, Karoff (2), Schroeder back to Minneapolis Club

Lodging: Berresford, Karoff (2), Schroeder at The Minneapolis Club

WEDNESDAY, AUGUST 1

8:00 a.m. Board Meeting at Faegre Continued – see Agenda

Noon Adjournment of Annual Meeting

Robina Foundation Board of Directors' Annual Meeting

Tuesday, July 31, 2012

Time	Faegre Office 2200 Wells Fargo Center, 90 South 7th Street, Minneapolis, MN 55402, Phone: 612-766-8078 (Go to 22nd floor and receptionist will direct you to the room.) (Continental Breakfast in Meeting Room available at 7:30 a.m.)	Tab#
8:00 a.m.	Welcome and Call to Order – Crosby	
8:05 a.m.	Abbott Northwestern Hospital <i>Care Guides in the Primary Care Office</i> – Guests: Dick Adair, Penny Wheeler <i>Late Life Supportive Care</i> – Guests: Eric Anderson, Sandra Schellinger, Heather Britt	1
9:30 a.m.	University of Minnesota Law School <i>Robina Institute for Criminal Law and Criminal Justice</i> – Guests: David Wippman, Kevin Reitz, Richard Frase <i>Binger Center for New Americans</i> – David Wippman	2
10:45 a.m.	Council on Foreign Relations <i>International Institutions and Global Governance</i> - Annual Report - Grant Payment – Action <i>Expanded Diversity Initiative</i> - Six-Month Report <i>Online Video Project</i> (Richard Haass letter)	3
11:30 a.m.	Yale School of Drama: Binger Center for New Theatre Annual Report	4
11:45 a.m.	Yale Law School: Robina Human Rights Initiative - Annual Assessment - Components of the Yale Law School Human Rights Programs	5
12:15 p.m.	Lunch (in the meeting room)	
1:00 p.m.	Foundation Grant Program - Robina Foundation Grants – Current Status Discussion - Sunset Timetable - Robina Grantees Meeting	6
4:00 p.m.	Adjournment	
6:00 p.m.	Board Social Evening – <i>The Bachelor Farmer Restaurant</i>	

Robina Foundation Board of Directors Annual Meeting

Wednesday, August 1, 2012

Time	Faegre Office 2200 Wells Fargo Center, 90 South 7th Street, Minneapolis, MN 55402, Phone: 612-766-8078 (Go to 22nd floor and receptionist will direct you to the room.) (Continental Breakfast in Meeting Room available at 7:30 a.m.)	Tab#
8:00 a.m.	Welcome and Call to Order – Crosby	
8:05 a.m.	Foundation Finances: Guests • USbank: Jerry Anderson, Joe Hinderer, Tim Towle • Investment Consultant: Mike Sullivan Treasurer's Report/Legal Report • Assets and Grants/Assets Detail • J.P. Morgan's Quarterly Report (Current Residuary Assets on Hand June 30, 2012) • Quarterly Report from Mike Sullivan (to be distributed at BOD Mtg.)	7
9:00 a.m.	Minutes from May 15, 2012 Board Meeting – Schroeder – Action	8
9:05 a.m.	Executive Director's Report – Hunt	9
9:15 a.m.	Governance Discussion – Crosby Robina Board of Directors • Size • Composition • Term/Term Limits • Compensation Lead Directors • Role • Rotation Officers • Term • Designation / rotation Governance - Action • Election of Board Members • Election of Officers • Board Compensation • Conflict of Interest Policy/Board Member Disclosure Meeting Dates • 2012/2013 (including calendars for both years)	10
11:45 a.m.	Other Business	
12 Noon	Adjournment	

1	Abbott Northwestern Hospital
2	University of Minnesota Law School
3	Council on Foreign Relations
4	Yale School of Drama
5	Yale Law School
6	Foundation Grant Program
7	Foundation Finances Treasurer's/Legal Reports
8	Board Minutes from May 15, 2012
9	Executive Director's Report
10	Governance Discussion

1. Care guide website

We are actively at work preparing a website describing the care guide program for interested parties (lay and professional). This website will include a description of the Robina Foundation, care guide research results at Abbott Northwestern Hospital and Allina Health, and a detailed description of how to start a care guide program.

2. Proposal to use remaining allocated funds to establish a Robina Care Guide Learning Center

We estimate unused funds will be about \$1.5 million. (Some work is continuing, notably analysis of the economic impact of care guides and preparation of research papers describing details of how the care guide program was implemented and how patients, nurses and doctors reacted to this new kind of employee.) We propose to use these funds to assist in translating this research into clinics both within and outside Allina. We plan to seek other sustaining funding partners.

The proposal:

Robina Foundation Care Guide Learning Center

Reasons for this proposal

1. The Robina Foundation and Allina Health would like to leverage investment in the care guide research project.
2. This model for helping chronic disease patients is not proprietary.
3. The research team is receiving many inquiries about this care model.
4. The research team understands its mandate to spend funds on transformation rather than operations.
5. The research project will be complete at about \$1.5 million dollars under budget.

Proposal

The unused funds will be allocated to create and sustain a "Care Guide Learning Center", which will include the following activities:

1. Create and maintain a website and toolkit containing up-to-date information about how to implement care guides in primary care clinics (e.g., recruitment and HR information, training materials, supervision plan, scope of practice, introducing the model to nurses and doctors, research results).
2. Contract with a public relations expert to further media coverage and publicity related to dissemination of results and availability of Care Guide Learning Center resources.
3. Partner with local and national institutions (e.g., Healthcare Leadership Institute, VHA, Twin Cities Public Television, Stratis Quality Improvement Organization, Institute for Healthcare Improvement) to advance the concept and implementation of care guides.
4. Make available within Allina Health and possibly to other healthcare organizations a 'swat-team' for support to clinics wishing to implement the care guide model: site visits, attendance at staff meetings, partnership in hiring care guides and locating and setting up their work stations, and establishing fidelity to the model. The center will provide an ongoing training program for care guides and care guide supervisors.
5. Offer mini grant, if funding permits, to cover initial start-up costs for employing care guides (e.g., furniture for new care guide, facilities changes to accommodate location, training costs), but not operating costs.
6. Gather data and maintain a web-available database regarding how other clinics use care guides including the economic, clinical results, and how patients, provider, and nurses react to this program. Ensure that sites partnering with the Care Guide Learning Center are gathering minimal evaluation data. Offer opportunities for more expanded data collection and ongoing research.
7. Foster creative new ways of using care guides: other conditions and kinds of patients, collaboration with other kinds of care managers and clinics established as patient-centered medical homes.
8. Secure other external funding (e.g., grants, charitable gifts, consulting fees) to ensure the Care Guide Learning Center can be sustained.

9. Use the Care Guide Learning Center to
 - a) test Allina's ability to disseminate research and other innovations to health systems and communities
 - b) foster other innovations in primary care or health system design that promote person-to-person interactions, as the care guide project does.
 - c) engage providers and other care team members in the development, implementation, and evaluation of innovations.

Next Steps

Identify key personnel necessary for the Care Guide Learning Center. Draft job descriptions and move to hire FTEs (e.g., business development manager, training coordinator). Supervision will be within the Allina Center for Healthcare Innovation.

3. Final phase 2 research results

Please see submission to the New England Journal of Medicine:

IMPROVING CHRONIC DISEASE CARE BY ADDING TRAINED LAYPERSONS TO THE PRIMARY CARE TEAM

Richard Adair, M.D., Jon Christianson PhD, Douglas R. Wholey PhD, Katie White EdD, Heather Britt PhD, and Suhna Lee, MPA

From Allina Health (R.A., H.B.) and the University of Minnesota (J.C., D.R.W., K.W., and S.L.), Minneapolis

ClinicalTrials.gov number, NCT011569074

Contact:

Richard Adair, M.D.
2800 Chicago Av S, Minneapolis, MN 55405
adair001@umn.edu
612-345-0539
FAX 612-863-2132

ABSTRACT

Background: Improving care for chronic disease patients is an important goal, but how to accomplish this efficiently is unclear.

Methods: We hypothesized that care guides, a new type of clinic employee dedicated to helping patients and providers reach standard care goals, could help. We recruited 2135 patients with hypertension, diabetes, or heart failure from 6 diverse primary care clinics; gave them disease-specific information about recommended care goals; and randomized them 2:1 to work toward these goals with a "care guide" for 1 year or to usual care. We recruited laypersons with strong interpersonal skills to serve as care guides and gave them brief training about these diseases and the mechanisms of behavior change. The primary endpoint was the probability of achieving a care goal at 1 year.

Results: Comparing care guide patients with control patients, the odds ratio (OR) of meeting a goal at 1 year was 1.31 (95% CI 1.16-1.47). For patients with hypertension, OR was 1.29 (1.12-1.49); with diabetes, 1.35 (1.18-1.56); with heart failure, 1.52 (1.15-2.01). Of 10 individual goals, 4 showed improvement with $p < .05$ (including not using tobacco) and 2 with $p < .10$. Similar results were seen when comparing these patients with 5326 matched patients in clinics without care guides. Care guide effects did not vary with patient demographic characteristics. Estimated cost was \$286 per patient per year.

Conclusion: Care guides added to the primary care team can improve care for chronic disease patients at low cost.

INTRODUCTION

Almost half of Americans with chronic disease fail to receive evidence-based care.¹⁻³ Reasons for this include limited access for some^{4,5} and payment systems that undervalue primary care and provide incentives for more care but not better results.^{6,7}

A consensus is emerging that chronic disease care can best be provided by a team, centered in the primary care office, working directly with patients to help them engage in their own care while giving providers feedback about which patients achieve evidenced-based care guidelines.^{4,8} These principles are integral to the chronic care model⁹⁻¹¹ and the patient-centered medical home.¹² Questions remain about how these teams will be structured, how they will be paid for, and which patients will benefit.^{13,14}

Despite potential global savings, active care management does not fit within the budgets of most primary care practices.^{13,14} Care management programs usually rely on nurses;¹⁵⁻¹⁷ some use lower-salaried medical assistants,^{18,19} community health workers,^{20,21} or volunteer same-diagnosis peer coaches.²²⁻²⁴ Telephone coaching or advice provided from a central location is less effective.²⁵⁻²⁷

Seeking a pragmatic way to help chronic disease patients, Allina Health, a large Minnesota health care delivery system, blended ideas from several sources and

introduced a new type of clinic employee, a “care guide”, whose only task was to help patients and providers meet standard care goals.

A pilot study in an inner-city clinic helped define this position and demonstrated significant improvement in clinical endpoints.²⁸

METHODS

Patients, clinics, and care guides

Patients with hypertension, diabetes, or congestive heart failure were selected for study because these diseases are common and have objective standards for care.²⁹⁻

³¹ A power calculation suggested that if two-thirds of goals were met at baseline, 729 patients would provide an 80% chance of detecting a 10% change; 3079 patients, a 5% change. We aimed to enroll 2000 patients.

From 50 Allina Health primary care clinics, we chose 6 diverse clinics (urban, suburban, rural; family practice, internal medicine; some giving monthly care-quality feedback to providers, others not). Twelve care guides were hired and assigned by clinic size (1, 2, or 3 per clinic). Two experienced registered nurses were hired as supervisors.

For the care guide position we hired laypersons with at least two years of college and strong interpersonal skills, and provided them with two weeks’ training that included basic information about hypertension, diabetes, and heart failure; barriers to care and resources for overcoming them; professional behavior; how to use the electronic health record (EHR); and behavior change techniques including motivational interviewing, goal setting, contracting, and feedback. The non-clinical nature of this position was stressed and a “scope of practice” document was created.

Care guides workstations were located in clinic waiting rooms to facilitate face-to-face interactions with patients, providers, and nurses. We hypothesized the resulting relationships would improve care for chronic disease patients at a reasonably low cost. Details are described in the pilot study.²⁸

Enrollment

Enrollment occurred following regularly scheduled visits over 6 months. Eligible patients had at least one of the study diagnoses, were aged 18-79, and not pregnant. Provider input was solicited from the start by asking them to refer patients whom they felt “needed help”. Diagnosis-related prompts were inserted into the EHR and care guides gave providers daily lists of potential patients. Analysis confirmed that providers preferentially referred patients with higher blood pressures and glycated hemoglobin values from these lists.

Each provider was assigned one care guide, although if unavailable another could substitute. When patients were referred, care guides explained the study and the randomization process. All patients who consented to enroll were given information about the value of reaching disease-specific care goals listed by the American Diabetes Association, the American Heart Association, and the 7th Joint National Committee on Prevention, Detection, Evaluation, and Treatment of High Blood Pressure (Table 1).²⁹⁻³¹ Patients were then randomized in a 2:1 ratio to work with a care guide and their primary provider to achieve these goals (care guide patients) or to work with their provider in the usual way to achieve these goals (randomized control patients). Thus, both groups began with the same information base.

The sole task for the care guides was to help assigned patients and their primary care providers achieve these goals. Care guides asked patients to sign a contract (scanned into the EHR) agreeing to work toward their disease-specific goals and to prioritize goals. Care guides and patients mutually decided how often and how (in person, by telephone) they would contact each other. Quarterly electronic reports about care goals achieved and not achieved were printed for patients and delivered electronically to primary care providers. Care guides also met with providers and sent them electronic messages on an *ad hoc* basis.

Endpoints

The primary endpoint was the probability of achieving a recommended care goal at one year, considering all goals for all patients. Whether a goal was met was determined by using the last data available in the EHR.

Secondary endpoints were the probability of achieving each individual clinical goal, and to determine whether the benefit of working with a care guide could be predicted by patient demographic data including age, sex, self-identified race, insurance type, educational attainment, and language spoken at home.

Costs

We recorded compensation for care guides and supervisors, training, and the cost of creating 12 workstations. We asked these employees to estimate the percentage of their time spent on patient care rather than research.

Matched patient study

Because we anticipated that working with care guides could influence the care given by providers to randomized control patients, we conducted a separate and concurrent study using propensity-matched patients in similar clinics with no exposure to care guides or this study. To identify these patients, we required an exact match for each enrolled patient's diagnoses of diabetes and/or hypertension and for a clinic visit during the 6-month enrollment period. We excluded heart

failure patients because of small numbers. From this pool, 5326 patients were identified as best matches considering age, sex, and blood pressure for all patients, and glycated hemoglobin, albuminuria testing and pneumonia vaccination for diabetic patients, using "nearest neighbor" and "nearest 4 neighbors" techniques. The matched study covered the 18 months that care guides were present in a given clinic, including the 6-month enrollment period.

Statistical analyses

For analysis of differences in the randomized trial and in the matched trial, we used logistic regression with grouped data to obtain odds ratios for meeting a care goal, controlling for baseline differences and for dichotomized patient demographic variables. We used independent group *t* tests to compare patient groups at baseline (STATA v12.0, College Station, TX). Authors S.L., D.R.W., and J.C performed the analyses.

Study approval

This study was approved by the Institutional Review Boards of Allina Health and of the University of Minnesota.

RESULTS

Patients

During 6 months, 2135 patients enrolled. Ten patients later withdrew consent, leaving 2125 randomized patients for study in an intention-to-treat analysis (Figure 1).

Table 2 shows diagnoses and characteristics of these patients. About half had more than one diagnosis. The groups were well matched without significant differences.

Primary endpoint

Patients working with care guides were more likely than control patients to achieve a care goal at 1 year, controlling for baseline values, with odds ratios of 1.31 (95% CI 1.16-1.47) for the entire group, 1.23 (1.16-1.30) for patients with one diagnosis, 1.37 (1.14-1.65) for patients with more than one diagnosis, 1.29 (CI 1.12-1.49) for patients with hypertension, 1.35 (CI 1.18-1.56) for patients with diabetes, and 1.52 (CI 1.15-2.01) for patients with heart failure (Figure 2). All these differences were significant at $p < .001$.

Secondary endpoints

Odds ratios for achieving individual clinical goals are shown in Figure 3. The odds of meeting a goal were greater in care guide patients than in control patients for 7

goals, not different for 3, and could not be calculated for 2 because almost all patients were meeting goals.

The benefit from working with a care guide was not different across demographic categories of patient age, sex, race, insurance, level of education, or language. Benefit did not vary by care guide or by clinic, except results were stronger in one clinic than in the other five.

Costs

Compensation for 12 full-time care guides (\$16/h salary plus benefits) was \$511,176, and for 2 nurse supervisors was \$116,736. Care guides estimated 63% of their duties were related to patient care rather than research; supervisors estimated 60%. Modular furniture and equipment for 12 semiprivate workstations within existing clinic space cost \$108,000, which could be depreciated over 5 years. Training cost \$3031. Care guides served a mean of 120 patients. Without research duties, each could serve approximately 190 patients, and the total cost per patient would be \$286 per year.

Care guides reported a mean of 8 patient contacts with each patient during the study year, 5 by telephone (range 1-37) and 3 in person (range 1-25). The wide range suggests a focus on patients who needed help.

Matched patient study

Comparing care guide patients with matched patients in similar clinics without care guides and controlling for baseline values, the odds ratio of achieving a goal was 1.38 (CI 1.26-1.51) for all patients, 1.56 (CI 1.22-1.99) for patients with more than 1 diagnosis, 1.61 (CI 1.25-2.08) for patients with diabetes, and 1.30 (CI 1.17-1.44) for patients with hypertension. Comparing randomized *control* patients with matched patients in other clinics, the odds ratio of achieving a goal was 1.25 (CI 1.12-1.40). All these differences were significant with $p < .001$. Results of the "nearest neighbor" and "nearest 4 neighbors" analyses were similar.

DISCUSSION

Improving the quality of care for chronic disease patients is an important goal for the US health care system. The question is, how to do this in a practical and efficient way?

Several innovative care management models have been proposed and implemented: the chronic care model/patient-centered medical home,^{11,15,32-34} the teamlet model,³⁵ and the community health worker model.^{20,36} Some include peer patients,²² family members³⁷ or surrogate family members.³⁸ The costs of activities that support chronic disease care programs can be shared within integrated delivery systems^{33,34}, but how to fund such programs in other settings is uncertain.¹³

This report describes in detail both benefits and costs of using care guides, information that permits this program to be compared in value with other ways of helping chronic disease patients and their providers.¹³

How do care guides differ from other personnel used as care managers? Care guides can explain the value of meeting standard goals but, unlike nurses, cannot answer clinical questions. Care guides and medical assistants have similar salaries but care guides have less training and no competing duties in clinic. Like community health workers, care guides are culturally similar to the patients they serve, but are located in the clinic. Care guides were recruited to have specific skills: an outgoing personality, the ability to engage easily with people of different ages and backgrounds, and a second language where needed (Spanish and Somali in the pilot study.)²⁸

Because of their relationships with providers, care guides in effect serve as quality improvement advocates integrated into the daily process of providing primary care. This arrangement differs from the common practice of giving periodic feedback to providers based on data gleaned from the EHR. Problems with such feedback include that grouped data may be skewed by outlier patients, provider attribution may be out of date, responsibility for care may be shared, and strict adherence to guideline targets may cause harm for multimorbid patients.³⁹⁻⁴¹ Clinicians become frustrated and ignore feedback perceived as inaccurate.³⁹ Despite efforts to use data flexibly, the benefit of external feedback has inherent limits.⁴⁰

Moving the quality improvement process into the primary care office resolves some of these problems. Each patient can be considered individually. Conversations about care quality can occur face-to-face rather than electronically, and providers can explain when clinical judgment leads them to make exceptions to guideline-based care. Strong relationships and a sense of teamwork increase workplace satisfaction.³⁹

After one year, the randomized *control* patients also met significantly more care goals than they had at baseline, and more than their matched counterparts in clinics without care guides. This suggests the presence of care guides in a clinic improved care overall.

Care guides were especially helpful for patients with multiple diagnoses. They helped achieve difficult goals (tobacco cessation, care for diabetic nephropathy) as well as easier ones (immunizations, retinal exams).

What were the key ingredients leading to clinical improvements? Care guides named building relationships with patients over time (for instance, most patients who quit tobacco did so between 9 and 12 months), meeting with patients face-to-face, asking patients to set goals and take responsibility for their own care, and remaining engaged when this didn't happen at first. 28

The cost of this program was low for several reasons. Most care guides were early in their careers (although one was nearing retirement) and accepted entry-level salaries in the Minneapolis-St Paul market. They were encouraged to concentrate on patients who seemed ready to make changes, while contacting others less often. They used brief, focused behavior change techniques. Each worked with a small number of providers, allowing informal and electronic communication rather than scheduled "huddles". To put the \$286 annual per patient care guide cost in perspective, the mean cost of one Allina Health hospitalization for a study diagnosis in 2011 was \$11,990. Although this was a clinical study not powered to detect economic benefits, there was a trend toward reduced hospitalizations in care guide patients compared to control patients.

Strengths of this study include its randomized design, matched comparison group analysis, large number of patients, community setting, and the relatively modest cost of the intervention.

Limitations include a relative lack of minority and non-English-speaking patients (groups well represented in the pilot study), a limited time frame for patient follow up, and that the study could not easily test economic benefits since patients could use outside hospitals and providers.

Care for chronic disease patients in the future will increasingly rely on teamwork.⁴ This study showed that laypersons with relevant skills and training, located in clinic waiting rooms where they could meet patients and providers face-to-face, could improve care quality for a group of chronic disease patients at a relatively low cost.

This model could be implemented in many settings, including small independent primary care offices, where most U.S. health care is delivered.^{13,14}

Table 1. Care goals by diagnosis

All patients

Not using tobacco

Patients with hypertension

Systolic pressure < 140 mm Hg

Diastolic pressure < 90 mm Hg

Patients with diabetes

Glycated hemoglobin < 8.0 %

Low-density lipoprotein cholesterol < 100mg/dl

Systolic pressure < 130 mm Hg

Diastolic pressure < 80 mm Hg

Retinal examination within 2 years

Pneumonia vaccination

Measurement of urinary albumin within 2 years

Prescription of an angiotensin converting enzyme inhibitor (ACEI) or angiotensin receptor blocker (ARB) if urinary albumin > 30 mg/g creatinine

Patients with congestive heart failure

Pneumonia vaccination

Echocardiogram

Prescription of a beta blocker if left ventricular ejection fraction < 40%

Prescription of an ACEI or ARB if left ventricular ejection fraction < 40%

Table 2. Baseline characteristics of care guide and control patients

	<u>Care Guide</u>	<u>Randomized Control</u>
Diabetes (%)	65	62
Hypertension (%)	82	80
Heart failure (%)	6	5
>1 study diagnosis (%)	50	55
Female (%)	50	53
White (%)	90	91
Speak English at home (%)	98	98
Medicaid insurance (%)	7	7
High school or less education (%)	39	39
Not using tobacco (%)	84	86
Mean age	61.1	60.9
Mean systolic blood pressure	128.8	128.7
Mean diastolic blood pressure	74.5	74.2
Mean HbA1c (diabetes)	7.4	7.3
Mean LDL cholesterol (diabetes)	86.1	86.4

Figure 1

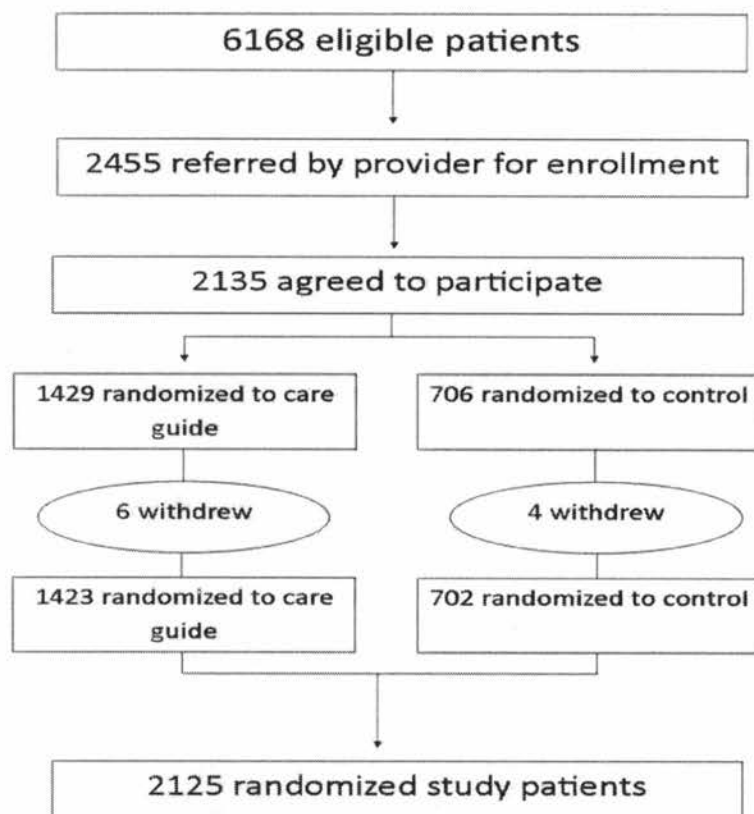
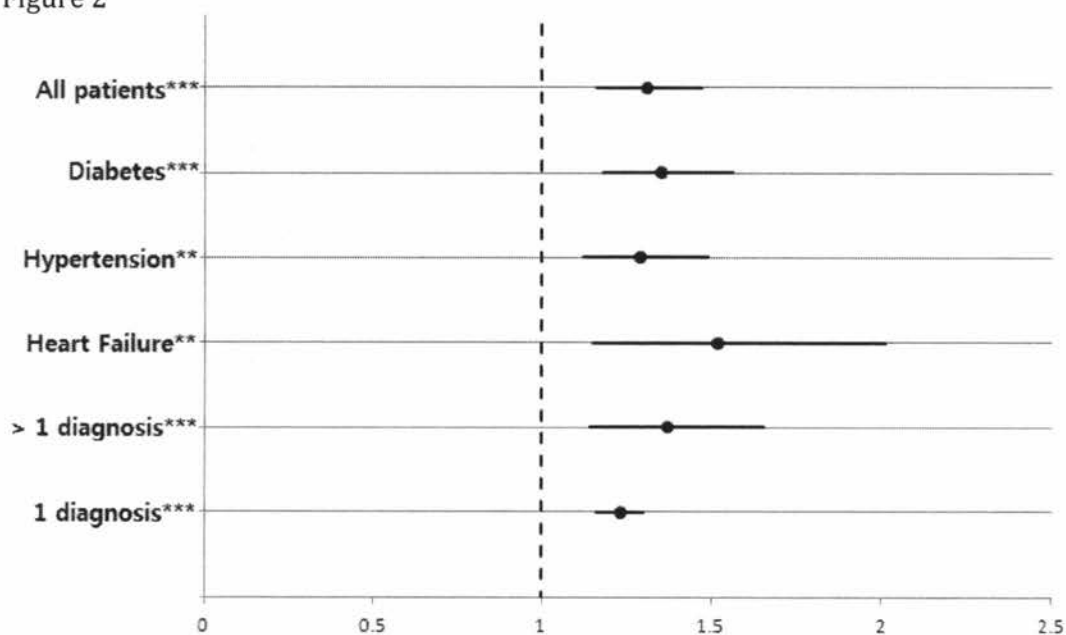


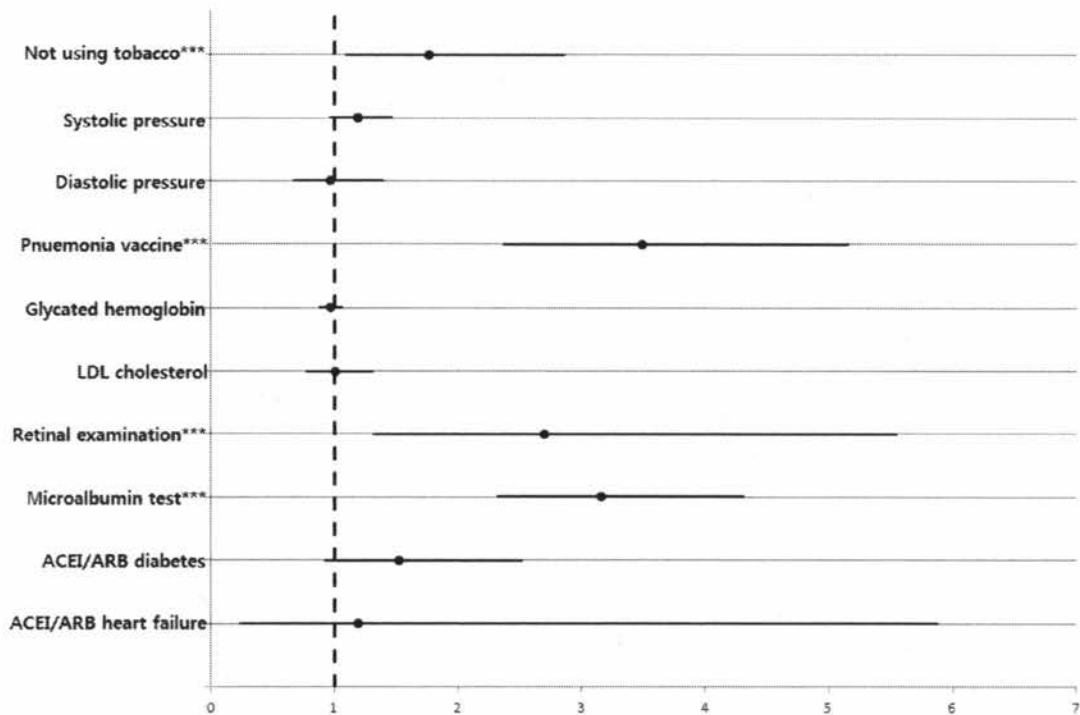
Figure 2



Legend for figure 2:

Odds of achieving a care goal, care guide patients compared to control patients.

Figure 3



Legend for figure 3:

Odds of achieving individual care goals, care guide patients compared to control patients. 2 goals could not be analyzed due to convergence at 100%. Abbreviations: SBP, systolic pressure. DBP, diastolic pressure. HbA1c, glycated hemoglobin. LDL, low-density lipoprotein cholesterol. ACEI/ARB diabetes, angiotensin converting enzyme inhibitor or angiotensin receptor blocker prescribed if microalbuminuria present. ACEI/ARB heart failure, these drugs prescribed if left ventricular ejection fraction <40%.

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Late Life Supportive Care (LLSC) Initiative

July 2012 Robina Foundation Board Quarterly Report

The LifeCourse team is continuing to build a robust operational team. We are maturing in our design process and have transitioned into a workgroup structure which allows us to tackle the operational needs to deploy the model. We are on track for pre-pilot patient enrollment starting October 1st. Contractual relationships with Twin Cities Public Television and the University of Minnesota have been fully established and those partnerships are in full motion. A recent convening of the National Advisory Committee, to review the model, revealed positive feedback and important critical adjustments in the ongoing work.

Building the Team

Since the last report, the following key personnel have been hired and on-boarded (*Appendix A – Core Staff Photo and Listing*): Information Systems Project Manager, Administrative Project Coordinator, Data Analyst, part-time Administrative Assistant, and one Clinical Site Manager. We are in the process of interviewing for a Process Improvement Specialist and the second Clinical Site Manager. Next members of the team include the interdisciplinary team that will support the patients and their families through this study.

Cultivating Advisors

Input from various stakeholders is essential to the development of the LifeCourse project model. We have launched the National Advisory Committee (*Appendix B – National Advisory Committee Charter*) which met for the first time on July 10th. The group will reconvene in October to react to our detailed operational plan, research and evaluation plan, and coach us as we prepare to enroll pilot patients. In December the committee will meet to discuss our first 15 – 20 pilot patients. The Patient & Caregiver Advisory Council is scheduled to meet every other month. The council has met twice and has provided invaluable feedback on the model, naming, caregiver and care team dynamics, and how to define patient-driven care. Select patient and caregivers from this group serve as members of the National Advisory Committee and operational workgroups, including model oversight, assessment and teams.

In person by phone?

Engaging the Community

Another mechanism to incorporate feedback from patients, their families and care givers is through listening sessions conducted by the project's primary community engagement partner, Twin Cities Public Television (tpt). A member from the LifeCourse team has attended each session to gather information about the current and desired late life experience of patients and their family members. To date, eight listening sessions have been completed throughout the Twin Cities covering the challenges and successes that patients and their caregivers have experienced dealing with late stage Alzheimer's, stage 3 and 4 cancer, and advanced heart failure.

Financial Report

For the 1st five months of 2012, expenses were as follows:

Account	Year to Date Expenses at 5/31/12	Year to Date Budget Remaining at 5/31/12
Salaries	181,720	582,405
Benefits	49,973	250,358
Supplies	2,712	51,788
Equipment	7,247	(7,247)
Printing	0	6,000
Consulting/Contractual Agreements	7,941	1,058,549
Education	0	138,000
Travel	4,891	(4,891)
Food	926	11,324
Misc	0	15,000
TOTAL	\$255,410	\$2,101,286

Designing the Model

The remainder of this document illustrates the conceptual and operational model for the LifeCourse project. The team and model design is maturing, turning concept into practice through deployment of the workgroups. The timeline on the final page demonstrates the work that will happen over the next six months to enable enrollment of pilot patients in January 2013.

Respectfully submitted,

Eric Anderson, MD, Principal Investigator

As I live well with serious illness, I am in charge.
You listen to me, help me, guide me, honor me, and support me as a person.

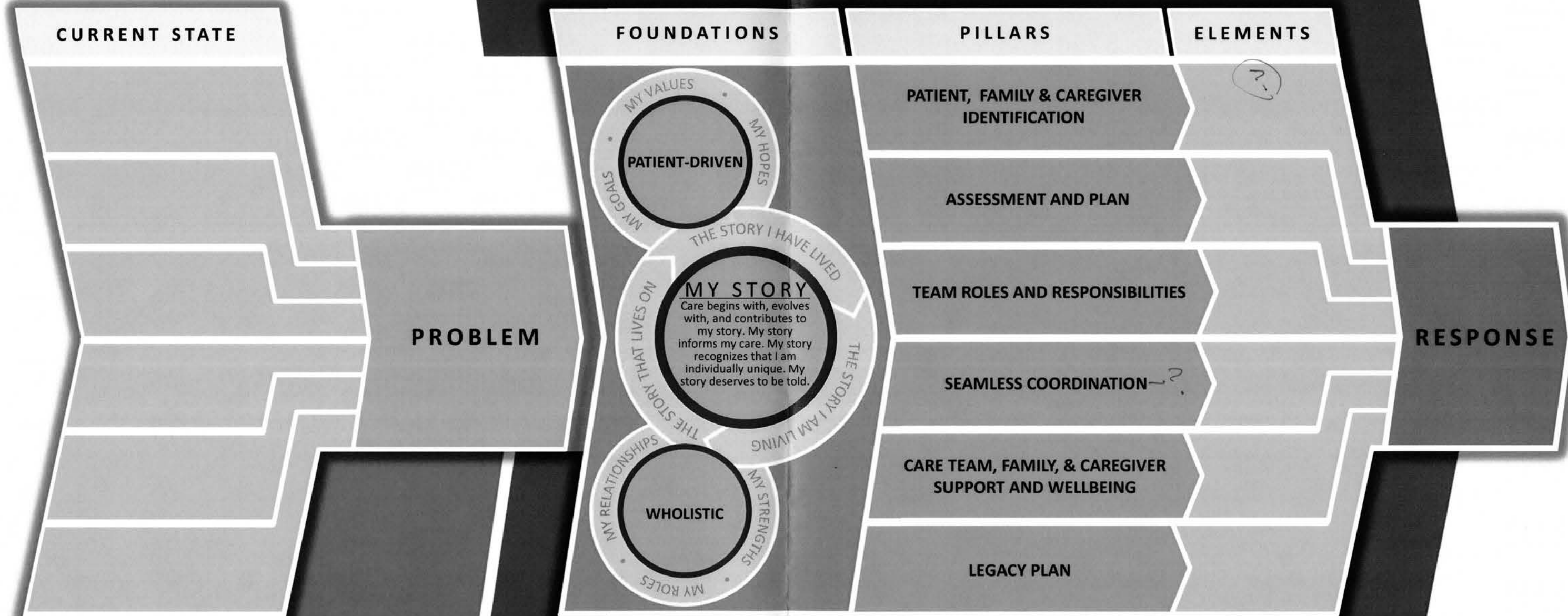
Aim Statement

What terms?

HOW?

LifeCourse is an integrated, comprehensive, patient-driven process for supporting patients, families, their caregivers, and care teams facing the challenges that arise in the last few years of life. These challenges may fall within the physical, emotional, social, spiritual, ethical, legal, and cultural dimensions that define a whole person.

Patient, family, and caregiver strengths and resources are central to the individualized plan of care, a plan which is grounded in the patient's story and evolves collaboratively through an ongoing partnership with the late life supportive care team. This team also builds on the assets of patients, their families and their caregivers, integrating and coordinating health system resources to actualize patient goals.



Care late in life from the patient's perspective often feels impersonal and episodic. The healthcare system provides care that can be singularly focused, reactionary, and fragmented.

The system finds it difficult to hear the voice of the patient and caregiver in guiding its approach and overly emphasizes the physical condition and diagnosis. Healing is perceived as the state of cure or absence of illness, whereas, the overall arc of illness and functional decline is poorly recognized, and often, more poorly communicated to health care team, patient and families.

Clinicians feel distressed, lacking the empowerment and resilience to care for patients late in life. Death is perceived as a medical event and a system failure.

Culture shifts internal to healthcare as well as in society at large, are necessary to fully embed the LifeCourse model into our conversations,; our interaction with patients, families, and caregivers; and our dialogues within communities. Active engagement with patients late in life requires an authentic, honest approach which can only be truly successful if the surrounding milieu is aware, supportive, and connected.

SOCIETAL ACCEPTANCE

WHY?

PILLARS

OPERATIONAL ACTIVITIES

PATIENT, FAMILY & CAREGIVER IDENTIFICATION

Patients are identified early in their life experience – approximately 12 to 24 months prior to end of life. A Patient Identification Workgroup is developing a method for regular, proactive identification of possibly eligible patients.

- Electronic health record and long-term care facility medical record data will be used for identification.
- Clinical review will accompany data-driven identification. Existing algorithms from peer-reviewed literature are the basis of the identification process.
- Traditional statistical techniques, along with data mining, are being explored to refine identification.

Once patients have been identified and invited to participate in LifeCourse, active identification of family members and caregivers will be a critical first step in the assessment experience.

ASSESSMENT AND PLAN

The patient's needs, goals and wishes are wholistically assessed and understood through the patient's story. Using story, the patient outlines their definition of living well and which domains are most important and which need the most attention.

The Patient & Caregiver Assessment Workgroup, and subsequently the Plan of Care Workgroup, are developing the assessment questions and tools, and ultimately the plan of care tools.

Assessment is driven based upon what information the patient, family, and caregivers; system; and LifeCourse team need to fulfill the patient's goals. Assessment will be iterative, qualitatively-driven, and wholistic. Assessment will face both the patient and the caregivers they identify.

The Plan of Care will be driven by the patient's goals. Performance against patient goals will be the most important patient-facing outcome of the model.

TEAM ROLES AND RESPONSIBILITIES

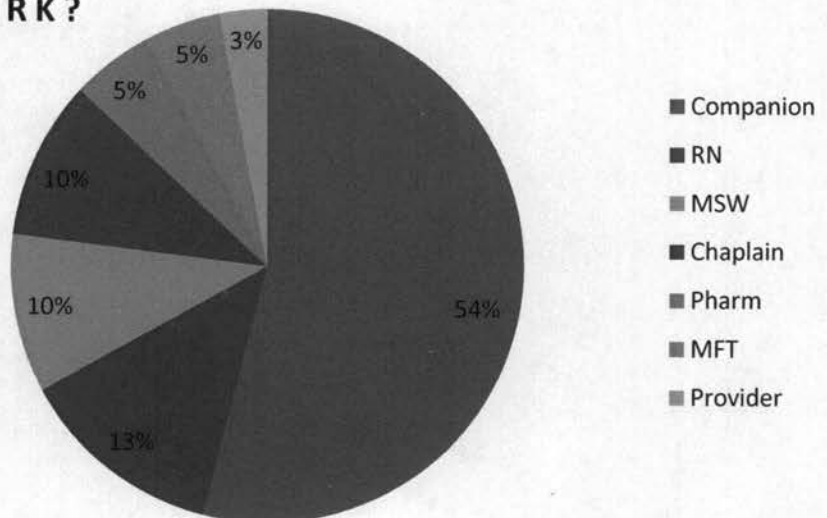
The Team Workgroup is working toward identification of the key tasks of the LifeCourse team that will strengthen the system assets and enhance the patient and caregiver resources. Throughout the end of life, the LifeCourse team assures a plan of care driven by the patient/family's goals and assets across all domains. Where needs and gaps arise, this team will seamlessly coordinate and when appropriate provide direct care by linking with current healthcare system services as well as external services.

The LifeCourse companion/partner (non-clinical) will act as the central facilitator, keeping the patient's story current and understanding how goals of care change and the need for structured professional care team members. When appropriate, the other members of the LifeCourse team will be utilized: nurse, family therapist, chaplain, social worker, and pharmacist. *new position?*

Primary work of the team will include the initial and ongoing assessment, advance care planning, coordination of care, family conferences, interdisciplinary team conferences, counseling, discipline-specific interventions, pharmacy assessment, and final overlap with hospice services, where appropriate. Of this work, we estimate over 50% can be accomplished by a non-clinical 'companion.'

We are planning to enroll patients systematically with the understanding that we are aiming for an approximately 18 month relationship with patients. Recruitment and hiring of additional staff will be based upon ongoing case loads.

WHO CAN DO THE WORK?



SEAMLESS COORDINATION

Because LifeCourse aims to connect to and enhance system strengths, seamless coordination with healthcare and community resources will be critical.

Within our health system, we are developing a 'Coordination of Care' plan in an effort to integrate key internal assets:

- Inpatient palliative care
- Community palliative care
- Chronic disease care management
- Senior care teams supporting long-term care facilities
- Hospice

In addition, two major long term care partners, Walker Methodist Health Center, and Augustana Health Center, are partnering with us to develop the model.

Finally, in conjunction with Twin Cities Public Television, we are hosting a series of 'Domain *Timing?* Roundtables' to begin the process of connecting with community resources in order to enhance our relationships with external assets, especially in the social, legal and ethical, psychological, and cultural arenas.

CARE TEAM, FAMILY, & CAREGIVER SUPPORT AND WELLBEING

Part of the Assessment process will include assessment of caregiver and family support needs and wellbeing. In addition, the LifeCourse model strives to support the care team through this experience.

Training around adaptive dialogue frameworks, behavioral modification, and motivational interviewing, will be embedded for all care team members and available to caregiver and family members as well.

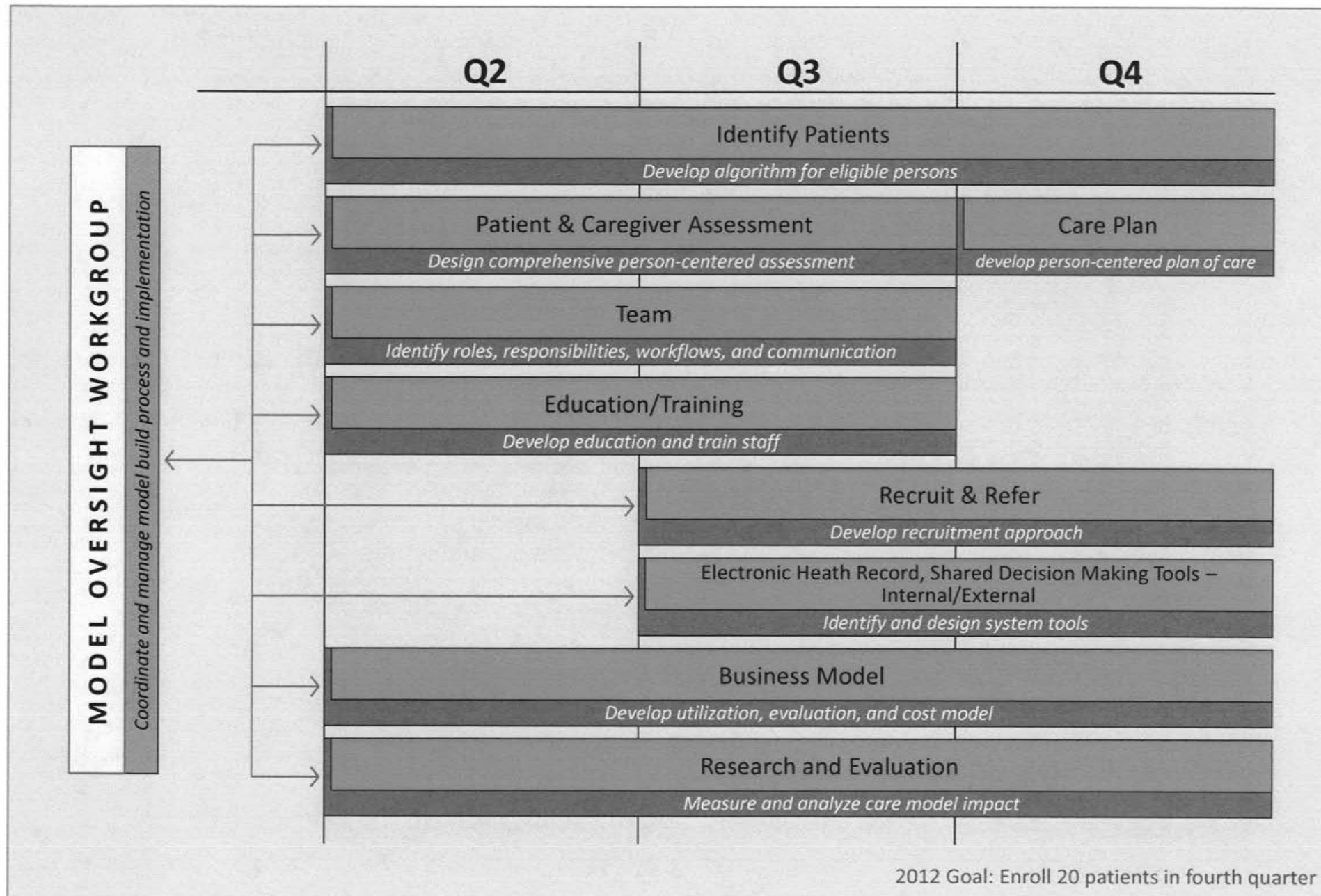
Specific offerings to support wellbeing, such as the Sacred Art of Living, will also be incorporated into LifeCourse.

LEGACY PLAN

As part of developing the plan of care with the patient and caregiver, the LifeCourse team will embed dialogue around, acknowledgement of, and enabling advancement of a legacy plan for the patient based upon his/her wishes.

WORKGROUPS

Care model design and development structure



2012 – 2013 Pilot Timeline

July-Sept.: pre-Pilot Preparation	Oct. – Dec. : Pilot refinement	January 2013
Develop pilot model Model Oversight Design Comprehensive person-driven assessment and plan of care Patient & Caregiver Assessment Hire and train team (includes non-clinical companion, RN, social worker, chaplain, marriage & family therapist) Team Data collection tools identified Research and Evaluation	Enroll 20 – 35 patients in pre-pilot to continuously refine: • Assessment & plan of care • Team roles & responsibilities • Technology tools	Launch pilot model
Develop approach for internal and external Collaboration & Coordination		
Development of algorithm that identifies potentially eligible advanced heart failure, stage III/IV cancer, and dementia patients Patient Identification		
Current cost & service utilization identified Business Model		

Core Staff
Robina Late Life Supportive Care Project



Left to Right: Heather Britt, Co-Investigator (Research); Jess Roberts, Design Specialist; Deb Elumba, Clinical Project Manager; Sandy Schellinger, Co-Investigator (Clinical Model); Marlene White, Administrative Research Coordinator; Alissa Jones, Research Manager; Eric Anderson, Principal Investigator; Kim Radel, Operations Director

Not Pictured: Kathy Shibrowski, Clinical Site Manager; Kathy Kypel, Information Systems project manager; Monica Frazer, Senior Scientific Advisor; Allison Shipley, Research Coordinator; Pam Hamann, Administrative Assistant

Allina Health*Robina LifeCourse**Center for Healthcare Research & Innovation***National Advisory Committee Charter**

Purpose – Integrate the advice and experience from national experts in the design and implementation of Allina's Late Life Supportive Care model.

- For the conceptual model, ensure the approach is sufficiently innovative, and identify missing components.
- For the initial operational model, identify critical functions and potential early mis-steps.
- As the team gains clinical experience and iterates the model, engage in high-level trouble shooting.
- Throughout the project, guide overall messaging, communication plan, and advise on managing culture change.

Meeting Time/Frequency – The National Advisory Committee will meet three times in 2012. Expect to meet quarterly in 2013, either in person or virtually.

Member	Title/Organization
Ben Bache-Wiig	President, Abbott Northwestern Hospital, Allina Health
Bill Hanley	Executive Vice President, Twin Cities Public Television
Brad Stuart	Chief Medical Officer, Sutter Care at Home
Diane Meier	Director, Center to Advance Palliative Care, Mount Sinai School of Medicine
Eric Anderson	Principal Investigator, Late Life Supportive Care project, Allina Health
Eric Coleman	Division head, health care policy and research, University of Colorado, Denver
Jon Christianson	University of Minnesota Evaluation Co-Principal Investigator
Heather Britt	Co-Investigator, Late Life Supportive Care project, Allina Health
Howard Epstein	Chief Health Systems Officer, Institute for Clinical Systems Integration
Joanne Lynn	Director, Center for Elder Care and Advanced Illness, Altarum Institute
Kent Krueger	Caregiver
Kim Radel	Operations Director, Late Life Supportive Care project, Allina Health
Michele Kimball	Director, AARP Minnesota
Penny Wheeler	Chief Medical Officer, Allina Health
Sandy Schellinger	Co-Investigator, Late Life Supportive Care project, Allina Health
Steve Schroeder	Robina Foundation; Distinguished Professor of Health and Health Care, UCSF

Project Description:

Persons with serious illness in the last several years of life and their families are often at a loss when seeking support within the current healthcare system.

- *"It is getting hooked up. I think that is extremely hard. I would say, in health care that's the weak link, I would say, until you get into the system. When you're in and you're in a good one, they guide you through it. I think that's really wonderful. But how to get there?"*
- *"I felt most out of control when we came into the hospital."*

- *"It's hard when you know too much, in some cases, and they won't listen."*
- *"It's such an honor to be able to be there with your parents. We're taking care of them....it's an honor to have that chance to be with them full circle."*
- *"That's why a guide would be helpful, just simple little things, like creating a power of attorney. It would take care of so much."*

This initiative will target a population in the Metro area with a diagnosis of stage III or IV cancer, heart failure, or Alzheimer's, with a life expectancy of between 6 months and two years. They will include patients residing both at home and in our two partnering senior care facilities.

UNIVERSITY OF MINNESOTA

Twin Cities Campus

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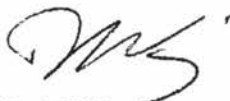
July 25, 2012

Thomas Crosby, Esq.
Chairman of the Board
Robina Foundation
4900 IDS Center
80 South 8th Street
Minneapolis, MN 55402

Dear Tom:

As we discussed, I am attaching a rough budget for a Binger Center for New Americans. It relies on constant dollars, i.e., it does not factor in either inflation or any increase (or decrease) in the initial endowment from investment earnings. I look forward to discussing this proposal with you and the other Robina board members at the July 31 meeting. If you or others have any questions in advance of the meeting, please let me know.

Thanks and regards,



David Wippman
Dean and William S. Pattee Professor of Law

jn

Enclosure

BINGER CENTER FOR NEW AMERICANS

	Year 1 2013	Year 2 2014	Year 3 2015	Year 4 2016	Year 5 2017	TOTAL
New Faculty #1 (@\$120,000)	160,920	160,920	160,920	160,920	160,920	804,600
New Faculty #2 (@\$120,000)	160,920	160,920	160,920	160,920	160,920	804,600
New Faculty #3 (@\$120,000)		160,920	160,920	160,920	160,920	643,680
Teaching Fellows (2 @\$70,000)	193,740	193,740	193,740	193,740	193,740	968,700
Adjuncts (6 @ \$6,000)	36,000	36,000	36,000	36,000	36,000	180,000
Student Clinic Directors (8 @ \$2,500)	20,000	20,000	20,000	20,000	20,000	100,000
Executive Director .5 FTE (Salary @ \$175,000)	124,938	124,938	124,938	124,938	124,938	624,688
Program Associate (@ \$50,000)	70,050	77,055	77,055	77,055	77,055	378,270
Outreach Activity (Includes Web based activity))	30,000	30,000	30,000	30,000	30,000	150,000
General Supplies/Operations	30,000	30,000	30,000	30,000	30,000	150,000
SUBTOTAL	826,568	994,493	994,493	994,493	994,493	4,804,538

ENDOWMENT AMOUNT	18,000,000	22,000,000
4.5% payout	810,000	990,000

UNIVERSITY OF MINNESOTA LAW SCHOOL

PRELIMINARY PROPOSAL FOR A BINGER CENTER FOR NEW AMERICANS

July 21, 2012

The U.S. immigration system is cumbersome, expensive, inefficient, and extremely onerous for those seeking to become new Americans. Law schools could play an important role in changing this system. The Binger Center for New Americans would set the gold standard for law school efforts to help meet the legal needs of immigrant communities.

Minnesota is an ideal place for such a Center. In the last 20 years, Minnesota has unexpectedly become home to the nation's largest Somali community, the nation's largest urban Hmong community, what may be the nation's largest Liberian community, and significant refugee populations from Burma, Ethiopia, and the former Soviet Union. Although Minnesota still ranks only 21 of 50 states in total immigrant population, an unusually high proportion of Minnesota's immigrant population arrives as refugees, roughly five times the national average. In the last decade, Minnesota has emerged as the Midwest's principal gateway state for refugees.

Members of these communities face enormous barriers in their attempts to become productive and valued members of the larger community. This is particularly true with respect to legal services. Members of immigrant communities share the problems of other economically disadvantaged groups, but also face substantial cultural and language barriers in their attempts to navigate a complex legal and administrative system. Many are detained for weeks, months, or years under harsh conditions and then deported without ever seeing a lawyer.

Minnesota's legal community has responded generously and well. A large network of loosely coordinated providers, including non-profits and law firm pro bono programs, offers a patchwork of legal services in areas ranging from asylum to family law. But the demand for comprehensive and coordinated legal services far outstrips the supply.

The Binger Center for New Americans, in a unique, formal collaboration with leading non-profit legal services providers and area law firms, would help meet that demand. In the process, the Binger Center would provide exceptional practical training for students and offer a national model for provision of comprehensive and cohesive legal services to immigrant communities.

The Binger Center would have two principal programs: a comprehensive litigation program dedicated to strategic impact litigation and a legal education and community development program. The Binger Center would fill key gaps in existing services, strengthen coordination among existing providers, help educate the community about the legal rights of immigrants, establish new case law with national impact, and dramatically expand the level of legal services available to immigrants in the community.

I. The Binger Center Impact Litigation Program

The Binger Center would run the area's only comprehensive immigration litigation program and the only such program run by any law school. The program will be based on ongoing partnerships with Minnesota's leading non-profit immigration legal service providers--the

Immigrant Law Center of Minnesota (ILCM), Advocates for Human Rights, Mid-Minnesota Legal Assistance, and Southern Minnesota Regional Legal Services—and with leading area law firms.¹ This unique collaborative model will allow the Law School to undertake a sustained campaign of litigation to shape and improve the law affecting immigrants, while at the same time providing students with truly extraordinary educational experiences. The litigation program will engage students in all stages and forms of immigration litigation, from contested administrative deportation hearings and asylum proceedings before immigration judges, to habeas corpus petitions in U.S. district court challenging the unlawful detention of asylum seekers, to cutting-edge appellate advocacy in the U.S. courts of appeals and the U.S. Supreme Court.

The litigation program will focus on five core areas in which the Law School can have the greatest impact: (1) detained immigration court proceedings; (2) asylum proceedings; (3) U.S. District Court actions; (4) federal appellate matters; and (5) human trafficking cases. The Law School already runs a very successful Immigration and Human Rights Clinic, which handles claims for political asylum. But the Binger Center would establish four additional clinics.

The need for such a comprehensive, coordinated litigation program can be traced in significant part to the Illegal Immigration Reform and Immigrant Responsibility Act of 1996 (IIRAIRA). This law dramatically expanded federal power to deport non-citizens, made it much more difficult for persons fleeing persecution to apply for asylum in the United States, and gave the government broad powers to detain non-citizens, including asylum seekers, as they pursue their rights to remain in America. In the years since IIRAIRA, and especially since September 11, 2001, the federal government has poured billions of additional dollars into immigration enforcement and detention, but it has neglected the immigration courts, which have become increasingly overburdened and dysfunctional. Also, during the past decade, the Board of Immigration Appeals (BIA) has implemented controversial regulations that “streamline” the process by which non-citizens can appeal a deportation order, making legal representation for non-citizens more important than ever.

Together, these developments have fundamentally altered the landscape of immigration litigation. In Minnesota and nationally, the number of immigrants subject to civil detention has skyrocketed; roughly 400,000 are detained each year, with over 30,000 in detention on any given day. In Minnesota alone, from 200 to 300 are in detention on any given day, in a federal facility in Bloomington and (by contract) in county jails in Carver, Freeborn, Nobles, Ramsey, and Sherburne counties.

A. Detainee Rights Clinic

A large number of non-citizens with meritorious cases are now forced to pursue asylum or other relief while locked in federal detention, but without the ability to work, most cannot afford counsel and must rely on limited pro bono services or else defend themselves pro se. It is well documented that detained immigration litigants—especially those who appear pro se—face severe disadvantages. For the past several years, the Advocates for Human Rights, the Immigrant Law Center of Minnesota, and area law school clinics including the University of

¹ We are at different stages in our conversations with area legal services providers about the partnerships described in this memorandum. ILCM is on board. Preliminary conversations with Advocates for Human Rights and several leading law firms suggest they will also be enthusiastic, but we need to explore this further. Both Mid-Minnesota Legal Assistance and Southern Minnesota Regional Legal Services (SMRLS) are also interested in partnering with us and have agreed to be on our steering committee.

Minnesota have jointly operated a detention project at the local immigration court, but due to inadequate resources, representation is generally restricted to a basic consultation and a single appearance during the detained immigrant's preliminary hearing before an immigration judge.

The Binger Center Detainee Rights Clinic would expand significantly the scope of representation available for detainees. First, law students would represent detainees at their initial removal hearings. Second, law students would continue to represent clients at any subsequent hearings. Third, when the client's situation requires recourse to federal court through a mandamus action or immigration court through an asylum application, law students would work with the Binger Center's Federal Litigation Clinic and the Law School's Immigration and Human Rights Clinic in pursuing the appropriate litigation.

It is the second and third stages of this process that are truly transformative. While law students and pro bono attorneys around the country sometimes represent detainees at their initial hearings, detainees are typically left to fend for themselves thereafter. By providing continuous representation of detainees through the labyrinth of immigration proceedings from initial hearing to final relief, the Binger Center would provide the kind of comprehensive and effective service sorely lacking in Minnesota and throughout most of the United States. It would also allow law students to follow their client's case from beginning to end and thus provide them with the opportunity to engage with U.S. detention policy and practice in a comprehensive, rather than piecemeal, fashion. This kind of broad and deep practical lawyering experience is rare in U.S. law schools.

B. The Binger Center Federal Litigation Clinic

The need for an integrated federal litigation clinic is particularly acute. In many cases, non-citizens can only vindicate their rights by going to federal court. For example, a non-citizen who is unlawfully detained may need to file a habeas corpus petition in U.S. district court in order to win release during the pendency of his or her deportation proceedings. Or an asylum seeker who has been wrongfully denied relief by an immigration judge and the BIA may need to pursue a further petition for review before the U.S. Court of Appeals for the Eighth Circuit.

* (Wherever feasible, the Federal Litigation Clinic would choose cases that offer the possibility of setting important national precedents and shaping a more just immigration legal system. The Immigrant Law Center of Minnesota launched a pro bono litigation project in 2008 to handle high-impact pro bono federal appellate immigration cases. For example, ILCM recently brought a class action in partnership with Lindquist and Vennum to preserve Emergency Medical Assistance for non-citizens in Minnesota in need of chemotherapy, dialysis or other life-saving care. But lack of resources has led ILCM to seek a law school home for the project. The Binger Center Federal Litigation Clinic would provide that home and expand the project to include federal district court litigation.

Litigating a claim in federal court is far more expensive than an administrative appeal, and it involves far more complicated rules of procedure and jurisdiction. Cost and complexity are barriers that most non-citizens with worthy cases simply cannot surmount, particularly those who are poor, who are seeking asylum, or who are being detained by immigration authorities. These same obstacles have also prevented non-profits like the Advocates for Human Rights and the Immigrant Law Center of Minnesota from implementing comprehensive litigation programs at the federal court level.

An in-house federal litigation clinic would substantially expand the availability of representation to detained non-citizens across the full spectrum of possible proceedings. The clinic would have the capacity to set strategic litigation priorities and then lead coordinated efforts to pursue those priorities at all levels, from immigration court, to the BIA, to U.S. District Court, to the U.S. Court of Appeals for the Eighth Circuit, and even the U.S. Supreme Court. A comprehensive clinic that engages key law firm and legal aid partners in formal, ongoing collaboration will have a dramatic, lasting, and positive impact on the refugee and immigrant populations of our state and create a model other states might follow.

C. The Binger Center Human Trafficking Clinic

The Asylum, Detainee Rights, and Federal Litigation Clinics would be complemented by a new human trafficking clinic, which would raise issues cutting across all of the other clinics. Human trafficking is a contemporary form of slavery in which victims are forced into prostitution or compelled to work in sweat shops, in agriculture, or as domestic servants. It is a global problem that victimizes hundreds of thousands of persons each year throughout the world – including throughout the state of Minnesota. The FBI ranks Minnesota as one of the 13 largest centers for sex trafficking of children.

A cohesive, coordinated approach is needed to combat trafficking in Minnesota and elsewhere. The Law School is ideally positioned to augment the efforts of law enforcement authorities and non-profit legal services providers in this field. The human trafficking clinic would be coordinated by Professor Kappelhoff, who has deep experience and contacts in this area. As the former Chief of the Criminal Section of the Civil Rights Division of the U.S. Department of Justice, he was responsible for leading the federal government's efforts to investigate and prosecute human trafficking cases throughout the United States. During his fourteen year career as a federal prosecutor, he trained thousands of prosecutors, federal agents, law enforcement officers, non-governmental organizations, and international delegations on human trafficking laws and investigative and prosecutorial strategies. As a result, he has extensive contacts in the federal law enforcement community, including the United States Attorney's Office in Minnesota and the FBI, as well as among the non-governmental anti-trafficking organizations throughout the United States.

The Law School human trafficking clinic would provide law students with the opportunity to gain practical legal experience representing human trafficking victims, while learning the substantive law and policy issues related to trafficking. The bulk of clinic work would involve providing direct legal services to human trafficking victims who have been rescued or have escaped from their trafficker. The clinic would help victims obtain government services and other public benefits and would seek immigration relief for undocumented victims so they can remain legally in the United States. The clinic would also represent victims during the course of a criminal prosecution by assisting the investigators or prosecutors as they debrief the victims and seek restitution for victims.

The clinic would also serve as plaintiff's counsel for affirmative civil causes of action on behalf of victims. Although underutilized to date, the Trafficking Victims Protection Reauthorization Act of 2003 (TVPRA) allows a trafficking victim to bring a private civil cause of action against traffickers in federal district court to recover compensatory and punitive damages and attorney's fees. Civil claims may be brought even if a criminal prosecution is not pursued.

Through the clinic, students would also have an opportunity to observe and collaborate with law enforcement and other stakeholders involved in combating human trafficking. Minnesota has two active human trafficking task forces: the “Statewide Human Trafficking Task Force,” which was established by legislation in 2006, and the “Gerald D. Vick Human Trafficking Task Force.” Both task forces bring together community organizations, non-governmental organizations (NGO’s), service providers and law enforcement agencies to develop a coordinated approach to human trafficking and to identify needs and resources to address trafficking issues throughout the state. As part of their clinical experience, students would participate in task force meetings, provide substantive input, and collaborate with the law enforcement and community-based stakeholders on the task force.

Only two other law schools (the University of Michigan and Boston University) have trafficking clinics, but they are not run by former federal prosecutors or integrated into the kind of comprehensive litigation program proposed here. The Law School’s clinic would serve as a training ground for the next generation of human trafficking advocates, prosecutors, and policy makers.

* * *

All of the Binger Center clinics would be able to draw on the resources of the Law School’s 24 existing clinics as needed to meet the needs of the Center’s clients for advice on immigration-related problems in areas such as family law, consumer protection, criminal law, and tax. In this way, the Binger Center would combine depth and breadth in a genuinely transformative enterprise.

II. The Binger Center Education and Economic Development Program

Although Minnesota’s existing legal services providers already offer a range of education and training programs designed to inform immigrants of their rights and assist attorneys who may volunteer time, basic education on immigration law and related issues remains a critical need in Minnesota’s immigrant communities. For example, if the parents are undocumented, many immigrant families eschew all government services or benefits, even those that would benefit the children, because the parents fear deportation or removal.

The Law School is ideally positioned to augment what is already available in this area, both through student volunteers and by enlisting education and outreach resources available elsewhere in the University. Twenty-six years ago, a group of University of Minnesota law students created the Minnesota Justice Foundation (MJF), which now provides legal aid for thousands of under-represented Minnesotans by coordinating the efforts of volunteer law students and attorneys. Although MJF serves all four area law schools, the University of Minnesota Law School remains its home. Every year, University of Minnesota Law School students provide thousands of hours of pro bono legal services to the community. The Law School also has a student-run Asylum Law Project, in which 100 or more students every year volunteer to work over their winter and spring breaks with nonprofit organizations to represent immigrants and asylum-seekers on legal issues at U.S. points of entry. With training from the Binger Center, law students could be deployed to community centers, schools, and other locations in Minnesota’s immigrant communities to offer “know your rights” programs and intake services.

The Law School's Human Rights Center already runs a very successful human rights outreach and education program for K-12 schools that has been integrated into many school districts. We would use that program and its existing networks as a model for community outreach.

As part of those outreach efforts, law students would provide legal advice to would-be entrepreneurs in the immigrant community. Although a number of organizations already work on such issues (e.g., Legal Corps, MITA, Women Venture, Neighborhood Development Corporation), more is needed. The Law School already runs a business law clinic that advises new businesses on legal issues ranging from the creation and interpretation of contracts to business formation, management, and governance. Similar services for immigrant entrepreneurs would be provided through the Binger Center.

Finally, the Law School will identify resources elsewhere in the University community that might benefit Binger Center clients and immigrant communities. For example, Kathy Fennelly, an immigration expert at the Humphrey School of Public Policy, is interested in working with us on providing legal education to immigrant communities. She is developing an e-course on immigration basics for law enforcement professionals, funded by a small grant from the Ramsey County Sheriff's office. Her goal is to disseminate the course widely across the U.S. It might be tailored to be useful for any population of individuals working with immigrants, including police, teachers, prison volunteers, public defenders, judges, etc.

More broadly, the Law School's association with the University's Urban Research and Outreach-Engagement Center (UROC) creates opportunities to network with community-based service providers and to reach potential client populations that might lack capacity or be reluctant to seek legal services through conventional access points. UROC's team of professional outreach workers will help disseminate information about available services, build trust relationships between immigrant communities and legal service providers, and coordinate community education programs. In addition, the University-Northside Partnership, a consortium of the University, Hennepin County, the City of Minneapolis, and local organizations has been set up to facilitate partnership-building throughout the metropolitan area for initiatives such as this. Among the many other University departments engaged in ongoing collaborations are the College of Education and Human Development, the Office for Business and Community Economic Development, the Center for Health Equity, and the Community Service Learning Center. A host of nonprofits (such as the Urban League, the Family Partnership, and Project for Pride in Living) have expressed an interest in collaborating with the Law School to improve access to justice for immigrants. These organizations can provide a range of "wraparound" services that will enhance the effectiveness of the Binger Center's legal work.

III. The Binger Center Structure

The Binger Center would include five or more core faculty, two or three teaching fellows, adjunct faculty, an Executive Director, and an administrative assistant with relevant language skills. Core faculty would include Professor Steve Meili, who currently runs the Law School's Immigration and Human Rights Clinic and recently received an NSF grant to conduct a comparative study of immigration practices in multiple countries, and Professor Mark Kappelhoff, former Chief of the Criminal Section of the Department of Justice's Civil Rights Division. Additional core faculty would be hired to run the Detainee Rights Clinic, the Federal Litigation Clinic, and the Education and Economic Development program. We would also engage as Teaching Fellows several recent law school graduates seeking careers in clinical legal

education. These Teaching Fellows would be hired on two-year fellowships. In this way, we can supplement at relatively low cost the work of the Center faculty while training new clinical faculty who could help replicate the Binger Center model at other law schools.

Binger Center faculty will teach and litigate within their respective subject areas, but faculty and students will operate together as members of a single clinical firm. The Executive Director would coordinate the work of the clinics with Binger Center partners, including the ILCM, Advocates for Human Rights, MMLA, SMRLS, and various area law firms.

A steering committee consisting of Binger Center faculty and representatives from our non-profit and law firm partners will meet regularly to help set litigation priorities and to identify the best cases for representation within each component area. The steering committee will also function to coordinate and expand pro bono representation within the core areas of unmet need. We will ask each of our law firm partners on the committee to assume shared ownership of one of our litigation priorities. In exchange, the clinic, along with immigration attorneys from the Advocates for Human Rights and the Immigrant Law Center of Minnesota and other area non-profits, will provide ongoing technical assistance, mentoring, and, in appropriate situations, co-counsel support to pro bono lawyers at the participating firms. Having investigated various approaches to pro bono collaboration, we are convinced that the best model is a sustained partnership between immigration specialists and talented volunteer attorneys within dedicated law firms. This approach allows firms and mentoring organizations to maximize the impact and visibility of their pro bono efforts in the most efficient way possible. It also allows firms to accrue unique institutional expertise in the immigration field, while affording volunteer attorneys the kind of meaningful opportunities that truly enhance their litigation skills.

Since the success of the Center depends principally on hiring additional faculty and staff, we seek an endowment sufficient to support those hires and the operating needs of the Center. We would also need to revamp some space in the Law School to allow the Center to function as an integrated clinical law firm. If the proposal is of interest to the Foundation, we will prepare a detailed budget for the Foundation to consider.

COUNCIL *on* FOREIGN RELATIONS

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July 16, 2012

Ms. Penny Hunt
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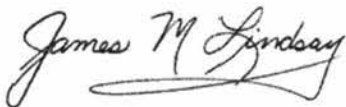
Dear Penny,

It is my pleasure to provide you and the Robina Foundation Board with this initial report from the Council on Foreign Relations (CFR) for activities undertaken from March 22, 2012 to June 30, 2012 for the Expanded Diversity Initiative.

This ambitious new project seeks to encourage young people from underrepresented groups to consider careers in foreign policy. In the three months since CFR launched the initiative, it has started a partnership with Humanity in Action, begun recruiting students for the Franklin Williams internship, developed a partnership with the International Career Advancement Program's Alumni Association, and started planning CFR's participation in college career fairs during the fall of 2012. CFR will be building on these early successes in the coming months.

CFR remains grateful to the Robina Foundation for its generous grant and continued support.

Sincerely,



James M. Lindsay
Senior Vice President, Director of Studies,
and Maurice R. Greenberg Chair
Council on Foreign Relations
1777 F Street, NW
Washington, DC 20006

Expanded Diversity Initiative in Foreign Policy

Interim Report to the Robina Foundation

Project Director: **James M. Lindsay**, *Senior Vice President, Director of Studies, and Maurice R. Greenberg Chair*

Reporting Period: March 22, 2012 to June 30, 2012

Report Due: July 19, 2012

Executive Summary

The Expanded Diversity Initiative in Foreign Policy that the Council on Foreign Relations (CFR) launched in March 2012 seeks to enrich and diversify the American foreign policy community through a concerted effort to identify talented members of underrepresented groups, expose them to career possibilities in foreign policy, actively encourage them to consider working in the field, and develop the personal networks that will help them further their careers.

In the first six months of the project, CFR has focused on: (1) launching its partnership with Humanity in Action (HIA), including holding a two-day workshop for all U.S. participants in HIA's 2012 summer programs; (2) encouraging college students from underrepresented groups to apply for the Franklin Williams internship; (3) developing a partnership with the International Career Advancement Program's Alumni Association (ICAPAA); and (4) planning CFR's participation in career fairs during Fall 2012 in New York, Washington, DC, and other select cities around the country.

In the coming months, CFR will assess the lessons of its initial collaboration with HIA, recruit its Franklin Williams interns, host the ICAPAA annual meeting, and participate in career fairs targeting underrepresented minorities.

We look forward to reporting on our continued progress over the coming months.

1. Please provide an update on your activities/work on the Robina-funded project since your last report, including how this work advances the goals and objectives set for the project.

CFR's Expanded Diversity Initiative consists of four specific elements that were intentionally conceived to be interrelated, complementary, and mutually reinforcing: (1) a partnership with HIA; (2) an expansion of CFR's current Franklin Williams internship for college students or graduate students from underrepresented groups; (3) a partnership with the International Career Advancement Association (ICAA); and (4) increased CFR participation in career fairs in New York, Washington, DC, and other select cities around the country.

Partnership with HIA

The Robina Foundation's generous support for CFR's Expanded Diversity Initiative made it possible for ten minority students to participate in HIA's summer fellowship program, which enables U.S. students to work with their European counterparts in exploring ways to address injustice relating to diverse societies. The four-week sessions, which were held in Amsterdam, Berlin, Copenhagen, Paris, and Warsaw, were highly interdisciplinary, featuring daily lectures and discussions with renowned academics, journalists, politicians, and activists, as well as site visits to government agencies, non-profit and community organizations, museums, and memorials. The 2012 fellowship ended with the Third Annual Humanity in Action International Conference in Sarajevo, which was held from June 27 to July 1, 2012 and featured remarks by former president Bill Clinton.

Appendix A provides the biographies of the ten minority fellows funded by the Expanded Diversity Initiative. They are an impressive group of young people who were selected through a highly competitive process—less than one in ten applicants was accepted—that assessed each candidate's academic standing, participation in human rights issues, and recommendations. Each application was considered by at least five different readers over a period of three weeks. Each finalist was interviewed by a member of HIA's American Planning Board, which is made up of former HIA participants and distinguished members of the academic community. The ten HIA participants funded through the CFR-HIA partnership were among the thirty-eight outstanding young leaders from thirty different universities chosen to participate in HIA's 2012 summer program.

All of the American students in the HIA summer program were invited to participate in a two-day workshop held at CFR's Washington, DC, offices. Appendix B contains the workshop agenda and the bios of the panelists. The workshop began on Monday, May 28 with a private dinner for the thirty HIA participants who attended the workshop. The students then spent Tuesday attending panels that brought together distinguished foreign policy experts to discuss issues such as the eurozone crisis, European immigration trends, and the role the European powers play in their former colonies. There was also a panel that allowed the HIA participants to ask three mid-career foreign policy professionals about their career choices. Tuesday closed with a dinner and networking reception. Peter Fischer, the economics minister at the German embassy in Washington, spoke about the eurozone crisis. More than seventy CFR members and staff attended the reception, attesting to the tremendous enthusiasm within the CFR community for the Expanded Diversity Initiative. The workshop closed on Wednesday with private tours of the Pentagon and the State Department, where the workshop participants heard from senior U.S. government officials about U.S. priorities and policies in Europe.

Franklin Williams Internship

The Expanded Diversity Initiative has made it possible for CFR to expand the Franklin Williams Internship, which seeks to give minority students in their junior year and above the exposure, knowledge, and skills needed to work in the foreign policy field. CFR plans to select one additional Franklin Williams intern for each of three semesters, beginning in fall 2012. During the reporting period, CFR began soliciting applications for the fall 2012 Franklin Williams internship. To publicize the internship opportunity, CFR posted a call for applicants on its award-winning website, CFR.org; sent the description of the internship opportunity to historically black universities and colleges, as well as to colleges with a large Hispanic population, and posted the internship opportunity on James M. Lindsay's blog, *The Water's Edge*.

International Career Advancement Program's Alumni Association

The Expanded Diversity Initiative has made it possible for CFR to partner with the International Career Advancement Program's Alumni Association (ICAPAA) and to begin planning a joint conference for April 2013. ICAPAA is the alumni association of the International Career Advancement Program, which seeks to bring greater diversity to staffing of senior management and policy-making positions in international public service and the global private sector. As such, ICAPAA constitutes the most diverse and robust network of people of underrepresented groups working across every sector in international affairs. Its participants are identified as "rising stars" early on in their careers, and many of them now hold senior foreign policy positions.

The April 2013 conference, which will be held at CFR's Washington, DC, office, seeks to create greater networking opportunities for the participants and to give them (and members of their networks) more information about career opportunities in foreign policy. To make the conference as successful as possible, CFR enlisted the support of the Global Access Pipeline (GAP). Its mission mirrors the goals of CFR's diversity initiative: to increase the representation and preparedness of minority groups in the international arena. Working with GAP, CFR has established a planning committee with representation from both organizations, and together they have begun working on an agenda, proposed panelists and speakers, and potential participants for the conference.

Career Fairs

CFR's Human Resources (HR) department has worked during the reporting period to plan its participation in career fairs that target underrepresented students. Research associates from the David Rockefeller Studies Program who are talented recent graduates will be invited to participate along with recruiters from HR. At the career fairs, CFR will actively recruit for candidates for the Franklin Williams internship program as well as the CFR-HIA partnership.

CFR has already identified two career fairs that it will participate in over the next few months:

- *The AUCC Career Fair, The Atlanta University Consortium Center.*
This career fair brings together students from Clark Atlanta University, Morehouse College, and Spelman College, all historically black universities. The career fair will be held on September 21, 2012 in Atlanta, Georgia.
- *The University of Texas at Austin, Liberal Arts Career and Internship Fair.*

This career fair targets students who major in subjects such as Political Science, History, and Economics. It typically attracts a strong Hispanic student population. The career fair will be on October 17, 2012 in Austin, Texas.

2. Describe any unanticipated results or lessons learned during this period and any changes you have made or propose to make in your plans.

The Expanded Diversity Initiative has not produced any unanticipated results. It is too early to assess the initiative's impact because by its very nature and design its consequences will be evident only over the course of many years.

The first phase of the initiative produced two main lessons. First, CFR staff and members are greatly interested in supporting and advancing the initiative's goals. The quality and seniority of the foreign policy experts who participated (without compensation) as panelists and attended the reception were impressive. Second, CFR's decision to build the workshop as much around exposing the HIA participants to different foreign policy careers and career paths as around exposing them to substantive issues was the right one. The HIA participants came to the workshop generally well informed about world affairs but knowing very little about the tremendous diversity in foreign policy careers or the possible avenues for pursuing them. Having a panel devoted specifically to career choices, with panelists who described their own career trajectories, greatly deepened the understanding that the HIA participants had about the potential for foreign policy careers.

Another noteworthy highlight is that CFR encouraged one of its minority employees, Roma Kaundal to apply for an International Career Advancement Program (ICAP) fellowship in 2013. CFR is pleased to report that Ms. Kaundal was accepted into the 2012 ICAP program. Ms. Kaundal will be part of ICAPAA upon her completion of the program in winter 2012 and will work on the planning committee for the CFR-ICAPAA conference. She will be instrumental in working to connect the work of ICAPAA and CFR, both in terms of helping to plan the conference and in working to facilitate collaboration among participants after the conference.

CFR is not proposing to make any changes in the plan of action contained in the proposal that the Robina Foundation approved.

3. Highlight any other issues or matters you think the Robina Board should be aware of, including changes in allocation of funds provided by Robina.

The Expanded Diversity Initiative has proceeded as proposed. No significant changes were made in allocations of funds as compared with the approved project budget.

Appendix A: Biographies of Robina-Supported HIA participants

Emmanuella Asabor, a rising senior at Harvard University, was born in London, lived in Lagos, Nigeria for a few years, and now calls New York City home. A degree candidate in History and Science and a Mellon Mays Undergraduate Fellow, her academic interests span global health and medicine, international diplomacy, and economic development. Emmanuella has spent her extended breaks working for the Global Fund to Fight AIDS, Tuberculosis and Malaria in Geneva, Switzerland (2011), serving as the financial sustainability intern at the Nyakibale Childhood Malnutrition Clinic in Rukungiri, Uganda (2011), conducting research on the molecular genetics of the malaria parasite at the Harvard School of Public Health (2010), and teaching high school chemistry and biology as an undergraduate Teach For America intern (2012). Outside of work and the classroom, she is actively involved with youth and education initiatives at the Phillips Brooks House Association, maternal health advocacy at Health Leads, and the social action committee of the Association of Black Harvard Women. Emmanuella recently joined the US team of Sweetly Designs, a fair trade jewelry social enterprise.

Elegance Bratton spent five years as United States Marine Corps Combat Production Specialist. During his service, Bratton worked as a photographer and filmmaker in Korea and Thailand. While there, he was astounded by the meaning of poverty in the third world. Of particular interest was the space that Kitoi (trans-women) were afforded in all strata of Thai society. While in garrison, Mr. Bratton also worked as a freelance music journalist and event photographer. Mr. Bratton was honorably discharged in November 2010 and immediately began studying at Columbia University's School of General Studies. Currently a sophomore double major in African American Studies and Anthropology, Mr Bratton has maintained his interest in issues surrounding gender, race, and poverty. Currently, Mr. Bratton is in production of his first film, "Pier Kids: The Documentary Film", which tells the story of gay and transgendered youth of color who navigate Christopher Street and its piers. Principal photography for the film, and his undergraduate education, are set to be completed by January 2014.

Raymundo (Alex) Cárdenas graduated from Cornell University in 2010 with a degree in Political Science. His academic focus was immigration policy and history, and he also studied abroad for a year in Berlin (2009). Alex has a special interest in immigrant detention centers and has worked with different organizations on topics related to ethnic media and politics. After his graduation from Cornell, Alex spent a year in Washington, D.C. working at White & Case LLP, where he was a Legal Assistant in the International Arbitration practice group. Alex is currently finishing a public affairs fellowship in San Francisco, CA with the Coro Fellows Program.

Alissa Escarce graduated from Princeton in 2011, where she majored in History and minored in Latin American Studies. Through her coursework and repeated trips to Mexico, she developed a strong interest in immigration, minority rights, education, and social and economic justice in the United States and Latin America. Midway through college, she took a leave of absence to spend six months in Mexico, interning first with a Mayan women's theater collective and community education center, and then with Centro de los Derechos del Migrante (CDM), a transnational migrant workers' rights law center. She returned to Mexico to conduct archival research for her senior thesis, which examined the origins of the Mexican government's development programs in indigenous communities. Following graduation, Alissa resumed her work with CDM as Princeton University's Labouisse Fellow, supporting popular education campaigns and conducting research

on the effects of the U.S. guest worker program out of CDM's new office in the indigenous Mixtec region. She plans to enter the Teacher Education Program at UCLA in the fall of 2012.

Andrea Cristina (Cristi) Ruiz recently graduated from the George Washington University with a dual degree in Economics and International Affairs, with a concentration in International Economic Development and Latin America. Her inspiration came from her experience as founder of Global Youth Initiative, an organization dedicated to increasing the quality of education through literacy and youth-to-youth engagement. Global Youth Initiative has started 12 libraries in Costa Rica, Ecuador, and Panama. Her organization has received funding from Ashoka's Youth Venture and Nestle Very Best in Youth, and it was featured at the Clinton Global Initiative University Conference. She was further motivated by the Benjamin Franklin Transatlantic Fellowship Initiative, a fellowship that brings together students from the US, Europe, and Central Asia to discuss issues facing their countries and to foster youth civic diplomacy and activism. Andrea Ruiz also participated in programs with People to People International, including the Global Youth Forum and a study trip to Japan. Andrea has since spent her spare time with her organization as well as interning at several institutions that work in International Development, such as the Ashoka, The Organization of American States, the Institute for International Economic Policy, and the Ecuadorean government. Andrea has researched political movements and their effects on the indigenous population, women, and other ethnic minorities. Her thesis focused on income wage differences of indigenous populations in Ecuador and was featured in the George Washington Universities Research day Symposium. Andrea likes to run half marathons and is very close to earning her black belt in Shoto-Kan Karate through the Japanese Karate Association.

Allen Sanchez graduated from Yale University with a degree in American Studies and a concentration in "The International United States." Throughout college, Allen directed a mentoring program for inner city youth, coached a youth water polo team, and started a campaign to reform investment ethics at Yale. During his summers, he worked as a labor union organizer in the hotel and hospitality industry in Los Angeles, CA, and as a community organizer in the warehousing and logistics industry in the Inland Empire in Southern California. After university, Allen took his experiences abroad, where he currently works as a secondary school social studies and history teacher at an international school in Seoul, South Korea. He is currently a volleyball coach, student government adviser, and an adviser to several on-campus North Korean human rights clubs. He is also active with Seoul-based North Korean human rights organizations and is currently working on a plan to streamline the process for foreigners living in South Korea to get more involved with local human rights issues.

Kashay N. Sanders graduated from Dartmouth College with a major in Women's & Gender Studies and a double minor in Anthropology and Japanese. She spent her college career heavily invested in issues of youth empowerment, diversity, and gender equality. During this time, she chaired committees such as Diversity & Community Affairs and served as an intern for Dartmouth's Center for Women & Gender. Off campus, Kashay held internships at the New York Women's Foundation in New York, NY (2009), the Cornerstone Foundation in San Ignacio, Belize (2009), and Feminist Majority Foundation in Washington DC (2010). Currently, Kashay works for the IDEX Fellowship in Social Enterprise in Hyderabad, India. This year, the program placed fellows in low-income schools to help improve the quality of education. As an IDEX fellow, Kashay put her passions for youth, gender empowerment, and education to work by focusing on three core areas: curriculum development and classroom innovation, teacher support, and career

knowledge/forward-thinking. In August, Kashay will return to India to work with Voice4Girls, a girls' empowerment NGO. Their flagship program is a four-week life skills and English-immersion summer camp for girls who live in low-income, slum communities.

Brandon Tensley graduated from Furman University in 2012 with degrees in German Studies and Political Science. While a student at Furman, Brandon had the opportunity to travel to Germany and Sweden in 2009 and to Austria, the Czech Republic, Germany, and Poland in 2011. He was active in a spectrum of activities on campus, including serving as the president of the Model United Nations, a mentor with the Legacies Peer Mentoring Program for Multicultural Students, and founding and directing Men of Distinction, a service program for at-risk middle-school males in the local community. Brandon spent his summers doing constitutional law research at his university (2010) and serving as a legal intern at Kilpatrick Townsend & Stockton LLP in Atlanta, GA (2011). Brandon has been selected as a Fulbright Scholar and will spend the 2012-2013 academic year doing research and serving as an English teaching assistant in Germany. Afterward, he hopes to pursue a career in comparative politics and international relations.

Calvin Walds is a double major in Political Science and Ethnic Studies with a minor in History at Albion College, in Albion, MI. Born and raised in Detroit, MI, Calvin has most recently completed his senior thesis using the nonfiction essays of James Baldwin and Ralph Ellison to explore how stereotypes of African-Americans in 20th American literature masked the "Negro's humanity." While a student at Albion, Calvin has held leadership positions within the Black Student Alliance and Ethnic Studies Scholars. He has served as a mentor and tutor to minority and non-traditional students since his sophomore year, and recently co-founded a book club for a local high school. He presented research concerning the intersection between race and politics at the 2009-2011 GLCA undergraduate conferences. He has interned with Congressman John Conyers Jr. (2011) and with the National Black Justice Coalition while he was a "New Leader" with the Center for Progressive Leadership in Washington, D.C. (2010). He studied the sociopolitical dimensions of South Africa's transition to democracy in Durban and completed an independent research project on the racial diversification of South Africa's media industry (2011). As part of this project, he interned and wrote for Durban-based Genuine Magazine.

Hana Worku is an alumna of the University of Minnesota-Twin Cities. She graduated in 2011 with a self-designed degree entitled 'Race and Activism.' Throughout her university career, Hana has sought to integrate community work with her academic studies—bridging theory and practice. This work has now carried her into the field of community organizing and her current position as a Research and Organizing Associate at the Organizing Apprenticeship Project- a statewide racial justice organization. Hana also started a grassroots group in Minneapolis called the Youth Education Justice Initiative, which uses popular education as a tool for engaging young people and neighbors around key social justice issues.

Appendix B: CFR-HIA Workshop Agenda and Panelist Biographies

AGENDA

Europe's Challenges and Opportunities

Tuesday, May 29, 2012

Council on Foreign Relations, Washington, DC

8:30 – 9:00 a.m. Breakfast Reception

9:00 – 9:05 a.m. Welcoming Remarks

James M. Lindsay, *Senior Vice President, Director of Studies, and Maurice R. Greenberg Chair,
Council on Foreign Relations*

9:05 – 10:00 a.m. Session One: European Security and Politics

Spencer Boyer, *Visiting Senior Fellow, Center for Transatlantic Relations, Paul H. Nitze School of
Advanced International Studies*

Heather Conley, *Senior Fellow and Director, Europe Program, Center for Strategic and International
Studies*

Presider: **Frank Klotz**, *Senior Fellow for Strategic Studies and Arms Control, Council on Foreign
Relations*

10:00 – 10:15 a.m. Break

10:15 – 11:15 a.m. Session Two: The Economic Crisis and Europe

Sebastian Mallaby, *Director of the Maurice R. Greenberg Center for Geoeconomic Studies and Paul A.
Volcker Senior Fellow for International Economics, Council on Foreign Relations*

Presider: **James M. Lindsay**, *Senior Vice President, Director of Studies, and Maurice R. Greenberg
Chair, Council on Foreign Relations*

11:15 a.m. – 12:20 p.m. Session Three: The Peoples of Europe

Nida Gelazis, *Senior Associate, European Studies, Woodrow Wilson International Center for Scholars*
Clarence Lusane, *Professor and Program Director, Comparative and Regional Studies Program, School
of International Service, American University*

Harris Mylonas, *Assistant Professor of Political Science and International Affairs, George Washington
University*

Presider: **Victoria Taylor**, *International Affairs Fellow, Council on Foreign Relations*

12:20 – 1:00 p.m. Lunch Buffet

1:00 – 2:00 p.m. Session Four: Keynote Address

Kristen Silverberg, *President, United Against a Nuclear Iran*

Presider: **James M. Lindsay**, *Senior Vice President, Director of Studies, and Maurice R. Greenberg
Chair, Council on Foreign Relations*

2:00 – 2:15 p.m. Break

2:15 – 3:15 p.m. Session Five: *The European Orbit*

Priscilla Clapp, *Senior Advisor, Asia Society*

Jendayi Frazer, *Adjunct Senior Fellow for Africa Studies, Council on Foreign Relations*

Presider: **Hans Binnendijk**, *Vice President for Research, National Defense University*

3:15 – 3:30 p.m. Break

3:30 – 5:00 p.m. Session Six: *Foreign Policy Careers*

Kimberly McClure, *Foreign Service Officer, U.S. Department of State*

Mark Vlastic, *Senior Fellow and Adjunct Professor of Law, Georgetown University*

Carmencita Whonder, *Policy Director, Brownstein Hyatt Farber Schreck, LLP*

Presider: **Kate Collins**, *Assistant Director, Studies, Council on Foreign Relations*

5:00 – 6:00 p.m. Break

6:00 – 7:30 p.m. Dinner and Networking Reception with Informal Remarks

Peter Fischer, *Economic Minister, German Embassy in Washington, DC*

Presider: **James M. Lindsay**, *Senior Vice President, Director of Studies, and Maurice R. Greenberg
Chair, Council on Foreign Relations*

Wednesday, May 30, 2012

9:00 – 10:30 a.m. Briefings with the staff of the secretary of the Air Force and tour of the Pentagon

11:30 a.m. – 12:30 p.m. Briefings with the Bureau of European and Eurasian Affairs, Department of State

Speaker and Presider Biographies

Hans Binnendijk

Hans Binnendijk is currently the vice president for research of the National Defense University (NDU) and the Theodore Roosevelt chair in national security policy. He is also director of the Institute for National Strategic Studies (INSS), and the founding director of the Center for Technology and National Security Policy at NDU.

He previously served on the National Security Council as special assistant to the president and senior director for defense policy and arms control (1999-2001). From 1994 to 1999, Dr. Binnendijk was director of the Institute for National Strategic Studies at the National Defense University. Prior to that, he was principal deputy director and acting director of the State Department's policy planning staff (1993-1994). He also served as deputy staff director and legislative director of the Senate Foreign Relations Committee (1980-1985). He has received numerous awards for his government service, including two Distinguished Public Service Awards and a Superior Service Award.

In academia, Dr. Binnendijk was director of the Institute for the Study of Diplomacy at Georgetown University, where he was also the Marshall B. Coyne research professor at the Edmund A. Walsh School of Foreign Service (1991-1993). He was deputy director and director of studies at London's International Institute for Strategic Studies and editor of *Survival* from 1988-1991. He is author or co-author of more than one hundred articles, editorials and reports. His most recent book is *Seeing the Elephant: The U.S. Role in Global Security* (Potomac Books: 2006).

Dr. Binnendijk serves on the board of overseers of the Fletcher School of Law and Diplomacy, on the Studies Committee of the Council on Foreign Relations, and as vice chairman of the board of Humanity in Action. He previously served on the U.S. committee of the International Institute for Strategic Studies and the CSIS International Research Council. He has received the Cross of the Order of Merit from the Federal Republic of Germany.

Dr. Binnendijk is a 1968 graduate of the University of Pennsylvania. He received his MALD and his PhD in international relations from the Fletcher School of Law and Diplomacy at Tufts University.

Spencer P. Boyer

Spencer P. Boyer is a visiting senior fellow at the Center for Transatlantic Relations at the Paul H. Nitze School of Advanced International Studies (SAIS) at Johns Hopkins University. From August 2009 to December 2011, he served in the Obama administration as a deputy assistant secretary of state in the Bureau of European and Eurasian Affairs. Mr. Boyer's work in the bureau focused on western Europe, public diplomacy, and public affairs. Prior to joining the State Department, Mr. Boyer was the director of international law and diplomacy in the national security and international policy department of the Center for American Progress, a Washington-based think tank.

Mr. Boyer is a graduate of Wesleyan University and received his JD from New York University School of Law, where he specialized in public international law and the work of international organizations. While at NYU, he also obtained a master's degree in French studies, with a concentration in French politics, history, and economy. Mr. Boyer began his professional career as an associate with the international law firm of Jones, Day, Reavis & Pogue in Washington, DC. Subsequently, he worked in The Hague as a law clerk to the president of the international criminal tribunal for the former Yugoslavia, in Zurich as a staff attorney at the Claims Resolution Tribunal for Dormant Accounts in Switzerland, and in Paris as counsel at the International Court of Arbitration. He has also served as the executive director and war powers initiative director at the Constitution Project, based at Georgetown University's Public Policy Institute.

Mr. Boyer has been a guest analyst with numerous international, national, and local news outlets, including CNN, BBC, MSNBC, FOX, ABC, and Voice of America, and is widely published on foreign affairs matters. He is co-editor of *Power and Superpower: Global Leadership and Exceptionalism in the 21st Century* (The Century Foundation Press, 2007). Among other professional distinctions, Mr. Boyer served on the Independent Task Force on U.S. Nuclear Weapons Policy at the Council on Foreign Relations and was a Wasserstein public interest fellow at Harvard Law School.

Mr. Boyer is a member of the bars of the District of Columbia, New York, and New Jersey, and a member of the Council on Foreign Relations.

Priscilla A. Clapp

Priscilla A. Clapp is a retired minister-counselor in the U.S. Foreign Service. She currently engages in foreign policy analysis and programs with several institutions and is a senior advisor to the Asia Society.

During her thirty-year career with the U.S. government, Ms. Clapp served as chief of mission and permanent charge d'affaires at the U.S. embassy in Burma (1999-2002), deputy chief of mission in the U.S. embassy in South Africa (1993-96), principal deputy assistant secretary of state for refugee programs (1989-1993), deputy political counselor in the U.S. embassy in Moscow (1986-88), and chief of political-military affairs in the U.S. embassy in Japan (1981-85). She also worked on the State Department's policy planning staff, in its East Asian, Political Military, and International Organizations bureaus, and with the U.S. Arms Control and Disarmament Agency. She speaks Russian, Japanese, French, and some Burmese.

Prior to government service, Ms. Clapp spent ten years in foreign policy and arms control research, with the MIT Center for International Studies and as a research associate at the Brookings Institution. She is a member of the Council on Foreign Relations and the International Institute for Strategic Studies.

Ms. Clapp's books include: with Morton Halperin, *Bureaucratic Politics and Foreign Policy* (Brookings, 2006), with I.M. Destler et al., *Managing an Alliance: the Politics of U.S.-Japanese Relations* (Brookings, 1976), and with Morton Halperin, *U.S.-Japanese Relations in the 1970's* (Harvard, 1974). She is the author of numerous publications on Burma and U.S. Burma policy with the U.S. Institute of Peace, the Brookings Institution, the East-West Center, Australia

National University, the Asia Society, and others. Her most recent publications include: "Prospects for Rapprochement Between the United States and Myanmar," in *Contemporary Southeast Asia*, December 2010, and, with Suzanne DiMaggio, "Advancing Myanmar's Transition: A Way Forward for U.S. Policy," Asia Society Policy Brief, February 13, 2012.

Heather A. Conley

Heather A. Conley is senior fellow and director of the Europe program at the Center for Strategic and International Studies (CSIS). Prior to joining CSIS, Ms. Conley was a senior adviser to the Center for European Policy Analysis.

From 2005 to 2008, Ms. Conley was the executive director of the office of the chairman of the board at the American National Red Cross. From 2001 to 2005, she served as deputy assistant secretary of state in the Bureau for European and Eurasian Affairs with responsibilities for U.S. bilateral relations with the fifteen countries of northern and central Europe. From 1994 to 2001, she was a senior associate with an international consulting firm led by former U.S. deputy secretary of state Richard L. Armitage.

Ms. Conley began her career in the Bureau of Political-Military Affairs at the U.S. Department of State where she served as the State Department liaison for the U.S. Department of Defense's Global Humanitarian Assistance Program (HAP). Following this assignment, she was selected to serve as special assistant to the coordinator of U.S. assistance to the newly independent states of the former Soviet Union.

Ms. Conley received her BA in international studies from West Virginia Wesleyan College and her MA in international relations from the Johns Hopkins University School of Advanced International Studies (SAIS).

Jendayi Frazer

Jendayi Frazer is adjunct senior fellow for Africa studies at the Council on Foreign Relations (CFR). Ambassador Frazer is also distinguished public service professor at Carnegie Mellon University, with joint appointments in the department of social and decision sciences and in the H. John Heinz College's School of Public Policy and Management. Her current research focuses on strengthening regional security cooperation and economic and political integration in Africa. She is the director of Carnegie Mellon's Center for International Policy and Innovation (CIPI), which focuses on utilizing technology and applying innovative solutions to core issues of development and governance in Africa. The author of and contributor to a number of articles, journals, and books, she is the co-editor of *Preventing Electoral Violence in Africa* (2011), which grows out of her work with CIPI.

Dr. Frazer served as the U.S. assistant secretary of state for African affairs from 2005 to 2009. She was special assistant to the president and senior director for African affairs at the National Security Council from 2001 until her swearing-in as the first woman U.S. ambassador to South Africa in 2004. She previously served in government from 1998 to 1999 as a CFR International Affairs Fellow, first at the Pentagon as a political-military planner with the Joint Chiefs of Staff,

working on West Africa during Nigeria's transition to civilian rule, and then as director for African affairs at the National Security Council, working on central and east Africa. Ambassador Frazer was also an assistant professor of public policy at the Harvard Kennedy School and assistant professor at the University of Denver's Graduate School of International Studies.

She has been awarded the Distinguished Service Medal, the highest award bestowed by the secretary of state in recognition of her public service. In 2010, she was given the distinction of Dame Grand Commander in the Humane Order of African Redemption by Liberian president Ellen Johnson Sirleaf. She was also honored with the 2008 Distinguished Leadership Award from the African Presidential Archives & Research Center at Boston University.

Ambassador Frazer received her BA in political science and African and Afro-American studies, MA in international policy studies and international development education, and PhD in political science, all from Stanford University.

Nida Gelazis

Nida Gelazis is senior associate of the European studies program at the Woodrow Wilson International Center for Scholars, in Washington, DC. At the Wilson Center since 2003, she has worked to create a setting for dialogue between policymakers, academics, and other public actors on some of the most pressing policy questions in Europe today, with particular emphasis on the legal, social, and economic consequences of European Union (EU) expansion; the aftermath and legacies of the Balkan conflicts; European energy cooperation, and the emerging questions of minority rights and migration in a changing European context. She directed the work of the working group on the western Balkans, which aimed at building cooperative relationships between European and American policy professionals on the European integration of the western Balkans.

Previously, she was managing editor of the *East European Constitutional Review* at the University of Chicago Law School and at the Constitutional and Legislative Policy Institute in Budapest, as well as a research associate for the east European program at the Robert Schuman Centre for Advanced Studies, at the European University Institute in Florence.

Nida holds a BA from the University of Chicago and an LLM degree from the European University Institute, where her research focused on the impact of EU conditionality on human rights and minority rights in accession states. She has published a number of articles and book chapters on democratic state-building, constitutionalism, judicial reform, EU enlargement, international migration and minority rights, and co-edited the book *Cities after the Fall of Communism: Reshaping Cultural Landscapes and European Identity*.

Frank Klotz

Frank Klotz is senior fellow for strategic studies and arms control at the Council on Foreign Relations (CFR). Lieutenant General Klotz (USAF, Ret.) is the former commander of Air Force Global Strike Command. In that position, he established and then led a brand new 23,000-person

organization that merged responsibility for all U.S. nuclear-capable bombers and land-based missiles under a single chain-of-command.

Earlier in his military career, General Klotz served as the defense attaché at U.S. Embassy Moscow during a particularly eventful period in U.S.-Russian relations. As the senior American military officer based in Russia, he advised the ambassador and senior U.S. officials on a wide range of bilateral defense issues, including financial support for securing weapons of mass destruction and cooperation in Arctic search and rescue.

Later, as the director for nuclear policy and arms control on the National Security Council staff, he represented the White House in the talks that led to the signing of the 2002 Moscow Treaty to reduce strategic nuclear weapons. He subsequently coordinated the executive branch's negotiations with the Senate Foreign Relations Committee to ratify the Moscow Treaty, resulting in a 95-0 vote in favor by the full Senate.

From 2005 to 2007, General Klotz was the vice commander of Air Force Space Command, a 39,400-person organization with responsibility for developing, acquiring, and operating a global network of launch, satellite control, and missile warning facilities. He was awarded the prestigious General Thomas D. White trophy by the Air Force Association for the most outstanding contribution to progress in aerospace in 2006.

General Klotz has spoken extensively on defense and space topics to audiences throughout the United States, as well as abroad. He is the author of *Space, Commerce and National Security* (Council on Foreign Relations Press, 1998) and *America on the Ice: Antarctic Policy Issues* (National Defense University Press, 1990).

A distinguished graduate of the U.S. Air Force Academy, General Klotz attended Oxford University as a Rhodes Scholar, where he earned an MPhil in international relations and a DPhil in politics. He is also a graduate of the National War College in Washington, DC.

James M. Lindsay

James M. Lindsay is senior vice president, director of studies, and Maurice R. Greenberg chair at the Council on Foreign Relations (CFR) where he oversees the work of the more than six dozen fellows in the David Rockefeller Studies Program. He is a leading authority on the American foreign policymaking process and the domestic politics of American foreign policy.

Dr. Lindsay previously served as vice president, director of studies, and Maurice R. Greenberg chair at CFR from 2003-2006. Before returning to CFR in 2009, he was the inaugural director of the Robert S. Strauss Center for International Security and Law at The University of Texas at Austin, where he held the Tom Slick chair for international affairs at the Lyndon B. Johnson School of Public Affairs. Before joining CFR the first time, he served as deputy director and senior fellow in the foreign policy studies program at the Brookings Institution. From 1987 until 1999, he was a professor of political science at the University of Iowa. In 1996-1997 he was director for multilateral issues and global affairs on the staff of the National Security Council.

Dr. Lindsay has written widely on various aspects of American foreign policy and international relations. His book with Ivo H. Daalder, *America Unbound: The Bush Revolution in Foreign Policy* (Brookings Institution Press, 2003), was awarded the 2003 Lionel Gelber Prize, named a finalist for the Arthur S. Ross Book Award, and selected as a top book of 2003 by *The Economist*. His other books include *Agenda for the Nation* (with Henry J. Aaron and Pietro S. Nivola, Brookings Institution Press, 2003), which was named an "Outstanding Academic Book of 2004" by Choice Magazine; and *Congress and the Politics of U.S. Foreign Policy* (Johns Hopkins University Press, 1994). He has also contributed articles to the op-ed pages of many major newspapers, including the *New York Times*, *Washington Post*, and *Los Angeles Times*. He writes the blog, "The Water's Edge," which discusses the politics of American foreign policy and the domestic underpinnings of American global power.

Dr. Lindsay holds an AB in economics and political science from the University of Michigan and an MA, MPhil, and PhD from Yale University.

Dr. Clarence Lusane

Dr. Clarence Lusane is a full professor of political science and international relations, and the program director of the comparative and regional studies program in the School of International Service at American University. He is also an author, activist, scholar, lecturer, and journalist. For more than thirty years, he has written about and been active in national and international human rights, anti-racism politics, U.S. foreign policy, and social issues such as education, crime, and drug policy.

Dr. Lusane spent two and one-half years living in London conducting research on racism and human rights in Europe, and working with European governments, institutions such as the European Union, the Council of Europe, and many non-governmental organizations. He is the former co-chair of the civil society committee for the U.S.-Brazil Joint Action Plan to Eliminate Racial Discrimination, a bilateral agreement involving governments and civil society. He has been an official election observer most recently in the Democratic Republic of the Congo.

Dr. Lusane has lectured and presented scholarly papers at a wide range of colleges and universities and has also lectured on U.S. race relations in over fifty nations. He taught previously at Columbia University.

Dr. Lusane's most recent book is *The Black History of the White House*. The book has been nominated for numerous awards and he has given two presentations on the book at the White House. Among his other books are *Colin Powell and Condoleezza Rice: Foreign Policy, Race, and the New American Century* (2006), and *Hitler's Black Victims: The Experiences of Afro-Germans, Africans, Afro-Europeans and African Americans During the Nazi Era* (2002)

Dr. Lusane has been a political consultant to the Congressional Black Caucus Foundation and to a number of elected officials and nonprofit organizations. He currently provides briefings on U.S. federalism to State Department international visitors and is also a senior policy advisor to TransAfrica.

Dr. Lusane is currently conducting research on the intersection of jazz and international relations; post-Castro race relations in Cuba; and the impact of President Barack Obama's election on the global discourse on race.

Sebastian Mallaby

Sebastian Mallaby is director of the Maurice R. Greenberg Center for Geoeconomic Studies (CGS) and Paul A. Volcker senior fellow for international economics at the Council on Foreign Relations (CFR). An experienced journalist and public speaker, Mr. Mallaby is also a contributing editor for the *Financial Times* and served previously as a columnist and editorial board member at the *Washington Post*. His interests cover a wide variety of domestic and international issues, including financial markets, the implications of the rise of newly emerging powers, and the intersection of economics and international relations. In addition to his monthly column for the *Financial Times*, his recent writing has been published in the *New York Times*, the *Wall Street Journal*, and the *Atlantic Monthly*.

Mr. Mallaby's latest book *More Money Than God: Hedge Funds and the Making of a New Elite* was released in June 2010. *New York Times* columnist David Brooks has called it "superb." *Washington Post* columnist Steve Pearlstein has called it "the definitive history of the hedge fund history, a compelling narrative full of larger-than-life characters and dramatic tales of their financial triumphs and reversals." *More Money Than God* was the recipient of the 2011 Loeb Prize, a finalist in the *Financial Times*/Goldman Sachs prize, and a *New York Times* bestseller. Mr. Mallaby's previous books are *The World's Banker* (2004), a portrait of the World Bank under James Wolfensohn, which was named as an "Editor's Choice" by the *New York Times*; and *After Apartheid* (1992), which was named by the *New York Times* as a "Notable Book." An essay in the *Financial Times* said of *The World's Banker*, "Mallaby's book may well be the most hilarious depiction of a big organization and its controversial boss since Michael Lewis's, *Liar's Poker*."

Before joining the *Post* in 1999, Mr. Mallaby spent thirteen years with the *Economist*. While at the *Economist*, he worked in London, where he wrote about foreign policy and international finance; in Africa, where he covered Nelson Mandela's release and the collapse of apartheid; and in Japan, where he covered the breakdown of the country's political and economic consensus. Between 1997 and 1999, Mr. Mallaby was the *Economist*'s Washington bureau chief and wrote the magazine's weekly Lexington column on American politics and foreign policy. His *Foreign Affairs* essay on failed states in 2002 was cited by commentators in the *New York Times*, *Financial Times*, and *Time Magazine*. He is a two-time Pulitzer Prize finalist: once for editorials on Darfur and once for a series on economic inequality.

Mr. Mallaby was educated at Oxford. He graduated in 1986 with a First Class degree in modern history.

Kimberly McClure

Kimberly McClure is a nine-year foreign service officer with the U.S. Department of State and currently works on the "100,000 Strong" initiative, an Obama administration initiative launched in 2010 that seeks to increase significantly the number of American students studying in China.

While traveling frequently to China in her current role, Ms. McClure has spent most of her career working on South Asia policy in India, Afghanistan, Pakistan, and Washington. Following two-year assignments to Mumbai, India, and Kabul, Afghanistan, she worked as special assistant to Ambassador Richard Holbrooke, the U.S. special representative for Afghanistan and Pakistan; completed an International Affairs Fellowship with the Council on Foreign Relations; and completed assignments in the U.S. State Department's Bureau of Human Resources and Operations Center. As an international affairs fellow, Ms. McClure worked with Global Kids to launch a program for underserved youth in Washington, DC that introduces them to global issues, international careers, and study abroad. She has also served as an observer on the Council on Foreign Relations' Education Task Force. She also serves as co-chair of the Global Access Pipeline, a consortium of over thirty-five organizations working to increase diversity in the field of international affairs.

Ms. McClure holds a BA in international relations from Stanford University and a master's degree in public policy from Harvard University's Kennedy School of Government. She has lived in Brazil, Egypt, India, and Afghanistan, and speaks Portuguese, Spanish, and Dari.

Harris Mylonas

Harris Mylonas is a political scientist interested in the processes of nation- and state-building, immigrant and refugee incorporation policies, the politicization of cultural differences, and political development. Dr. Mylonas joined the George Washington University faculty in fall 2009 as an assistant professor of political science and international affairs. He teaches courses on nationalism, European integration, nation-building in the Balkans, and qualitative research methods. For the 2008-2009 and 2011-2012 academic years, he was an academy scholar at the Harvard Academy for International and Area Studies.

Dr. Mylonas's forthcoming book, *The Politics of Nation-Building: Making Co-Nationals, Refugees, and Minorities* (Cambridge University Press), identifies the conditions in which the ruling political elites of a state target non-core groups with assimilationist policies instead of granting them minority rights or excluding them from the state. He is currently working on a second book project—tentatively entitled *The Politics of Ethnic Return Migration*—which focuses on state policies developed either to attract or to incorporate people returning to their country of origin, allegiance, or citizenship.

Dr. Mylonas's recent publications include an article on third-party nation-building in occupied territories in *Ethnopolitics* (with Keith Darden), an article on Greece in the *European Journal of Political Research*, a chapter on nation-building in western Macedonia in the edited volume *Rethinking Violence: State and Non-State Actors in Conflict* (BCSIA International Security Series, MIT Press), an article on electoral competition in sub-Saharan Africa elections in *Comparative Political Studies* (with Nasos Roussias), and a chapter on Greek repatriation policies in *Immigrants and Minorities: Discourse and Policies* (Vivliorama/KEMO, with Elpida Vogli). He has also written opinion pieces on international affairs which have appeared on CNN.com and in the *Los Angeles Times*, the *Guardian*, *Foreign Policy*, and *Newsweek Japan*, among others.

Dr. Mylonas received his PhD from Yale University in 2008.

Kristen Silverberg

Kristen Silverberg is the former U.S. ambassador to the European Union. From 2005 to 2008, she served as assistant secretary of state for international organization affairs. She previously held a number of positions in the White House, including deputy assistant to the president and advisor to the chief of staff. In 2003, she served as a senior advisor to Ambassador L. Paul Bremer in Baghdad, Iraq.

Ambassador Silverberg formerly practiced law at Williams and Connolly, LLP in Washington, DC. She was a law clerk to Justice Clarence Thomas of the U.S. Supreme Court and Judge David Sentelle of the U.S. Court of Appeals. She graduated from Harvard College and the University of Texas School of Law. She serves on the board of directors of Vorbeck Materials and the board of trustees of the American College of Greece.

Ambassador Silverberg currently serves as the president of United Against Nuclear Iran and as a senior resident fellow at the German Marshall Fund. She was selected by the World Economic Forum as a Young Global Leader of 2009. She received the Secretary of Defense Award for Outstanding Public Service and an award from the University of Texas as an Outstanding Young Alum.

Victoria Taylor

Victoria Taylor is an international affairs fellow in residence at the Council on Foreign Relations (CFR) in Washington, DC. She is a career foreign service officer at the U.S. Department of State.

Ms. Taylor joins CFR from the Department of State's Office of Southern European Affairs. As the Turkey desk and southern European economic affairs officer, she managed a wide range of bilateral policy issues with Turkey and has worked to promote U.S. economic interests in Turkey, Greece, and Cyprus. From 2008 to 2009, Ms. Taylor worked in the Office of Iranian Affairs, where she managed the nonproliferation and Iranian foreign policy portfolio. Since joining the State Department in 2003, she has served as an economic officer in the U.S. embassy in Tunis, Tunisia (2006-2008); as the political and economic officer in the U.S. consulate in Lahore, Pakistan (2006); and as a vice consul at the U.S. embassy in Islamabad, Pakistan (2004-2005).

Ms. Taylor holds a BA in international relations and diplomatic history from the University of Pennsylvania and an MSc from the London School of Economics and Political Science in development studies. She speaks French, Mandarin, and Urdu.

Mark V. Vlasic

Mark V. Vlasic has served as a soldier, a lawyer, a professor, and a diplomat, and has worked for the White House, the Pentagon, the World Bank, the United Nations, and a large international law firm. He is currently a senior fellow and adjunct professor of law at Georgetown University and a

principal at Madison Law & Strategy Group PLLC, where he heads the firm's international practice. He also serves as a senior advisor to Madison Strategies LLP.

Prior to his return to academia and private practice, Mr. Vlasic was a public sector specialist at the World Bank Group, where he served as head of operations of the Stolen Asset Recovery (StAR) Initiative. A member of StAR's management team, He was responsible for country engagements on four continents, furthered bilateral relations with major financial centers, foreign governments, and civil society organizations, and worked on cases involving Sani Abacha of Nigeria and Jean-Claude Duvalier of Haiti, among others.

Before joining the World Bank, Mr. Vlasic was selected and appointed by the president to serve as a White House fellow. As part of his nonpartisan fellowship, he served as a special assistant to the secretary of defense (focused on foreign policy issues and bilateral relations) and helped advise the president's special envoy to Sudan. In recognition of his contributions to the department, he was awarded the Secretary of Defense Medal for Exceptional Public Service by Secretary Robert M. Gates, the highest non-career award in the office of the secretary of defense.

Prior to his government service, Mr. Vlasic practiced law in the litigation, public policy, banking, and international trade practice groups at Gibson, Dunn & Crutcher LLP, and served as a prosecution attorney at the United Nations International Criminal Tribunal for the former Yugoslavia in The Hague.

An adjunct professor of law at Georgetown University Law Center and senior fellow at Georgetown's Institute for Law, Science & Global Security, Mr. Vlasic has provided advice to the U.S. National Intelligence Council and the Central Intelligence Agency, and has lectured at numerous academic institutions on both sides of the Atlantic. He also serves on the board of directors of the White House Fellows Association & Foundation, the NCAC Fulbright Association, and the Humanity in Action Foundation.

Carmencita N. Whonder

Carmencita N. Whonder is a policy director in the Washington, DC office of Brownstein Hyatt Farber Schreck, LLP where she is a member of the government relations department. She provides strategic public policy advice to clients primarily in the financial services and housing sectors before the U.S. Congress and executive branch agencies. Prior to joining Brownstein, Ms. Whonder served as the staff director for the Senate subcommittee on housing, transportation, and community development and as the principal adviser on the Senate Banking, Housing and Urban Affairs Committee to United States Senator Charles E. Schumer (D-NY). During the 109th Congress she held the position of minority staff director for the Senate subcommittee on economic policy. For four years, she was responsible for issues including banking, financial institutions, securities and commodities markets, economic and monetary policy, the Committee on Foreign Investment in the United States, insurance, consumer protection, housing and community development, and trade.

Ms. Whonder previously worked as a leadership education counselor for Gates Millennium Scholars Program, a \$1 billion education initiative of the Gates Foundation administered by the United Negro College Fund. Prior to that, she worked in Geneva, Switzerland at the World

Intellectual Property Organization, a United Nations specialized agency, focusing on Internet and domain name disputes and trade and investment in least developed countries. Additionally, she previously worked for the U.S. ambassador to the UN Commission on the Status of Women at the Center for Policy Alternatives, assisting her to develop two transatlantic summits: the first summit on the role of women in the political and policy arenas in Belfast, Northern Ireland and the second summit on the role of women in the economy at Downing Street in London, England.

Ms. Whonder holds a bachelor's degree from Howard University, a master's degree from the Johns Hopkins University School of Advanced International Studies (SAIS), and a certificate from the Universidad de Pontificia de Salamanca in Salamanca, Spain. She is a term member of the Council on Foreign Relations, an Aspen Institute Socrates Society scholar, a member of the Young Leaders Circle and an associate with the Milken Institute. Currently, she is a member of the board of directors of the DC Jazz Festival, an advisory committee member of the Reading Connection, and a member of the leadership committee of Manna, Inc.

COUNCIL *on* FOREIGN RELATIONS

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2012
IIGG
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report

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July 19, 2012

Ms. Penny Hunt
Executive Director
Robina Foundation
80 South 8th Street, Suite 4900
Minneapolis, MN 55402

Dear Penny:

I am pleased to submit the annual progress report for the Council on Foreign Relations (CFR) International Institutions and Global Governance (IIGG) program. The reporting period is from July 1, 2011, to June 30, 2012, and corresponds with the fourth and final year of Phase I of the Robina Foundation's grant.

IIGG's marquee initiative was the creation of the Council of Councils (CoC), launched at an inaugural conference in Washington, DC. The CoC is the first network of international think tanks dedicated to understanding and improving global governance. It offers an innovative and unprecedented forum for influential global leaders to engage in a common conversation and deliberate on how to solve the major challenges of the twenty-first century. Attracting the attention and interest of media and policy elite around the world, CoC members have lauded the network as a "great initiative," which stands as a testament to its early success.

The past year solidified IIGG's value and impact amongst influential audiences who consistently turned to IIGG to examine collective-action problems. For instance, officials in the Department of Defense and the Food and Drug Administration encouraged IIGG to assess the threats arising from a crowded outer space and weak global drug safety rules. IIGG delivered cutting-edge solutions to both these sets of critical challenges in two well-received Policy Innovation Memoranda. In addition, high-level decision-makers, including Michelle Bachelet, former president of Chile and executive director of UN Women, and Samantha Power, senior director for multilateral affairs at the National Security Council, turned to IIGG as a host to discuss their views of the merits and weaknesses of existing international institutions.

Ms. Penny Hunt

July 19, 2012

Page 2

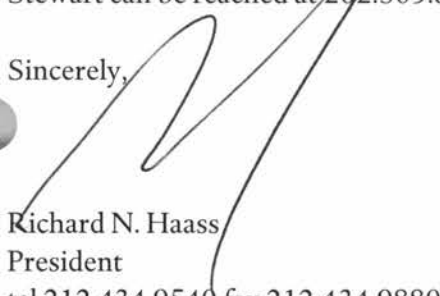
Google Ideas, the "think-do" arm of Google, asked IIGG to organize and lead a roundtable series with leading experts from around the globe to assess what is known about transnational illicit networks. The results of those meetings formed the intellectual underpinning of a major conference that Google Ideas is holding this week, in association with CFR and the Tribeca Film Festival, on combating illicit networks. The conference is bringing together leading global figures to assess how technology might be leveraged to track, disrupt, and dismantle international criminal networks.

IIGG continued to break new ground with its original publications and products. It released two new components of its flagship interactive, the Global Governance Monitor; one examined terrorism and the other assessed human rights. Previously released components of the monitor received twenty-two Telly Awards—honors for the best television commercials, film productions, and web content—for excellence in online education, in a competition that featured more than 12,000 entries from around the world.

We are proud of IIGG's accomplishments over the past four years in providing the U.S. and global foreign policy communities with recommendations for more effective multilateral cooperation. Thanks to the Robina Foundation's continued support, the Council looks forward to building on that success over the next five years.

Please contact me or Stewart if you have any questions or if you need additional information about this project report. Stewart can be reached at 202.509.8482 or spatrick@cfr.org.

Sincerely,



Richard N. Haass
President

tel 212.434.9540 fax 212.434.9880

president@cfr.org

Annual Report Executive Summary

International Institutions and Global Governance Program

The International Institutions and Global Governance (IIGG) program of the Council on Foreign Relations (CFR) has enlivened and shaped the public dialogue on improving multilateral cooperation to tackle the gravest transnational challenges of the twenty-first century. In the past year, IIGG's valuable contribution to the study of global governance has been reaffirmed as it formed new and innovative partnerships, provided expert analysis on breaking news and flashpoint issues, won industry awards, and received accolades from broad audiences on its meetings, publications, and online features.

IIGG's singular achievement in FY2012 was launching the Council of Councils (CoC) initiative. The CoC is the first network of its kind, gathering leading think tanks from around the world to debate and propose fresh solutions to stubborn global governance challenges. The first meeting, held in March 2012, convened presidents of twenty prominent think tanks and featured discussions on nonproliferation, global finance, and humanitarian intervention. The overwhelmingly positive response has encouraged IIGG to build on these discussions by expanding the membership to new institutions, launch a monthly roundup that collects global opinions on breaking news, and organize regional conferences, with partner organizations contributing to cover costs.

In addition to the CoC initiative, IIGG has been consistently in high demand to collaborate with think tanks, renowned scholars, and policymakers. One of the highlights of FY2012 is an exciting partnership with Google Ideas, forged at their request, to explore the shadowy world of organized crime and improve the understanding of illicit networks. The resulting meeting series provided the intellectual foundation for a major conference that Google Ideas held in July 2012 in association with CFR and the Tribeca Film Festival. The conference brought together scholars, law enforcement, government officials, technologists, and survivors of illicit networks to assess the potential of technology to track, disrupt, and dismantle the most egregious forms of transnational crime.

Moreover, U.S. government officials and international policymakers have eagerly sought out IIGG for its rigorous analysis on global governance issues. Both IIGG Policy Innovation Memoranda released this year, for instance, were encouraged by prominent policymakers at the Department of Defense and the Food and Drug Administration. In addition, high-level decision-makers such as Michelle Bachelet, former president of Chile and executive director of UN Women, and Samantha Power, senior director at the National Security Council for human rights and multilateral affairs, enthusiastically leveraged IIGG as a platform to discuss the merits and weaknesses of existing international institutions.

At the same time, IIGG continued to focus attention and shape public understanding on the broad range of global governance challenges by generating cutting-edge multimedia products. IIGG launched two new components of the award-winning Global Governance Monitor (GGM) on terrorism and human rights, released more than one hundred blog posts for the IIGG blog *The Internationalist: World Order, State Sovereignty, and Multilateral Cooperation*, and created a new video series to reach new, untapped audiences, and harness the power of new media. The quality of the new and innovative programming that IIGG produces has received wide acclaim. The GGM was recognized for excellence in online education by the Telly Awards, achieving an unprecedented twenty-two awards in a competition that featured more than twelve thousand entries from around the world.

IIGG worked aggressively over the past year to inform interested and influential audiences about its work. To do so, the program initiated a promotional campaign with a new advertising strategy for Facebook and Google, and reached out to IIGG audiences through social media, the IIGG newsletter, and the *Internationalist* blog. These promotional investments paid dividends. Our online viewership for FY2012 includes over one hundred thousand views for the GGM and approximately eighty thousand views for the *Internationalist* blog, resulting in a total of nearly two

hundred thousand views for major IIGG web offerings in the past year. This year's viewership for the GGM is approximately equivalent to viewership over the past three years combined. In addition, IIGG products are regularly picked up by major online media outlets, further expanding IIGG's reach and influence.

FY2012 marked the fourth and final year of the first phase of the Robina grant. Next year, IIGG will begin its second stage of activities, focusing on the most pressing global governance challenges identified in phase I. The IIGG program will expand on three thematic clusters—building a resilient global economy, managing the global commons, confronting transnational threats—and three crosscutting themes—enlisting rising powers, leveraging regional organizations, and protecting U.S. sovereignty. IIGG will also launch a new project, the Global Governance Report Card, which will grade the international community on efforts to address major global challenges. In July 2012, IIGG released its final installment of the GGM on transnational crime. Finally, IIGG will expand the CoC initiative with two regional meetings and the second annual conference to be held in Washington, DC, in March 2013.



International Institutions and Global Governance Program

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International Institutions and Global Governance Program

Annual Report to the Robina Foundation

Project director: Stewart Patrick, senior fellow and director of the International Institutions and Global Governance Program

Reporting Period: July 1, 2011 – June 30, 2012

Report Due: July 19, 2012

The Council on Foreign Relations (CFR) is pleased to submit the fourth annual report of the International Institutions and Global Governance (IIGG) program. To accompany this narrative, we attach a preliminary draft of the financial statement for the current grant period (The final financial statement will be available in August, given CFR's budgetary cycle). For your interest, we also include two annexes summarizing the program's FY2012 research projects and initiatives, and our anticipated work plan for FY2013.

- 1. Briefly outline your original goals and objectives as stated in your proposal. Summarize your progress in meeting these goals and objectives, and describe how your activities relate to achieving the ultimate goal/purpose of the program.**

Established in 2008, the IIGG program's mandate is to enrich the dialogue on multilateral cooperation and offer innovative solutions to tackle the most defiant global problems.

In FY2012, IIGG made substantial progress on this objective by propelling the conversation on global governance to the international stage with the launch of the Council of Councils (CoC) initiative; generating new and creative solutions for major challenges through publications and high-level meetings; and producing cutting edge online features that connect scholars, educators, policymakers, and the broader public in a global exchange on effective multilateralism.

The CoC is the first network of international think tanks dedicated to understanding and improving global governance. Its launch enabled IIGG—and CFR more broadly—to expand the conversation on global governance beyond the traditional walls of CFR and the corridors of power in Washington, and gain international recognition as

a reputable and esteemed resource on the study of global governance. Foremost, the initiative offers a novel approach to engaging opinion leaders in the world's largest economies and major regional players in a common conversation on potential solutions to collective transnational challenges. Prominent officials and decision-makers such as Robert B. Zoellick, then-president of the World Bank Group, and Robert D. Hormats, undersecretary for economic growth, energy, and the environment at the U.S. Department of State, enthusiastically participated as featured speakers at the inaugural CoC conference, thereby acknowledging the inherent value of this important initiative. Due to the overwhelmingly positive response from CoC members, IIGG now gathers monthly opinions from CoC experts on news breaking stories and posts them on CFR.org. To help sustain the momentum generated by the inaugural CoC conference and to build a more effective and durable network, IIGG now plans to hold regional meetings, with the host organization helping to cover the conference costs. This tangible commitment by CoC partners to sustain the network, along with the requests by numerous other organizations to become members, attests to the value and impact of the CoC initiative.

IIGG also continued to produce groundbreaking publications that offer fresh recommendations to address entrenched gaps and weaknesses in the international system. The two IIGG Policy Innovations Memoranda released in FY2012 were initiated by informal requests from U.S. government officials to undertake studies on unsafe medicines and the increasingly congested realm of outer space. Both publications were well-received, achieving significant encouragement and recognition from officials at the Food and Drug Administration and the Department of Defense. In addition, IIGG sponsored seven working papers analyzing reform opportunities within the current global economic system, the strengths and weaknesses of the UN human rights architecture, and the conflict capabilities of the African Union. These publications have also garnered considerable attention and praise from policymakers and issue-specific experts.

To inform and complement its publications, IIGG sponsored more than one hundred roundtables, briefings, workshops, and public meetings to allow experts, policymakers, and CFR members to brainstorm and propose ideas to fix the cracks in the today's archaic institutional architecture. For example, the [Rising Regionalism Workshop series](#) examined the risks and opportunities of regional institutions as complements to universal institutions, bringing together regional practitioners, experts, and scholars on Africa, Asia, and Latin America. The flagship IIGG roundtable series, [The United States and the Future of Global Governance](#), convened prominent policymakers such as Samantha Power, senior director at the National Security Council for human rights and multilateral affairs, and Michelle Bachelet, former president of Chile and the executive director of UN Women, to discuss ideas for improving security and development efforts at the United Nations. Finally, IIGG's new partnership with Google Ideas offered an innovative forum—the [Illicit Networks Roundtable series](#)—to reconceptualize transnational crime and explore strategies to manage the scourge.

In addition, IIGG launched two new components and five annual updates of the award-winning [Global Governance Monitor](#) (GGM). The two new products on transnational terrorism and human rights assess existing international institutions and frameworks within these issue areas and offer steps for the United States and its partners to ensure the success of global efforts. The GGM continues to be one of IIGG's signature products that enrich the general public's understanding of the major global governance challenges facing humanity.

Finally, domestic and international policymakers, analysts, journalists, and educators have turned to IIGG director Stewart Patrick to provide real-time analysis on major global governance events. In particular, Patrick's expertise on the Group of Twenty (G20) has pushed forward discussion of the informal body's role beyond its initial crisis-fighting responsibilities to a longer term steering committee. Through articles, blog posts, briefings, interviews, and

presentations, Patrick is recognized as a reliable authority on identifying the gaps in the existing institutional architecture, assessing challenges, and providing solutions for the future.

2. Outline your plans to share your results and findings.

In FY2012, IIGG pursued an outreach strategy based on four pillars: (1) expanding its online presence; (2) forming innovative partnerships; (3) reaching influential audiences; and (4) leveraging social media to promote IIGG activities and products

Expanding Web Presence

IIGG aggressively expanded its web presence by releasing two new components and five annual updates of the GGM, publishing over one hundred blog posts, and launching a new video series.

The new components of the award-winning GGM offer educators, students, and the broad interested public with an innovative, interactive, and readily digestible platform to enhance their knowledge about the strengths and weaknesses of the global counterterrorism and human rights machinery. *Global Governance Monitor: Terrorism* concludes that, despite unprecedented attention and mobilization since 9/11, global counterterrorism efforts are still insufficient and uncoordinated. And although the international community has made critical strides, *Global Governance Monitor: Human Rights* notes that the regime still falls short in many areas such as legal protection, capacity building, and response to atrocities. In addition to the new releases, IIGG updated five components to reflect recent developments and emerging flashpoints in the architecture of global governance for global finance, public health, oceans, nuclear nonproliferation, and climate change.

Over the past year, Patrick's blog, *The Internationalist: World Order, State Sovereignty, and Multilateral Cooperation*, attracted a significant following of core readers. Patrick wrote over one hundred blog posts on topics ranging from the rise of emerging powers to humanitarian assistance to global financial governance. Complementary to the blog, IIGG launched a *new video series* that provides viewers with a novel, easily digestible, and in-depth online medium to view the program's ideas and analysis. The video series, featuring Patrick, seeks to delve beyond the headlines for a deeper, more nuanced perspective of the structural forces transforming the international system, and outline the potential steps that can be taken to improve global governance in important issue areas. It also serves as a platform to discuss how current events are changing the direction of—or challenging—international cooperation.

The three online products have been remarkably successful in widening IIGG's audience and reaching educators and influential thinkers. In the past year, viewership for the GGM doubled, reaching nearly two hundred thousand page views since its launch in 2009 (please see section on "*Leveraging Social Media to Aggressively Promote IIGG Activities and Products*" for more information). The GGM consistently ranks as one of the most popular interactive features on CFR.org; in FY2012, it was the third most-viewed CFR content page with over 106,000 page views. The Telly Awards also recognized the interactive, which received an unprecedented twenty-two awards in a competition involving more than twelve thousand entries from around the world. Four of the GGM components were awarded the Silver Telly Award, the highest achievement granted by the organization. In addition, the GGM received high praise from educators, scholars, and policymakers, and has been widely reposted on blogs and tweeted by experts. One such accolade came from Ann Florini, director of the Centre on Asia and Globalization at the Lee Kuan Yew School of Public Policy and senior fellow at the Brookings Institution, who wrote to Patrick: "Also wanted to let you know that the Monitor has been a godsend for my teaching this year... [This is] far more effective than me lecturing. Hope you'll keep on going for years to come."

The Internationalist blog posts also prompted policy makers and prominent scholars to contact Patrick, and such informal discussions have given rise to CFR meetings and roundtables. As a result of his blog posts, Patrick received interview requests from news agencies around the world, including the *Daily Telegraph*, *Deutsche Welle*, and *Politico*, among numerous others. Since its launch, the blog has been viewed close to 150,000 times on CFR.org and on partner sites.

Lastly, the Internationalist Video Series, launched in January 2012, produced nine installments that also achieved an impressive viewership. Several of the installments were picked up by news media, including the *Washington Post* blog, Think Tanked, and CNN.com. IIGG posts the video segments on the Internationalist blog to maximize reach and impact.

Forming Innovative Partnerships

IIGG expanded its international partnerships with the launch of the CoC initiative. By bringing together twenty-four think tanks in a collective conversation on major transnational issues, the CoC elevated IIGG to the global stage—with intimate and regular access to influential decision-makers and policy elites from around the world. The CoC promotes the discussion and understanding of pressing global issues, encourages its members to generate and exchange practical ideas and solutions, and shares the results and assessments with home governments and publics. Overall, the response to the initiative has been inspiring. Think tanks commented that the inaugural conference was “an impressive representation of leading think tanks in the world” and “a great initiative.”

Following the successful CoC inaugural conference, IIGG launched an online forum that leverages the exceptional expertise of CoC member institutions on critical global governance issues. The Global Roundup features opinion pieces from CoC members on major international events that are posted on CFR.org to inform and shape global debates. To date, IIGG released three Global Roundups (please see Annex I for more details). CoC members have been eager to contribute analysis and have been enthusiastic about the final product. In addition, IIGG invited new institutions from underrepresented regions—including the Polish Institute of International Affairs, the Nigerian Institute of International Affairs, India’s Center for Policy Research, and Egypt’s Al Ahram—to join the initiative as part of its vision to expand and advance the global reach and influence of the CoC. All invitations were accepted, attesting to the value of this marquee project.

IIGG’s unrivaled authority in bringing global governance issues to the forefront is increasingly recognized by outside organizations, leading to numerous invitations for partnership opportunities on landmark projects. Google Ideas, Google’s “think-do” tank, approached IIGG to organize a large multi-event project on transnational criminal networks. The Illicit Network Roundtable series—the first of its kind—delves into the shadowy underworld of transnational organized crime by convening preeminent policy experts, historians, former U.S. government officials, victims of human trafficking, and law enforcers to explore new ways to harness and leverage technology to track, disrupt, and dismantle illicit networks. The initiative culminated in a July 2012 summit, “Illicit Networks: Forces in Opposition,” which assessed the potential of technology to address and combat the most egregious forms of transnational crime.

Other prominent academic and research institutions such as Princeton University, Canada’s Center for International Governance Innovation (CIGI), the Stanley Foundation, and the Munk School at the University of Toronto, also partnered with IIGG for its unparalleled grasp on global governance issues, and its ability to gather leading experts to engage in a rigorous debate. This year’s workshop on global governance, held at Princeton University, assessed the

future of the liberal international order. Over the course of five panels, participants debated the nature of the liberal international order and whether rising powers have the political will and capability to take up the mantle of liberal internationalism absent U.S. leadership. A follow-up workshop following based on this year's discussions attests to the continued success of IIGG to inject its ideas in robust scholarly debates.

Reaching Influential Audiences

IIGG has had a significant impact among U.S. and international audiences by offering cutting-edge solutions to global challenges. Its activities attracted the interest and attention of influential policy elite who increasingly sought out IIGG to inform strategies addressing emerging issues. In particular, the flagship Policy Innovation Memoranda were particularly successful at reaching major decision-makers within the U.S. government. The Policy Innovation Memorandum "[A Code of Conduct for Outer Space](#)," released in November 2011, builds on IIGG's pioneering work exploring ideas for integrating emerging spacefaring nations like India, Brazil, and China behind a common set of norms for outer space. The Department of Defense [stated](#) (PDF) its support for a new U.S. position on a space code of conduct and Ambassador Gary Schulte, deputy assistant secretary of defense for space policy, verbally confirmed the catalytic role IIGG played in bringing this policy change to fruition. Following the release of the report, CFR held a roundtable at the request of Frank A. Rose of the U.S. Department of State on "U.S. Policy for a Secure and Sustainable Outer Space" to discuss the Policy Innovation Memorandum with CFR Fellow Micah Zenko, author of the report.

IIGG's second Policy Innovation Memorandum "[Ensuring the Safety and Integrity of the World's Drug, Vaccine, and Medicines Supply](#)," released in May 2012, flows from the forward-looking IIGG-sponsored meeting series on global drug safety led by CFR Senior Fellow Laurie Garrett. The project achieved policy impact when G8 leaders at the Camp David Summit addressed the issue of unsafe drugs in their final communiqué. That declaration contained the following language: "To protect public health and consumer safety, we also commit to exchange information on rogue internet pharmacy sites in accordance with national law and share best practices on combating counterfeit medical products." In addition, other think tanks, including the American Enterprise Institute, blogged about the Policy Innovation Memorandum, and its recommendations were picked up by several prominent health organizations such as [NewsMedical](#) and [Kaiser Family Foundation](#).

IIGG's reputation among policymakers also led to numerous high-profile events. A [U.S.-India joint study group](#) sponsored by IIGG and cochaired by CFR Henry A. Kissinger Senior Fellow for U.S. Foreign Policy Robert D. Blackwill and the former Indian ambassador to the United States, Naresh Chandra, represented an unprecedented accomplishment by former high-level U.S. and Indian government officials to cooperatively produce and unanimously endorse a comprehensive, prescriptive policy roadmap that promises to build a strong and enduring bilateral relationship between the two countries. The policy roadmap has been recognized by prominent officials in both countries, including Indian ambassador to the United States Nirupama Rao.

Similarly, a symposium held in Beijing on China's effort to internationalize its currency convened high-level Chinese and U.S. participants, including a former U.S. treasury secretary and senior Chinese economic officials to discuss the role played by the renminbi in the international monetary system. These sessions were informed by a series of five working papers, commissioned from U.S. and Japanese participants by CFR Paul A. Volcker Senior Fellow for International Economics Sebastian Mallaby. A link to the working paper series was cited in a *Foreign Affairs* article, and a *Financial Times* op-ed referred readers to the *Foreign Affairs* piece.

Moreover, in the past year, Patrick received countless requests to provide expert analysis on the role and future of the G20, among other issues, through articles, media interviews, presentations, and government briefings. In particular, Patrick was invited to a workshop of the Think20 Initiative, which convened experts from leading international think tanks to advise policymakers in Mexico (this year's host) on the G20 agenda. Patrick's presentation was featured in a [video](#) on the G20 website called "Main Contributions of Think Tanks to the G20 Summit." Patrick was also interviewed by the Mexican foreign ministry on Think20 and Mexico's G20 hosting role. The audio was also [posted](#) on the G20 website. Lastly, Patrick featured his contributions to the Think20 meeting in a blog post, "[The G20: What We Thinktank It Should Do](#)" which received 574 visits. The post also earned the following feedback from Edward Davey of the Prince's Charities' International Sustainability Unit: "A quick note to complement you on an excellent and thoughtful piece on the G20 a week or two ago."

Leveraging Social Media to Aggressively Promote IIGG Activities and Products

In FY2012, IIGG revamped its advertising campaign for the GGM that expanded its promotional outreach to scholars and educators, launched an IIGG Facebook page, and overhauled its newsletter dissemination strategy.

IIGG's new advertising campaign for the GGM has been particularly successful. The new strategy promotes the GGM through paid Google advertising (Google AdWords) and allows IIGG to run targeted text advertising that significantly expanded GGM viewership. Facebook advertising, which consists of flashy pictographics, continues to generate consistent viewership. Combined, the new Google and Facebook advertising campaigns earned the GGM over one hundred thousand page views in FY2012—equal to the page views in the first three years of the program combined.

Educators consistently emphasize the importance of providing students with the knowledge and context of the impact of globalization, and the increasingly critical need for countries and other actors to work together to address emerging transnational challenges. To this end, IIGG actively promoted its activities and interactive resources to educators at the high school, college, and graduate levels over the past year. Patrick attended the International Studies Association annual convention in San Diego, California, which convened international relations scholars and foreign policy experts to discuss and promote their research. Patrick presented two papers: "The United States and Global Conflict Management: UN, Regional, and Ad Hoc Approaches" and "The United States and International Institutions." In addition, IIGG set up a dedicated booth that showcased its publications, interactives (via a high-definition television), and mission literature to scholars and interested participants. Among other promotional activities, CFR's Education and Outreach department hosted an educator's workshop that introduced the GGM to seventy professors from across the country.

Active web presence management has led new readers to IIGG content. IIGG regularly updates its homepage with relevant news on global governance and promotes its activities through IIGG's dedicated [Facebook page](#) and through a Facebook page for Patrick's book, *Weak Links: Fragile States, Global Threats, and International Security*. IIGG launched its official Facebook page in January 2012. This move, part of IIGG's broader social media efforts, has resulted in increased awareness about IIGG published content, particularly the GGM, as well as the program's overall goals and objectives. Since the launch of both Facebook pages, IIGG has received over one thousand "likes" (448 for IIGG and 718 for *Weak Links*) that includes users from twenty countries speaking nineteen different languages—and a total potential reach of over two hundred thousand Facebook users. Also, as part of a wider CFR project, IIGG revamped its homepage to make it fresh and more accessible to readers.

IIGG has also updated its newsletter strategy to disseminate IIGG news to interested audiences on a bimonthly instead of a quarterly basis. IIGG revamped the newsletter template to make the content more digestible and attractive. Currently, IIGG has nearly eleven thousand people subscribed to its newsletter list.

Lastly, IIGG works across CFR to reach relevant audiences, including bloggers and journalists. For example, the Communications and Marketing team liaised with thousands of members of the media and interested members of the public, facilitated media interviews, exchanged information, and promoted IIGG products and Patrick's activities. They also run online advertisements and promote CFR products via social media platforms and its newsletters.

3. Describe any unanticipated results, either positive or negative, what you have learned from implementation of the program, and any changes made or planned based on these results.

Over the past year, IIGG took advantage of numerous opportunities to forge new partnerships with domestic and international think tanks and collaborate with high-level policymakers. As a result of these unanticipated initiatives, IIGG shifted, postponed, or cut back previously scheduled programmatic activities and initiatives program activities in order to accommodate staffing and logistical needs. Programmatic modifications include:

- Building on IIGG's thematic focus on defending human rights in FY2012, Suzanne Nossel, former deputy assistant secretary of state at the Bureau for International Organizational Affairs at the U.S. State Department and now executive director at Amnesty International USA, joined CFR for two months during fall 2011. Nossel assessed the effectiveness of U.S. efforts to improve the UN Human Rights Council in the working paper, "[Advancing Human Rights in the UN System.](#)"
- IIGG formed a new and exciting partnership with Google Ideas on a series of roundtable meetings exploring transnational crime and the networks engaged in illicit criminal activities.
- Release of the Global Governance Report Card has been moved to fall 2012. IIGG held a workshop "Evaluating Global Governance" in June 2012 that hosted U.S. and regional experts to provide feedback on the first drafts of the report cards. The IIGG team will continue to refine its methodology to assess the international community's performance and effectiveness at addressing global challenges through multilateral institutions in the early part of FY2013, with an anticipated release of six report cards in November 2012.
- IIGG decided to produce fewer components of the Policy Innovations Memoranda series than originally anticipated, and instead focused on launching reports that provided cutting-edge solutions to resolve salient global governance challenges. The program produced two, rather than five, Policy Innovation Memoranda: "[Ensuring the Safety and Integrity of the World's Drug, Vaccine, and Medicines Supply](#)" by CFR Senior Fellow for Global Health Laurie Garrett and "[A Code of Conduct for Outer Space](#)" by CFR Fellow for Conflict Prevention Micah Zenko.
- The Middle East regionalism meeting, under the direction of CFR Senior Fellow Steven Cook, was pushed back to the first half of FY2013 in light of the continued unrest in the region. The broader initiative on Rising Regionalism remained a focus of FY2012, with three workshops exploring the increasingly important role of regional and subregional organizations as complements to—and sometimes substitutes for—universal membership organizations. The workshops included "[The Future of U.S.-Pakistan Relations in an Asian](#)

Context,” “Peacebuilding in Africa: Regional and International Efforts,” and “Sustaining the Peace in Latin America: Regional and International Efforts.”

- IIGG decided to defer its planned workshops on “Exploring Future of U.S. Sovereignty” to FY2013. IIGG plans to assess the impact of multilateral cooperation on the diverse aspects of U.S. sovereignty by engaging legal scholars, political experts, and current U.S. officials in two to three workshops. The discussions will feed into the Patrick’s single author volume on the future of U.S. sovereignty.

4. Attach an income and expense statement for this grant period as well as your original budget. Please include a narrative explanation for any line item differences between the original budget and actual expenses.

At the end of the fourth year, IIGG had a balance of \$189,043. This figure will be applied to phase II activities.

The largest cost savings in the fourth year stem from staff salaries and benefits as a result of lower expenses for IIGG-supported fellows and core staff. In FY2012, IIGG continued to deliver on an ambitious research agenda that examined a wide range of global governance issues, from integrating emerging powers to addressing weaknesses in global public health governance. Some of the costs associated with CFR fellows were allocated in FY2011, although the activities were realized in FY2012. At the same time, some support for IIGG-sponsored fellows was funneled into programmatic activities, resulting in lower salary expenses. Overall, IIGG supported fewer fellows than in previous years as the program shifted its resources toward launching the CoC initiative. In addition, outreach activities managed by CFR’s Communications and National Outreach departments incurred lower than expected costs, largely due to a more effective and targeted marketing strategy that leveraged social media and cross-promotional campaigns.

IIGG went over budget in a few areas. The program invested considerable effort and resources expanding its international audience by launching the CoC initiative and other major projects, such as the Joint U.S.-India Study Group. These activities have achieved notable success in connecting prominent thinkers and policy elite in a deeper conversation on global governance and multilateralism. As a result, however, expenses related to research-related travel and meetings were larger than anticipated. Additionally, the opportunity to cohost a symposium in China on the future of the international monetary system resulted in unforeseen professional expenses related to expert contributions for working papers.

The application of net savings realized in the fourth year should result in IIGG coming in or under budget in the phase II reporting period.

5. Please distinguish the work funded by the Robina Grant from your broader, ongoing work on the subject. Include a list of additional funders, including amounts received, for this program.

The Robina Foundation remains the sole source of funding for CFR’s IIGG program, and serves as the focal point for CFR’s research and policy agenda on global governance and institutional reform.

IIGG collaborated with departments across CFR and external partners for the Illicit Networks Meeting series, which was partially funded by Google Ideas (approximately \$11,000). In addition, Robina funds contribute to the overall operation of departments across CFR, including marketing and communications, national program and outreach, CFR.org, and the executive office. These departments are also funded by membership dues among other grants.

COUNCIL ON FOREIGN RELATIONS

Financial Statement

Robina Foundation

July 1, 2011 - June 30, 2012

Year four award	\$2,073,100
Balance as of June 30, 2012 to be applied to year five activities	\$189,043

	Year Four Budget	Actual Expenses (7.1.11-6.30.12)
Core Staff	\$578,300	\$429,646
Senior Fellows/Studies Staff	\$610,400	\$409,230
Meetings	\$107,600	\$129,138
Research Travel	\$73,600	\$209,315
Publications	\$36,000	\$89,988
Multimedia	\$43,700	\$37,614
Professional Services	\$21,500	\$85,616
Research Materials	\$7,800	\$2,387
Administrative	\$69,400	\$65,040
Outreach	\$236,400	\$142,984
Project Management	\$288,400	\$283,100
Total	\$2,073,100	\$1,884,057

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International Institutions and Global Governance Program

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International Institutions and Global Governance Program Annex I: FY12 Activities and Outputs

Program Director: **Stewart Patrick**, senior fellow and director of the International Institutions and Global Governance program

Reporting Period: July 1, 2011–June 30, 2012

Report Due: July 19, 2012

UPDATE: July 1, 2011

Council of Councils (CoC) Inaugural Meeting:

— The CFR-hosted conference in Washington, DC, marked the first gathering of the CoC membership (March 12, 2012–March 13, 2012).

Sessions on the following topics were included:

- “The State of Global Governance”
- “The Challenge of Iran”
- “The Multilateral View”
- “Lessons of Libya”
- “The View From the Obama Administration”
- “The Dollar’s Future as a Reserve Currency”
- “Wrap-Up—Where Do We Go From Here?”

CoC “Global Roundup” Expert Briefs (provided by CoC members):

- “Does Kim Signal World Bank Changes?”
- “How NATO Can Remain Relevant”
- “G20 Summit Overshadowed by Euro Crisis”

Roundtables:



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— U.S.-United Nations Relations:	9
— Global Stakes in Human Rights Roundtable Series:	9
— The United States and the Future of Global Governance:	8
— Roundtable Series on Global Drug Safety:	5
— Cybersecurity and Cyberconflict Initiative:	5
— Global Health Roundtable Series:	4
— Illicit Networks Roundtable Series (with Google Ideas):	3
— International and National Security Law:	3

Workshops and Study Groups:

— Making Multilateralism Work:	3
— Rising Regionalism:	3
— U.S.-India Joint Study Group:	3
— World Health Organization Reform:	1
— International Institutions and Human Dignity:	1
— Evaluating Global Governance Workshop:	1
— 2012 Annual Princeton Global Governance Conference: The Future of Liberal Internationalism: Global Governance in a Post-American Hegemonic Era.	1

Congressional Meetings and Briefings:

— Expert Bank Briefings:	43
— Congressional Senior Staff Roundtables:	16
— Foreign Policy Breakfast Forums:	6
— Senate Chiefs of Staff Dinners:	5

Publications, Meetings, and Briefings by Stewart Patrick:

— Blog Posts:	104
— Book Talks:	21
— Briefings of Government Officials or Prominent Experts:	20

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— Video Interviews:	7
— Articles:	6
— Book Briefings:	5

Symposia:

- The Beijing Symposium on the Future of the International Monetary System and the Role of the Renminbi (RMB) (October 30, 2011–November 2, 2011)

Meetings included sessions on the following:

- “Currencies in the International Monetary System”
- “Impact of RMB Internationalization on the Global Monetary System”
- “Impact of RMB Internationalization on China’s Development Model”
- “Alternative Pathways for RMB Internationalization: Challenges and Opportunities”
- “The Economic Situation in the United States and China and the Outlook of Cooperation”
- “Trends of the Global Economy”

Global Governance Monitor:

— Relaunch Updates:	5
— New Components:	2

Policy Innovation Memoranda:

- “A Code of Conduct for Outer Space” by Micah Zenko (November 2011)
- “Ensuring the Safety and Integrity of the World’s Drug, Vaccine, and Medicines Supply” by Laurie Garrett (May 2012)

Working Papers:

- The African Union’s Conflict Management Capabilities by Paul D. Williams (October 2011)
- What Drives CNH Market Equilibrium? by Peter Garber (November 2011)
- Historical Precedents for Internationalization of the RMB by Jeffrey A. Frankel (November 2011)
- Renminbi Internationalization and China’s Financial Development Model by Robert N. McCauley (November 2011)

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- *The Internationalization of the RMB: Opportunities and Pitfalls* by Takatoshi Ito (November 2011)
- *The Future of International Liquidity and the Role of China* by Alan M. Taylor (November 2011)
- *Advancing Human Rights in the UN System* by Suzanne Nossel (June 2012)

General Meetings:

New York:

- “The Challenge of Noncommunicable Diseases” featuring Derek Yach, PepsiCo Inc.; Nils Daulaire, U.S. Department of Health and Human Services; and Babatunde Osotimehin, United Nations Population Fund (July 25, 2011)
- “Challenges and Opportunities for the World Economy and the IMF” featuring Christine Lagarde, International Monetary Fund (IMF) (July 26, 2011)
- “World Economic Update” featuring Stephen Roach, Morgan Stanley Asia; Lewis Alexander, formerly of the U.S. Department of the Treasury; and Bruce Kasman, J.P. Morgan (September 13, 2012)
- “A Conversation with James Stavridis” featuring James Stavridis, Supreme Allied Command Europe (October 14, 2011)
- “An Overview of the Global Debt Crisis” featuring Alan Greenspan, Greenspan Associates LLC (November 10, 2011)
- “How Can the United States and China Help Strengthen the Global Economy” featuring Henry M. Paulson, Jr.; Paulson Institute (November 16, 2011)
- “World Energy Outlook” featuring Fatih Birol, International Energy Agency (November 29, 2011)
- “The Global Energy Landscape” featuring Daniel Yergin, IHS Cambridge Energy Research Associates and Carlos Pascual, U.S. Department of State (December 13, 2011)
- “The Synthesis of Law and Politics and the Evolution of International Justice” featuring John B. Bellinger III, CFR; and David Scheffer, Northwestern University Law School (January 30, 2012).
- “Transforming Foreign Aid” featuring Rajiv Shah, U.S. Agency for International Development (March 7, 2012)

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- “The Arab Uprisings: How Did We Get Here?” featuring Margaret MacMillan, University of Toronto (March 29, 2012)
- “The State of the Transatlantic Relationship” featuring Philip H. Gordon, U.S. Department of State (April 23, 2012)
- “The Service Chiefs” featuring General Norton A. Schwartz, U.S. Air Force; General Raymond T. Odierno, U.S. Marine Corps; General James F. Amos, U.S. Army; and Admiral Jonathan W. Greenert, U.S. Navy (May 3, 2012)
- “The Current Challenges of Forced Displacement” featuring Antonio Guterres, United Nations Office of the High Commissioner for Refugees (May 31, 2012)

Washington, DC:

- “The American Agenda for United Nations Reform” featuring Joseph M. Torsella, U.S. Mission to the United Nations (January 20, 2012)
- “No One’s World: The West, the Rising Rest, and the Coming Global Turn” featuring Charles A. Kupchan, CFR (March 6, 2012)
- “Humanitarian Intervention: If, When, Where, and Why” featuring Joshua S. Goldstein, University of Massachusetts, Amherst and John J. Mearsheimer, University of Chicago (March 8, 2012)
- “Views from Abroad: International Perspectives on the United States” featuring Thierry de Montbrial, French Institute of International Relations; Yasushi Kudo, Genron NPO; and Igor Yurgens, Institute of Contemporary Development (March 14, 2012)
- “Next Steps for NATO” featuring Ivo Daalder, North Atlantic Treaty Organization (NATO) (May 7, 2012)
- “Grading the Groups: Priorities and Performance of the G8 and G20” featuring Stewart Patrick, CFR and Faryar Shirzad, The Goldman Sachs Group, Inc. (May 25, 2012)



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International Institutions and Global Governance Program **Annex II: FY13 Anticipated Activities**

Program Director: **Stewart Patrick**, senior fellow and director of the International Institutions and Global Governance program

Reporting Period: July 1, 2011–June 30, 2012
Report Due: July 19, 2012

UPDATE: July 1, 2011



The International Institutions and Global Governance (IIGG) program will devote its fifth year to building on the major themes and trends identified in Phase I of the program, as well as expanding on several projects initiated in FY2012. These include: exploring the shifting nature of U.S. sovereignty; increasing the capacity of regional organizations; expanding the Council of Councils initiative; and launching the Global Governance Report Card.

Exploring the Future of U.S. Sovereignty

Deepening global interdependence poses challenges to traditional conceptions of national sovereignty, including in the United States. Many Americans are concerned that by participating in international institutions and other global governance arrangements, the United States may sacrifice too much freedom of action, find its domestic policy autonomy constrained, or find its constitutional democracy subordinated to unaccountable and anonymous international organizations. The IIGG program will soberly assess the impact of various forms of multilateral cooperation on these diverse aspects of U.S. sovereignty, involving legal scholars, political experts, and current U.S. officials in three wide-ranging workshops that address the trade-offs that may be involved in embedding the United States in new international rules and institutions.

Enhancing the Capabilities of Regional Organizations

Regional organizations increasingly provide effective solutions to tackle global challenges. Yet the depth and performance of these institutions varies hugely across regions and issue areas.

Following the workshops on regionalism in Latin America, South Asia, and Africa in FY2011, the IIGG program will examine the architecture and efficiency of regional institutions in the Middle East and Southeast Asia. A workshop on the Middle East will take place in Cairo, Egypt and will evaluate regional institutions, norms, and current themes. The initiative will be led by CFR fellows and will involve representatives of regional bodies, as well as government officials, experts, opinion leaders, and civil society representatives from the region. IIGG will examine regionalism in Southeast Asia through a working paper on the Association of Southeast Asian Nations (ASEAN). This paper will examine ASEAN's place in the evolving network of regional and subregional institutions in Asia, as well as ASEAN's potential to contribute to collective action at the regional and global level. The paper will propose steps and recommend concrete actions for the United States to improve the capabilities of ASEAN and other regional institutions to address transnational challenges in Southeast Asia. A meeting with government officials, prominent regional experts, and scholars will follow the release of the working paper in early fall. As a complement to this project, the Council of Councils initiative will launch its first regional meeting in October in Singapore on "Asia at the Crossroads: Regional Priorities for the Twenty-First Century."

Building the Council of Councils Initiative

Building on the momentum of the successful launch of the Council of Councils (CoC) initiative in FY2012, the IIGG program will organize two regional conferences, host the second annual CoC conference, and continue its monthly online "roundup" of CoC opinion on pressing global issues. First on the calendar is the CoC regional conference, which IIGG is planning with its partner, the S. Rajaratnam School of International Studies, and which will be held in Singapore in October 2012. The conference will gather CoC members, as well as other think tanks from across the Asian continent to join in a conversation about global challenges that are particularly salient in Asia, including regional stability, maritime security, and financial stability.

In March 2013, IIGG will host the second annual meeting of the Council of Councils at CFR's Washington, DC office. As in FY2012, the objective will be to solicit the thoughts of our partners and to inject these ideas back to home governments, and thus contribute to effective national and multilateral policy responses to shared policy challenges. In framing this conference, IIGG will incorporate feedback from partner organizations shared after the inaugural conference. This will include additional sessions on "soft" global governance issues (such as development, climate change etc.), more attention to marketing and promotion for the event, and expanding CoC membership to think tanks from underrepresented regions, namely the Middle East, Africa, and India.

Third, IIGG will continue to collect expert opinions for the newly created online forum, the "Global Roundup." The Global Roundup, which launched in April 2012, provides CoC members an opportunity to share their unique perspective and opinions on breaking news stories and other major international headlines. IIGG plans on releasing one Global Roundup each month.

Grading the Performance of the International Community

During FY2013, the IIGG program will launch the biannual Global Governance Report Card, designed to assess the international community's performance in addressing and resolving the most

serious global and transnational challenges over the past two years. These assessments will also include an evaluation of the U.S. role in contributing to the effective management of particular issues. The Report Card will include an overview piece summarizing and assessing trends in global governance and multilateral cooperation. The first installment will focus on six major issues: Nuclear Nonproliferation, Global Finance, Climate Change, Global Health, Armed Conflict, and Terrorism. The scorecard will build on inputs from CFR senior fellows, external experts, as well as baseline data from the Global Governance Monitor and other sources.

COUNCIL *on* FOREIGN RELATIONS

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July 2, 2012

Ms. Penny Hunt
Executive Director
Robina Foundation
80 South 8th Street
Minneapolis, MN 55402

Dear Penny:

Thank you for the Robina Foundation's second payment of \$276,805 toward its grant of \$696,555 to the Council on Foreign Relations (CFR) for our online video project. As you know, this grant supports an important part of CFR's mission, namely providing open, informed discussion and preeminent analysis of foreign policy issues through our award-winning website, CFR.org.

Robina's investment has allowed CFR to significantly improve the quality of the production and distribution of its videos, and extend our reach to new audiences. For example, CFR.org's History Lessons video series has now become one of our most popular online offerings. Narrated by Senior Vice President and Director of Studies James M. Lindsay, this series places current affairs in a historical context and highlights the important links between past and present issues in international relations. The success of the series in reaching the public is evidenced by its YouTube viewership, which stands at over 27,000 views for the first fifteen videos. We have also received positive feedback from teachers and students at both a high school and a college level who have used the videos as classroom tools.

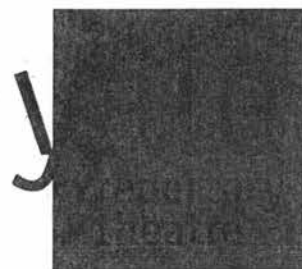
We are truly grateful for this investment, which has made this work possible, and for Robina's support for other Council projects over the years.

Sincerely,

Richard N. Haass
President

tel 212.434.9540 fax 212.434.9880
president@cfr.org

cc: Nancy Gilberg



JAMES BUNDY,
ARTISTIC DIRECTOR

VICTORIA NOLAN,
MANAGING DIRECTOR

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July 13, 2012

Ms. Penny A. Hunt
Executive Director
Robina Foundation
4900 IDS Center
80 South 8th Street
Minneapolis, MN 55402

Dear Penny,

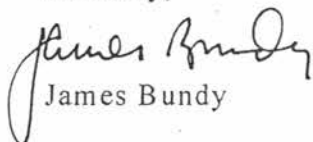
It is my pleasure to enclose our year-end report for FY2012, the fourth year of Robina Foundation funding for the Center for New Theatre—now the Binger Center for New Theatre. Throughout this year, we have continued to build our new play activities and provide our writers with the individualized support that characterizes the program.

I am delighted to share with you that plays by several of the writers whose work was developed through the Center will be featured in Yale Rep's coming season: *Marie Antoinette* by David Adjmi, whom you met during your visit to New Haven a few years ago; *In a Year with 13 Moons*, an adaptation of Rainer Werner Fassbinder's film masterpiece, by Bill Camp and Robert Woodruff; and Sarah Ruhl's *Dear Elizabeth*, which you and the Board will be seeing in December, when Yale celebrates your extraordinary generosity.

The Robina Foundation's initial grant allowed us to invest in artists in an unprecedented way. The Foundation's recent transformational gift, establishing the Binger Center for New Theatre, will ensure that Yale is a vibrant home for artists and their collaborators far into the future.

As always, I am looking forward to speaking with you and Peter once you've had a chance to review the attached report. My heartfelt thanks again for all you have done for Yale.

Sincerely,


James Bundy

Enclosures

1. Briefly outline your original goals and objectives as stated in your proposal.

The Center for New Theatre is an initiative to commission, develop, and produce new work for the stage, thereby cultivating the skills and nurturing the talents of playwrights and other theatre professionals.

Goals

- To keep writers of outstanding potential engaged in the profession.
- To establish a new standard of artist-centered development and production.
- To create a pipeline of new talent and new works for theatre companies across the country.
- To broaden the experiences and expertise of Yale students and embolden them to imagine new possibilities for the stage.
- To serve as a model for the training of theatre professionals in the production of new work.

Objectives

- To support a significant number of Yale Rep-commissioned plays and musicals and provide commissioned artists with readings and workshops, as well as residencies at the School of Drama.
- To produce work of the highest possible artistic standards at Yale Rep and to encourage the advancement of plays commissioned, developed, and produced through the Center for New Theatre.
- To promote partnerships through the Production Enhancement Fund, a mechanism that helps to underwrite multiple productions of Yale-commissioned plays and musicals at theatres across the country.
- To introduce writing-centered, collaborative, and integrated workshops, laboratories, and short courses to the Yale School of Drama curriculum, focusing specifically on musical theatre (including libretto, lyric and music composition for the stage).

2. Summarize your progress in meeting these goals and objectives and describe how your activities relate to achieving the ultimate goal/purpose of the program.

The fourth year of the Center's work has been productive and rewarding. We maintained the robust level of commissioning of FY2011, while increasing the amount of development activities offered to our commissioned artists in FY2012.

Commissions

- In FY2012, we commissioned five new plays, plus musical arrangements for one previously commissioned project: original plays by Christina Anderson, Sheila Callaghan, Lucinda Coxon, and Dorothy Fortenberry; a new stage version of Rainer Werner Fassbinder's film, *In a Year with 13 Moons*, adapted by Bill Camp and Robert Woodruff; and arrangements for David Nugent's commissioned musical, *Her Lightness*.
- We anticipated awarding eight commissions in FY2012, but conversations for the seventh and eighth projects—plays by Lynn Nottage and Noah Haidle—have extended beyond the fiscal year. Conversations are continuing, and first commission payments will be posted in FY2013.
- First drafts of the following commissioned projects were submitted in FY2012: David Nugent's musical *Her Lightness*, Lina Patel's *Love Play*, Sarah Ruhl's *Dear Elizabeth*, and Julie Marie Myatt's *Opium Den*. We decided not to produce Lina Patel's *Love Play* and released it back to Lina so she could pursue other production opportunities. We are currently planning a two-week workshop of David Nugent's *Her Lightness* this August in New York, and we will conduct a workshop of Julie Marie Myatt's *Opium Den* in the fall as well.
- Three commissioned plays are scheduled for world premiere productions in the Yale Rep 2012-13 season: David Adjmi's *Marie Antoinette* (in a co-production with the American Repertory Theater), Sarah Ruhl's *Dear Elizabeth*, and *In a Year with 13 Moons*, adapted by Bill Camp and Robert Woodruff.

Workshops, Readings, and Residencies

The Center's development opportunities continue to provide a wide range of resources for our commissioned artists and their collaborators. This year, we produced nine readings/workshops and eight residencies (an increase from five workshops and six retreats/residencies in FY2011).

- Workshop of Will Eno's *The Realistic Joneses* (New York, July 2011)
- Yale School of Drama Boot Camp Residency, which included three commissioned writers (Carson Kreitzer, Lucy Thurber, Alice Tuan) and nine playwriting students (New Haven, August 2011)
- Workshop of Lina Patel's *Love Play* (New York, October 2011)
- Musical Residency: Carson Kreitzer and Matt Gould working on commissioned musical, *Lempicka*, with music director Ian Axness in preparation for one-week workshop at New Dramatists (New Haven, October 2011)
- Workshop of Will Eno's *The Realistic Joneses* (New York, November 2011)
- Playwright Residency: Branden Jacobs-Jenkins (New Haven, November 2011)
- Workshop of Will Eno's *The Realistic Joneses* (New York, January 2012)
- Reading of Lucy Thurber's *Perry Street* (New Haven, February 2012)
- Writers Residency: Carson Kreitzer and Matt Gould (New Haven, February 2012)
- Workshop of David Adjmi's *Marie Antoinette* (New York, March 2012)

- Playwright Residency: Alice Tuan (New Haven, March 2012)
- Playwright Residency: Aditi Kapil (New Haven, March 2012)
- Reading of Alice Tuan's *Private Rivals* (New Haven, March 2012)
- Reading of Lucy Thurber's *Perry Street* (New Haven, May 2012)
- Musical Residency: Carson Kreitzer and Matt Gould working on commissioned musical, *Lempicka*, with musical director Ian Axness in preparation for one-week workshop at New Dramatists (New Haven, May 2012)
- Workshop of Sarah Ruhl's *Dear Elizabeth* (New York, May 2012)
- Musical Residency: David Nugent working on commissioned musical, *Her Lightness*, with music director Alexander Rovang and director Jackson Gay in preparation for a two-week August workshop in New York (New Haven, June 2012)

New Play Production

In FY12, Yale Repertory Theatre produced three world premieres:

- Amy Herzog's *Belleville* ran October 21 to November 12, 2011. The production was a critical success, and the play was included on Charles Isherwood's "Top 10 of 2011" list in *The New York Times*. *Belleville* will be produced in the 2012-13 season at New York Theatre Workshop and in Chicago at Steppenwolf Theatre Company.
- Christina Anderson's *Good Goods* ran at Yale Repertory Theatre February 3 to 26, 2012. San Francisco's Crowded Fire Theater subsequently produced its west coast premiere (May 31 to June 23, 2012) and received positive notices from the critics. The *San Francisco Examiner* praised the play's "magic realism and dazzling theatricality," while Chad Jones of the Bay Area's *theaterdogs* examined both the influences and the originality of Christina Anderson's writing: "What's so appealing about this two-act play is that it's old-fashioned and fresh at the same time, mysterious yet straightforward enough to be instantly engaging. You get a sense of community and real human connection intermingled with the supernatural as in an August Wilson play and abundant romance, betrayal and pining, as in a Tennessee Williams play. But this is not to say that Anderson is being derivative. It's more like she's using the best parts of drama to tell an interesting story and keep her audience involved and wondering what the heck is going to happen next."
- Will Eno's *The Realistic Joneses* closed Yale Rep's 2011-12 season in May. The production received Connecticut Critics Circle Awards for Best Directing (Sam Gold) and Best Ensemble (Johanna Day, Glenn Fitzgerald, Tracy Letts, and Parker Posey). Conversations are ongoing with producers in New York about the timing of subsequent productions of *The Realistic Joneses*.

Production Enhancement Fund

In FY2012, the Production Enhancement Fund supported Pittsburgh City Theatre's production of Maggie-Kate Coleman and Anna K. Jacobs's musical, *POP!* The production ran May 5 to 27, 2012 and featured Anthony Rapp as Andy Warhol. The Fund helped to underwrite the cost of orchestrating new songs written specifically for Rapp. The decision to use the Production Enhancement Fund to support this production represents a change in the allocation of the funds provided by Robina. The original intention was for the Fund to solely underwrite projects commissioned by Yale, but we now believe it is wise to encourage future productions of new plays and musicals supported by the Center, regardless of which theatres first commissioned or developed them. We appreciate the Foundation's willingness to allow this adjustment to our policy.

As reported previously, we plan to make a significant expenditure from the Fund to underwrite the co-production (with the American Repertory Theater) of David Adjmi's *Marie Antoinette* in the fall of 2012. We anticipate significant costume design and labor costs and will use Fund resources for these extra production expenses. We expect these expenses will be reflected in the FY2013 budget.

3. Describe any unanticipated results, either positive or negative, what you have learned from implementation of the program and any changes made or planned based on these results.

In last year's annual report to the Foundation, we outlined our intention not to pursue reviews by the lead critics of *The New York Times*, as they wield a disproportionate amount of power over the future life of new American plays and their creators. In consultation with our Press Director, we outlined a plan to actively pursue local and regional critical response to our work. We were aware that this was a calculated risk; there was no way to know if other feature or editorial coverage of Yale Rep would be denied moving forward. We discussed this strategy with our commissioned artists, who were grateful for our willingness to put their interests before the theatre's need for potentially increased ticket sales through national reviews. Ultimately, however, when we explained our position to *The New York Times* editorial staff and directly to Charles Isherwood (the national critic who most frequently reviews new plays at Yale Rep), we were told that while we could decide not to invite a critic, the paper reserves the right to send a critic of its choice to any given production. This proved to be the case twice in our 2011-12 season: Charles Isherwood reviewed Amy Herzog's *Belleville* and Will Eno's *The Realistic Joneses*. The reviews were positive, and both plays will benefit from them.

4. Outline your plans to share your results or findings.

The signal event of the 2011-12 season was the announcement of the Foundation's transformational \$18M gift to permanently endow the Binger Center for New Theatre. That announcement was represented in local and national press, leading to a spike in awareness of the Center's contributions to the field. Coverage included a feature article in Yale's *ELI* magazine, and there will also be a feature article in Yale School of Drama's annual magazine. In preparation for the announcement, Yale Rep amended the dedicated page for the Binger Center for New Theatre on its website (yalerep.org/center). The page will be updated regularly with background information about commissioned artists, productions, and news about the Center.

In FY2013, we plan to convene our first five-year review with an independent panel of leading professionals from the following areas: ¹new play development organizations, ²producing theatres, ³fund⁴ers, and individual artists. The purpose of this review is to provide the Dean/Artistic Director and the Center staff with the opportunity to evaluate the Center's mission, strategy, and programming. Together with the panel, the Center staff will examine current models in new play development, production, and dissemination in the American theatre and explore ways the Center can continue to leverage its strategic competitive advantage as a leader in the field. Peter?

5. Attach an income and expense statement for this grant period as well as your original budget. Please include a narrative explanation for any line item difference between the original budget and actual expenses.

Financial information is attached.

6. Please distinguish the work funded by the Robina Grant from your broader, ongoing work on the subject. Include a list of additional funders (if any), including amounts received for this program.

In addition to the work of the Center for New Theatre, Yale School of Drama annually produces three new play festivals that are not funded by the Robina Foundation: the Carlotta Festival of New Plays, the Thornton Wilder Festival of One-Acts, and the Langston Hughes Play Festival. These festivals offer our students the chance to see their plays in full production before public audiences and invited industry professionals.

Also separate from the work funded by the Robina grant in FY2012 is the Yale Institute for Music Theatre (YIMT). YIMT nurtures young music theatre artists—no more than five years out

of school—at a crucial stage in their artistic development. This year, YIMT provided two-week workshops at Yale for two original music theatre pieces. The Institute began as a partnership between the School of Music and the School of Drama and has operated without funds from the Robina Foundation over the past four years. The School of Music is no longer in a position to continue its support, but the School of Drama and Yale Rep see this program as providing a critical contribution to the field. Beginning in FY2013, funds from the Binger Center for New Theatre endowment will underwrite a portion of the operating costs of YIMT.

Other funding for the Center includes a five-year, \$1 million grant from the Andrew W. Mellon Foundation, a significant gift from an anonymous individual donor, and the continued support of Yale School of Drama and Yale University. Additionally, in FY2012, YSD/YRT received a \$250,000 gift, to be paid over five years, to support musical theatre.

Summary

We successfully pursued the original goals and objectives of the Center in its first four years. While investing in some of the most creative minds in the American theatre, we have burnished a national reputation as a highly respected and desired home for artists. The key to our success has been our commitment to flexibility in every aspect of the Center's operations. Our unique ability to tailor each new play development activity to meet the writer's specific needs, to provide production opportunities at Yale Rep and beyond, and to prioritize competitive compensation has positioned Yale Rep as a field leader in new play commissioning, development and production.

Yale Center for New Theatre FY2012

	FY2012 Robina Grant Budget	FY2012 Other Sources Budget	FY2012 Center for New Theatre Total Budget	FY2012 Robina Grant Actual	FY2012 Other Sources Actual	FY2012 Center for New Theatre Total
Income						
Robina Foundation	950,000		950,000	720,715		720,715
Robina Production Enhancement Funds			—	15,000		15,000
Andrew W. Mellon Foundation		200,000	200,000		200,124	200,124
Other (Foundation, Individual, and University support)		366,286	366,286		335,091	335,091
Grand Total Income	950,000	566,286	1,516,286	735,715	535,215	1,270,930
Expenses						
Literary Manager: Salary plus Benefits	80,775		80,775	78,769		78,769
Commissions (including musicals)*	200,000		200,000	95,500		95,500
New Play and Musical Workshops	75,000	80,000	155,000	75,333	84,069	159,402
Production Expenses	450,225	214,359	664,584	355,870	164,701	520,571
YSD Lecturers for Musical Theater/YSD Playwriting Fellowships		68,281	68,281		108,401	108,401
YSD Key Staff Time**	49,000	203,646	252,646	48,350	178,044	226,404
Production Enhancement Fund***			—	15,000		15,000
Robina Indirect Costs	95,000		95,000	66,883		66,883
Grand Total Expenses	950,000	566,286	1,516,286	735,715	535,215	1,270,930

*Commission fees are fluid and may extend over fiscal years

**Key Staff Time includes a portion of Artistic Associate's salary and benefits

***Production Enhancement Fund supported *POP!* at City Theatre, Pittsburgh, PA

Appendices

1. Yale Center for New Theatre Artist Bios
2. PRESS RELEASE: "Yale Repertory Theatre Presents the World Premiere of *Belleville*"
3. REVIEW: "When Two Beautiful Lives Begin to Unravel" (by Charles Isherwood for *The New York Times*, November 4, 2011)
4. ARTICLE: "World Premiere of Amy Herzog's Play At Yale Rep" (by Frank Rizzo for *The Hartford Courant*, October 28, 2011)
5. ARTICLE: "Yale Rep: Things are not what they seem in *Belleville*" (by Donna Doherty for *The New Haven Register*, October 19, 2011)
6. PRESS RELEASE: "Yale Repertory Theatre Presents the World Premiere of *Good Goods*"
7. REVIEW: "Yale Rep's '*Goods*': Review" (by Jeremy Gerard for *Bloomberg News*, February 13, 2012)
8. ARTICLE: "Playwright's Got The *Goods*" (by Charles Gershman for *The New Haven Independent*, February 15, 2012)
9. PRESS RELEASE: "Yale Repertory Theatre Presents the World Premiere of *The Realistic Joneses*"
10. REVIEW: "Casual Joy and Dread, Mingling Every Day" (by Charles Isherwood for *The New York Times*, May 1, 2012)
11. REVIEW: "*The Realistic Joneses* Review" (by Frank Rizzo for *Variety*, April 29, 2012)
12. PRESS RELEASE: "Yale Repertory Theatre's Critically Acclaimed World Premiere of *The Realistic Joneses*"
13. REVIEW: "*A Southern dry goods store full of wonder*" (by Jean Schiffman for *The San Francisco Examiner*, June 7, 2012)
14. ARTICLE: "*POP!*, a surreal musical take on the shooting of Andy Warhol, comes to City Theatre" (by Bill O'Driscoll for *The Pittsburgh City Paper*, May 2, 2012)
15. PRESS RELEASE: Yale Repertory Theatre's 2012-2013 Season

Artist Bios

Christina Anderson's plays include *Drip*, *Hollow Roots*, *Blacktop Sky*, *Inked Baby*, and *Man in Love*. Her work has been produced by or developed with Steppenwolf Theatre Company, Playwrights Horizons, Crowded Fire, American Conservatory Theater, About Face, The Public Theater, Penumbra Theatre, and other theatres all over the country. Awards and honors include the PONY Fellowship nomination, ASCAP Cole Porter Prize (Yale School of Drama), Schwarzman Legacy Scholarship awarded by Paula Vogel, two Susan Smith Blackburn Prize nominations, Lorraine Hansberry Award (American College Theater Festival), Van Lier Playwriting Fellowship (New Dramatists), Wasserstein Prize nomination (Dramatists Guild), Lucille Lortel Fellowship (Brown University), and Core Writer (Playwrights' Center). *American Theatre* magazine selected Anderson as one of fifteen up-and-coming artists "whose work will be transforming America's stages for decades to come." Born and raised in Kansas City, KS, she received her B.A. from Brown University and her M.F.A. from Yale School of Drama. Through the National New Play Network, Anderson is currently a playwright-in-residence with Magic Theater in San Francisco, CA.

Sheila Callaghan's plays have been produced and developed with Soho Rep, Playwrights Horizons, South Coast Repertory, Clubbed Thumb, The LARK, Actors Theatre of Louisville, New Georges, Woolly Mammoth, and Rattlestick Playwrights Theatre, among others. Sheila is the recipient of the Princess Grace Award for emerging artists, a Jerome Fellowship from the Playwrights' Center in Minneapolis, a MacDowell Residency, a Cherry Lane Mentorship Fellowship, the Susan Smith Blackburn Award, and the prestigious Whiting Award. Her plays have been produced internationally in New Zealand, Australia, Norway, Germany, Portugal, and the Czech Republic. These include *Scab*, *Crawl Fade to White*, *Crumble (Lay Me Down, Justin Timberlake)*, *We Are Not These Hands*, *Dead City*, *Lascivious Something*, *Kate Crackernuts*, *That Pretty Pretty*, *Or The Rape Play*, *Fever/Dream*, *Everything You Touch*, *Roadkill Confidential*, and *Women Laughing Alone with Salad*. She is published with Playscripts.com and Samuel French, and several of her collected works are published with Counterpoint Press. She has taught playwriting at Columbia University, The University of Rochester, The College of New Jersey, Florida State University, and Spalding University. Sheila is an affiliated artist with Clubbed Thumb and a member of the Obie winning playwrights' organization 13P. Sheila is also a resident of New Dramatists. In 2010, Callaghan was profiled by *Marie Claire* as one of "18 Successful Women Who Are Changing the World." She was also named one of *Variety* magazine's "10 Screenwriters to Watch" of 2010.

Bill Camp co-adapted and performed in Yale Rep's commissioned adaptation of *Notes From Underground*. His acting credits include Prince Hal in *Henry IV, Parts I and II*; King Henry in *Henry V*; Picasso in *Picasso at the Lapin Agile*; Jamie in *Long Day's Journey Into Night* (Elliot Norton Award, Best Actor); Bolingbroke in *Richard II*; Sir John Brute in *The Provok'd Wife*; Mike in *Olly's Prison* (all at American Repertory Theatre). Broadway credits include *St. Joan*, *The Seagull*, *Jackie: An American Life*. Off-Broadway credits include *Homebody/Kabul* (OBIE Award), *Lydie Breeze*, and *The Demons* (New York Theatre Workshop); *Macbeth* (Theatre for a New Audience); *Measure for Measure*, *One Flea Spare* (Public Theater). Other credits include Brooklyn Academy of Music, Mark Taper Forum, The Guthrie Theater, Yale Repertory Theatre, Berkeley Repertory Theatre, Seattle Repertory Theatre, La Jolla Playhouse, and Hartford Stage, among others. Television/Film: *The Dying Gaul*, *Rounders*, *In and Out*, *Reversal of Fortune*, *Law and Order*, *Joan of Arcadia*, *The Great Gatsby*.

Lucinda Coxon's plays include *Nostalgia* and *Vesuvius* at South Coast Rep; *Improbabilities* at Soho Poly; *Wishbones* and *Waiting at the Water's Edge* at the Bush Theatre, London; *Three Graces* at Lakeside Theatre, Colchester, and the Haymarket Theatre, Leicester. Adaptations include *The Shoemaker's Incredible Wife* from Federico García Lorca and *The Ice Palace* from the novel by Tarjei Vesaas—both for the National Theatre Connections scheme. Her play *Happy Now?* premiered at the Cottesloe Theatre, National Theatre, London in 2008. It has since been produced in Yale Repertory Theater's 2008–2009 Season, and Primary Stages Theater's 25th Anniversary Season in 2009–2010. Her play *Herding Cats* was first seen at the Ustinov Studio, Bath, in December 2010 and revived at the Hampstead Theatre, London, in December 2011. Her screenplays include *The Heart of Me*, *Lily and the Secret Planting*, and *Spaghetti Slow*. Current film projects include *Mrs. Gonzalez*, *Wild Target*, and *The Danish Girl*, adapted from David Ebershoff's novel. Coxon adapted Michel Faber's novel *The Crimson Petal and the White* for the BBC. The series aired in April 2011.

Dorothy Fortenberry is a playwright and graduate of Yale School of Drama. Her plays include *Caitlin and the Swan*, *Good Egg*, *Bibles and Candy*, and the play with music *Large as Life and Twice as Natural: A Status Update with Songs*. Her work has been developed at Arena Stage, Ars Nova, Geva Theatre, New Jersey Rep, and Perishable Theatre, and produced by Chalk Rep, Red Fern Theatre, and The Management. She is a winner of the Helen Merrill Award, the ASCAP Cole Porter Prize in Playwriting from Yale School of Drama and has been nominated for the PONY Fellowship, the Weissberger Award, and the Wasserstein Prize. Her play *Large as Life and Twice as Natural* was a 2011 Finalist for the O'Neill Conference. Her play *Good Egg* won the Jane Chambers Student Playwriting Prize and was a Finalist for the Princess Grace Award. She has received an EST/Sloan commission, a residency at the Djerassi Program, and a Walter E. Dakin Fellowship at the Sewanee Writers' Conference. Dorothy is an alumna of Youngblood and a member of the Playwrights Union and Tilted Field Productions. She has taught playwriting for Young Playwrights Theater in Washington, DC; the Dwight/Edgewood Project in New Haven, CT; and currently teaches with the Virginia Avenue Project in Los Angeles.

Noah Haidle's plays include *Vigils*, *Saturn Returns*, *Mr. Marmalade*, *Persephone*, *Rag and Bone*, and *What is the Cause of Thunder?* His work has been widely produced in the U.S. and abroad. His screenplay, *Old Timers*, will be produced by Sidney Kimmel Entertainment. Mr. Haidle has taught playwriting at Princeton University and The Kennedy Center, and in Kenya and Uganda as part of the Sundance Institute Theatre Program. He is a graduate of Princeton University and The Juilliard School, where he was a Lila Acheson Wallace Playwright-in-Residence. He is the recipient of three Lecomte du Noüy awards, the 2005 Helen Merrill Playwriting Award for emerging playwrights, the 2007 Claire Tow Award, and a National Endowment for the Arts/Theatre Communications Group theater residency grant. He is the inaugural writer-in-residence at Aquinas College.

Lynn Nottage is a proud graduate of Yale School of Drama. Her play, *By The Way, Meet Vera Stark* ran Off-Broadway at Second Stage Theatre. Her Pulitzer Prize-winning play *Ruined* has also received an OBIE, Lucille Lortel, New York Drama Critics' Circle, Drama Desk, and Outer Critics Circle Award for Best Play (Manhattan Theatre Club, Goodman Theatre). It premiered in London at the Almeida Theatre in April 2010 and is touring several US regional theatres in 2010-2011. Nottage is currently writing the screen adaptation for Oprah Winfrey's production company, Harpo Films and HBO. Other plays include *Intimate Apparel* (New York Drama Critics' Circle Award for Best Play); *Fabulation*, or *The Re-*

Education of Undine (OBIE Award); *Crumbs from the Table of Joy*; *Las Meninas*; *Mud, River, Stone*; *Por'knockers* and *POOF!* Nottage is the recipient of the 2010 Steinberg Distinguished Playwright Award, the Dramatists Guild Hull-Warriner Award, the inaugural Horton Foote Prize for Outstanding New American Play (*Ruined*), the Lee Reynolds Award, and the Jewish World Watch iWitness Award. Her other honors include the 2007 MacArthur Foundation "Genius Grant," the National Black Theatre Festival's August Wilson Playwriting Award, the 2005 Guggenheim Grant for Playwriting, the 2004 PEN/Laura Pels Award for Drama, as well as fellowships from the Lucille Lortel Foundation, Manhattan Theatre Club, New Dramatists and New York Foundation for the Arts.

Robert Woodruff co-adapted and directed Yale Rep's commissioned adaptation of *Notes from Underground*. Robert Woodruff has directed plays performed at Lincoln Center Theatre, the New York Shakespeare Festival, the Brooklyn Academy of Music, the American Conservatory Theatre in San Francisco, and The Mark Taper Forum in Los Angeles, among others. Internationally he has created productions at the Habimah National Theatre in Israel and Toneelgroep Amsterdam in the Netherlands. His work has been seen at the Sydney Arts Festival, the Los Angeles Olympic Arts Festival, the Edinburgh International Festival, the Hong Kong Festival of the Arts, the Jerusalem Festival and the Spoleto Festival USA. He has taught at the University of California campuses at San Diego and Santa Barbara, New York University's Tisch School of the Arts and Columbia University. He is now on the faculty of the Yale School of Drama. In 1972, he co-founded the Eureka Theatre in San Francisco, where he served as Artistic and Resident Director until 1978. In 1976 Woodruff established the Bay Area Playwrights Festival, a summer forum for the development of new plays that is still flourishing. From 2002-2007, Mr. Woodruff was the Artistic Director of the American Repertory Theatre. He was named a 2007 USA Biller Fellow by United States Artists, an arts advocacy foundation dedicated to the support and promotion of America's top living artists.



November 8, 2011

FOR IMMEDIATE RELEASE

Contact: Steven Padla / 203 432 1574 / steven.padla@yale.edu

**YALE REPERTORY THEATRE'S
CRITICALLY-ACCLAIMED WORLD PREMIERE OF**

***BELLEVILLE*
BY AMY HERZOG
DIRECTED BY ANNE KAUFFMAN**

NOW PLAYING IN NEW HAVEN THROUGH NOVEMBER 12

**YALE CENTER FOR NEW THEATRE OFFERS
PRODUCTION FUND FOR FUTURE PRODUCTIONS**

YALE REPERTORY THEATRE's critically-acclaimed world premiere of *BELLEVILLE* by Amy Herzog, directed by Anne Kauffman is now playing through Saturday, November 12.

BELLEVILLE was commissioned by Yale Repertory Theatre. Development and production support are provided by the Yale Center for New Theatre, an artist-driven initiative that devotes major resources to the commissioning, development, and production of new plays and musicals at Yale Rep and around the country. Additionally, the Yale Center for New Theatre administers a production fund as support provided to other not-for-profit theatres producing world premiere or second or third productions of plays commissioned by Yale. Learn more about the Yale Center for New Theatre [here](#).

Watch the *BELLEVILLE* video trailer on YouTube [here](#).

The cast of *BELLEVILLE* is Pascale Armand, Maria Dizzia, Greg Keller, and Gilbert Owuor.

BELLEVILLE features sets by Julia C. Lee, costumes by Mark Nagle, lighting by Nina Hyun Seung Lee, sound and original compositions by Robert Kaplowitz, dramaturgy by Amy Boratko and Alex Ripp, vocal and dialect coaching by Beth McGuire, fight direction by Rick Sordelet and Jeff Barry, and stage management by Gina Noele Odierno.

Here's a sampling of what the critics are saying about *BELLEVILLE*:

"Heartbreaking and hair-raising. Ms. Herzog's thrillingly good play confirms her reputation as one of the brightest new talents in the theatre. Directed with flawless finesse by Anne Kauffman, *Belleville* is both a

perceptive drama depicting the sudden fraying of a young marriage and a nail-biting psychological thriller about how festering secrets and reservoirs of guilt can drive even stable people to the brink of violence. While *Belleville* is among the most suspenseful plays I've seen in years, I don't mean to suggest Ms. Herzog has written a standard-issue thriller. The drama is as **moving as it is unnerving.**"

The New York Times

"Anne Kauffman helms judiciously, allowing her actors to create their own inter-personal dynamic—and **it's a sizzler, full of delicious details and bold choices.** Maria Dizzia in particular is a wonder as she rides Abby's emotional roller coaster. Greg Keller earns audience's sympathy at first with his charm and patience before showing other colors as well. It's a head trip for all involved. Gilbert Owuor and Pascale Armand give perfectly measured performances as the couple who understand the Americans better than they know themselves. Production values are top notch, including Julia C. Lee's funky apartment setting, Nina Hyun Seung Lee's Parisian light and Robert Kaplowitz's effective sound."

Variety

"A **complex and compelling** play. The cast navigates the subtle shifts of their characters beautifully and believably (and keeps the audience guessing on where the play is going); Anne Kauffman's sometimes unnerving direction is **pitch-perfect** as Amy Herzog's script keeps adding on the layers."

Hartford Courant

"*Belleville* is a **triumph** of slow-burn technique. It's the kind of play that, with only four characters, one set and no intermission, provides all its thrills and brilliance by simply placing its characters before us and letting us see them squirm and prevaricate and plead and joke and couple and coo and become gradually, relentlessly unhinged and desperate. The effect is **exhilarating**, an entertaining skirting of the abyss where the pursuit of normality turns deadly."

New Haven Review

"A Wild Ride. Engrossing. A fresh, unexpected and ultimately uneasy look at a modern relationship capped by **jaw-dropping irony.**"

The Examiner

"*Belleville's* **chills and thrills** come from everyday, present-day anxieties. Herzog wants to show you the hopelessness and rage that can spiral out of the stresses of everyday living, but she really cares about raising the entertainment value of the experience. *Belleville* is funny. It's suspenseful. It's mock-shocking, then genuinely horrifying. It's weird yet real. It's old-fashioned yet current and immediate. It's ironic yet earnest."

New Haven Theater Jerk

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www.yalerep.org

November 4, 2011
THEATER REVIEW | 'BELLEVILLE'

When Two Beautiful Lives Begin to Unravel

By CHARLES ISHERWOOD

NEW HAVEN — The young couple in "Belleville," a quietly devastating new play by Amy Herzog, would seem to have everything going for them. Attractive, amiable and well educated, they are still playfully affectionate after five years of marriage. Sure, their funky new apartment in Paris is on the scruffier outskirts of the city, in the neighborhood that gives the play its title. But what's better than to be young, in love and living in Paris — anywhere in Paris?

And yet as the play proceeds, Ms. Herzog slowly scrapes away the surface of glossy hope and promise coating the central characters, Zack (Greg Keller) and Abby (Maria Dizzia). Hints of unhappiness and disorder are slowly, almost stealthily revealed, until we come to see, with a clarity that is both heartbreaking and hair-raising, how both members of this seemingly contented couple are walking a tightrope over a chasm of despair.

Ms. Herzog's thrillingly good play, having its premiere here at Yale Repertory Theater, confirms her reputation as one of the brightest new talents in the theater. (Her play "4000 Miles" will reopen at Lincoln Center Theater in the spring after its acclaimed run in a smaller theater last summer.) Directed with flawless finesse by Anne Kauffman, "Belleville" is both a perceptive drama depicting the sudden fraying of a young marriage and a nail-biting psychological thriller about how festering secrets and reservoirs of guilt can drive even stable people to the brink of violence.

After meeting in college and marrying shortly after, Zack and Abby have embarked on a new life in Paris, where he is working for Doctors Without Borders on research to prevent the spread of AIDS among children. Abby, an aspiring actress who feels she is already surfing toward Social Security at 28, has to settle for teaching yoga. ("To be an actor you have to love to suffer," she says in one of the play's lighter moments, "and I only *like* to suffer.") Their move was inspired in part by the death of Abby's mother, from which Abby has not entirely recovered, although she has finally decided to stop taking antidepressants.

In the play's opening scene Abby shuffles in from a canceled yoga class, expecting to find the apartment empty. Instead she stumbles on Zack in the bedroom, in front of the computer during a moment of, shall we say, self-intimacy. At Zack's cajoling, Abby quickly laughs off the embarrassment, but when she later steals into the bedroom to see what he was watching on that



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World Premiere of Amy Herzog's Play at Yale Rep

October 28, 2011|By FRANK RIZZO, frizzo@courant.com, The Hartford Courant

The show: "Belleville"

The place: Yale Repertory Theatre, 1120 Chapel St., New Haven

What is it?: The world premiere of Amy Herzog's new play. I loved her intellectually vigorous family-politics drama "After the Revolution" when it premiered at the Williamstown Theatre Festival in the Berkshires a few summers back. She is definitely a talent to watch and this new work is a fascinating piece, too, that offers a dazzling, disturbing performances from Maria Dizzia and Greg Keller.

What's this one about?: A young married couple in their 20s are living in the Belleville section of Paris, a diverse, funky and transitional neighborhood that isn't quite as romantic as one associates with the elegant architecture. In many ways it's a meaningful metaphor for the couple's relationship, too.

In what way?: Aspirational rather than real. When we first meet Zack and Abby they are quite adorable. They have a breezy banter (and the chemistry between Keller and Dizzia is perfection). The audience might think this will be a hip, contemporary and romantic comedy — sort of an expatriate version of "Barefoot in the Park Goes to Paris." But the audience would be terribly wrong.

Not romantic?: Perhaps a psychologically twisted romance. It becomes increasingly clear that this relationship is based on a fragile foundation. Abby, 28, is a former actress who is now a yoga instructor. She is just off her anti-anxiety anti-depressive meds and is now quite hyper, slightly paranoid and full of mood swings. Zack smokes pot, takes time off from work and seems quite laid back and professionally unengaged for a person who has an important job doing pediatric AIDS research. Then more significant troubles begin to emerge.

Such as...?: Their young landlord from Senegal tells Zack that the couple must pay the four months arears in rent — or leave. And then other unstabilizing incidents occur that signal even greater problems. The reveals become darker and darker until the romantic spell is irrevocably shattered.

The cast navigates the subtle shifts of their characters beautifully and believably (and keeps the audience guessing on where the play is going); Anne Kauffman's sometimes unnerving direction is pitch-perfect as Herzog's script keeps adding on the layers (sometime too many, sometimes not fully fleshed out).



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The New Haven Register (nhregister.com), Serving New Haven, CT

Entertainment > Arts

Yale Rep: Things are not what they seem in 'Belleville' (video)

Tuesday, October 18, 2011

By Donna Doherty, Register Arts Editor

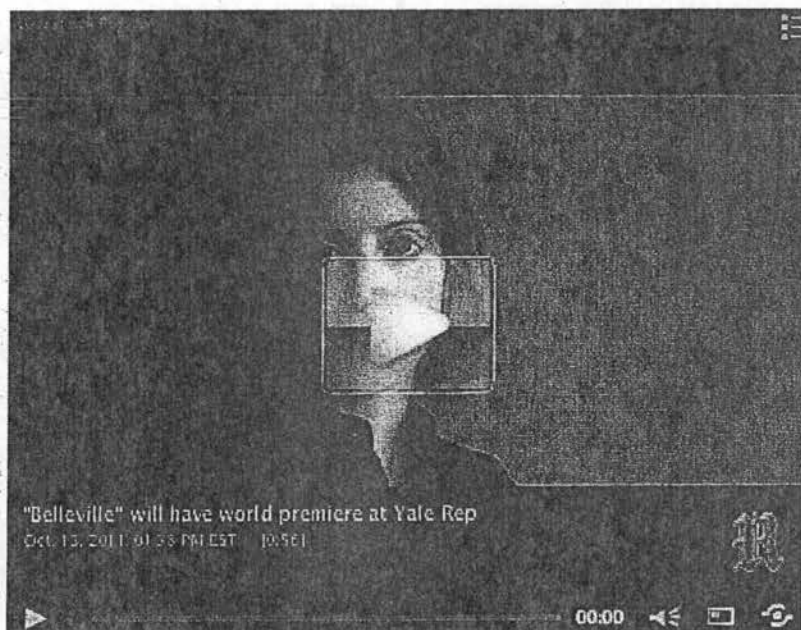
ddoherty@nhregister.com / Twitter: @nhregarts

NEW HAVEN — No one really knows what goes on behind the closed doors of a marriage. Things are not always what they appear to be — sometimes even to the couple.

"Belleville," the new play by the gifted playwright Amy Herzog, which has its world premiere at the Yale Repertory Theatre starting Oct. 21, explores the dynamics of both personal relationships and cultural ones.

Two young couples, American ex-pats Zack and Abby, played by Greg Keller and Maria Dizzia, (last seen at the Rep in Sarah Ruhl's "Eurydice"), and Alioune (Gilbert Owuor) and Amina (Pascale Armand), a French-Senegalese immigrant couple, live in Paris, the Americans renting an apartment in the building owned by the immigrants.

The play, which was commissioned by the Rep, marks the Rep debut for Herzog, as well as a departure for the playwright, whose works such as the acclaimed "After the Revolution" and "4,000 Miles" she says were inspired by her extended family.





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January 11, 2012

FOR IMMEDIATE RELEASE

Contact: Steven Padla / 203 432 1574 / steven.padla@yale.edu

YALE REPERTORY THEATRE
PRESENTS
THE WORLD PREMIERE OF

GOOD GOODS

BY CHRISTINA ANDERSON

DIRECTED BY TINA LANDAU

FEBRUARY 3-25
OPENING NIGHT: FEBRUARY 9

YALE REPERTORY THEATRE (James Bundy, Artistic Director; Victoria Nolan, Managing Director) presents the world premiere of ***GOOD GOODS*** by Christina Anderson, directed by Tina Landau. ***GOOD GOODS*** plays February 3-25 at Yale Repertory Theatre (1120 Chapel Street, at York Street). Opening Night is Thursday, February 9.

GOOD GOODS features sets by James Schuette, costumes by Toni-Leslie James, lighting by Scott Zielinski, sound by Junghoon Pi, dramaturgy by Amy Boratko and Alexandra Ripp, vocal and dialect coaching by Jane Guyer Fujita, and stage management by Maria Cantin.

The cast of ***GOOD GOODS*** features Oberon K.A. Adjepong, de'Adre Aziza, Kyle Beltran, Clifton Duncan, Marc Damon Johnson, and Angela Lewis.

ABOUT *GOOD GOODS*

Yale Rep presents the world premiere of ***Good Goods*** by Christina Anderson, selected by *American Theatre* magazine as an up-and-coming artist "whose work will be transforming America's stages for decades to come." Acclaimed director Tina Landau, an award-winning ensemble member of Steppenwolf Theatre Company who recently staged *Superior Donuts* on Broadway, makes her Yale Rep debut.

Amidst the cluttered shelves of a family-owned general store in a small Black town that doesn't appear on any map, four lost souls reunite. Partnerships dissolve, alliances shift, and romances ignite as a tragic accident unleashes the town's mysterious history. Blurring the line between body and spirit, ***Good Goods*** is an otherworldly love story of the (dis)possessed.

TICKET INFORMATION AND PERFORMANCE SCHEDULE

Tickets for **GOOD GOODS** range from \$20-88, are available online at www.yalerep.org, by phone at (203) 432-1234, and in person at the Yale Rep Box Office (1120 Chapel Street, at York Street). Student, senior, and group rates are also available.

Friday, February 3	8PM	
Saturday, February 4	8PM	Grad Night Reception begins at 7PM
Monday, February 6	8PM	ALL TICKETS \$20
Tuesday, February 7	8PM	ALL TICKETS \$20
Wednesday, February 8	8PM	ALL TICKETS \$20
Thursday, February 9	8PM	Opening Night
Friday, February 10	8PM	
Saturday, February 11	2PM	Talk Back
Saturday, February 11	8PM	
Tuesday, February 14	8PM	
Wednesday, February 15	2PM	Senior Reception begins at 1PM
Wednesday, February 15	8PM	
Thursday, February 16	8PM	Talk Back
Friday, February 17	8PM	
Saturday, February 18	2PM	Open Captioning, Talk Back
Saturday, February 18	8PM	
Tuesday, February 21	8PM	
Wednesday, February 22	8PM	
Thursday, February 23	8PM	
Friday, February 24	8PM	
Saturday, February 25	2PM	Audio Description
Saturday, February 25	8PM	

ABOUT THE CREATIVE TEAM

CHRISTINA ANDERSON (PLAYWRIGHT) Plays include: *Drip*, *Hollow Roots*, *Blacktop Sky*, *Inked Baby*, and *Man in Love*. Her work has been produced by or developed with Steppenwolf Theatre Company, Playwrights Horizons, Crowded Fire, American Conservatory Theater, About Face, The Public Theater, Penumbra Theatre, and other theatres all over the country. Awards and honors include the PONY Fellowship nomination, ASCAP Cole Porter Prize (Yale School of Drama), Schwarzman Legacy Scholarship awarded by Paula Vogel, two Susan Smith Blackburn Prize nominations, Lorraine Hansberry Award (American College Theater Festival), Van Lier Playwriting Fellowship (New Dramatists), Wasserstein Prize nomination (Dramatists Guild), Lucille Lortel Fellowship (Brown University), and Core Writer (Playwrights' Center). *American Theatre* magazine selected Anderson as one of fifteen up-and-coming artists "whose work will be transforming America's stages for decades to come." Born and raised in Kansas City, KS, she obtained her BA from Brown University and her MFA from Yale School of Drama. Through the National New Play Network, Anderson is currently a playwright-in-residence with Magic Theater in San Francisco, CA. christinaranderson.com

TINA LANDAU (DIRECTOR) is a writer and director and an ensemble member at Steppenwolf Theatre Company, where her directing credits include *Hot L Baltimore*, *The Brother/Sister Plays*, *Superior Donuts*, *The Tempest*, *The Time of Your Life* (also at Seattle Rep, American Conservatory Theater), *The Diary of Anne Frank*, *The Cherry Orchard*, and Chuck Mee's *Berlin Circle* and *Time to Burn*. New York credits

include Tarell Alvin McCraney's *Wig Out!* (Vineyard Theatre) and *In the Red and Brown Water* (The Public Theater), Mee's *Iphigenia 2.0* (Signature Theatre Company), and the Broadway productions of *Superior Donuts* and *Bells Are Ringing* (revival). Tina's other directing work includes *Antony and Cleopatra* (Hartford Stage), Paula Vogel's *A Civil War Christmas* (Long Wharf), and *A Midsummer Night's Dream* (McCarter Theatre), while her original writing work includes the upcoming musical *Beauty* with composer Regina Spektor and lyricist Michael Korie, *Floyd Collins* with Adam Guettel (Playwrights Horizons, Prince Theatre, The Old Globe, Goodman Theatre), *Dream True* with Ricky Ian Gordon (Vineyard Theatre), and her plays *Space* (The Public, Mark Taper Forum, Steppenwolf) and *Beauty* (La Jolla Playhouse). Tina's a graduate of Yale College, a USA Fellow, and is the author, with Anne Bogart, of *The Viewpoints Book*.

JAMES SCHUETTE (SCENIC DESIGNER) has worked with Tina Landau on over 25 productions, including Tarrell Alvin McCraney's *The Brother/Sister Plays* (Steppenwolf Theatre Company, The Public Theater, McCarter Theatre), Tracy Letts's *Superior Donuts* (Broadway), Ricky Ian Gordon's *Sycamore Trees* (Signature Theatre), and Paula Vogel's *A Civil War Christmas* (Long Wharf). Recent work includes *Carmen* (Glimmerglass Opera); *La Fille du Regiment* and *The Death of Klinghoffer* (Opera Theatre of St. Louis). His work has been seen at the Vineyard Theatre, New York Theatre Workshop, Brooklyn Academy of Music, Playwrights Horizons, American Repertory Theatre, Arena Stage, Oregon Shakespeare Festival, Berkeley Rep, Goodman Theatre, Manhattan Theatre Club, Court Theatre, American Conservatory Theater, La Jolla Playhouse, Mark Taper Forum, Seattle Rep, Trinity Rep, Houston Grand Opera, Seattle Opera, New York City Opera, Boston Lyric Opera, Chicago Opera Theatre, Opera Theatre of St. Louis, Washington National Opera, Minnesota Opera, Santa Fe Opera and internationally. He is a member of Anne Bogart's SITI Company and is a graduate of the Yale School of Drama.

TONI-LESLIE JAMES (COSTUME DESIGNER) Broadway credits include *The Scottsboro Boys*; *Finian's Rainbow*; *Chita Rivera: The Dancer's Life*; *Ma Rainey's Black Bottom*; *King Hedley II*; *One Mo' Time*; *The Wild Party*; *Marie Christine*; *Footloose*; *The Tempest*; *Twilight: Los Angeles, 1992*; *Angels in America: Millennium Approaches & Perestroika*; *Chronicle of a Death Foretold*; and *Jelly's Last Jam*. Off-Broadway: multiple productions at Lincoln Center Theater, The Public Theater, The Vineyard Theatre, Second Stage, Playwrights Horizons, and 16 productions for the City Center Encores! series. Television: *Whoopi* for NBC, five specials for WNET/13's *Great Performances* series, *As the World Turns*, and *The Huey P. Newton Story*. Ms. James has been honored with a Tony nomination, three Drama Desk nominations, a Lucille Lortel nomination, the Hewes Design Award and three additional nominations, the Connecticut Critics Circle Award, The Irene Sharaff Young Masters Award, and the 2009 OBIE Award for Sustained Excellence in Costume Design. She is Director of Costume Design at Virginia Commonwealth University.

SCOTT ZIELINSKI (LIGHTING DESIGNER) New York credits include *Topdog/Underdog* (Broadway), Atlantic Theater Company, Classic Stage Company, Lincoln Center Festival, Manhattan Theatre Club, New York Theatre Workshop, Playwrights Horizons, The Public Theater, Signature Theatre Company, Theatre for a New Audience, among others. Regionally he has designed at numerous theatres throughout the U.S. Internationally he has designed in Adelaide, Amsterdam, Avignon, Berlin, Bregenz, Edinburgh, Fukuoka, Gennevilliers, Hamburg, Hong Kong, Istanbul, Linz, London, Lyon, Melbourne, Orleans, Oslo, Ottawa, Paris, Reykjavik, Rouen, St. Gallen, Singapore, Stockholm, Stuttgart, Tokyo, Toronto, Vienna, Vilnius, and Zurich. Dance credits include American Ballet Theatre, American Dance Festival, Boston Ballet, Centre National de la Danse, Houston Ballet, Joyce Theater, Kennedy Center, National Ballet of Canada, and San Francisco Ballet. His opera work includes Arizona Opera, Bregenzer Festspiele, Brooklyn Academy of Music, Canadian Opera Company, English National Opera, Gotham Opera, Houston Grand Opera, Lithuanian National Opera, Minnesota Opera, Nederlandse Opera, New York City Opera, Opera Colorado, Pittsburgh Opera, San Francisco Opera, and Spoleto Festival USA. Upcoming productions

include *Miss Fortune* at Royal Opera House (London), *Abigail's Party* at National Theatre (Oslo), *Lear Dreaming* at TheatreWorks Singapore, and *The Seagull* at Festival d'Avignon (Cour d'Honneur).
scottzielinski.com

JUNGHOON PI (SOUND DESIGNER) made his Yale Rep debut last season with *The Piano Lesson*. He is a composer, sound designer, and multi-instrumentalist from South Korea. He has composed scores for mainstream Korean films including *Wondeuki* (Berlin Film Festival, 2012), *Finis Operis* (Cannes Film Festival, 2011), and *A Better Tomorrow* (Venice Film Festival, 2010). K-Pop credits include *Crown J*, *Spacecowboy*, *Shinhwa*, *Roo'ra*, and *R.ef*. New York and regional theatre credits include *Walkabout Yeolha* (The Riverside Theatre), *Blood Wedding* (Schapiro Theatre), and *Price* (New York International Fringe Festival). He received BM and MM from Yonsei University and Dongguk University, and he is a third-year MFA candidate at Yale School of Drama, where he is the recipient of the Eldon Elder Fellowship and where his credits include *Twelfth Night* and *Every Other Hamlet In The Universe*. At Yale Cabaret: *Electra: Mask Ritual*, *The Other Shore*, *Out of the Blue*, *Creation 2011*. junghoonpi.com

AMY BORATKO (PRODUCTION DRAMATURG) is the Literary Manager at Yale Rep and has previously served as dramaturg on the Yale Rep productions of *Belleville*, *Autumn Sonata*, *We Have Always Lived in the Castle*, *Battle of Black and Dogs*, *Compulsion*, *Notes from Underground*, *A Woman of No Importance*, *Eurydice*, and *The Cherry Orchard*. Other dramaturgy credits include *The Time of Your Life*, *The Summer People*, *Romeo and Juliet*, *The War Is Over* (Yale School of Drama); as well as Voice and Vision's ENVISION Retreat at Bard College. She has been a teaching fellow at Yale College and Yale School of Drama and was a managing editor of *Theater* magazine. A graduate of Rice University, she received her MFA in Dramaturgy and Dramatic Criticism from Yale School of Drama.

ALEXANDRA RIPP (PRODUCTION DRAMATURG) is a second-year MFA candidate at Yale School of Drama and a current managing editor of *Theater Magazine*. She served as assistant dramaturg on *The Piano Lesson* and production dramaturg on *Belleville* at Yale Rep. She was literary intern at McCarter Theatre, where she was the assistant dramaturg on *Fetch Clay*, *Make Man*, and *Take Flight*. She is a graduate of Princeton University, where she majored in Spanish and Portuguese Languages and Culture. Alex's translation of *Rey Planta* by Chilean theatre artist Manuela Infante was produced by Yale Cabaret in the fall.

JANE GUYER FUJITA (VOCAL AND DIALECT COACH) is a Lecturer in Speech at Yale School of Drama. Her coaching credits include productions at Yale Rep (*Bossa Nova*, *We Have Always Lived in the Castle*), American Repertory Theatre, Ensemble Studio Theater, Actors' Shakespeare Project, and Shakespeare in the Parking Lot. Jane received her MFA in voice and speech pedagogy from the American Repertory Theatre Institute at Harvard University and is an associate teacher of Fitzmaurice Voicework.

MARIA CANTIN (STAGE MANAGER) previously worked at Yale Repertory Theatre as the Assistant Stage Manager for *The Piano Lesson* and *Three Sisters*. She is a third-year MFA candidate at Yale School of Drama, where her credits include *The Tall Girls*, *A Streetcar Named Desire*, *Every Other Hamlet In The Universe*, *The Droll*, *The Seagull*, and *Buffalo, Maine*. Other credits include *Normal*, *Future Oprah Lovesong* (Yale Cabaret); and *Stuck Elevator* (Yale Institute for Music Theatre). She is a graduate of Hillsdale College. She is a proud member of Actors Equity Association.

ABOUT THE CAST

OBERON K.A. ADJEPONG (WAYMON AS HUNTER PRIESTESS, FACTORY FOLK) is making his Yale Rep debut. He has performed Off-Broadway in *Like I Say*, *Cellophane* (The Flea Theater); *Mother Courage*,

The Blacks (Classic Stage Company, The Classical Theatre of Harlem); *Wabenzi* (Ohio Theatre); *Hieroglyphic Graffiti* (Hip-Hop Theater Festival); *The Hamlet Project* (La MaMa E.T.C.); *Oya and Sango* (The National Black Theatre). Regional credits include *Ruined* (La Jolla Playhouse, Huntington Theatre Company, Berkeley Repertory Theatre, Philadelphia Theater Company); *The Piano Lesson*, *Our Town*, *James and the Giant Peach* (Arden Theatre Company); *Timon of Athens*, *Coriolanus* (Shakespeare Theatre Company); and *A Rhyme Deferred* (National Black Theatre Festival, The Kennedy Center, Nuyorican Café). He has appeared on film and television projects such as *Smash*, *The 22*, *Margin Call*, *Son of No One*, *Hope and Faith*, and *Law & Order: SVU*. He has trained at Lola Louis' Creative and Performing Arts Studio, Oxford University, and Howard University.

DE'ADRE AZIZA (PATRICIA) is proud to be making her Yale Rep debut. Her Broadway credits include *Women on the Verge of a Nervous Breakdown* and *Passing Strange*, for which she won OBIE and Theatre World Awards and was nominated for a Tony Award. Off-Broadway and regional theatre credits include *Passing Strange* (Berkeley Rep, The Public Theater), *The Radio City Christmas Spectacular* (Radio City Music Hall), *Doris to Darlene* (Playwrights Horizons), and *The Hot L Baltimore* (Steppenwolf Theatre). Film and TV credits include three Spike Lee films: *Passing Strange*, *Miracle at St. Anna*, *Red Hook Summer*, *Law and Order: SVU*, and *Sex and the City*. de'Adre has also performed as a jazz singer at Carnegie Hall, The Hollywood Bowl, Lincoln Center, and many other venues. Training: NYU's Tisch School of the Arts, The Groundlings Improv School in Los Angeles.

KYLE BELTRAN (WIRE) is making his Yale Rep debut. He recently made his Broadway debut as Usnavi in *In the Heights* after originating the role on the show's first national tour. His other credits include *10 Things to Do Before I Die* (Second Stage Theatre), *Kingdom* (The Old Globe), and *Aida* (West Virginia Public Theatre). Workshops: *Fortress of Solitude* (Center Theatre Group), *Choir Boy* (Manhattan Theatre Club), *Clueless* (New Group), *Tupac Shakur's Holler If Ya Hear Me* (The Gold Company), Lincoln Center Theater Directors Lab, *Bubble Boy* (ASCAP/PCLO). Kyle recurs as Henry on CBS's hit procedural *Unforgettable*. He received his BFA in drama from Carnegie Mellon University.

CLIFTON DUNCAN (STACEY) is making his Yale Rep debut. He has appeared Off-Broadway in *Lost in the Stars* at City Center Encores!, *Twelfth Night* at The Public Theater, and as a featured artist at Ars Nova's ANT Festival in his hip-hop solo piece, *the universe project*. His regional theatre credits include productions at Arena Stage, CENTERSTAGE, Barrington Stage, Williamstown Theatre Festival, Signature Theatre in Virginia, The Shakespeare Theatre Company, Eugene O'Neill Theater Center, Kansas City Rep, The Shakespeare Theatre of New Jersey, Hangar Theatre, Georgia Shakespeare Festival, and Chautauqua Theatre Company, and Washington Shakespeare Company. He was also recently seen on Comedy Central's *Onion Sports Network*. Clifton received his MFA from NYU's Graduate Acting Program. Follow him in @cliftonduncaniv.

MARC DAMON JOHNSON (TRUTH) is honored to make his Yale Rep debut. Selected credits include *The Brother/Sister Plays* (OBIE Award, Drama League Award nomination), *Measure for Measure* (The Public Theater); *The Brothers Size* (Abbey Theatre, Dublin), *Mr. Fox: A Rumination* (Signature Theatre Company; Drama League Award nomination), as well as productions at John Houseman's The Acting Company, Arena Stage, McCarter Theatre, Berkeley Repertory Theatre, The Kennedy Center, La Jolla Playhouse, Long Wharf Theatre, Cincinnati Playhouse, Cleveland Play House, and Great Lakes Theater Festival. Film and television credits include *Preaching to the Choir* (directed by Charles Randolph-Wright), *It Runs in the Family* (directed by Fred Schepisi), *Grace & Glorie* (directed by Arthur A. Seideman), *Sweet & Lowdown* (directed by Woody Allen), *Army Wives*, *Rescue Me*, *The Sopranos*, *Law & Order*, *Law & Order: Criminal Intent*, *Third Watch*, and *100 Centre Street*.

ANGELA LEWIS (SUNNY) is pleased to make her Yale Rep debut. Angela's Off-Broadway credits include *Hoodoo Love* (Cherry Lane Theatre; AUDELCO Award nomination, Best Actress), *Sand* (Women's Project), *Inked Baby* by Christina Anderson (Playwrights Horizons), and *Milk Like Sugar* (Women's Project/ Playwrights Horizons, also La Jolla Playhouse in California). Angela received her BFA in acting from the University of Michigan, and is a member of LAByrinth Theater Company.

ABOUT YALE REPERTORY THEATRE

YALE REPERTORY THEATRE is dedicated to the production of new plays and bold interpretations of classics and has produced well over 100 premieres—including two Pulitzer Prize winners and four other nominated finalists—by emerging and established playwrights. Eleven Yale Rep productions have advanced to Broadway, garnering more than 40 Tony Award nominations and eight Tony Awards. Yale Rep is also the recipient of the Tony Award for Outstanding Regional Theatre. Established in 2008, the Yale Center for New Theatre is an integrated, artist-driven initiative that devotes major resources to the commissioning, development, and production of new plays and musicals at Yale Repertory Theatre and across the country. Professional assignments at Yale Repertory Theatre are integral components of the program at Yale School of Drama, the nation's leading graduate theatre training conservatory.

ALSO THIS SEASON

THE WINTER'S TALE

By William Shakespeare

Directed by Liz Diamond

March 16-April 7, 2012

World Premiere

THE REALISTIC JONESES

By Will Eno

Directed by Sam Gold

April 20-May 12, 2012

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Bloomberg

Yale Rep's 'Goods': Review

By Jeremy Gerard - Feb 13, 2012

Yale's 'Good Goods'

Yale Repertory Theatre is the place where August Wilson began his unmatched cycle about life in a black enclave of Pittsburgh. Those 10 plays unselfconsciously shifted between realism and ghost story, tall tale and religious experience.

Christina Anderson, whose "Good Goods" has just opened at the Rep, has some Wilson coursing through her veins.

Good Goods is the name of a family-owned dry goods store in a rural outpost somewhere in the deep south. Truth (the wonderful Marc Damon Johnson) cares for the place founded by his adoptive father, now dead.

Stacey is the prodigal, the owner's birth son, who has come back after years on the road as an entertainer with Patricia (de'Adre Aziza). Patricia also shows up, with Sunny (Angela Lewis) a sweet young girl she met on the bus. Rounding out the company is Wire (Kyle Beltran), with whom Truth shares a secret.



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NEW HAVEN INDEPENDENT

IT'S YOUR TOWN. READ ALL ABOUT IT.

Playwright's Got The "Goods"

BY Charles Gershman | FEB 15, 2012 3:18 PM

Commenting has been closed | E-mail the Author

Posted to: Arts



Certain facets of Christina Anderson's new play *Good Goods*, which opened for previews Feb. 3 at the Yale Repertory Theatre, are hard to pin down. The setting is definitively a general store-cum-house in a largely black town in the American South, but the time is described as "1961 and 1994. And everything in between. Time is layered, stacked, mixed, and matched." Similarly, the place is described as "a small town/village that doesn't appear on any map. You have to know about it to get to it." The intentional vagueness with which Anderson constructs time and place creates a sense of overlap and borderlessness that runs through the piece: there's overlap between periods of time, and between places that, layered and stacked as they are, lack the form conventionally imposed by geographical boundaries. Time and place are, in essence, queered.

The play opens with Stacey's return to his father's store, *Good Goods*, which Truth (Marc Damon Johnson) has devotedly managed ever since Stacey's father quit town. Stacey (Clifton Duncan) is half of a popular traveling comedy duo. Patty (De'Adre Aziza) is his steady both onstage and off—until, that is, he leaves her and returns home to the store, where Wire (Kyle Beltran), Patty's twin brother and an effervescent messenger-about-town, has long awaited Stacey. It's Stacey's return to the store—and to Wire—that sets this lively phantasmagoria in motion.

Thankfully, due to a colorfully drawn script and a cadre of larger-than-life characters who continually challenge themselves and each other, that motion never stops.



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March 19, 2012

FOR IMMEDIATE RELEASE

Contact: Steven Padla / 203 432 1574 / steven.padla@yale.edu

YALE REPERTORY THEATRE

PRESENTS

THE WORLD PREMIERE OF

THE REALISTIC JONESES

BY WILL ENO

DIRECTED BY SAM GOLD

FEATURING

JOHANNA DAY, GLENN FITZGERALD, TRACY LETTS, AND PARKER POSEY

APRIL 20-MAY 12

OPENING NIGHT: APRIL 26

YALE REPERTORY THEATRE (James Bundy, Artistic Director; Victoria Nolan, Managing Director) presents the world premiere of *THE REALISTIC JONESES* by Pulitzer Prize-nominated playwright Will Eno, directed by OBIE Award winner Sam Gold. *THE REALISTIC JONESES* plays April 20-May 12 at Yale Repertory Theatre (1120 Chapel Street, at York Street). Opening Night is Thursday, April 26.

The cast of *THE REALISTIC JONESES* features Johanna Day, Glenn Fitzgerald, Tracy Letts, and Parker Posey.

THE REALISTIC JONESES features sets and costumes by David Zinn, lighting by Mark Barton, sound by Ken Goodwin, dramaturgy by Amy Boratko and Anne Seiwerath, and stage management by Jenna Woods.

THE REALISTIC JONESES was commissioned by Yale Repertory Theatre. Development and production support are provided by the Yale Center for New Theatre, established and operated through a grant from the Robina Foundation and with significant support from the Andrew W. Mellon Foundation.

ABOUT THE REALISTIC JONESES

Meet Bob and Jennifer (Tracy Letts and Johanna Day), and their new neighbors John and Pony (Glenn Fitzgerald and Parker Posey), two suburban couples who have more in common than their identical homes and the same last name on their mailboxes.

Two electrifying artists team up at Yale Rep for the world premiere of *The Realistic Joneses*. Dubbed "a Samuel Beckett for the Jon Stewart generation" by *The New York Times*, playwright Will Eno burst onto

the scene in 2005—picking up a Pulitzer Prize nomination along the way—for his play *Thom Pain* (based on *nothing*). His recent *Middletown* was hailed as “totally engrossing” (Associated Press) and “utterly spellbinding!” (*Time Out New York*). One of the most insightful and sought-after directors of his generation, Sam Gold recently staged *Seminar* on Broadway and *Look Back in Anger* at the Roundabout Theatre Company.

TICKET INFORMATION AND PERFORMANCE SCHEDULE

Tickets for *THE REALISTIC JONESES* range from \$20-88, are available online at www.yalerep.org, by phone at (203) 432-1234, and in person at the Yale Rep Box Office (1120 Chapel Street, at York Street). Student, senior, and group rates are also available.

Friday, April 20	8PM	
Saturday, April 21	8PM	Grad Night Reception begins at 7PM
Monday, April 23	8PM	ALL TICKETS \$20
Tuesday, April 24	8PM	ALL TICKETS \$20
Wednesday, April 25	8PM	ALL TICKETS \$20
Thursday, April 26	8PM	Opening Night
Friday, April 27	8PM	
Saturday, April 28	2PM	Talk Back
Saturday, April 28	8PM	
Tuesday, May 1	8PM	
Wednesday, May 2	2PM	Senior Reception begins at 1PM
Wednesday, May 2	8PM	
Thursday, May 3	8PM	Talk Back
Friday, May 4	8PM	
Saturday, May 5	2PM	Open Captioning, Talk Back
Saturday, May 5	8PM	
Tuesday, May 8	8PM	
Wednesday, May 9	8PM	
Thursday, May 10	8PM	
Friday, May 11	8PM	
Saturday, May 12	2PM	Audio Description
Saturday, May 12	8PM	

ABOUT THE CAST

JOHANNA DAY (JENNIFER JONES) made her Yale Rep debut in the 2008 world premiere of *The Evildoers* by David Adjmi. Her Broadway credits include *Lombardi*, *August: Osage County*, and *Proof* (Tony and Lucille Lortel Award nominations). Regional and Off-Broadway theatre credits include *God of Carnage* (Huntington Theatre Company), Will Eno's *Middletown* (Vineyard Theatre), *Quality of Life* (Arena Stage), Ethan Coen's *Almost an Evening* (Atlantic Theater Company), Edward Albee's *Peter and Jerry* (Second Stage Theatre, Drama Desk Award nomination), *Satellites* (New York Stage and Film), *How I Learned To Drive* (Vineyard Theatre, original cast), *Distracted* (Mark Taper Forum), and *Blue Window* (Manhattan Theatre Club). Her film and television credits include *Unbreakable*, *The Eternal Pedicure*, *Fringe*, *Law & Order*, *Law & Order: Trial by Jury*, *Judging Amy*, and Showtime's upcoming *Masters of Sex*.

GLENN FITZGERALD (JOHN JONES) New York theatre credits include *This* (Playwrights Horizons, also Center Theatre Group), *Mizlansky/Zilinsky* or “*Schmucks*” (Manhattan Theatre Club), *Lobby Hero* (Playwrights Horizons; Lucille Lortel Award nomination), *Blue/Orange* (Atlantic Theater Company), and

Hedda Gabler (New York Theatre Workshop). Film credits include *Flirting with Disaster*, *The Ice Storm*, *A Price Above Rubies*, *The Sixth Sense*, *Finding Forrester*, *Manny & Lo*, *Series 7*, *The Believer*, *Tully*, *40 Days and 40 Nights*, *Igby Goes Down*, *Buffalo Soldiers*, and *Trust the Man*. Television credits include *Dirty Sexy Money*, *Six Feet Under*, *Law & Order*, *Law & Order: Criminal Intent*, *Homicide: Life on the Street*, *New York Undercover*, *Wonderfalls*, *CSI: Miami*, *The Cape*, and *Drop Dead Diva*.

TRACY LETTS (BOB JONES) is an ensemble member of the Steppenwolf Theatre Company in Chicago, where he most recently appeared in Enda Walsh's *Penelope*. Previous acting credits include *Middletown* by Will Eno, *Who's Afraid of Virginia Woolf?*, *American Buffalo*, and *The Pillowman*, among many others. Mr. Letts was awarded the Pulitzer Prize for Drama and the Tony Award for Best Play in 2008 for *August: Osage County*. His play, *Superior Donuts*, opened on Broadway in 2009, after its world premiere at Steppenwolf in 2008. *Nebraska* was a finalist for the Pulitzer in 2003. He wrote the plays and screenplays for *Killer Joe* (the film, starring Matthew McConaughey, premiered at the Venice Film Festival in 2011) and *Bug* (starring Michael Shannon and Ashley Judd). The movie version of *August: Osage County* is scheduled to begin filming this fall, starring Meryl Streep.

PARKER POSEY (PONY JONES) Stage credits include David Rabe's *Hurlyburly* (Lucille Lortel Award; The New Group), Lanford Wilson's *Fifth of July* (Signature Theatre Company), John Patrick Shanley's *Four Dogs and a Bone* (Geffen Playhouse), and Elaine May's *Taller than a Dwarf* opposite Matthew Broderick on Broadway. Honored in 2008 by the Deauville Film Festival for her achievement in independent cinema, Parker's indie film credits include *Party Girl*, *The Daytrippers*, *Clockwatchers*, *The House of Yes* (Special Jury Prize, Sundance Film Festival), *Dazed and Confused*, *Personal Velocity* (Independent Spirit Award nomination), *Happy Tears*, *Broken English*, *Waiting for Guffman*, *Best in Show*, *A Mighty Wind*, *For Your Consideration*, and *Price Check*. Other film and television credits include *You've Got Mail*, *Scream 3*, *Josie and the Pussycats*, *The Sweetest Thing*, *Superman Returns*, *Blade Trinity*, the upcoming *Hemingway & Gellhorn* opposite Nicole Kidman and Clive Owen, *The Good Wife*, *The Big C*, *Parks and Recreation*, *Bored to Death*, Armistead Maupin's *Tales of the City*, *The Simpsons*, *Futurama*, *Will & Grace*, *Boston Legal*, and *As the World Turns*.

ABOUT THE CREATIVE TEAM

WILL ENO (PLAYWRIGHT) lives in Brooklyn. He is the recipient of a Residency 5 Fellowship at Signature Theatre Company, where his play *Title and Deed* will be performed in May. His play *Middletown* was a winner of the Horton Foote Award and was produced at the Vineyard Theatre in New York and Steppenwolf Theatre Company in Chicago. His play *Thom Pain (based on nothing)* was a finalist for the 2005 Pulitzer Prize and has been translated into many Romance languages and several Slavic ones. His work is published by TCG, DPS, playscripts, and Oberon Books in London. Other work has also appeared in *Harper's*, *The Believer*, and *The Quarterly*.

SAM GOLD (DIRECTOR) is making his Yale Rep debut. His recent credits *Seminar* on Broadway; *The Big Meal*, *Kin*, *Circle Mirror Transformation* (OBIE Award, Drama Desk Award nomination), all at Playwrights Horizons; *Look Back in Anger*, *Tigers Be Still* (Roundabout Theatre Company); *A Doll's House* (Williamstown Theatre Festival); *August: Osage County* (The Old Globe, San Diego Critics Circle Award); *The Coward* (Lincoln Center's LCT3); *Dusk Rings a Bell* (Atlantic Theater Company); *The Aliens* (OBIE Award), *Rag and Bone* (Rattlestick Playwrights Theater); *Jollyship the Whiz-Bang* (Ars Nova, 2008; The Public Theater's Under the Radar Festival, 2010); *The Joke* (Studio Dante); and *The Black Eyed* (New York Theatre Workshop). Sam was the Dramaturg at The Wooster Group from 2003-2006. He is a Roundabout Associate Artist; NYTW Usual Suspect; Drama League Directing Fellow; recipient of the Princess Grace Award, The Garson Kanin/Marian Seldes Theater Hall of Fame Fellowship; and a graduate of the Juilliard Directing Program.

DAVID ZINN (SCENIC AND COSTUME DESIGNER) Previous Yale Rep credits include the sets for *We Have Always Lived in the Castle* and *Notes from Underground* and the costumes for *Medea/Macbeth/Cinderella*. His Broadway credits include the sets and costumes for *Seminar* and costumes for *Other Desert Cities*, *Bengal Tiger at the Baghdad Zoo*, *Good People*, *In the Next Room (or the vibrator play)* (Tony and Drama Desk Award nominations), *A Tale of Two Cities*, and *Xanadu*. His recent Off-Broadway credits include *The Big Meal*, *Completeness*, *Circle Mirror Transformation* (Playwrights Horizons); *Carrie*, *The Pride* (MCC Theater); *Look Back in Anger* (Roundabout Theatre Company); *The Select (The Sun Also Rises)* (New York Theatre Workshop); *We Live Here, That Face, Back Back Back*, *The Four of Us* (Manhattan Theatre Club); *Middletown* (Vineyard Theatre); and *The Sound and the Fury* (Elevator Repair Service). His regional credits include productions at Berkeley Repertory Theatre, Mark Taper Forum, Oregon Shakespeare Festival, La Jolla Playhouse, Guthrie Theater, Alliance Theatre, Spoleto Festival, Intiman Theatre, Seattle Rep, and CENTERSTAGE, among many others. His set and costume designs for opera have been seen at the Lyric Opera of Chicago, Santa Fe Opera, Glimmerglass, New York City Opera, and others. He is the recipient of the 2008 OBIE Award for Sustained Achievement in Set and Costume Design and the 2005 TDF/Irene Sharaff Young Master Award.

MARK BARTON (LIGHTING DESIGNER) previously designed the lighting for Yale Rep's *Notes from Underground*. Off-Broadway credits include *Look Back in Anger* (Roundabout Theatre Company); *The Big Meal*, *Circle Mirror Transformation* (Playwrights Horizons); *Titus Andronicus* (The Public Theater); *Elective Affinities* (Soho Rep); *The Select*, *The Sound the Fury* (Elevator Repair Service/New York Theatre Workshop); *The Patsy/Jonas* (Transport Group); *Notes from Underground*, *Chair* (Theatre for a New Audience); *Gatz* (Elevator Repair Service: The Public and in over 20 cities around the world); *The Shipment*, *Church* (Young Jean Lee's Theater Company); *No Child...* (Epic Theatre Ensemble/Barrow Street); Will Eno's *Thom Pain (based on nothing)*; as well as work at Target Margin, New Georges, Clubbed Thumb, PS122, and Signature Theatre Company. Regional credits include productions at American Repertory Theater, La Jolla Playhouse, Perseverance Theatre, Long Wharf, South Coast Rep, Berkeley Rep, Center Theatre Group/Kirk Douglas Theatre, Syracuse Stage, Asolo Rep, as well as many productions with Curtis Opera Theatre in Philadelphia.

KEN GOODWIN (SOUND DESIGNER) made his Yale Rep debut earlier this season on *A Doctor in Spite of Himself*. A sound designer and engineer originally hailing from upstate New York and Pennsylvania, he has worked with a number of different companies in the U.S. and U.K., ranging from drama and musical theatre to opera and rock 'n' roll. Ken's background also includes a number of corporate clients and touring dance companies throughout the States. Selected companies he has worked with include Adirondack Theatre Festival, Berkeley Repertory Theatre, Merry-Go-Round Playhouse, Spoleto Festival USA, Utah Festival Opera, and others. Ken also serves as an artistic associate for Yale Cabaret's 44th season. He has also worked with numerous live bands at nightclubs and festivals in Pennsylvania and New Jersey.

AMY BORATKO (PRODUCTION DRAMATURG) is the Literary Manager at Yale Rep and has previously served as dramaturg on the Yale Rep productions of *Good Goods*, *Belleville*, *Autumn Sonata*, *We Have Always Lived in the Castle*, *Battle of Black and Dogs*, *Compulsion*, *Notes from Underground*, *A Woman of No Importance*, *Eurydice*, and *The Cherry Orchard*. Other dramaturgy credits include *The Time of Your Life*, *The Summer People*, *Romeo and Juliet*, *The War Is Over* (Yale School of Drama), as well as Voice and Vision's ENVISION Retreat at Bard College. She has been a teaching fellow at Yale College and Yale School of Drama and was a managing editor of *Theater* magazine. A graduate of Rice University, she received her MFA in Dramaturgy and Dramatic Criticism from Yale School of Drama.

ANNE SEIWERATH (PRODUCTION DRAMATURG) is a third-year MFA candidate at Yale School of Drama and a Literary Associate at Yale Repertory Theatre. Other dramaturgy credits include Yale Rep's world premiere of *Bossa Nova* by Kirsten Greenidge and the School of Drama productions of *The Taming of the Shrew*, Justin A. Taylor's *Rodeo*, Michael Mitnick's *elijah*, and Caroline V. McGraw's *Thriftcrawl*. Recent work at Yale Cabaret includes *Creation 2011* (performer), *Rey Planta* (translation consultant), *Crumbs* (co-writer/director), and *Debut . . . or, the Shed* (producer). She holds degrees in English literature from Barnard College and the University of Toronto.

JENNA WOODS (STAGE MANAGER) Previous Yale Rep credits include *Battle of Black and Dogs*, *POP!*, and *Notes from Underground*. Her New York credits *CQ/CX*, *Through a Glass Darkly*, *The New York Idea* (Atlantic Theater Company); *The Language Archives* and *Suicide, Incorporated* (Roundabout Theatre Company). Other productions include *Measure for Measure* (Elm Shakespeare Company), the National Tours of *The Music Man* and *Footloose* (Props Supervisor), and the North American tour of *Riverdance* (Wardrobe Supervisor). Education: BFA, University of Kansas; MFA, Yale School of Drama.

ABOUT YALE REPERTORY THEATRE

YALE REPERTORY THEATRE is dedicated to the production of new plays and bold interpretations of classics and has produced well over 100 premieres—including two Pulitzer Prize winners and four other nominated finalists—by emerging and established playwrights. Eleven Yale Rep productions have advanced to Broadway, garnering more than 40 Tony Award nominations and eight Tony Awards. Yale Rep is also the recipient of the Tony Award for Outstanding Regional Theatre. Established in 2008, the Yale Center for New Theatre is an artist-driven initiative that devotes major resources to the commissioning, development, and production of new plays and musicals at Yale Repertory Theatre and across the country. Professional assignments at Yale Repertory Theatre are integral components of the program at Yale School of Drama, the nation's leading graduate theatre training conservatory.

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May 1, 2012

THEATER REVIEW

Casual Joy and Dread, Mingling Every Day

By CHARLES ISHERWOOD

NEW HAVEN — Intimations of mortality hover in the pauses punctuating the dialogue in "The Realistic Joneses," the tender, funny, terrific new play by Will Eno at the Yale Repertory Theater here. Mr. Eno's voice, which teases out the poetry in the pedestrian and finds glinting humor in the static that infuses our faltering efforts to communicate, is as distinctive as any American playwright's today. He writes about big matters — nothing bigger than life and death, after all — as if they were incidental oddities deserving of wry comment but no great moralizing or posturing.

"The Realistic Joneses," directed with grace by the busy Sam Gold, is dappled with the quirky non sequiturs and deadpan wordplay that are among Mr. Eno's signature effects, along with a quiet insistence on the majesty and mystery of human existence. As delivered by an ideal cast — Johanna Day, Glenn Fitzgerald, Tracy Letts and Parker Posey, all keenly attuned to Mr. Eno's sensibility — his off-kilter dialogue comes to seem as natural, and lovely, as the chirping of crickets and the sound of bird song.

Such images spring to mind because the humming of the natural world is heard throughout "The Realistic Joneses," which is set in a small town in the countryside (more rural than Mr. Eno's "Middletown"), where two couples who share the same last name find their lives slowly twining together in ways large and small.

Bob and Jennifer Jones (Mr. Letts and Ms. Day) are taking in the night air in the backyard when John and Pony Jones (Mr. Fitzgerald and Ms. Posey), perhaps a decade or so younger, come to introduce themselves, bottle of wine in silver cellophane in hand. They have just moved into a house down the road. Conversation lurches from friendly and awkward to suddenly intimate, when Jennifer confides that Bob has a disease for which he is undergoing complicated treatment.

"Say no more," says Pony.

"Have you had experience with something like this?" Jennifer naturally responds.

"I just didn't want you to say any more," Pony replies flatly. (And nobody does flat as funny as Ms. Posey.)



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<http://www.variety.com/review/VE1117947467?refcatid=33>

To print this page, select "PRINT" from the File Menu of your browser.

Posted: Sun., Apr. 29, 2012, 5:24pm PT

The Realistic Joneses

Meet the Joneses. And meet the Joneses again. They're two couples that share more than a surname in Will Eno's weird and wonderful play, getting its world preem at New Haven's Yale Repertory Theater.

By FRANK RIZZO

Meet the Joneses. And meet the Joneses again. They're two couples that share more than a surname in Will Eno's weird and wonderful play, getting its world preem at New Haven's Yale Repertory Theater. Eno has a field day with existential dualities that come on like doppelgangbusters. High-profile cast (Parker Posey, Tracy Letts), hip helmer Sam Gold and a seemingly more accessible -- and very funny -- work assures a route to Gotham.

But a tightening of the wordplay and more heat -- or at least warmth -- to the characters may be necessary for this Rep-commissioned work to cross over from the Eno repertory of quirky, cool loners and reach a wider audience.

Eno, Pulitzer finalist for the solo show "Thom Pain (based on nothing)," goes domestic with a story about two suburban couples with the same last monikers, similar homes and mutual rhythms of speaking. Jennifer (Johanna Day) and Bob (Tracy Letts) are an older couple, whose relationship is strained as they deal with his degenerative health issue.

Enter new neighbors Pony (Parker Posey) and John (Glenn Fitzgerald), a short-attention-span couple with offbeat sensibilities and an affinity for twisting words into linguistic pretzels.



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May 2, 2012

FOR IMMEDIATE RELEASE

Contact: Steven Padla / 203 432 1574 / steven.padla@yale.edu

**YALE REPERTORY THEATRE'S
CRITICALLY ACCLAIMED WORLD PREMIERE OF**

THE REALISTIC JONESES

BY WILL ENO

DIRECTED BY SAM GOLD

NOW PLAYING IN NEW HAVEN THROUGH MAY 12

**BINGER CENTER FOR NEW THEATRE OFFERS
PRODUCTION ENHANCEMENT FUND FOR FUTURE PRODUCTIONS**

YALE REPERTORY THEATRE's critically acclaimed world premiere of *THE REALISTIC JONESES* by Will Eno, directed by Sam Gold, is now playing through Saturday, May 12.

THE REALISTIC JONESES was commissioned by Yale Repertory Theatre. Development and production support are provided by the **Binger Center for New Theatre**, an artist-driven initiative that devotes major resources to the commissioning, development, and production of new plays and musicals at Yale Rep and around the country. A key component of the Center's programs is its Production Enhancement Fund, which provides financial support for productions at other theatres of works commissioned and/or first produced at Yale Rep. Learn more about the Binger Center for New Theatre [here](#).

The cast of *THE REALISTIC JONESES* features Johanna Day, Glenn Fitzgerald, Tracy Letts, and Parker Posey.

THE REALISTIC JONESES features sets and costumes by David Zinn, lighting by Mark Barton, sound by Ken Goodwin, projections by Paul Lieber, dramaturgy by Amy Boratko and Anne Seiwert, and stage management by Jenna Woods.

Watch *THE REALISTIC JONESES* on YouTube: [interviews with cast and creative team](#) and [performance footage](#).

[Here's a sampling of what the critics are saying about *THE REALISTIC JONESES*:](#)

"TENDER, FUNNY, TERRIFIC! Mr. Eno's voice, which teases out the poetry in the pedestrian and finds glinting humor in the static that infuses our faltering efforts to communicate, is as distinctive as any American playwright's today. *The Realistic Joneses*, directed with grace by Sam Gold, is dappled with the quirky non sequiturs and deadpan wordplay that are among Mr. Eno's signature effects, along with a **quiet insistence on the majesty and mystery of human existence**. As delivered by an ideal cast—Johanna Day, Glenn Fitzgerald, Tracy Letts and Parker Posey, all keenly attuned to Mr. Eno's sensibility—his off-kilter dialogue comes to seem as natural, and lovely, as the chirping of crickets and the sound of bird song."

The New York Times

"Leaving aside the matter of how very funny *The Realistic Joneses* is,—the play **worms its way into the psyche**. Eno subtly imprints on our consciousness not just a general awareness of our mortality—that's old news—but of the way dread pervades our daily routines, and how it instills in us a need for other people. The resulting domestic arrangements are often accidental or arbitrary, and the attempts to communicate with one another can go haywire. In the world according to Eno, sudden change is not a possibility but a certainty, and there's not a thing we can do to prepare for it."

Boston Globe

"Weird and wonderful! Eno's sudden-shifting between profound and playful verbiage is delightfully disarming and sometimes awfully funny."

Variety

"Within five minutes, Will Eno has his audience eating out of his hand, feeding theatergoers refreshingly tasty dialogue. Nothing pre-packaged or canned here—the plainspoken morsels of off-kilter idle chat arrive straight off the vine. The wizardry of Eno's craft, directed with just the right tone by Sam Gold, is that, as surrealistic as this world may seem, and as awkwardly funny as the action is, theatergoers most certainly identify with these characters' loneliness. In its quirky fashion, it may be **the most singular work in some time**."

New Haven Register

"Will Eno creates a fascinating word fest of meaning and meaninglessness in a new work that **dazzles**."

Hartford Courant

"This new play captures with honesty and compassion the fear and dread that lies at the core of so much of modern life. A **witty, touching, and bittersweet** production."

The Examiner

"Will Eno uses the structure of language itself to tell a story. His characters often grapple with finding the right words to express themselves and the realization that sometimes those words don't exist. His **thought-provoking** new work, *The Realistic Joneses*, now getting a **superb production** at Yale Rep, is no exception."

Theater Mania

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www.yalerep.org

www.yalerep.org/center

The Examiner

sfexaminer.com

A Southern dry goods store full of wonder

By: Jean Schiffman | 06/07/12 4:00 AM

Special To The SF Examiner

If Tennessee Williams had been born black, he might have written a play like Christina Anderson's "Good Goods," receiving a stellar West Coast premiere by the ever-adventurous Crowded Fire Theater.

Anderson's script is so dense — and the dialogue so melodiously thick — that it takes a while to grasp the nuances of the various relationships among the characters in Good Goods, which is a dry-goods store in a small, blue-collar Southern town.

There's high-strung Truth (David E. Moore), longtime shop manager and protege of the original shop owner, Mr. Good.

There's the slightly younger, restlessly disturbed Stacey (Yahya Abdul-Mateen II), the owner's son, who has been touring in a comedy duo for years and has suddenly reappeared and taken over, much to Truth's resentment.

There's good-natured messenger-boy Wire (Armando McClain), eager to celebrate his 30th birthday today, especially now that Stacey is back — the erotic undercurrent between them is palpable.



COURTESY PHOTO

In the act: Mollena Williams appears in Crowded Fire Theater's evocative West Coast premiere of "Good Goods."



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[THEATER REVIEWS + FEATURES]

ON STAGE » THEATER REVIEWS + FEATURES

May 02, 2012

POP!, a surreal musical take on the shooting of Andy Warhol, comes to City Theatre

"This is what happens if someone turns other people into art, or if the only way they love other people is if they're art."

by [Bill O'Driscoll](#)

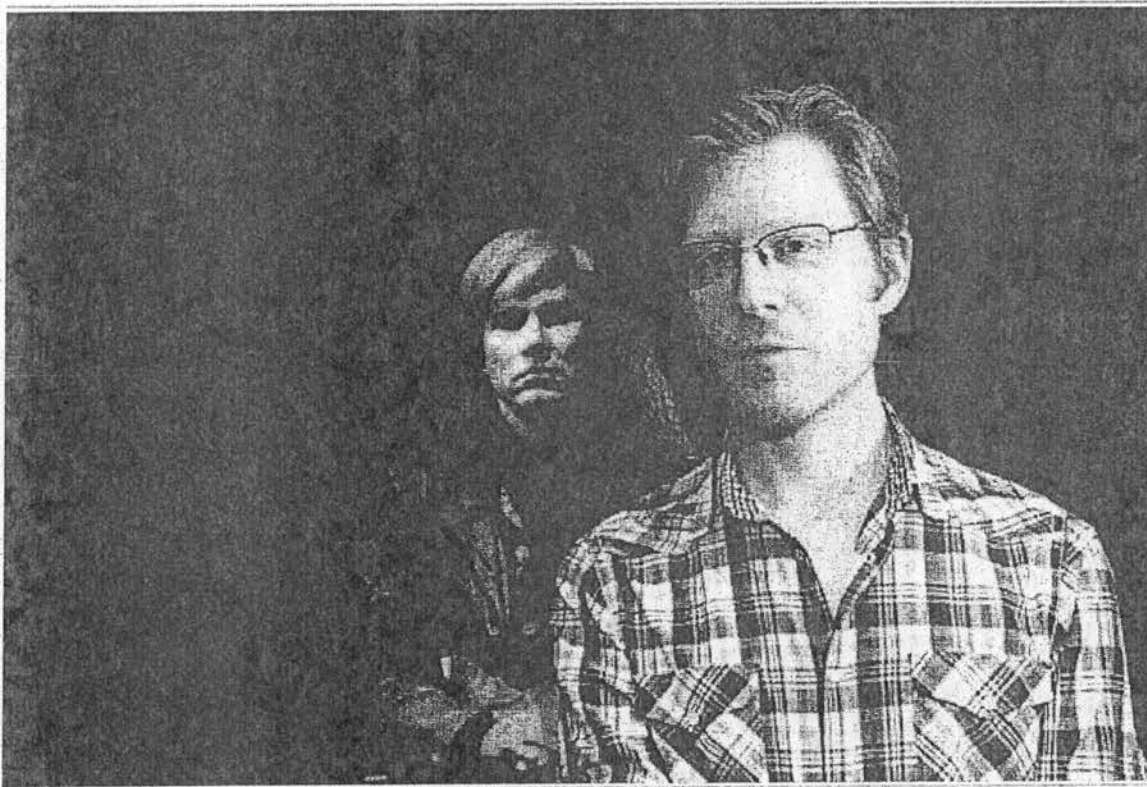


Photo by Heather Mull

Though not yet in costume, Broadway star Anthony Rapp works on his noncommittal gaze as he prepares to play Andy Warhol in *POP!*, a new musical at City Theatre



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March 16, 2012
FOR IMMEDIATE RELEASE

Contact: Steven Padla
203 432 1574 / steven.padla@yale.edu

YALE REPERTORY THEATRE ANNOUNCES 2012-2013 SEASON

**AMERICAN NIGHT:
THE BALLAD OF JUAN JOSÉ**
Written by RICHARD MONTOYA
Developed by CULTURE CLASH and JO BONNEY

**WORLD PREMIERE
MARIE ANTOINETTE**
By DAVID ADJMI
Directed by REBECCA TAICHMAN
A Co-Production with American Repertory Theater

**WORLD PREMIERE
DEAR ELIZABETH**
By SARAH RUHL
A play in letters
from Elizabeth Bishop to Robert Lowell
and back again
Directed by LES WATERS

STONES IN HIS POCKETS
By MARIE JONES
Directed by EVAN YIONOULIS

**PAUL GIAMATTI
HAMLET**
By WILLIAM SHAKESPEARE
Directed by JAMES BUNDY

**WORLD PREMIERE
IN A YEAR WITH 13 MOONS**
By RAINER WERNER FASSBINDER
Adapted by BILL CAMP and ROBERT WOODRUFF
Directed by ROBERT WOODRUFF
Featuring BILL CAMP

YALE REPERTORY THEATRE (James Bundy, Artistic Director; Victoria Nolan, Managing Director) is pleased to announce its 2012-2013 Season, which will include Academy Award-nominated actor Paul Giamatti in William Shakespeare's *Hamlet*; three world premieres: *Marie Antoinette* by David Adjmi, *Dear Elizabeth* by Sarah Ruhl, and Rainer Werner Fassbinder's *In a Year with 13 Moons* adapted by Bill Camp and Robert Woodruff; *American Night: The Ballad of Juan José*, a new play by Richard Montoya; and *Stones in His Pockets* by Marie Jones.

ABOUT THE 2012-2013 SEASON

AMERICAN NIGHT:

THE BALLAD OF JUAN JOSÉ

Written by Richard Montoya

Developed by Culture Clash and Jo Bonney

Directed by Shana Cooper

September 21-October 13, 2012

Opening Night: September 27

University Theatre (222 York Street)

As Juan José feverishly studies for his citizenship exam, his obsession to pass takes him on a fantastical odyssey through U.S. history guided by a handful of unsung citizens who made courageous choices in some of the country's toughest times. *American Night: The Ballad of Juan José* is a provocative, irreverent, and hilarious mix of past and present, stereotype and truth.

"Fast-paced, gleeful, and sly" (*Los Angeles Times*), *American Night* is a new play by writer and performer Richard Montoya. With Ric Salinas and Herbert Siguenza, he co-founded Culture Clash, the country's most popular Chicano/Latino performance troupe, in 1984. *Culture Clash in AmeriCCa* played at Yale Rep in 2003.

World Premiere

MARIE ANTOINETTE

By David Adjmi

Directed by Rebecca Taichman

A Co-Production with American Repertory Theater

October 26-November 17, 2012

Opening Night: November 1

Yale Repertory Theatre (1120 Chapel Street)

The young queen Marie Antoinette delights and inspires her French subjects with her three-foot tall wigs and extravagant *haute couture*. But times change and even the most fashionable queens go out of style. In David Adjmi's humorous and haunting *Marie Antoinette*, idle gossip turns more insidious as the country revolts, demanding *liberté, égalité, fraternité*!

David Adjmi's recent Off-Broadway plays, *Elective Affinities* and *Stunning*, were hailed by *The New Yorker* for their "gorgeous blend of narrative, girl talk, and politics." The world premiere of *Marie Antoinette* reunites the playwright with director Rebecca Taichman, who staged Adjmi's play, *The Evildoers*, at Yale Rep in 2008.

The world premiere of *Marie Antoinette* is a co-production with American Repertory Theater, where it will play in September 2012.

World Premiere

DEAR ELIZABETH

By Sarah Ruhl

A play in letters

from Elizabeth Bishop to Robert Lowell

and back again

Directed by Les Waters

November 30-December 22, 2012

Opening Night: December 6

Yale Repertory Theatre (1120 Chapel Street)

Sarah Ruhl, one of the most celebrated and honored playwrights of her generation, returns to Yale Rep with the world premiere of *Dear Elizabeth*, chronicling the remarkable thirty-year friendship between two of the most celebrated and honored American poets of the 20th century: Elizabeth Bishop and Robert Lowell. With postmarks from Maine to Key West, and as far away as London and South America, *Dear Elizabeth* is a lyrical and moving portrait of two lives that unfold in letters.

Sarah Ruhl made her Yale Rep debut in 2004 with the world premiere of *The Clean House*, a finalist for the Pulitzer Prize in Drama. Her collaborations with director Les Waters include the acclaimed productions of *Eurydice* at Yale Rep in 2006 and the Pulitzer and Tony Award-nominated *In the Next Room (or the vibrator play)* on Broadway.

STONES IN HIS POCKETS

By Marie Jones

Directed by Evan Yionoulis

January 25-February 16, 2013

Opening Night: January 31

Yale Repertory Theatre (1120 Chapel Street)

In Marie Jones's "inventive and riotously funny" (*Associated Press*) play, a rural Irish village is turned upside down by the arrival of an American film crew. When Charlie and Jake are cast as extras in the movie, they discover that Hollywood's romanticized Ireland stands in stark contrast to the reality of their daily lives.

Winner of London's Olivier Award for Best Comedy, *Stones in His Pockets* is staged by OBIE Award-winning resident director Evan Yionoulis and features two actors playing more than a dozen eccentric characters—from the film's spoiled American starlet to the star-struck locals.

Paul Giamatti

HAMLET

By William Shakespeare

Directed by James Bundy

March 15-April 13, 2013

Opening Night: March 21

University Theatre (222 York Street)

Academy Award nominee Paul Giamatti returns to the Yale Rep stage as the Prince of Denmark in *Hamlet*, Shakespeare's harrowing tragedy of corruption, betrayal, and madness. Haunted by a ghostly revelation that his father, the King, was murdered, Hamlet puts into motion a vengeful plan that will have devastating consequences for his family and the kingdom.

Staged by Artistic Director James Bundy, *Hamlet* marks the first Yale Rep appearance for Paul Giamatti since Shakespeare's *As You Like It* in 1994. His critically-acclaimed body of work includes the films *Cinderella Man* and *Sideways*; HBO's *John Adams*, for which he received Emmy and Golden Globe Awards; and *The Iceman Cometh* on Broadway.

Please note: *Hamlet* is Yale Rep's 2012-2013 WILL POWER! production. The run includes four 10:15AM performances available only to 9th-12th grade school groups. For information on WILL POWER! performances, please contact Ruth M. Feldman at (203) 432-8425 or rm.feldman@yale.edu.

World Premiere

IN A YEAR WITH 13 MOONS

By Rainer Werner Fassbinder

Adapted by Bill Camp and Robert Woodruff

Directed by Robert Woodruff

Featuring Bill Camp

April 26-May 18, 2013

Opening Night: May 2

Yale Repertory Theatre (1120 Chapel Street)

When the object of his affection off-handedly commented, "too bad you're not a girl," Erwin disappeared to Casablanca and returned as Elvira. Now, adrift and alone, Elvira revisits the people and places of the past, desperately searching for the identity and love she's never known.

The world premiere of *In a Year with 13 Moons*—a new adaptation of Rainer Werner Fassbinder's melodramatic, darkly comic, and unsettling New German Cinema masterpiece—is staged by Robert Woodruff, "the country's most adventurous director" (*Time Out New York*), and features Bill Camp, "one of the bravest, smartest, and most physically intense actors in New York" (*The New York Times*).

ABOUT YALE REPERTORY THEATRE

Yale Repertory Theatre is dedicated to the production of new plays and bold interpretations of classics and has produced well over 100 premieres—including two Pulitzer Prize winners and four other nominated finalists—by emerging and established playwrights. Eleven Yale Rep productions have advanced to Broadway, garnering more than 40 Tony Award nominations and eight Tony Awards. Yale Rep is also the recipient of the Tony Award for Outstanding Regional Theatre. Established in 2008, the Yale Center for New Theatre is an artist-driven initiative that devotes major resources to the commissioning, development, and production of new plays and musicals at Yale Repertory Theatre and across the country. Professional assignments at Yale Repertory Theatre are integral components of the program at Yale School of Drama, the nation's leading graduate theatre training conservatory.

2012-2013 SUBSCRIPTION INFORMATION

Yale Repertory Theatre offers a variety of subscription packages for audiences to enjoy the entire season, starting at \$30 per ticket for the general public and \$10 for students.

Subscriptions are available now online at www.yalerep.org, by phone at (203) 432-1234, and in person at the Yale Rep Box Office (1120 Chapel Street) during regular business hours (Monday through Friday 10AM-5PM, Saturday 12-5PM, and until 8PM on all performance evenings).

Individual tickets for the entire season will go on sale on September 4. Group Sales will be available as well on September 4 by calling (203) 432-1572.

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www.yalerep.org

commend all of you for your continued efforts to connect the dots of YLS' many human rights initiatives, including those that are part of the Robina Foundation program. A couple of questions:

- 1) We're wondering what, if anything, Jim would say is still missing in YLS' human rights programming.
- 2) As your data base becomes more substantive, are there changes in your programming that might enhance your work, e.g. aggregating student interests, perhaps by focusing on certain areas? You can undoubtedly think of other ways to enhance your already comprehensive work.

Thanks for considering these questions. Let me know your thoughts.

Warm regards,
Penny

Penny A. Hunt
Executive Director

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**Robina Foundation Human Rights
Fellowship Initiative**

Assessment Report



Yale Law School

Submitted by

**James Silk, Clinical Professor of Law
and Executive Director,
Orville H. Schell, Jr. Center for International Human Rights**

**Katy Lawder, Coordinator, Robina Foundation
Human Rights Fellowship Initiative**

July 2012

I. Overview

The Robina Foundation Human Rights Fellowship Initiative Assessment, submitted in spring 2011, constituted a multi-year overview, drawing upon three years of activities at the Yale Law School. A significant part of last year's assessment efforts, therefore, involved developing and piloting a variety of tools designed to generate and systematize data about the various activities supported by the Robina Initiative. By contrast, this year's priority has been to institutionalize the various assessment tools, in order to integrate them into the academic cycle of Yale Law School. Another priority has been to make the Orville H. Schell, Jr. Center for International Human Rights Database, which was initially started in the fall of 2010, increasingly useful. This database is a centralized repository that complements many of the other assessment activities and documents the activities of individual members of the Law School's human rights community on a long-term basis.

There has been significant progress in both these areas. We have refined and regularized the use of a set of tools to gain information from students and fellows associated with the Robina Human Rights Fellowship Initiative and have upgraded the Schell Center Human Rights Database software and begun to make greater use of it. Use of this software will, among other things, permit us to document and analyze information more longitudinally. We present in this report limited quantitative information but with the caveat that it is, in most cases, based on relatively small annual numbers. As we move forward and begin to store and manage data with more consistency, we will be in a better position to track trends over time.

II. Robina Summer Human Rights Fellowships

In the summer of 2011, there were 41 *Kirby Simon Summer Human Rights Fellows Funded by the Robina Foundation*: 32 from the class of 2013; 8 from the class of 2012 (several of whom were also 2010 Summer Fellows); and one, just graduated, from the class of 2011. Robina Summer Fellows worked in 18 foreign countries, including Brazil, Cambodia, the Czech Republic, Guatemala, India, Mexico, Pakistan, the Philippines, Senegal, and South Africa. Eleven Summer Fellows worked in the United States for the summer, in several cases splitting the summer between a U.S. placement and a placement abroad. The full listing of 2011 Summer Human Rights Fellowships is attached as Appendix A.

A. Description of Summer Human Rights Fellowships

Summer Fellows worked in a diverse range of organizations and institutions, including both places with a long history of hosting Yale Law School Summer Fellows and other sites that the students themselves identified and contacted. A partial list of summer fellowships presented here shows the contrast between placements at host organizations with well-established histories of cooperation with the Law School and placements developed more recently, in most cases by the Fellows themselves.

Nongovernmental Organizations: Many organizations that have hosted Summer Human Rights Fellows in the past did so again in 2011.

- The Doughty Street Chambers in London, a law firm that regularly works on important international human rights cases, hosted two Summer Fellows in 2011; they previously hosted one in 2009 and two in 2010.
- The International Justice Mission hosted a 2011 Summer Fellow in the Philippines; they previously hosted Summer Fellows in India in both 2007 and 2008 and in Rwanda in 2008. They will also be hosting a 2012 Yale Law School Post-Graduate Fellow in Uganda.
- The Alternative Law Forum in India hosted a 2011 Summer Fellow, as well as Summer Fellows in 2009 and 2010, including one who is a current Robina Post-Graduate Fellow working with the UN Special Rapporteur on the Right to Food. They are currently hosting a 2012 Summer Fellow.
- The American Bar Association Central European and Eurasian Law Initiative (CEELI), hosted a 2011 Summer Fellow and has also hosted Summer Fellows in the past: in Georgia (2004) and in Kosovo (2008 and 2009). CEELI is also hosting Paul Linden-Retek '12 as a Summer Fellow in the Czech Republic. Paul was a 2011 Summer Fellow in the Czech Republic's Department of Human Rights and Minority Protection; a Robina JD Scholar in 2010 and 2011; and a student director of the Lowenstein Clinic this past academic year.

First-time Summer Fellowship placements developed by students for 2011 include:

- the Uganda Rural Fund;
- the UN Special Rapporteur on the Right to Housing and the Global Network for Public Interest Law and Women's Watch in China (same person, a split summer);
- the Center for Migrants' Rights in Mexico;
- Lawyers for Human Rights in South Africa (which is also hosting a 2012 Summer Fellow)
- the Comité Senegalais des Droits de L'Homme; and
- the Public Interest Group at the Universidad de los Andes in Bogotá, Colombia, which develops public interest cases to submit to Colombia's Constitutional Court.

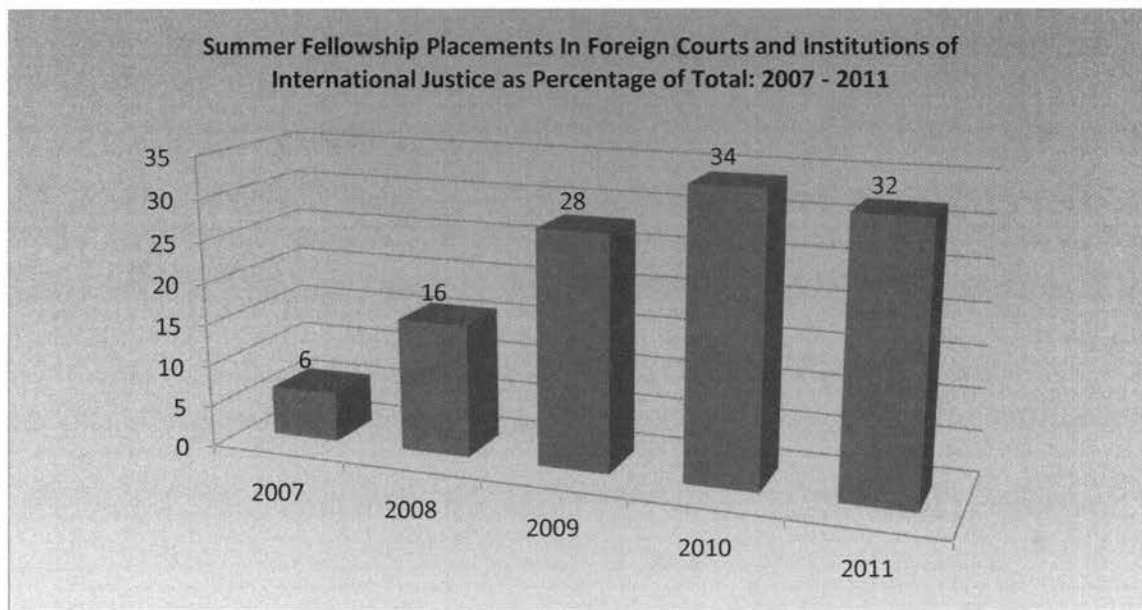
Foreign Courts and Institutions of International Criminal Justice: Most years, several Summer Fellows go to a number of constitutional courts that handle significant human rights dockets, and 2011 was no exception. There were:

- four Summer Fellows at the Supreme Courts of India (one split the summer with the European Court of Human Rights);
- three Summer Fellows at the Supreme Court of Israel;
- one Summer Fellow at the Supreme Court of Pakistan, which is not only unprecedented for Yale Law School but also for the Court, which had never hosted U.S. interns before (the Fellow also worked to persuade the Court to create a permanent, expanded program to allow more foreign law students to have summer internships with the Court, thus establishing an ongoing opportunity for Yale Law School students);
- three Summer Fellows at the European Court of Human Rights, one of whom spent part of the summer working at a small NGO in Paris devoted to refugee assistance (the Summer Fellowships at what one Summer Fellow referred to as "probably the

most important functioning human rights court in the world,” are noteworthy because they have not been generally available to U.S. students, and the collaboration between the Law School and the Court that led to establishing these summer opportunities has also made it possible for one of the 2012 Robina Post-Graduate Fellows to spend his fellowship year at the Court); and

- three 2011 Summer Fellows at institutions of international justice: the International Criminal Tribunal for the former Yugoslavia (ICTY); the International Criminal Tribunal for Rwanda (ICTR); and the Special Tribunal for Lebanon.

We thought it would be interesting to look at the frequency with which the Summer Fellows pursue summer positions at foreign courts and institutions of international justice. The chart below shows what percentage of the Summer Fellows have worked at these institutions each year from 2007 to 2011. It reflects a general increase in the percentage of students working as interns in foreign and international courts dealing with human rights. Note that, because some students split their summer fellowships between two different organizations, the chart represents percentages of placements, not individuals.



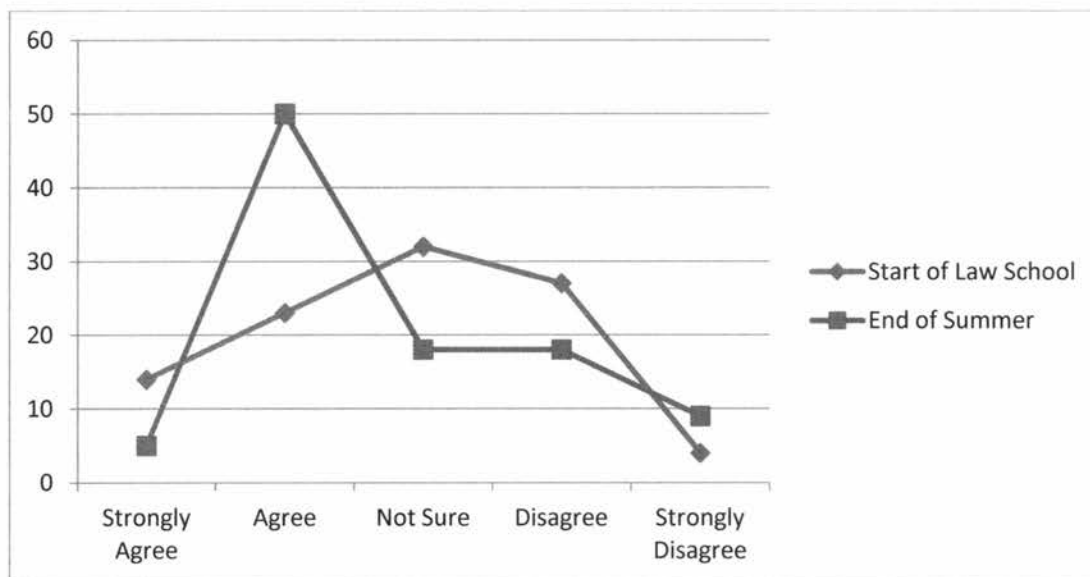
Organizations included in this analysis include: the International Criminal Tribunals for the Former Yugoslavia and for Rwanda; the Special Court for Sierra Leone; the Special Tribunal for Lebanon; the International Criminal Court; the Extraordinary Chambers in the Courts of Cambodia (ECCC) and the Documentation Center of Cambodia (DC-Cam, an organization that has worked for accountability for the crimes of Cambodia’s Khmer Rouge period and cooperates with the ECCC); the European Court of Human Rights; and the highest courts of several countries. Given the level of Summer Fellows’ interest in these types of positions, it is gratifying that a number of students have been able to look forward to opportunities to receive Robina Foundation support for similar placements as Robina Post-Graduate Human Rights Fellows, explored in more detail in a later section.

B. Assessment Findings

As part of the ongoing assessment process, we interviewed a total of 22 Summer Fellows about their experiences, using the interview protocol that we developed last year. To complement the interviews and to try to quantify the impact of the Summer Fellowships, we also used again a Likert scale, which is a sliding scale commonly used in questionnaires that asks respondents to specify their level of agreement with statements. These scaled responses enabled us to gauge the level of commitment to international human rights before and after the summer and thus quantify the impact of students' Summer Human Rights Fellowship experiences. A total of 22 forms were returned, one from every student interviewed. Below are the highlights of this year's findings.

Fourteen percent of the respondents strongly agreed with the statement, "When I first started law school, I was certain that I wanted to pursue international human rights as a career path." A total of 23% agreed with the statement; 32% were not sure; and 31% strongly disagreed or disagreed. After their summer overseas, 5% of the respondents strongly agreed that they wanted to pursue human rights as a career path; 50% agreed with the statement; 18% were not sure; and 27% strongly disagreed or disagreed.

2011 Robina Summer Human Rights Fellows: Scaled Likert Scale Responses



Blue = "When I first started law school, I was certain that I wanted to pursue international human rights as a career path."

Red = "After the Summer Human Rights Fellowship experience, I am certain that I want to pursue international human rights as a career path."

Ninety-five percent of respondents "strongly agreed" or "agreed" that the Summer Fellowship had been valuable. One person believed it had not been valuable; further discussion with her showed that her disappointment was largely related to a very difficult housing issue. A

total of 59% of the respondents strongly agreed or agreed that their summer had influenced their course selections or extracurricular activities; 27% were not sure; and 14% did not agree. A total of 91% of the respondents strongly agreed or agreed that the Schell Center was helpful in preparing them for and setting up their Summer Fellowships. The few students who selected "not sure" indicated that they had not needed to seek help.

Although the numbers are too small for statistical power, they quantify and confirm what we learn anecdotally and in the interviews about the impact of the Summer Fellowship: A few students enter law school certain that they want to pursue human rights careers; although some of those lose a measure of that certainty, a much more significant number move from not being sure of an interest in human rights careers to having a clear interest. A few students embark on their Summer Fellowships unsure of their career plans and remain unsure; and a few students use the summer to rule out international human rights as a career option. For the largest group of Summer Human Rights Fellows, the Fellowship affected their views, nudging those on the fence and encouraging those already considering international human rights as a possible career path.

This data about the impact of the Summer Fellowship experience confirms what we learn in interviews.

"You get to the Law School, and you don't know what the practice of law is like and you get a bit jaded when you see the gap between ideal and practice, people who came here to do one thing but end up doing a corporate job.... So you get hit with that a lot the first year. And so part of what I really wanted to do was be in a place where I could really be reminded why law matters and that's what I got [through the Summer Human Rights Fellowship experience]. I found it incredibly inspiring: You come back here and you are rejuvenated."

III. Robina Post-Graduate Human Rights Fellows

Of the six 2011-2012 Robina Post-Graduate Fellowships, three were with international criminal justice institutions in The Hague: Elizabeth Nielsen will finish her Fellowship at the International Criminal Tribunal for the Former Yugoslavia (ICTY) in July 2012; Katie Rivkin, who has been working in the chambers of the President of the ICTY, and Michelle Argueta, who has split her fellowship year between chambers at the International Criminal Tribunal for Rwanda and the office of the prosecutor at the ICTY, will complete their fellowships in the fall of 2012. Clark Gard was at the Constitutional Court in South Africa. Nadia Lambek has been working with the U.N. Special Rapporteur on the Right to Food. Amanda Aikman began her fellowship with the International Labor Organization slightly later and will complete her fellowship in January 2013.

These fellowships are crucial in establishing recent Yale Law School graduates in an increasingly competitive environment. Some of them would otherwise not be in a position to get their careers started in this field. Michelle Argueta, currently working at the Office of the Prosecutor, International Criminal Tribunal for the former Yugoslavia, writes at the conclusion of her interim Robina Fellowship report:

Finally, I would like to note that if it were not for the Robina Fellowship, I would not have been able to work in international criminal law this early in my career. This

entire experience has been made possible only through the support of the Robina Fellowship and I am very thankful to have had this opportunity.

Now that the Post-Graduate Human Rights Fellowships have been offered for several years, we can begin to discern a few patterns emerging. The Law School has forged connections with specific institutions. Some Robina Fellows have opened doors that have later opened for others.

The first Robina Post-Graduate Fellow, Brittan Heller '09, spent six months in 2009 at the International Criminal Court (ICC) Office of the Prosecutor. One of this year's Post-Graduate Fellows, Colleen Gilg '08, will also be in the Office of the Prosecutor at the ICC. In 2010-11, Terra Gearhart-Serna '10 spent her Robina Fellowship year in chambers at the ICTY, six months assigned to the *Prosecutor v. Sainovic et al.* appeal team and six months serving as a law clerk to Appeals Judge Theodor Meron. This year, Katie Rivkin '11, is spending the year clerking for Judge Meron, who is now President of the ICTY. In her interim fellowship report, Katie explicitly acknowledged the importance of the Yale Law School connection.

I have felt extremely fortunate to spend my fellowship year working for and learning from Judge Theodor Meron, who is an inspired international jurist and a dedicated mentor, and his team of legal officers, all brilliant lawyers, including, in particular, fellow YLS graduates, Alexandros Zervos and Willow Crystal.

As a 2012-13 Robina Post-Graduate Fellow, Leah Bellshaw '12 will soon be following in Katie Rivkin's footsteps. This constitutes three consecutive generations of Robina Post-Graduate Fellows clerking for the ICTY's President Meron.

Almost every summer for the past several years, Professor Silk has been teaching a summer course on International Human Rights at the Tulane Center for International Human Rights and International Criminal Law in Amsterdam and has organized a gathering of any Summer Fellows and Post-Graduate Fellows and other Yale Law School graduates working in The Hague. These have been great opportunities for these students and graduates to connect and share and compare their experiences.

Robina Post-Graduate Fellows also find placement with foreign courts. Clark Gard '08 has recently concluded his clerkship at the Constitutional Court of South Africa. He wrote in his final Robina Fellowship report:

My clerkship with the Chief Justice of the Constitutional Court of South Africa will always be something I can look back on and say: that made a difference. I can look at the way the law has developed in certain cases, or the way our debates within the Court – amongst the clerks and judges alike – evolved as a result of my engagement in complex constitutional issues, and I can be proud of that.

The Robina Post-Graduate Fellowships also support less traditional initiatives that evolve from specific individual interests. This can consist of scholarship, as in the case of Sam Ferguson (2009 Robina Post-Graduate Fellow), who conducted research in Argentina, or another form of independent project. Students are encouraged to submit Robina Post-Graduate Fellowship applications that apply human rights law to contemporary human rights issues in a creative way. Nadia Lambek, a 2011 Robina Post-

Graduate Fellow working with the U.N. Special Rapporteur for the Right to Food, falls into this category. The inter-disciplinarily nature of this project is illustrated by a statement in Nadia's recent interim Robina Fellowship report:

The path towards the full realization of the right to food and an end to hunger and malnutrition is a long one. It will involve not just dramatic changes in the structure of the global food system, but more fundamentally it will involve a change in the understanding of the problems faced and the solutions needed. Rather than viewing hunger as a question of merely supply and demand and solutions to hunger in charity, there needs to be a complete reorientation to understanding hunger as a problem of distribution, access, purchasing power and poverty, and solutions as a question of entitlements and new global and local food systems centered on the marginalized. I have no doubt that the Special Rapporteur on the right to food is providing a key voice in the rising wave of people arguing for these changes.

She also noted:

I feel privileged to be a part of this path towards positive change and offer my deepest gratitude to the Robina Foundation for providing me the opportunity to spend my days working for a cause I am so very passionate about.

IV. Robina Foundation Visiting Human Rights Fellows

This past academic year, Or Bassok LL.M '07, Eugene Garver, Lucas Guttentag, and Luke Norris '11, were at Yale Law School as Robina Visiting Human Rights Fellows. The Robina Visiting Human Rights Fellows program, among the various components of the Robina Human Rights Fellowship Initiative, has perhaps the most direct impact on the intellectual life of the Law School; at the same time, its impact is the most difficult to quantify.

Of all those who have been appointed Robina Visiting Fellows, Professor Guttentag has, in his several years visiting the Law School, had an impact on the largest number of Yale Law School students. This past fall, he taught two courses: Advanced Immigration and Migration Topics and Immigration Law, Policy, and Constitutional Rights. Although he did not teach in the spring, he had three students doing Supervised Research under his guidance.

During the spring 2012 semester, Professor Garver co-taught, with Professors Paul Kahn and Bryan Garsten, a seminar, entitled Persuasion and Politics. Or Bassok and Luke Norris spent the year pursuing academic projects, the details of which have been provided in the Annual Report on the Robina Foundation Human Rights Fellowship Initiative, submitted in April 2012. Or was also managing a book project that the Schell Center initiated; he was outlining and conceptualizing the chapters for a possible book, based on the 2011 Bernstein Symposium, *Human Rights in 2025*.

The academic relationships fostered by Robina support sometimes continue long after particular Visiting Fellowships have ended. Robina Visiting Human Rights Fellows often return to the Law School for conferences or to give talks, consult with students about academic research or summer or career plans, or provide contacts for students and graduates seeking jobs.

V. Connections and Synergies

A close look at this past year's human rights activities at the Law School and the involvement of students affected by the Robina Initiative shows the breadth and diversity of the synergistic connections among these students and between them and various aspects of the Law School's human rights program. The human rights community at Yale Law School has been growing in strength and numbers, and the Robina Initiative has acted as an accelerant, providing resources and support to groups and individuals in many different ways at a crucial early point in their professional lives. The connections and interactions are complex and not always obvious, but there is a community of people at the Law School who care deeply about issues of social justice, both domestic and international, and the Robina Initiative has supported many of them in one way or another. In this section, we will look at various kinds of synergy: the apparent link between Robina support during law school and the pursuit of post-graduate human rights and other public interest fellowships; the role of Robina beneficiaries (students and visiting faculty) in human rights-related activities at the Law School, including clinics, journals and conferences; the role of the Bernstein Symposium in fostering the human rights community at the Law School; and the role of the new Human Rights Database going forward.

A. Connections Between Robina-Affiliated Students and Yale Law School Public-Interest Post-Graduate Fellowships

Of the total of 25 Yale Law School public interest fellows chosen for 2012-13, thirteen of them, or 52%, have received at least one form of concrete support from the Robina Initiative; most have also benefited from the presence of Robina Visiting Fellows, in particular Lucas Guttentag, which we have not attempted to capture here. It is, of course, not possible to show a causal connection; the claim is that the Robina Initiative is a vibrant and integral component of the human rights community at the Law School. Please note that the information in parentheses indicates the number of a particular fellowship that was awarded to students with Robina affiliation, out of the total number of those fellowships awarded.

Bernstein Fellowship: (2 out of 3)	Project	Robina Affiliation
Rupali Sharma '12	Center for Reproductive Rights	• 2010 Robina Summer Fellow, Supreme Court of India • 2010 Robina JD Scholar
Katie Reisner '12	Iraqi Refugee Assistance Project	• 2009 Robina Summer Fellow, Alternative Law Forum, India
Gruber Fellowship: (2 out of 3)		
Stephanie Keene '12	International Justice Mission in Kampala, Uganda	• 2010 Robina JD Scholar • 2011 Robina JD Scholar
Rebecca (Becca) Heller '10	Iraqi Refugee Assistance Project	• 2008 Robina Summer Fellow, Gisha, Israel
Liman Fellowship: (6 out of 13)		
Diala Shamas '11 (Project Extended)	Creating Law Enforcement Accountability and Responsibility, at CUNY School of Law	• 2009 Robina Summer Fellow, Adalah-the Legal Center for Arab Minority Rights, Israel
Daniel Mulkoff '10	New York Civil Liberties Union,	• 2008 Robina Summer Fellow,

(Project Extended)		Association for Civil Rights, Argentina
Chesa Boudin '11	San Francisco Public Defender's Office	• 2009 Robina Summer Fellow, Constitutional Court, South Africa
Sirine Shebaya '12	ACLU of Maryland	• 2010 Robina Summer Fellow, Human Rights Watch, Lebanon • 2011 Robina Summer Fellow, ACLU Immigrants' Rights Project, NY • 2011 Robina JD Scholar
Olivia Sinaiko '09	Southeast Alaska Conservation Council	• 2007 Robina Summer Fellow, South Asia Human Rights Documentation Center, India
Jenny Zhao '12	ACLU of Southern California,	• 2011 Robina Summer Fellow, ACLU of Southern California
Other Yale Law School Public Interest Fellowships: (3 out of 6)		
Talia Kraemer '12	Legal Services for Children in San Francisco, CA	• 2010 Robina Summer Fellow, Supreme Court of Israel
Kristin McLeod-Ball '12	American Immigration Council in Washington, DC	• 2008 Robina Summer Fellow, National Economic & Social Rights Initiative, DC • 2008 Robina JD Scholar
Gabriella Rivera '11	American Civil Liberties Union Foundation of San Diego & Imperial Counties, CA	• 2009 Robina Summer Fellow, Extraordinary Chambers, Court of Cambodia

The Robina Initiative has touched and is deeply intertwined with the Law School's public interest community and, in particular, its students committed to public service and social justice, not only in human rights internationally, but in the important issues that face us domestically as well.

B. The Role of Robina Beneficiaries in the Law School's Human Rights Activities

Robina JD Scholars and Summer Fellows are active in organizing and participating in human rights-related events and activities at the Law School. A few examples illustrate the extent to which the Robina Initiative is integrated throughout the Law School human rights community. There are many activities at the Law School, but clinics, journals and conferences represent significant activities that, in many cases, are spearheaded by students who have received Robina Initiative support or, in some cases, by Robina Visiting Fellows.

1. Human Rights Clinics

Clinical education plays a significant role in the education of Yale Law School students. The **Allard K. Lowenstein International Human Rights Clinic (Lowenstein Clinic)**, directed by Professor Jim Silk, is a cornerstone of the human rights program at the Law School. It undertakes a wide variety of projects each term on behalf of human rights organizations and individual victims of human rights abuse. The **Transnational Development Law Clinic**, begun recently by Professor Muneer Ahmad, addresses closely related issues from the perspective of the role of transnational lawyers in advancing "bottom up" development. The majority of the students who participated in these two clinics last year benefited from some form of Robina Initiative support: 84% in the case of the Lowenstein Clinic and 23% in the case of the

Transnational Development Clinic. Students with some Robina Initiative affiliation participated in other clinics and courses that address human rights-related issues as well.

The Work of the Lowenstein Clinic

In the academic year 2011-2012, a total of 81% of the 21 students in the fall term Lowenstein Clinic had received Robina support, either a Summer Fellowship or JD scholarship. In the spring, there were 17 students, of whom 88% had received Robina support. The Lowenstein Clinic's 2011 – 2012 projects included:

- BANGLADESH INTERNATIONAL CRIMINAL TRIBUNAL: GUIDE ON PROTECTION OF WITNESSES AND VICTIMS AND AMICUS BRIEF: Collaboration with the Liberation War Museum (LWM), an NGO in Dhaka, Bangladesh.
- PAPUA RESOURCE NETWORK: REPORT ON HUMAN RIGHTS IMPACT OF INDONESIAN AGRICULTURAL INVESTMENT PROJECT IN PAPUA: The Clinic is working with a Papuan national with asylum in the United States who devotes his time to advocacy for human rights in Papua and for Papuan self-determination.
- AMERICAN CIVIL LIBERTIES UNION (ACLU) : REPORT ON TRAFFICKING OF THIRD-COUNTRY NATIONALS (TCNs) TO IRAQ AND AFGHANISTAN BY U.S. MILITARY CONTRACTORS : The report was just published and is available at the Lowenstein Clinic's website at <http://www.law.yale.edu/intellectuallife/lowensteinclinic.htm>.
- NATIONAL LAW CENTER ON HOMELESSNESS AND POVERTY (NLCHP): HUMAN RIGHTS REPORT ON ABUSES AFFECTING RESIDENTS OF TENT CITIES: Report documenting municipal treatment of homeless people living in tent cities in final stages of review before publication.
- OPEN SOCIETY JUSTICE INITIATIVE (OSJI): PREPARING LITIGATION CHALLENGING MANIFESTATIONS OF XENOPHOBIA IN EUROPE: Submitted research memoranda on relevant European law to OSJI.
- ASSOCIATION FOR FREEDOM OF THOUGHT AND EXPRESSION (AFTE) (CAIRO, EGYPT): COMPARATIVE RESEARCH FOR INITIATIVE TO REFORM STATE INFORMATION LAWS IN EGYPT: Drafting section of report comparing various countries' practices and legal regimes regarding state television and radio broadcasting to Egypt's.
- CONNECTICUT JUVENILE JUSTICE & SENTENCING REFORM ADVOCACY (JOINT PROJECT WITH QUINNIPIAC LAW SCHOOL CRIMINAL JUSTICE CLINIC): As part of advocacy to reform practice of sentencing people to long prison sentences for crimes committed when they were juveniles, the Clinic has prepared and presented testimony to the Connecticut General Assembly's Judicial Committee on this issue under international human rights law and the law of other developed legal systems. The team will also be interviewing people serving such long sentences in Connecticut for use in a report that will be submitted to the legislature.

- PLAN INTERNATIONAL: REPORT ON SIERRA LEONE'S FAILURE TO IMPLEMENT LAWS PROHIBITING CHILD MARRIAGE: Report, based largely on Clinic investigative mission to Sierra Leone, is in final stages of review and will be published in September in conjunction with a civil society roundtable in Sierra Leone in which the Clinic team will participate.

The Work of the Transnational Development Law Clinic

The Transnational Development Law Clinic focuses on the role of lawyers in transnational development work, particularly in support of community-based efforts to address poverty. In the 2011-2012 academic year, 23% of the JD students who participated in the Clinic had received Robina support (75% in 2010-2011). Projects in 2011 - 2012 included:

- REMITTANCES RESEARCH & REPORT – SUPPORTING TRANSNATIONAL FAMILIES: IMPROVING REMITTANCE AND BANKING SERVICES FOR IMMIGRANTS IN NEW HAVEN – done on behalf of Junta for Progressive Action.
- ACCESS TO MEDICINES PROJECT – done in collaboration with the Initiative for Medicines, Access & Knowledge (I-MAK). Students have helped to prepare oppositions to patent applications for HIV and other essential medicines in India.
- HAITI CHOLERA EPIDEMIC PROJECT – done in collaboration with the Institute for Justice and Democracy in Haiti. Students have conducted research on means of ensuring accountability from the U.N. for the outbreak of cholera in Haiti in 2010.
- WORLD BANK INSPECTION PANEL COMPLAINT – working in collaboration with the Center for International Environmental Law, students assisted civil society, environmental and labor organizations in Kosovo in the preparation of a complaint to the World Bank Inspection Panel regarding Bank funding of a coal-fired energy plant and concerns about adherence to social and environmental standards. (Joint project of the Lowenstein Clinic and the Transnational Development Clinic, with students and faculty supervisors from the two clinics working together.)
- SINDICATO MEXICANO DE ELECTRICISTAS (SME) (UNION OF MEXICAN ELECTRICAL WORKERS) – working with the AFL-CIO, students helped to prepare a complaint under the North American Agreement on Labor Cooperation (NAALC), the NAFTA side agreement on labor, contesting unfair labor practices by the Mexican government toward electrical workers in Mexico.

2. Law Journals

Another interesting example of the active involvement of Robina Fellowship Initiative beneficiaries in the intellectual life of the Law School is the *Yale Human Rights and Development Law Journal*. For the 2011 – 2012 academic year, 25% of the editorial board members had a Robina affiliation, either as a Summer Fellow or as a JD Scholar. In the 2010 –

2011 academic year, 40% of the editorial board members had a Robina affiliation, several of whom contributed directly to the content of the journal that year. Sarah El-Ghazaly, a Robina JD Scholar in 2010 and 2011, contributed an article entitled "Entrenching Poverty in Egypt: Human Rights Violations That Contributed to the January 25 Revolution." Nicholas Serafin, a 2011 Summer Fellow in India at the Alternative Law Forum, reviewed Gary Rivlin's book, *Broke, USA: From Pawnshops to Poverty, Inc. – How the Poor Became Big Business*. In the forthcoming issue, Justin Zaremby is contributing a review, "On the Uses and Disadvantages of History for Human Rights Law: A Review of Professor Samuel Moyn's *The Last Utopia: Human Rights in History*." Professor Moyn visited the Law School as a Robina Visiting Fellow in the spring of 2011 (and returned to the Law School as a Ribicoff Visiting Professor this spring, 2012).

3. Conferences

Many students who have received Robina Foundation support were involved in this year's Eighteenth Annual Rebellious Lawyering (RebLaw) Conference, as was another previous Robina Visiting Fellow, Professor Ali Miller. The RebLaw Conference is an annual student-run conference that brings together practitioners, law students, and community advocates from around the country to discuss innovative, progressive approaches to law and social change. Three of the six co-directors of the RebLaw conference this year have been Robina Summer Fellows. One of the co-directors of the RebLaw Conference, Amanda Alexander, was a 2011 Summer Fellow, working with the U.N. Special Rapporteur on the Right to Housing in Brazil and the Center for Constitutional Rights in New York. Another co-director was Sophia Shin, a 2011 Summer Fellow at the International Justice Mission in the Philippines; and another was Elizabeth Wilkins, a 2011 Summer Fellow at the Center for Migrants' Rights in Mexico. Professor Alice Miller participated in a panel, entitled Politics of Truth and Documentation in Transnational Sexual Rights Advocacy. Professor Miller was appointed this year as Associate Professor (Adjunct) of Law at the Law School, as well as an Assistant Clinical Professor in the Yale School of Public Health and a Lecturer in Global Affairs at the Jackson Institute for Global Affairs at the Whitney and Betty MacMillan Center for International and Area Studies at Yale.

Another conference held this spring was entitled Between Equality and Subordination: The Politics of Legal Knowledge in Global North-South Academic Exchange. The conference was based on a paper, "Legal Clinics in the Global North and South: Between Equality and Subordination – An Essay," which was written by Professor Daniel Bonilla during his period of residence at the Law School as a Robina Visiting Human Rights Fellow in 2011. Sponsored by the Leitner Center for International Law and Justice at Fordham Law School and the Schell Center at Yale Law School, the conference focused on the dynamics of collaboration between law schools of the Global North and South and attempted to articulate and analyze the origins and characteristics of the tension between equality and subordination that characterizes these collaborative relationships. The conference included three panels: *The Politics of Legal Knowledge, the Global North and the Global South*; *Between Equality and Subordination: Collaboration Between Law Schools in the Global North and South*; and *From Empire to Empathy: Clinical Collaboration Between the Global North and the Global South*. The papers for the final panel included Professor Bonilla's original paper and a response written by Professor Silk. The conference itself and Professor Silk's response paper grew out of conversations that Professors Bonilla and Silk had when Professor Bonilla was visiting as a

Robina Fellow. Professors Bonilla and Silk also discussed their papers on a panel they organized for the Law School's annual SELA conference, held this June in Mexico City.

C. The Role of the Bernstein Symposium in Fostering Human Rights Community

In March, the Schell Center held the annual Robert L. Bernstein International Human Rights Symposium, which includes a series of workshops and other events designed to promote thoughtful, creative discourse on international human rights. This year's Bernstein Symposium, Human Rights and Political Change in the Arab World, was coordinated with the Information Society Project, an intellectual center at the Law School that seeks to address the implications of the Internet and new information technologies for law and society. The Bernstein Symposium included panel discussions on the origins of change, the interim situation, and the potential ends of change in the Middle East and North Africa. The final two events of the Bernstein Symposium, a panel and a lecture, were the opening two events of the Information Society Project's Global Censorship Conference. The co-sponsored panel considered the role that technology has played in igniting, sustaining and shaping recent political changes in the Arab world. The lecture (the Bernstein Symposium's concluding lecture and the Global Censorship Conference's keynote) was delivered by Irwin Cotler, Canadian Member of Parliament and former Professor of Law at McGill University.

The Bernstein Symposium is the Schell Center's signature annual event. It is a central vehicle for more effectively integrating the various human rights-related programs and, in particular, human rights fellowships at the Law School. It provides, in addition to substantive panels and discussions, an opportunity for the Law School's Bernstein, Robina, and Gruber Post-Graduate Human Rights Fellows to gather and share experiences. The concluding reception is also the occasion on which the new Bernstein and Robina Fellows are announced and introduced.

In the past, the Schell Center has covered travel costs for the current and recent past Bernstein Fellows to attend the Symposium. The same invitation is extended to Robina and Gruber Post-Graduate Fellows. The Symposium now encourages all past and present Yale Law School international human rights fellows to return to the Law School to get to know each other and exchange experiences, ideas, concerns, and career advice about the challenges of human rights advocacy, and to join discussions with leading activists and scholars to explore effective approaches to promoting respect for human rights. The 2012 Bernstein Symposium was attended by thirteen former fellows, eight current fellows, and eight new fellows.

Each year will bring a new cohort of Bernstein, Robina, and Gruber Post-Graduate Fellows, and we are planning changes in the structure of the Bernstein Symposium to create more opportunities for the current Bernstein, Robina, and Gruber Post-Graduate Fellows to present their work and to interact informally with each other and with current Yale Law School students. The Fellows have already begun to be and to see themselves as a community of Yale Law School graduates committed not only to human rights and justice, but to each other. They are future leaders in the field of international human rights. The Bernstein Symposium will be an increasingly powerful opportunity to integrate the various Yale Law School human rights fellowships; to bring the fellows together with each other and with scholars and activists to discuss critical human rights issues; to enable the fellows to provide continuing support for each

other as they pursue challenging careers; and to foster the human rights community at the Law School.

D. Database

The human rights database is envisioned as a tool to bind together and support the Law School's human rights community. For example, the initial database was completed just in time to use to invite graduates who had been involved in human rights activities when they were Yale Law School students to the 2011 Alumni Weekend: Human Rights in a Turbulent World. The Schell Center was able to send 800 email invitations to alumni, highlighting the theme, detailing the various talks and panel discussions, and extending an invitation to a special reception hosted by the Schell Center.

It soon became apparent, however, that the database's original Excel spreadsheet format was not flexible or robust enough for the Schell Center's needs. The spreadsheet encompassed information on more than a thousand individuals, most of whom had participated in multiple human rights activities. With assistance from the Law School's information technology department, we have recently been able to overcome a number of technical obstacles and successfully transfer the data from Excel to Access, which, as a "relational" format, is considerably more flexible.

The Access version of the Schell Center Human Rights Database is fully operational and has already been tremendously helpful. It is a complex program and will take time to learn fully. Moreover, a few major categories that will be valuable both for assessment and program purposes, including, in particular, graduates' employment history, are missing, and adding them will require planning and collaboration with other departments of the Law School. This may be time consuming, and we are working through the details of the process. The database will ultimately include, at a minimum, contact information for former students, which will help us to move forward on other projects. We hope to use the database to work toward more direct and interactive communication with the Law School's human rights alumni network.

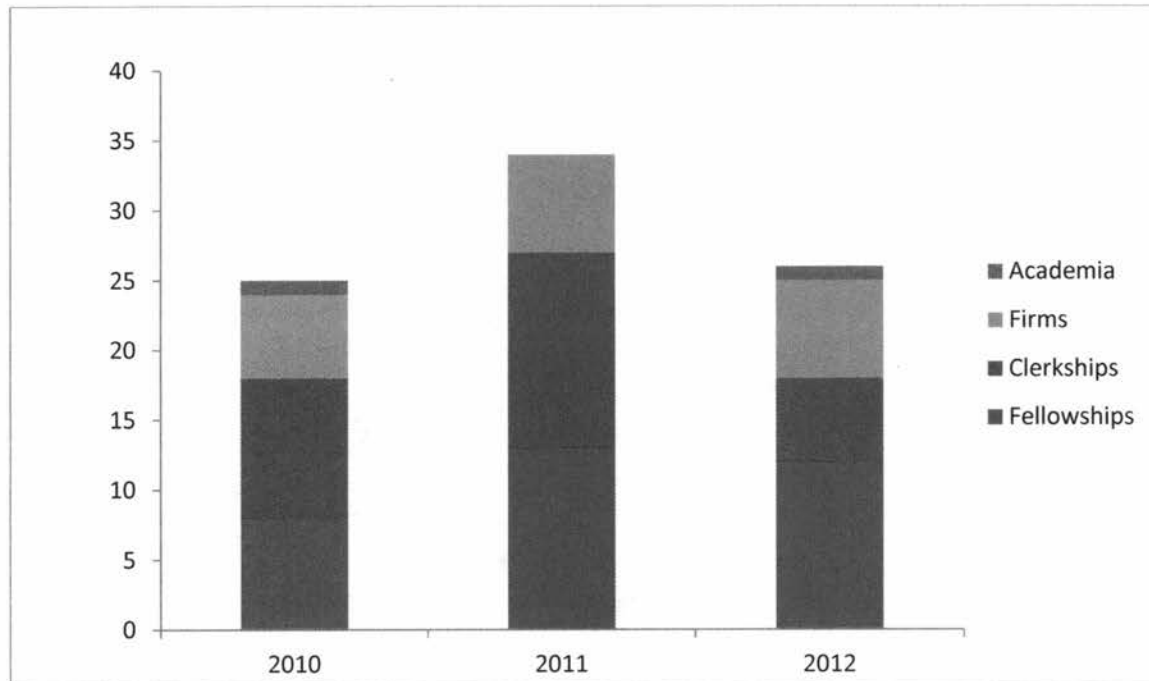
VI. Class of 2012 Employment Information

Thanks to the Robina Foundation's flexibility in allowing us to submit this assessment later in the year, we are now in a position to review information about the initial employment of the Yale Law School class of 2012. A total of 32 individuals in the class of 2012 received at least one form of support from the Robina Foundation, of whom 26 voluntarily listed their initial employment with the Law School's Career Development Office. A full listing of post-graduate employment among those members of the Class of 2012 who received Robina Foundation support (and who have reported their employment to the Career Development Office) is attached as Appendix 2. To summarize, the breakdown is: six obtained clerkships; twelve obtained public interest fellowships; seven joined law firms; and one is pursuing a Ph.D. Because we have been gathering this information for several years now, we are in a position to contrast it with previous years.

The graph below represents the allocation by general employment categories of 2010, 2011 and 2012 graduates who have received some form of Robina support. Recall that we have

not previously reported on initial employment for the Class of 2011, as it was not yet available at the time of the 2011 Assessment Report.

Graduates who have received Robina Foundation support, by general employment categories



The data in this chart represents extremely small samples (25, 34 and 26 individuals for the classes of 2010, 2011, and 2012, respectively) and, therefore, do not provide statistical significance. Over time, we hope that tracking employment trends will provide us with a valuable picture of how students who receive various forms of Robina support develop their career paths.

In developing the Human Rights Database, we are making adjustments to allow us to enter students' employment information in categories that correspond to those used by the Law School's Career Development Office: Academia, Business & Industry, Judicial Clerkships, Law Firms, and Public Service. By categorizing post-graduate employment in this way, we will be able to compare Robina Initiative funding recipients with their entire graduating classes.

VII. Conclusion

The Robina Initiative continues to make a significant contribution to the Yale Law School and has solidified and deepened its effect over the past few years. By complementing the robust intellectual life that already thrives at the Law School, the Robina Initiative has successfully enhanced and become a vital part of the deep and richly diverse human rights program. The vision underlying the Initiative was based on providing capacity to strengthen the human rights community at the Yale Law School on a number of levels and, in particular, to support and cultivate the potential of people to make an impact, now and in the future, on the

advancement of human rights. The Initiative accomplishes this by providing scholarships to JD students committed to human rights, fellowships for students' summer and post-graduate human rights experience, and fellowships that bring a range of scholars and activists – seasoned and junior, foreign and domestic – to the Law School to enrich human rights content at Yale and foster human rights discourse among fellows, students and faculty. We continue to document and assess progress toward the Robina Initiative's prescient goals.

The Summer Human Rights Fellowships are a cornerstone of human rights programming at the Law School. They afford students a broad range of human rights experiences outside the classroom, addressing various issues, using various approaches, and in various cultural contexts. They give students opportunities for the kinds of intense real-world work that only an immersion for a significant period of time can provide. The Summer Fellowships have an enormous impact on the lives of our students. They allow students to test their commitments and their ability to work on human rights in challenging circumstances. For many students, Summer Human Rights Fellowships solidify their commitment to human rights work or inspire a greater commitment than their previous experience, before and at law school, had instilled. Assessment data suggest that participation in the Summer Fellowship program increases the likelihood that an individual student will consider international human rights as a viable career path. Although only following the careers of these students over time will tell, we are confident that the Summer Fellowship experiences will continue to resonate for many of the Fellows as they work to find career paths that will enable them to contribute to improving respect for human rights.

The Robina Human Rights JD Scholarships have enabled the Law School to further sustain its commitment to cultivate brilliant student human rights leaders who represent a diverse array of perspectives and economic backgrounds. Distinguishing them with the title and support that the Robina Human Rights JD Scholarships provide is a critical part of nurturing their learning, development and commitment. Every year, these students lead and energize the key human rights activities at the Law School through their involvement in relevant clinics and student organizations. The assessment results show that they are likely to pursue human rights careers.

The Robina Initiative has also significantly increased the number of opportunities available to recent graduates interested in entering the field of human rights. Assessment tools cannot quantify the critical role the Robina Post-Graduate Fellowships play in increasing the likelihood that our graduates will be able to fulfill their ambitions to obtain jobs in human rights. Because professional opportunities in human rights are limited, gaining positions in the field is competitive and generally requires post-graduate experience. Enabling our graduates to get that experience in highly regarded and demanding institutions or to carry out innovative research often transforms their possibilities for contributing to human rights efforts. And they consistently recognize it and express their gratitude for these opportunities.

The Robina Visiting Human Rights Fellowships complement the opportunities that the Robina Initiative has created for our students and graduates. Giving the Visiting Fellows time in residence at the Law School has proven to be important not only to the individual Visiting Fellows, but also to the larger human rights community at Yale and beyond. The Visiting Fellows have taught courses on human rights themes that would not otherwise have been taught, particularly in areas where the Law School's faculty does not specialize. They have spoken at events attended by people from the Law School, the University more broadly, and the

community. And they have not only had time to do their research and to write, but also great counterparts with whom to discuss their work. In all of these ways, the Visiting Fellows have, by injecting their knowledge, ideas, curiosity and commitment, brought great benefit to each other, our students, our faculty, and the wider human rights community.

Our development of the Human Rights Database is enabling us to foster increased links among the various categories of Robina Initiative support and among current students and graduates of the Law School's human rights program. The database will help us create and sustain a lasting community of students and graduates that will be an active network for them and a source of shared information, ideas, advice and contacts. The database already contains more than a thousand graduates, all of them involved in some way in the Law School's human rights program, and dozens more continue to be added each year. With the Robina Foundation's vital support, we hope to continue to build on and make increasingly valuable use of this work.

Appendix 1

2011 Summer Fellows Chart

Country	Fellowship Host Organization
Cambodia	Documentation Center of Cambodia
China	PILnet – The Global Network for Public Interest Law Women's Watch
Colombia	Law faculty based in Bogota - Public Interest Group
Czech Republic	Dept. of Human Rights and Minority Protection
Czech Republic	CEELI Institute
France	European Court of Human Rights
France	European Court of Human Rights Groupe d'information et de soutien des immigrés
Guatemala	Desarrollo sostenible para Guatemala (DESGUA)
US/LA	New Orleans Workers' Center for Racial Justice
India	Supreme Court of India
France	European Court of Human Rights
India	Supreme Court of India
India	Alternative Law Forum
India	Centre for Microfinance
India	Supreme Court of India
India	Supreme Court of India
Israel	Supreme Court of Israel
Israel	The Supreme Court of Israel
Israel	Supreme Court of Israel
Mexico	Migrants' Rights Center
Netherlands	International Criminal Tribunal for Rwanda
Netherlands	Special Tribunal for Lebanon
Netherlands	Office of the Prosecutor, International Criminal Tribunal for the Former Yugoslavia
Pakistan	Supreme Court of Pakistan
Philippines	International Justice Mission
Senegal	Comite Senegalais des Droits de L'Homme
South Africa	Lawyers for Human Rights
Switzerland	United Nations High Commissioner for Refugees
United Kingdom	Doughty Street Chambers/Death Penalty Project
United Kingdom	Doughty Street Chambers
US/CA	ACLU of Southern California
US/CA	ACLU of Southern California
US/New York	Center for Constitutional Rights
Brazil	UN Special Rapporteur on the Right to Housing
US/DC	Human Rights Law Foundation
US/DC	World Bank
US/DC	World Bank
US/DC	World Bank
US/NY	ACLU Immigrants Rights Project
US/NY	Natural Resources Defense Council
US/NY	ACLU Center for Democracy
US/NY	Becket Fund for Religious Liberty
US/NY	Public International Law and Policy Group
US/Uganda	Uganda Rural Fund

Appendix 2

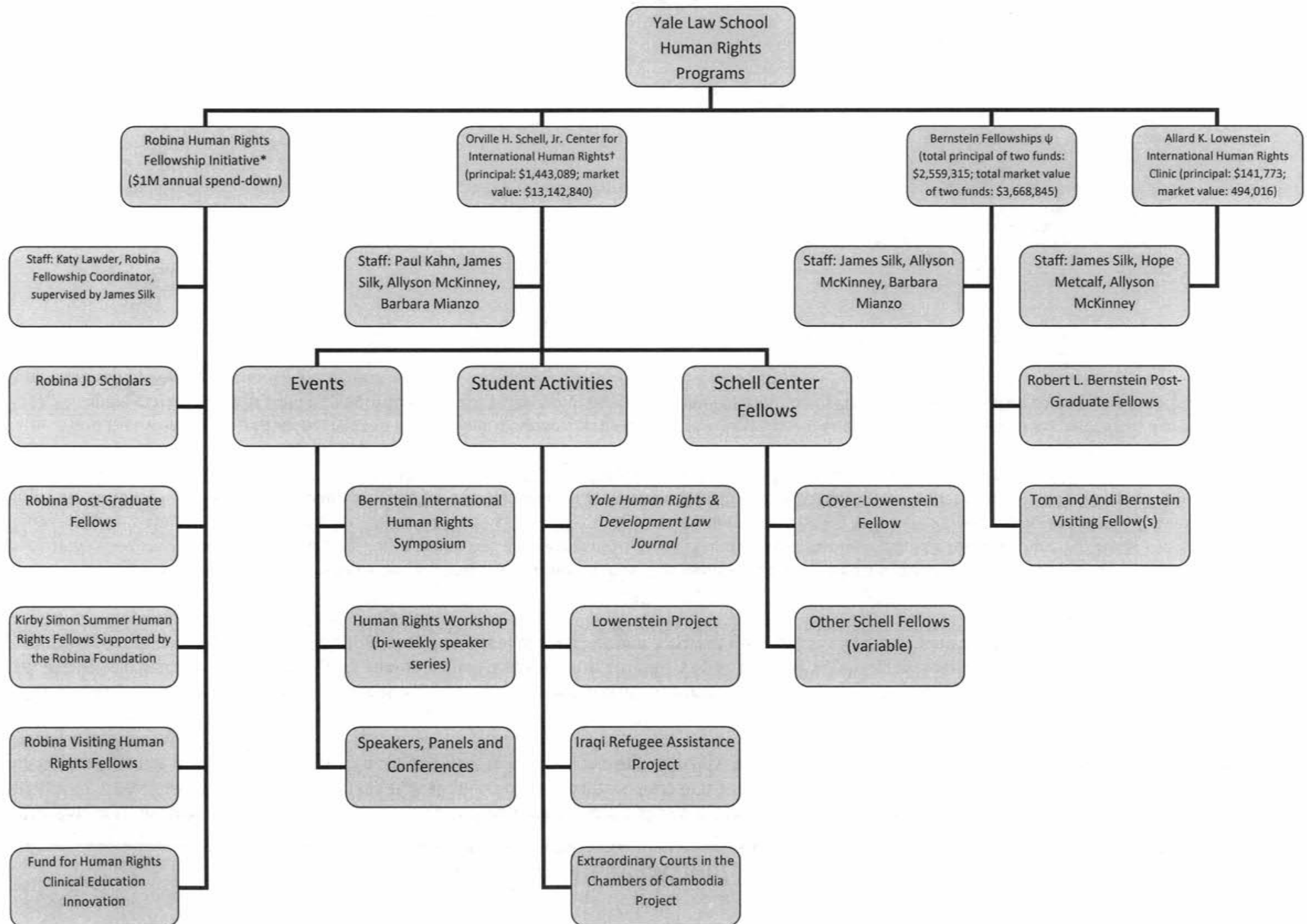
Class of 2012 Graduates who received Robina Support: Post Graduate Employment*

Robina Affiliation(s)	Summer Fellowship (where applicable)	Employment Category
• Robina JD 2011	-	Firm
• Robina Summer 2010	United Nations High Commissioner for Refugees, Panama	Clerkship
• Robina Summer 2010	Doughty St Chambers, UK	Clerkship
• Robina Summer 2010	International Criminal Tribunal for the Former Yugoslavia	Clerkship
• Robina Summer 2010	Hong Kong High Court	Firm
• Robina Summer 2010	International Criminal Tribunal for Rwanda	Firm
• Robina JD 2010	-	Firm
• Robina JD 2011	-	Public Interest Fellowship
• Robina Summer 2011	ACLU NY	Clerk
• Robina Summer 2010 • Robina Summer 2011 • Robina JD 2011	• Doughty Street Chambers, UK • Senegalese Committee of Rights of Man, Senegal	Public Interest Fellowship
• Robina Summer 2010	Hong Kong High Court	Public Interest Fellowship
• Robina Summer 2010	Supreme Court of Israel	Public Interest Fellowship
• Robina Summer 2011	• Doughty Street Chambers, UK • Death Penalty Project, United Kingdom	Firm
• Robina Summer 2010 • Robina Summer 2011 • Robina JD 2010 • Robina JD 2011	International Civilian Office & EU Special Rep, Dept of Human Rights and Minority Protection	Public Interest Fellowship
• Robina Summer 2010	Hong Kong Judiciary	Clerkship
• Robina Summer 2008 • Robina JD 2008	National Economic & Social Rights Initiative, Washington, DC	Public Interest Fellowship
• Robina JD 2010 • Robina JD 2011	-	Firm
• Robina Summer 2010	Center for Policy Alternatives, Sri Lanka	Public Interest Fellowship
• Robina Summer 2010	Alternative Law Forum, India	Academia
• Robina Summer 2010 • Robina JD 2010	Supreme Court of India	Public Interest Fellowship
• Robina Summer 2010 • Robina Summer 2011 • Robina JD 2011	• Human Rights Watch, Lebanon • ACLU, NY	Public Interest Fellowship
• Robina Summer 2010	International Criminal Tribunal for the Former Yugoslavia	Clerkship

• Robina Summer 2010	ACLU of Southern CA	Public Interest Fellowship
• Robina Summer 2010	Center for Women's Law Studies/ Legal Services, China	Firm

* Includes information about students who responded to the Career Development Office's survey.

Components of the Yale Law School Human Rights Programs



Components of the Yale Law School Human Rights Programs

* The Robina Foundation Human Rights Initiative has been supported by a gift of \$1,000,000 annually since May 2008. The Robina Initiative provides comprehensive support for individuals interested in human rights in all stages of their careers, from first-year law students to those pursuing post-graduate fellowships. The goal of the Robina Initiative is to foster and support a commitment to international human rights, by leveraging the robust international human rights community that already exists at the Law School.

† The Schell Center is supported by the Orville H. Schell, Jr. Center Endowment Fund (est. 1988), which has a principal of \$1,443,089 and a market value of \$13,142,840 as of June 30, 2011. The Fund's annual income distribution in 2011-12 is \$638,113. The Schell Center's activities are also supported by the Vivien Wei-Ying U Fund for Human Rights (est. 1998), which has a principal of \$180,724 and a market value of \$361,976 as of June 30, 2011. The Wei-Ying U Fund's annual income distribution in 2011-12 is \$17,575.

‡ The Bernstein Fellowships are supported by two separate endowment funds. The Robert L. Bernstein Post-Graduate Fellowships are funded by the Robert L. Bernstein Fellowship Endowment Fund (est. 2001), which has a principal of \$1,759,315 and a market value of \$2,835,248 as of June 30, 2011. The Robert L. Bernstein Fund's annual income distribution in 2011-12 is \$137,657. The Tom and Andi Bernstein Visiting Fellowship(s) are supported by the Tom and Andi Bernstein Fund for Human Rights Endowment Fund (est. 2008), which has a current principal of \$800,000 and a market value of \$833,597 as of June 30, 2011. The Tom and Andi Bernstein Fund's annual income distribution in 2011-12 is \$40,473. This Fund's principal will continue to be added to in the next several years.

§ The Allard K. Lowenstein International Human Rights Clinic is supported by the Allard K. Lowenstein Endowment Fund (est. 1996), which has a principal of \$141,773 and a market value of \$494,016 as of June 30, 2011. The fund's annual income distribution in 2011-12 is \$23,986. The Lowenstein Clinic's budget is supplemented by Yale Law School general funds.

ROBINA FOUNDATION GRANT PROGRAM

DISCUSSION

July 31, 2012

Sunset Timetable

At the August 2010 Board Meeting following discussions with Harvey Dale and Bill Roberts and consideration of the pros and cons of setting a date to sunset the Robina Foundation, the Board of Directors unanimously approved the following resolution:

“... the Robina Foundation is a foundation of limited duration with the current time horizon ending not later than December 31, 2025, with the understanding that the Foundation's support of exemplary programs of its four institutions could result in a shorter duration.”

At the time of the adoption of this resolution, the Board anticipated that its total assets would equal approximately \$125 million, resulting in annual expenditures of approximately \$11 million with a 15-year sunseting timeline beginning in 2010.

Questions relating to the Sunset Timetable:

- Is the Board's 2010 decision still relevant?
- What changes to the Board composition, if any, should be made now given the Foundation's current sunset timetable?
- Should the Board work to make major grant decisions in the next five years, which could shorten the sunset timetable? How would this be accomplished?
- Could a meeting of Robina Grantees help the Board reflect on the sunset timetable?

Robina Grantees Meeting

Following is a summary / synthesis of comments and ideas voiced by Board Members during recent conversations.

Value of a Robina Grantees Meeting

All Board Members indicated that a convening could be a good idea, but had varying levels of enthusiasm for a convening. Comments about convening included:

- I'm open to convening, but it's a little forced.
- We shouldn't do it just because we think we should, but there is no downside to convening.

- I'm open to convening even if we don't get a "product." Since Jim Binger mentioned convening, this would be a way to "close the loop" with respect to this issue and move on. It wouldn't be a waste of time.
- I'm not quite there on convening. For a worthwhile meeting, it would be important to put several questions on the table in advance of the gathering.
- Convening isn't essential to the success of Robina. We are experiencing "success" separately with each of our grantees.
- Although Robina documents reference convening, Jim Binger didn't select organizations with natural connections.
- Jim Binger liked the idea of convening. It would be good to get Robina Grantees together, probably around a particular topic.
- Interesting stuff always comes from convening. Convening would stimulate conversation among grantees.
- Convening would provide an opportunity for Board Members to listen. We may see synergies not otherwise apparent.
- Convening would shift Board's focus from understanding issues addressed by grants to focusing on how to sustain and expand the Foundation's work.

Positioning

Ideas for positioning the convening included:

- Completion of five years of grantmaking is a good time to bring Robina Grantees together.
- Convening Robina Grantees is aligned with Jim Binger's vision of bringing grantees together to share ideas.
- Opportunity for Foundation to update Robina Grantees on where we are (financially as well as programmatically) and ask for ideas about where we might go from here and new strategies or approaches to enhance our grant program. What would Robina Grantees do if they were in the Board's position? (Discussion could include a description of Robina's endowment grant to Yale School of Drama and the possibility of similar grants to other grantees, as well as other kinds of "legacy grants.")
- Opportunity for Robina Grantees to describe what they are doing with Robina grants, how their work is transformative and relates to the broader world. Good way to stimulate the thinking of others.

- Stated purpose of the convening shouldn't be to bring about collaboration. Rather, convening is an opportunity for Robina and Robina Grantees to share what is going on and for Robina Grantees to help chart Robina's future.
- It would be great to pose several questions, e.g. How could Robina's grants be more transformative? Relate more to the broader world? Could a partnership with another organization (a non-Robina Grantee) enhance your work?

Possible Outcomes

- New strategy or approach for future Robina grants.
- Confirmation that our current approach is effective.
- Identification of a joint project involving several Robina Grantees.
- Identification of endowment and/or legacy opportunities.
- Better understanding of how to work effectively with grantees.

Other details

Attendees: senior leaders of Robina Grantees.

Timing: February 2013 as part of February Board Meeting.

Location: Minneapolis may be the logical place, but it might be easier for more attendees if the meeting were held in New York City.

**ROBINA FOUNDATION
ASSETS AND GRANTS**

Q/E DATE	ASSETS	GRANTS (cumulative)	GRANTS (outstanding commitments)
12/31/07	\$149,839,012.57	\$350,000	\$ 0
12/31/08	128,359,302.03	7,028,535	17,507,864
12/31/09	127,065,750.39	14,719,093	9,947,881
03/31/10	126,595,324.27	14,719,093	9,947,881
06/30/10	123,001,620.97	15,719,093	8,947,881
09/30/10	121,856,212.63	20,549,431	10,067,543
12/31/10	128,007,811.51	22,922,663	7,694,311
03/31/11	128,482,893.73	22,922,663	16,944,311
06/30/11	128,031,543.16	24,422,663	15,444,311
09/30/11	125,106,894	30,208,267	23,229,046
12/31/11	120,827,123	30,658,267	32,895,500
03/31/12	121,350,931	34,489,187	48,338,828
06/30/12	99,963,670	53,765,992	32,563,646 (1)

- (1) Includes commitments of \$7,309,758 (over 2 years) to Abbott's Late Life Supportive Care project; \$10,305,357 (over 5 years) to CFR's IIGG Phase II, and \$897,214 for CFR's Diversity Initiative; \$893,457 (2012) to U of M LaPPS final payment, \$6,656,237 (over 4 years) for U of M Institute of Criminal Law & Justice program, and \$1,000,000 (over 4 years) to U of M Scholarship program, \$3,501,623 (over 5 years) for U of M Public Interest Scholars; and \$2,000,000 (over 2 years) to Yale Law School Human Rights II program.

3. Value of endo-in #s

ROBINA FOUNDATION ASSETS DETAIL

USbank Checking, USbank Investment Account, TIFF Account, Estate of Jim Binger, IRS Refund

Assets	12/31/07	12/31/08	12/31/09
USbank Checking	\$28,607.85	\$39,292.02	\$3,299,000.81
USbank Investment	28,068,147.99	21,523,747.18	30,793,370.96
TIFF	8,587,802.83	6,356,616.51	8,183,916.75
Estate of Jim Binger	96,165,289.90	83,450,482.32	67,800,297.87
IRS Refund	16,989,164.00 (1) (2)	16,989,164.00	16,989,164.00
Total	\$149,839,012.57	\$128,359,302.03	\$127,065,750.39

Assets	03/31/10	06/30/10	09/30/10
USbank Checking	\$3,260,931.19	\$2,211,528.66	\$5,338,375.00
USbank Investment	30,990,610.24	31,231,745.96	23,575,643.46
TIFF	8,441,421.21	8,058,254.83	8,792,014.78
Estate of Jim Binger	66,913,197.63	64,510,927.52	67,161,015.39
IRS Refund	16,989,164.00	16,989,164.00	16,989,164.00
Total	\$126,595,324.27	\$123,001,620.97	\$121,856,212.63

Assets	12/31/10	03/31/11	06/30/11
USbank Checking	5,279,343.30	3,969,261.41	3,899,548.61
USbank Investment	21,160,516.65	70,072,133.88	79,068,499.17
TIFF	9,262,202.25	Closed – Funds wired to USbank	-0-
Estate of Jim Binger	82,985,461.31	45,121,210.44	35,743,207.38
IRS Refund	9,320,288.00 (3)	9,320,288.00	9,320,288.00
Total	\$128,007,811.51	\$128,482,893.73	\$128,031,543.16

Assets	09/30/11	12/31/11	03/31/12
USbank Checking	3,242,279	3,107,762	1,554,595
USbank Investment	79,623,780	74,568,396	76,710,536
Estate of Jim Binger	30,618,655	30,705,220	30,640,055
IRS Refund	11,622,180	12,445,745	12,445,745 (4)
Total	\$125,106,894	120,827,123	121,350,931

Assets	06/30/12	09/30/12	12/31/12
USbank Checking	538,773		
USbank Investment	74,687,548		
Estate of Jim Binger	12,291,604		
IRS Refund	12,445,745		
Total	\$99,963,670		

- (1) Estimated info from Peggy Quinn of McDermott.
- (2) This figure includes both a refund from the IRS and amounts payable by the Binger Marital Trust to the Binger Estate because such Trust owes money to the IRS which money is subtracted by the IRS from monies otherwise payable to the Estate.
- (3) Updated info from Peggy Quinn of McDermott.
- (4) The expected amount is at least \$12,445,745.

JP Morgan

Current Residuary Assets on Hand (as of June 30, 2012)

Cash and Short Term¹

	<u>Market</u>
James H. Binger Revocable Trust [REDACTED]	\$ 2,687,278.94
James H. Binger Revocable Trust - Income Account [REDACTED]	7,210,445.87
Estate of James H. Binger [REDACTED]	100,041.58
Estate of James H. Binger - Income Account [REDACTED]	449,595.67
Total Cash and Short Term:	\$ 10,447,362.06

Tartan I LP (as of 3/31/2012)

	<u>Total Market</u>	<u>% Owned</u>	<u>JHB Trust</u>	
Tartan I LP - Scotch I	88,491.70	43.4%	38,405.40	
Tartan I LP - ScotchGard	87,597.43	33.3%	29,169.94	
Tartan I LP - Post It	74,506.80	19.8%	14,752.35	
Total:	250,595.93		82,327.69	\$ 82,327.69 (Liquidation Value)

Other Assets:

James H. Binger Revocable Trust [REDACTED]		
→ Tomsten Inc.	125,001.00	
→ 301 Clifton	-	
MN Community Dev. Bond	-	
Jason McLean Prom. Note	50,000.00	
Venture Capital	1,184,802.00	
Eridon	60,000	
Loring Pasta Bar	66,576	
Myfitlife Inc.	275,000	
Project Apple	-	
Raymedica Inc.	535	
Total:	1,761,914.00	\$ 1,761,914.00

TOTAL ASSETS FOR DISTRIBUTION FOR TAXES AND EXPENSES AND ROBINA:

\$ 12,291,603.75

Note: Distributions to date total \$115.52MM (an interim distribution of \$27MM was made on 10/4/2007, of \$20MM on 3/25/2009, of \$38.295MM on 3/3/11, of \$10MM on 5/17/2011, and of \$15MM on 6/18/2012. Additionally, venture capital distributions were made of \$1.34MM on 7/11/2011 and of \$3.88MM on 7/14/2011.)

Note: Robert Pennell devise of \$584,575.34 on 1/22/09

¹Cash and Short Term Values as of 6.30.12

**Robina Foundation
Meeting Minutes
May 15, 2012**

A meeting of the Board of Directors of the Robina Foundation, a Minnesota nonprofit corporation, was held on November 15, 2011, via conference call.

Directors present: Gordon Aamoth, Susan Berresford, Kathleen Blatz, Thomas Crosby, Peter Karoff, and Steven Schroeder.

Staff present: Penny Hunt, Executive Director, and Nancy Gilberg, Administrative Consultant.

Mary Lou White was present and served as recorder.

Welcome and Call to Order

Crosby, Chair, called the meeting to order and welcomed Board Members.

Minutes of February 14-15, 2012 Meeting

Blatz proposed that the description on page 2 of the minutes in the Board Book outlining actions to be accomplished to finalize the grant to Yale School of Drama be clarified to specify that the final grant amount would take into account early payment of the grant and an appropriate discount of the grant amount.

A motion made and seconded to approve the Minutes of February 14-15, 2012, as amended, was approved unanimously.

Executive Director's Report

Hunt called Board Members' attention to several items in the Executive Director's Report in the Board Book.

Treasurer's and Legal Report

Crosby called the Board's attention to several details in the "Assets and Grants," "Assets Detail," and Quarterly Financial Report, including:

- The Foundation's assets and cumulative grants reflect a \$150 million foundation, which is considerably larger than earlier estimates of the Foundation's size;
- Future reports from Mike Sullivan will include information on the total grants made during the quarter;
- After receipt of the IRS refund and payment to Yale School of Drama, Sullivan will shift funds from corporate bonds to more secure investments;
- The Foundation's investment program is going well, in part because of a fairly large holding of Apple stock;
- While the Foundation has not received the IRS refund, the figure of \$12,445,745 included in the reports is an accurate figure according to all parties.

Crosby reported that he has requested that JP Morgan transfer funds to the Foundation to cover the commitment to Yale School of Drama since even after the transfer JP Morgan would retain sufficient funds to cover unforeseen situations.

Grant Program

Board Members reviewed the chart of Foundation Grants included in the Board Book, noting in particular "placeholder" numbers inserted to help the Board understand the potential

impact of future funding at current levels. Karoff emphasized that the Board should remain flexible and not view the pattern of funding reflected in the chart as a given.

Crosby led a discussion of Robina oversight of the work of Robina Grantees by attendance at meetings and other activities related to the programs funded by the Foundation, citing his recent attendance at University of Minnesota Law School conferences as helping him understand better the program area and reinforcing Robina's role as a partner with its grantees. Two kinds of meetings are involved: on-site visits as part of grant reviews, which should be scheduled regularly with each Robina Grantee, and attendance at other meetings to observe Robina-funded programs in action. Hunt will ask Robina Grantees to alert us to opportunities to observe program activities. In some cases, a Robina Board Member could serve as an ex-officio, non-voting member of a committee such as the advisory committee to evaluate the Yale School of Drama Binger Center for New Theatre or an advisory committee for the LLSC program at ANHW.

Yale School of Drama

Crosby called the Board's attention to the fully-executed indenture which governs the Foundation's \$18 million grant to support the Binger Center for New Theatre, noting in particular the Foundation's ability to designate a successor organization to oversee the Center after the Foundation's sunset.

University of Minnesota Law School

Institute of Criminal Law and Justice

Crosby and Hunt reported on Institute conferences they attended, which highlighted practical aspects of the Institute. They noted further the numerous practitioners attending Institute conferences and the importance of the networking that occurs at the conferences. Blatz, Crosby and Hunt will continue to attend Institute events when possible.

New Proposals

Board Members discussed two proposals submitted by the University of Minnesota Law School: *Clinic Funding Opportunities* and *Public Interest Scholars Program*.

Upon motion made and seconded the Board approved a five-year grant to the University of Minnesota Law School to support the Public Interest Scholars Program in the total amount of \$3,501,623, payable as follows: Year 1: \$379,800; Year 2: \$694,544; Year 3: \$809,355; Year 4: 813,736; Year 5: \$804,188.

Board Members, with the exception of Aamoth, voted in favor of providing this grant.

Abbott Northwestern Hospital

Care Guides in the Primary Care Office

Board Members discussed the final report from ANWH on the results of Phase II of the Care Guides in the Primary Care Office funded by the Robina Foundation. Dr. Adair will attend the July Board Meeting to discuss the results of Phase II and ANWH/Allina's plans to expand the system to provide Care Guides in all Allina primary care clinics.

Late Life Supportive Care Program (LLSC)

Schroeder will meet with Dr. Anderson in advance of the July Board Meeting, and Dr. Anderson and other leaders of the programs will make a presentation at the meeting.

Yale Law School

Robina Human Rights Fellowship Initiative

Karoff and Hunt described their conversation with Jim Silk, Kate Norton and Katie Lawder concerning the Robina Human Rights Fellowship Initiative. All agreed that this year's report was the best ever and more clearly places the Robina program within YLS's other human rights programs. Karoff described, in particular, his conversation with Silk concerning how YLS could provide leadership among law school human rights programs to broaden the impact in the human rights field. Yale will provide its annual assessment of the initiative for review at the July Board Meeting.

Upon motion made and seconded, the Board unanimously approved payment to Yale Law School of the \$1 million 2012 installment of the Foundation's three-year grant to support the Robina Human Rights Fellowship Initiative.

Other Business

Board Members discussed the agenda for the July Board Meeting, including how to develop plans for a meeting with Robina Grantees at the February 2013 Board Meeting. Hunt will survey Board Members in advance of the July meeting to develop several scenarios for a meeting with all grantees.

Adjournment

There being no other business, the meeting was adjourned.

Respectfully Submitted,

Steven A. Schroeder, Secretary

Date

**ROBINA FOUNDATION
BOARD OF DIRECTORS MEETING
August 1, 2012**

EXECUTIVE DIRECTOR'S REPORT

As in the past, my time following the May telephone conference Board Meeting has been focused on work with Robina Grantees and preparation for the Foundation's annual meeting. Much of my work is reflected in the material in this book. A few additional comments:

WORK WITH ROBINA GRANTEES

Yale School of Drama

As you know, we are scheduled to travel to Yale in early December to celebrate Robina's endowment grant to support YSD's Binger Center for New Theatre. YSD is planning a reception with the President and Provost taking part and has asked for our thoughts on other members of the Yale community to invite to the reception. Deborah Berman has suggested that if we are interested and time permits, a tour of the Yale Art Gallery, which just completed a major renovation, would be possible. I will be working with Yale to develop a schedule for our visit and welcome your suggestions. It may be possible for all or some of us to take advantage of our visit to meet with Dean Post and others at Yale Law School.

Council on Foreign Relations

Expanded Diversity Initiative: Unfortunately I was ill and had to cancel my planned attendance at the May two-day workshop at CFR for participants in the newly-formed partnership with Humanity in Action. Early reports suggested that the workshop was successful. The report at Tab 3 covers the launch event as well as other work on the *Expanded Diversity Initiative*.

IIGG:

To follow up on Board Members' comments concerning the content of reports for IIGG, I provided Jim Lindsay and Stewart Patrick with suggestions for modifications to the report to focus on areas of most interest to the Board.

University of Minnesota Law School

University of Minnesota Clinical Funding Opportunities:

Kathleen, Tom and I met with David Wippman and leaders of the U of M's clinical programs to understand better the U's needs as described in the *Clinic Funding Opportunities* the Board considered at the May Board Meeting. During the course of the discussion, our focus shifted to the Law School's interest in developing a community-based legal aid center at UROC, the University of Minnesota's "Urban Research and Outreach-Engagement Center" located in North Minneapolis. (This concept was included in funding opportunities the Law School identified for Board consideration at last February's meeting. At that meeting Board Members expressed greater interest in other opportunities.) Following our meeting, David consulted with others at the Law School as well as leaders of law firm pro bono programs and non-profit legal organizations to begin to flesh out an initiative for the Law School. David will join the Board to talk about opportunities in this area.

Penny

ROBINA FOUNDATION

TO: Robina Foundation Board of Directors

FROM: Penny Hunt

RE: Governance Discussion and Action

DATE: July 19, 2012

Following is information relating to the Board's consideration of governance issues at the August 1, 2012 annual meeting:

Robina Board of Directors

- Size: Robina Foundation Bylaws call for a board of not "fewer than three and no more than seven" Board Members "as determined by resolution of the Board." (Article IV, Section 2)
- Composition: Directors:

Must be at least 18 years old and no more than 79 when elected to the Board
Need not be a resident of Minnesota or formally affiliated with a Robina Grantee.
(Article IV, Section 3)
- Term/Term Limits:
Three year term of office
No limit on the number of terms, although "the Founder believed Directors would be more productive if they served no more than three terms."
(Article IV, Section 4)
- Compensation: At the August 2011 annual meeting the Board reviewed information from the Association of Small Foundations and calculations of time spent working on Foundation matters (Attachment 1) to determine the appropriate level of compensation for service on the Board. The Board approved annual compensation in the amount of \$25,000 retroactive to January 1, 2011 and agreed to review Board Members' time commitment each to insure that compensation is appropriate.

Attachment 1 also includes information from ASF's 2011 Foundation Operations and Management Report.

Lead Directors: Attachment 2 contains the "job description" for the Foundation's "Lead Directors" developed in 2010.

Officers:

- **Term:** Officers serve at the pleasure of the Board and hold office until their successors are elected or appointed. Two or more offices may be held by the same person. (Article VI, Section 2)

Election of Directors and Officers: Attachment 3.

Conflict of Interest Policy/Board Member Disclosure: Attachment 4.

COMPENSATION OF ROBINA BOARD MEMBERS

Alternative Calculations

1. Based on Time

<u>August & February Meetings</u> Preparation: 4 hrs/mtg	3 days/mtg (including travel) 1/2 day/mtg	6 days 1 day
<u>May & November Meetings</u> Preparation: 4 hrs/mtg	2 hours/mtg 1/2 day/mtg	1/2 day 1 day
Conference Calls re: reports + preparation	1 3/4 hours/report	1 1/2 days
Misc. meetings, review of emails, articles, consultation, etc.		3 days

TOTAL: 13 days x \$2000/day = \$26,000

2. Based on Retainer + Meeting Fees

Basic retainer: \$15,000

Meeting Fees:

August and February: \$3,000/mtg: \$6,000

May and November: \$2,000/mtg: \$4,000

TOTAL: \$25,000

Board Meeting: 8/24/2011

Board Compensation

About one-third (36%) of foundations compensate board members for routine board and committee service (distinct from any additional compensation for advisory or staff services). Among those foundations, 54% pay an annual fee to board members, 34% pay per board meeting, 14% compensate per committee meetings, and 12% compensate using a combination of annual and per meeting fees. Foundations with more assets are more likely to compensate board members, as are non-family foundations.

TABLE 3

Board Compensation by Foundation Type and Asset Size

	Type		Asset Size						
	Overall	Family Foundations	Non-Family Foundations	< \$1M	\$1–4.9M	\$5–9.9M	\$10–24.9M	\$25–49.9M	\$50+M
	36%	24%	50%	11%	27%	39%	33%	50%	56%
Overall annual compensation per board member**									
Average	\$8,687	\$6,637	\$9,859	*	\$2,933	\$5,847	\$7,995	\$7,981	\$16,811
Median	\$5,000	\$3,825	\$6,120	*	\$2,325	\$5,075	\$3,750	\$6,000	\$13,000
(n)	(165)	(60)	(105)	*	(22)	(24)	(37)	(37)	(36)
Typical board member receives annual fee only									
Average	\$19,158	\$19,326	\$19,063	*	\$3,891	\$15,712	\$30,115	\$10,650	\$29,333
Median	\$8,200	\$5,000	\$10,000	*	\$3,600	\$7,935	\$8,400	\$9,500	\$20,000
(n)	(92)	(33)	(59)	*	(11)	(14)	(25)	(18)	(18)
Typical board member receives fee per board meeting only									
Average	\$786	\$1,022	\$636	*	\$466	\$506	\$777	\$771	\$1,527
Median	\$500	\$750	\$488	*	\$300	\$450	\$700	\$675	\$1,000
(n)	(59)	(25)	(36)	*	(11)	(9)	(12)	(12)	(11)
Compensation per committee meeting									
Average	\$464	*	\$485	*	*	*	\$596	*	\$469
Median	\$375	*	\$338	*	*	*	\$425	*	\$375
(n)	(23)	*	(18)	*	*	*	(7)	*	(8)

* Insufficient data (five or fewer cases) to report

** Overall annual board compensation includes board members who receive annual fees only, those who receive per meeting fees only (multiplied by the number of board meetings per year), and those who receive a combination of annual and per meeting fees

Expense Reimbursement

Nearly three-quarters (74%) of foundations reimburse board members for expenses incurred while on foundation business (e.g., travel, hotel accommodations, meals). Foundations with more assets reimburse board members more frequently.

TABLE 4
Expense Reimbursement by Foundation Type and Asset Size

Overall	Type		Asset Size					
	Family Foundations	Non-Family Foundations	< \$1M	\$1–4.9M	\$5–9.9M	\$10–24.9M	\$25–49.9M	\$50+M
74%	74%	74%	55%	70%	79%	74%	83%	82%

Discretionary Grantmaking

Forty-three percent (43%) of foundations allow their board chairs to make discretionary grants, 36% allow other board members to make discretionary grants, and 32% allow their CEO/top administrators to make such grants. Discretionary grant dollars awarded are typically \$13,500 among board chairs and \$10,000 among CEO/top administrators and other board members.

TABLE 5
Discretionary Grantmaking

	Percentage of Foundations Allowing Discretionary Grants	Median Maximum Amount of Discretionary Grants Allowed
By the board chair	43%	\$13,500
By board member(s) other than the board chair	36	\$10,000
By the CEO/top administrator	32	\$10,000

ROBINA FOUNDATION

"LEAD DIRECTORS"
~~DRAFT DESCRIPTION~~

From time to time the Board of Directors may designate "Lead Directors" for the Robina Foundation's four designated recipients and for other key activities (e.g. financial issues) of the foundation.

Goals:

Connect individual director with specific grantee or foundation activity to deepen understanding of one funding area or foundation issue.

Facilitate resolution of simple questions/issues, which need not involve the entire board.

Provide executive director with a sounding board to discuss foundation grantees, proposals and concerns.

Maximize use of board members' time.

Role of the Lead Directors: Although no director will "own" a particular grantee or area, lead directors will:

Pay particular attention to grants, reports, issues, etc. related to their designated grantee or area.

Be available to consult with the executive director as requested and provide counsel and advice.

Note:

Notwithstanding the designation of "lead directors," the executive director will continue to be the primary contact for donees. Board members and the executive director will make this clear in communications and interactions with grantees.

ROBINA FOUNDATION

BOARD OF DIRECTORS MEETING

August 1, 2012

DIRECTORS AND OFFICERS

BOARD OF DIRECTORS - Action

- Election to third term (9/1/12 – 8/31/15) – Peter Karoff

OFFICERS – Action

- Chair – Tom Crosby
- Vice Chair – Steve Schroeder
- Treasurer – Kathleen Blatz
- Secretary – Steve ~~Schroeder~~ *Susan B.*
- Executive Director – Penny Hunt

Name/Office	1st Term	2 nd Term	3 rd Term
Gordon Aamoth	9/1/04 – 8/31/07	9/1/07 – 8/31/10	9/1/10 – 8/31/13
Susan Berresford <i>Secretary</i>	9/1/11 – 8/31/14 (1)		
Kathleen Blatz Treasurer	9/1/11 – 8/31/14 (2)		
Thomas Crosby, Jr. Chair	2/20/07 – 8/31/10	9/1/10 – 8/31/13	
Peter Karoff	12/1/06 – 8/31/09	9/1/09 – 8/31/12	9/1/12 – 8/31/15
Steven Schroeder Vice Chair and Secretary	9/1/04 – 8/31/07	9/1/07 – 8/31/10	9/1/10 – 8/31/13

(1) Berresford served an initial partial term from 4/1/11 – 8/31/11.

(2) Blatz served an initial partial term from 2/24/10 – 8/31/11.

ROBINA FOUNDATION

Conflict of Interest Acknowledgment (2012)

I hereby certify that I have reviewed, and agree to abide by, Robina Foundation's Director and Officer Conflict of Interest Policies and Procedures as currently in effect. I acknowledge that failure to comply with the Director and Officer Conflict of Interest Policies and Procedures is grounds for my removal as an officer or director of the Foundation.

Signature: _____ Date: _____

Print Name: _____

**Robina Foundation
2012 Board Meeting Dates**

DATE (2012)	PLACE/TIME
February 13-15, 2012 (Mon, Tues, Wed) (Valentine's Day – February 14) Santa Barbara, California	California Monday, February 13 – 6:30 p.m. Dinner (PST) Tuesday, February 14 – 8 a.m. – 4 p.m.(PST) Dinner at the Karoff's home 6 p.m. (PST) Wednesday, February 15 – 8:00 a.m. to 12 noon (PST)
May 15, 2012 (Tuesday) Conference Call	10:00 a.m. to 12 noon (CDT)
July 30 – August 1, 2012 (Mon, Tues, Wed) Annual Meeting Minneapolis, Minnesota	Minneapolis, MN Monday, July 30 – 6:00 p.m. Dinner (CDT) Tuesday, July 31 – 8 a.m. to 4 p.m. (CDT) Wednesday, August 1 – 8 a.m. to 12 noon (CDT)
November 13, 2012 (Tuesday) Conference Call <i>7. KB</i>	10:00 a.m. to 12 noon (CST)
DATE (2013)	PLACE/TIME
February 25-27, 2013 (Mon, Tues, Wed)	NYC Minneapolis , MN Monday, February 25 – 6:00 p.m. Dinner (CST) Tuesday, February 26 – 8 a.m. to 4 p.m. (CST) Wednesday, February 27 – 8 a.m. to 12 noon (CST)

Calendar for year 2012 (United States)

January Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 1: 9: 16: 23: 30:	February Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 7: 14: 21: 28:	March Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 8: 14: 22: 30:
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Calendar for year 2013 (United States)

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May 14
9:30 - 11:30

Holidays and Observances:

Jan 1 New Year's Day	Sep 2 Labor Day
Jan 21 Martin Luther King Day	Oct 14 Columbus Day (Most regions)
Feb 14 Valentine's Day	Oct 31 Halloween
Feb 18 Presidents' Day	Nov 11 Veterans Day
Mar 31 Easter Sunday	Nov 28 Thanksgiving Day
May 12 Mother's Day	Dec 24 Christmas Eve
May 27 Memorial Day	Dec 25 Christmas Day
Jun 16 Father's Day	Dec 31 New Year's Eve
Jul 4 Independence Day	

Jerry
Tim
Joe

The Robina Foundation
U.S. Bank Portfolio Management Team
Discussion Agenda
August 1, 2012

- Introductions.
- Your Objectives for our Discussion Today.
 - *Head thru book*
 - *Barclays*
- Update Regarding the Foundation's Mission.
- Update Regarding the Foundation's Investment Objectives.
- Rationale for Current Investment Strategy.
- Implementation of Investment Strategy.
- Impact of Changes to Foundation's Mission and Objectives on Investment Strategy.
- Administration of Foundation Portfolio.
- Portfolio Investment Performance.
- Your Questions, Comments or Concerns.

Our Mission: To enrich the lives of our clients by honoring their unique goals

THE
PRIVATE CLIENT
RESERVE



Investment Relationship Review

Prepared For: Robina Foundation

Presented: August 1, 2012

All of  serving you™



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Your Dedicated Client Service Team & List of Accounts

- **Wealth Management Advisor**

Jerry Anderson

Phone: 612.303.3081

Email: jerrold.anderson@usbank.com

- **Senior Portfolio Manager**

Jon Gennaro

Phone: 612.303.3130

Email: jonathan.gennaro@usbank.com

- **Personal Trust Relationship Manager**

Tim Towle

Phone: 612.303.4969

Email: timothy.towle@usbank.com

Accounts Profiled In This Report

- Robina Foundation Mgmt Agy [REDACTED]



Discussion Topics

- **Market Review**
 - Highlights of Recent Economic Environment and Capital Markets
- **Performance & Holdings**
 - Robina Foundation Management Agency**
 - Portfolio Analysis Reports
 - Portfolio Performance
 - Summary of Holdings
- **Market Outlook**
 - Our Views on the Economy and Capital Markets
- **Appendix**
 - Disclosures and Definitions

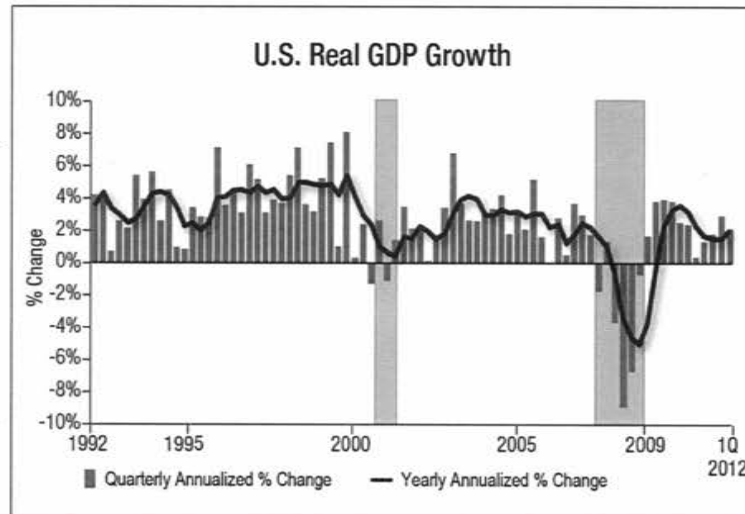
Review: The Global Economy – July 2012

- U.S. economic data has eased over the first half of 2012. After a strong start, surveys for Manufacturing activity and Consumer Confidence have slowed. Housing started the year strong and despite recent moderation, seems to be offering support to U.S. growth. Risk to the U.S. economy is rising from eurozone contagion and our own fiscal issues due, in part, to potential expiration of tax cuts and stimulus which could cause a modest drag on GDP growth.

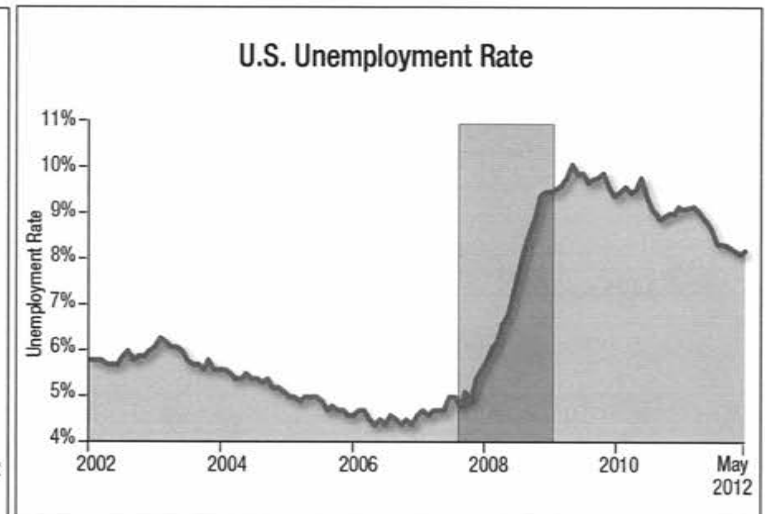
- The unemployment rate has risen to 8.2%. Weekly initial unemployment claims have worsened recently. In our view, employment growth will improve modestly, despite an unemployment rate which may remain higher than historical averages.

- U.S. inflation has moderated as commodity prices have eased. Core prices, excluding food and energy, have continued to increase modestly. Excess capacity in housing and labor seem likely to constrain price increases.

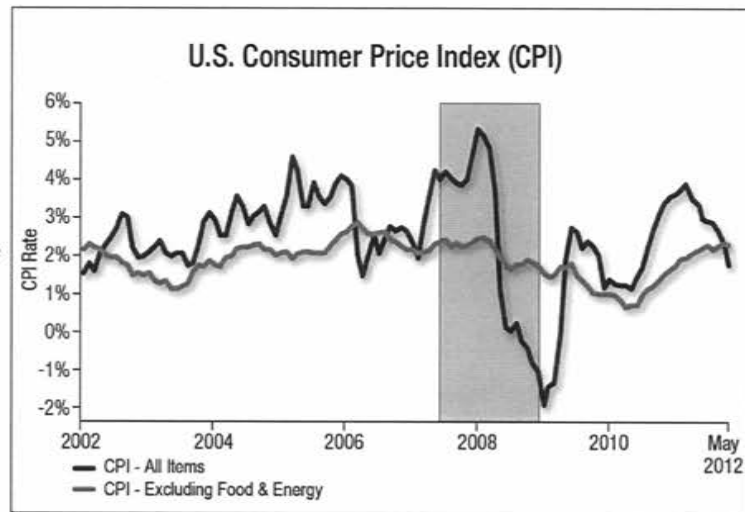
- Manufacturing has moderated in line with global economic growth and the turmoil from the eurozone debt crisis. The contraction in eurozone activity seems to indicate a recession, while U.S. indicators seem to indicate modest growth. In China, indicators seem to point toward moderation in output, however, easier monetary policy may support improvement over the next quarter.



Source: FactSet; gray bars = recessionary periods



Source: FactSet; 1/31/02-5/31/12; gray bars = recessionary periods



Source: FactSet; gray bars = recessionary periods

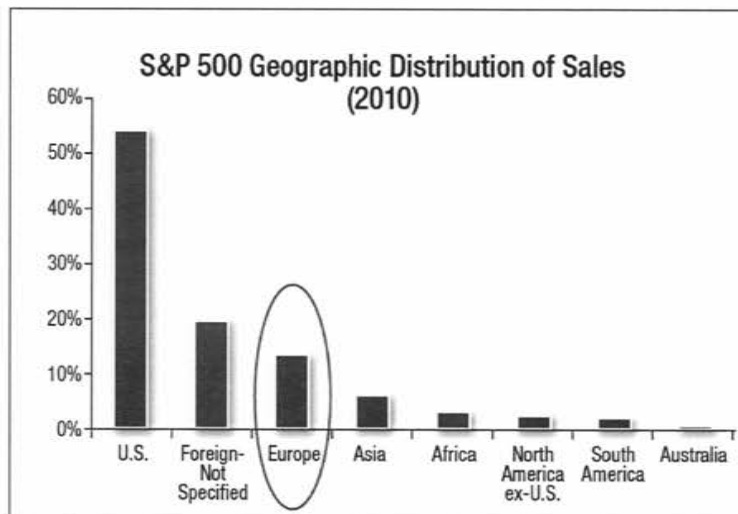


Source: Strategas Research Partners; April 2006-June 2012
PMI (Purchasing Managers Index)

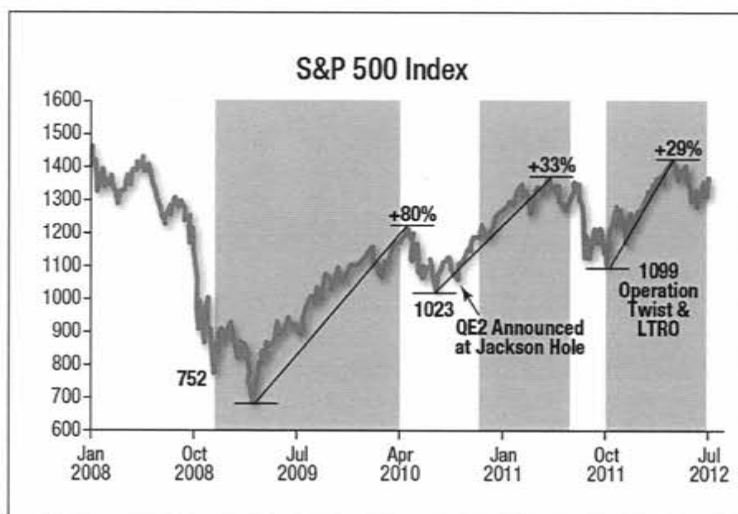
Review: Equity Capital Markets – July 2012

- June was an eventful month highlighted by a Greek election, daily policy pronouncements from Europe, weak U.S. employment results and a European Summit. Despite clear evidence of a slowing global growth profile, the domestic equity markets, as measured by the S&P 500, added 2.2% for the month. Europe is 13.5% of the S&P 500's revenue, but the indirect impact of slow growth in Europe is also influencing profit growth. Earnings estimates for the S&P 500 are now being revised lower, with muted results expected for the 2Q earnings season.

- Much of the strength in the month of June was likely due to investor enthusiasm and expectations that central banks globally would soon act to mitigate slowdown in growth as opposed to fundamental economic strength/profit growth expectations. In early July, China and the European Central Bank (ECB) both cut rates and the Bank of England extended the quantitative easing program in that country. U.S. investors are urging the Fed to act to spur job growth and the capital markets. We anticipate that the equity markets will react positively to additional Fed action, consistent with prior experiences.



Source: Strategas Research Partners



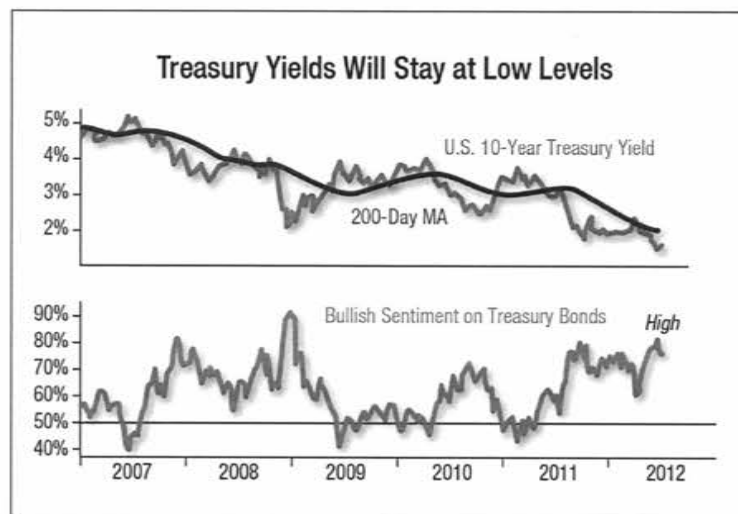
Source: Strategas Research Partners
LTRO: Long Term Refinancing Operation

Review: Fixed Income Capital Markets – July 2012

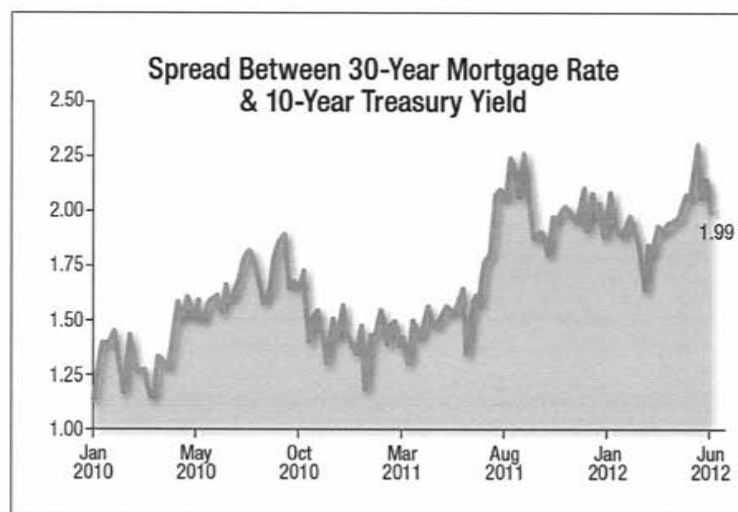
- In June, Treasury yields hit record lows with the ten-year Treasury note reaching an all-time low yield of 1.46%. Recently, yields have moved back up, but not to levels that would cause concern for a major directional change in interest rates. The move to record low rates on Treasuries has been augmented by large cash flows into bond funds and extreme bullish sentiment by fixed income investors. Bullish sentiment on Treasury bonds reached a three-year high last month.

- The low interest rate environment, along with the Fed's Operation Twist, has greatly benefited the mortgage market. The spread between the 30-year mortgage rate and the ten-year Treasury yield narrowed to below 2% in June. This enabled the 30-year mortgage rate to drop to below 3.75%, even though the ten-year Treasury note yield slightly increased towards the end of the month. This has helped stabilize the residential housing market and a created boom in refinancing in mortgages for individuals.

- After a bad month in May for U.S. investment grade corporate and high yield corporate bonds, spreads tightened in June. High grade corporate bond spreads were 14 basis points tighter. High yield debt rallied strongly in the month of June with spreads ending at 636 basis points or 60 basis points tighter than the month before. We believe the accommodative stance from the Fed will continue to support the domestic credit markets.



Source: BCA Research



Source: Strategas Research Partners



ROBINA FOUNDATION MGMT AGY

Portfolio Overview

Portfolio Number: [REDACTED]

Holdings Method: Direct

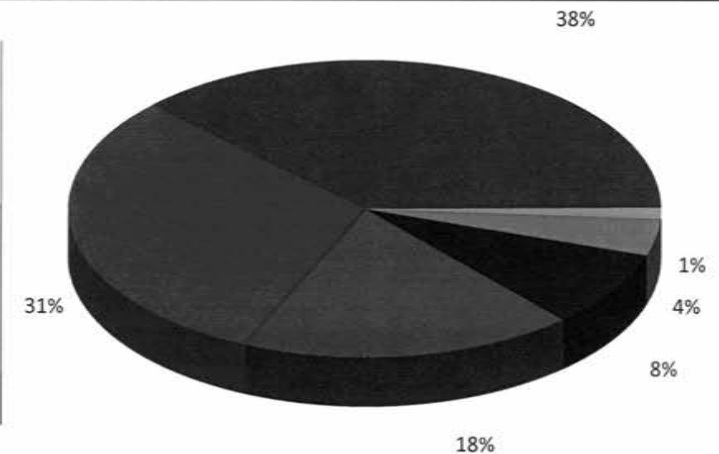
Report Date: 07/27/2012

Portfolio Summary

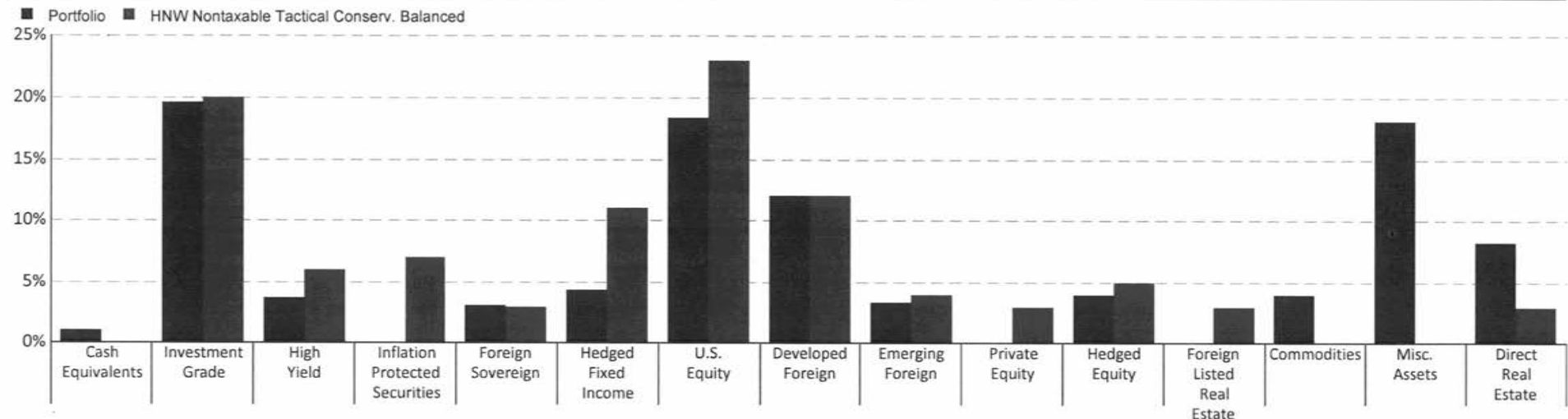
Inv. Objective	Conserv Bal/Nontaxable-2
Total Portfolio Value	\$75,486,352
Capital Gains YTD	\$-56,630
Current Yield	2.04
Projected Annual Income	\$1,530,445
Number of Securities	61
Portfolio Mgr.	Jon Gennaro

Portfolio Asset Allocation

Equity	\$28,475,632	38%
Fixed	\$23,199,260	31%
Misc	\$13,691,792	18%
Real Estate	\$6,262,854	8%
Commodities	\$3,039,010	4%
Cash	\$817,804	1%



Portfolio Model Allocation





*This = better than
bonded bond portfolio*

ROBINA FOUNDATION MGMT AGY

Portfolio Holdings

Portfolio Number: [REDACTED]

Holdings Method: Direct

Report Date: 07/27/2012

			Symbol	% of Port.	Price	Shares/ Units	Portfolio Value	\$ Cost Basis	Unrealized Gain/Loss	Curr. Yield	Annual Income
Total			--	100.0	--		75,486,352	73,455,784	1,858,424	2.04	1,530,445
Cash				1.1	--	--	817,804	817,804	0	0.20	1,636
Cash Equivalents				1.1	--	--	817,804	817,804	0	0.20	1,636
US BANK PRIVATE CLIENT MMKT SAVINGS			[REDACTED]	1.1	1.00	817,804	817,804	817,804	0	0.20	1,636
Fixed				30.7	--	--	23,199,260	23,249,768	-222,655	3.83	881,593
Investment Grade				19.6	--	--	14,782,184	14,759,672	-148,683	4.01	586,260
Corporate				19.6	--	--	14,782,184	14,759,672	-148,683	4.01	586,260
PEPSIAMERICAS INC	5.750%	7/31/12	71343PAE1	0.2	100.00	125,000	128,534	134,478	-9,478	5.75	7,188
PROCTER GAMBLE	1.375%	8/01/12	742718DR7	0.8	100.00	600,000	604,033	606,498	-6,498	1.38	8,250
HEWLETT PACK CO	2.950%	8/15/12	428236AY9	0.7	100.06	500,000	506,963	516,530	-16,205	2.95	14,750
* BARCLAYS BANK PLC	5.450%	9/12/12	06738GUZ1	0.7	100.53	500,000	512,884	535,030	-32,365	5.42	27,250
NORTHERN TRST CO	5.200%	11/09/12	665859AH7	0.4	101.32	262,000	268,421	281,692	-16,223	5.13	13,624
BOTTLING GROUP LLC	4.625%	11/15/12	10138MAB1	0.3	101.20	240,000	245,107	259,542	-16,655	4.57	11,100
ABBOTT LABORATORIES	5.150%	11/30/12	002819AA8	0.7	101.57	500,000	511,907	541,155	-33,325	5.07	25,750
NUCOR CORP	5.000%	12/01/12	670346AF2	0.7	101.42	495,000	505,864	533,357	-31,343	4.93	24,750
ALABAMA POWER CO	4.850%	12/15/12	010392EY0	0.5	101.65	350,000	357,748	379,424	-23,656	4.77	16,975
JOHN DEERE CAP MTN	4.950%	12/17/12	24422EQM4	0.7	101.55	500,000	510,510	538,420	-30,660	4.87	24,750
WELLS FARGO CO	4.375%	1/31/13	949746NY3	0.5	102.00	375,000	390,581	383,296	-781	4.29	16,406
BANK OF NY MELLO MTN	4.500%	4/01/13	06406HBJ7	0.6	102.74	400,000	416,756	428,132	-17,176	4.38	18,000
ORACLE CORP	4.950%	4/15/13	68389XAD7	0.5	103.30	375,000	392,642	405,041	-17,659	4.79	18,562
EMERSON ELECTRIC	4.500%	5/01/13	291011AT1	0.5	102.99	350,000	364,224	374,196	-13,734	4.37	15,750
IBM CORP	2.100%	5/06/13	459200GR6	0.5	101.30	400,000	407,094	399,544	5,660	2.07	8,400
COLGATE PALM CO MTN	4.200%	5/15/13	19416QDL1	0.5	103.12	350,000	363,878	369,551	-8,614	4.07	14,700
CONOCO PHILLIPS	4.400%	5/15/13	20825CAM6	0.5	103.23	395,000	411,219	417,760	-10,018	4.26	17,380
DUPONT EI NEMOUR	5.000%	7/15/13	263534BU2	0.7	104.33	500,000	522,498	536,880	-15,215	4.79	25,000
BERKSHIRE HATHAWAY	4.625%	10/15/13	084664AD3	0.7	104.96	500,000	531,357	527,755	-2,950	4.41	23,125
GOLDMAN SACHS	5.250%	10/15/13	38141GDQ4	0.7	104.18	500,000	528,322	531,260	-10,375	5.04	26,250
DISNEY WALT CO	4.500%	12/15/13	254687AW6	0.6	105.71	400,000	424,952	427,684	-4,832	4.26	18,000

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Holdings Date: 07/27/2012



ROBINA FOUNDATION MGMT AGY

Portfolio Holdings

Portfolio Number:

Holdings Method: Direct

Report Date: 07/27/2012

			Symbol	% of Port.	Price	Shares/ Units	Portfolio Value	\$ Cost Basis	Unrealized Gain/Loss	Curr. Yield	Annual Income
NOVARTIS CAPITAL	4.125%	2/10/14	66989HAA6	0.5	105.51	350,000	375,993	367,283	2,012	3.91	14,438
HONEYWELL INTL	3.875%	2/15/14	438516AY2	0.7	105.39	490,000	524,936	507,929	8,462	3.68	18,988
UNILEVER CAPITAL	3.650%	2/15/14	904764AJ6	0.6	104.93	445,000	474,248	459,618	7,320	3.48	16,242
ELI LILLY CO	4.200%	3/06/14	532457BE7	0.6	105.99	400,000	430,544	424,132	-168	3.96	16,800
COCA COLA CO	3.625%	3/15/14	191216AL4	0.7	105.07	500,000	532,006	513,285	12,075	3.45	18,125
UNITED PARCEL SRVC	3.875%	4/01/14	911312AL0	0.6	105.94	400,000	428,734	420,596	3,144	3.66	15,500
GLAXOSMITHKLINE	4.375%	4/15/14	377372AA5	0.5	106.75	370,000	399,547	392,658	2,302	4.10	16,188
BELLSOUTH CORP	5.200%	9/15/14	079860AG7	0.5	109.01	366,000	405,966	396,002	2,985	4.77	19,032
PROCTER & GAMBLE	3.500%	2/15/15	742718DM8	0.5	107.26	350,000	380,930	360,199	15,218	3.26	12,250
MERCK & CO INC	4.750%	3/01/15	589331AK3	0.2	110.64	115,000	129,452	122,963	4,275	4.29	5,462
BP CAPITAL PLC	3.875%	3/10/15	05565QBH0	1.0	107.75	700,000	764,580	718,820	35,438	3.60	27,125
PROCTER & GAMBLE	3.150%	9/01/15	742718DQ9	0.1	107.48	100,000	108,760	100,086	7,396	2.93	3,150
PRAXAIR INC	3.250%	9/15/15	74005PAV6	0.5	107.40	350,000	380,074	349,636	26,268	3.03	11,375
TOTAL CAPITAL	3.125%	10/02/15	89152UAA0	0.7	107.19	500,000	540,921	499,240	36,690	2.92	15,625
High Yield				3.8	--	--	2,834,494	2,984,000	-149,506	8.21	232,741
Mutual Funds & ETFs				3.8	--	--	2,834,494	2,984,000	-149,506	8.21	232,741
Nuveen High Income Bond Cl Y			FJSYX	3.8	8.72	325,057	2,834,494	2,984,000	-149,506	8.21	232,741
Foreign Sovereign				3.1	--	--	2,323,175	2,396,096	-73,872	2.70	62,593
ONTARIO PROVINCE	3.500%	7/15/13	683234ZR2	0.3	102.95	215,000	221,585	225,126	-3,793	3.40	7,525
ONTARIO PROVINCE	4.100%	6/16/14	6832348A9	0.2	106.64	150,000	160,654	154,970	4,984	3.84	6,150
T. Rowe Price International Bond Fd			RPIBX	2.6	9.84	197,250	1,940,936	2,016,000	-75,064	2.52	48,918
Hedged Fixed Income				4.3	--	--	3,259,406	3,110,000	149,406	--	--
GAM ABSOLUTE RETURN BND OFFSHORE			99MSCX7M7	4.3	109.16	29,858	3,259,406	3,110,000	149,406	--	--
Equity				37.7	--	--	28,475,632	29,876,646	-1,401,013	2.08	592,140
U.S. Equity				18.3	--	--	13,822,919	13,407,891	415,028	1.72	238,371
Mutual Funds & ETFs				18.3	--	--	13,822,919	13,407,891	415,028	1.72	238,371
American Century Small Cap Value - Institu...			ACVIX	0.7	8.32	65,825	547,666	599,800	-52,134	1.45	7,965
Neuberger Berman Genesis Institutional			NBGIX	0.6	48.26	9,329	450,239	471,200	-20,961	1.32	5,943
SPDR S&P 500 ETF			SPY	13.6	138.68	73,800	10,234,215	9,698,662	535,553	1.94	199,039

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Holdings Date: 07/27/2012

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ROBINA FOUNDATION MGMT AGY

Portfolio Holdings

Portfolio Number: [REDACTED]

Holdings Method: Direct

Report Date: 07/27/2012

	Symbol	% of Port.	Price	Shares/ Units	Portfolio Value	\$ Cost Basis	Unrealized Gain/Loss	Curr. Yield	Annual Income
SPDR S&P MidCap 400 ETF Trust	MDY	3.4	172.72	15,000	2,590,800	2,638,229	-47,429	0.98	25,425
Developed Foreign		12.1	--	--	9,137,118	10,774,754	-1,637,636	3.41	311,645
Mutual Funds & ETFs		12.1	--	--	9,137,118	10,774,754	-1,637,636	3.41	311,645
iShares MSCI EAFE Index Fund	EFA	12.1	50.37	181,400	9,137,118	10,774,754	-1,637,636	3.41	311,645
Emerging Foreign		3.3	--	--	2,517,492	2,694,000	-176,508	1.67	42,123
Mutual Funds & ETFs		3.3	--	--	2,517,492	2,694,000	-176,508	1.67	42,123
Aberdeen Emerging Markets Fund, Insti Class	ABEMX	1.7	14.25	91,612	1,305,465	1,347,000	-41,535	1.25	16,307
Oppenheimer Developing Markets Fund Class Y	ODVYX	1.6	31.69	38,246	1,212,027	1,347,000	-134,973	2.13	25,816
Hedged Equity		4.0	--	--	2,998,103	3,000,000	-1,897	--	--
POINTER OFFSHORE LTD.	99MSCPGB8	4.0	1.00	2,998,103	2,998,103	3,000,000	-1,897	--	--
Real Estate		8.3	--	--	6,262,854	5,881,100	381,754	--	--
Direct		8.3	--	--	6,262,854	5,881,100	381,754	--	--
IDR CORE EQ RE 2010 LP NET CAP BAL	98MSCFFW7	8.3	1.04	6,000,000	6,262,854	5,881,100	381,754	--	--
Commodities		4.0	--	--	3,039,010	3,442,000	-402,990	1.81	55,076
Commodities		4.0	--	--	3,039,010	3,442,000	-402,990	1.81	55,076
* BARCLAYS VOYAGER MTN	6/07/16 06738KKW0	0.9	88.49	750,000	663,675	750,000	-86,325	--	--
* BARCLAYS VOYAGER MTN	7/15/16 06738KMF5	0.9	89.24	750,000	669,300	750,000	-80,700	--	--
Invesco Balanced-Risk Commodity Strategy F...	BRCYX	1.2	10.61	84,552	897,100	971,000	-73,900	0.00	0
Oppenheimer Commodity Strategy Total Retur...	QRAYX	1.1	3.29	245,877	808,935	971,000	-162,065	6.81	55,076
Misc		18.1	--	--	13,691,792	10,188,463	3,503,329	--	--
Misc		18.1	--	--	13,691,792	10,188,463	3,503,329	--	--
COMMON SENSE OFFSHORE LTD	98MSC70S0	2.7	143.00	14,288	2,043,277	2,010,000	33,277	--	--
FLAG PRIVATE EQUITY LP	98MSC9DH6	1.6	0.48	2,500,000	1,195,695	1	1,195,694	--	--
FLAG VENTURE PARTNERS III LP	98MSC9DE3	1.3	0.20	5,000,000	1,009,145	1	1,009,144	--	--
FLAG VENTURE PARTNERS IV LP	98MSC9DG8	1.6	0.59	2,125,000	1,244,759	1	1,244,758	--	--
GCA CREDIT OPP FUND LTD 05-2009	98MSCDF44	5.4	1,705.54	2,369	4,040,768	3,880,000	160,768	--	--
MARATHON CREDIT OPP FUND LTD.	98MSC7167	4.0	959.23	3,110	2,983,196	3,110,000	-126,804	--	--
PFINGSTEN EXECUTIVE FUND III LP	98MSC9DF0	1.6	0.59	2,000,000	1,174,952	1,188,460	-13,508	--	--

Robina Foundation Management Agency

Selected Period Performance ROBINA FOUNDATION MGMT AGY Account [REDACTED] Period Ending: 06/30/2012

<u>Sector</u>	<u>Market Value</u>	<u>Year to Date (6 Months)</u>	<u>1 Year</u>	<u>3 Years</u>	<u>5 Years</u>	<u>Inception to Date (61 Months)</u>
Total Managed Portfolio	70,290,787	3.73	-.38	1.19	2.00	2.05
Total Equity	30,310,207	5.89	-3.86			
S&P 500 Composite Index		9.48	5.44	16.39	.21	-.12
Russell Midcap Index		7.96	-1.67	19.44	1.05	.58
Russell 2000 Index		8.53	-2.06	17.80	.54	.24
→ MSCI EAFE Index (Gross)		3.38	-13.39	6.45	-5.64	-5.52
→ MSCI EM Free Index (USD)		3.93	-15.95	9.77	-.09	.81
Hedged Equity	5,101,655	1.67	2.93			
HFRI Equity Hedge Index		2.14	-7.33	4.73	-.69	-.50
Total Fixed Income	30,443,210	2.63	1.23	2.65		
Barclays 1-3 Yr Gov/Credit Index		.58	1.11	2.25	3.66	3.69
Hedged Fixed Income	10,225,497	4.23	-.29			
HFRI Relative Value Total		4.17	1.26	9.07	4.17	4.21
Total Real Estate - Private v.e. fund	6,102,966	8.35	9.23			
Dow Jones Select REIT - relative		14.92	13.30	33.52	1.97	-.02
Total Commodities	2,903,410	-3.37	-10.83			
Dow Jones UBS Commodity TR		-3.70	-14.33	3.50	-3.65	-3.86
Total Cash Equivalents	530,994	.11	.21	.10	1.10	1.16

Portfolio Inception: 06/01/2007

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Past performance does not guarantee future results. Performance returns may not reflect the deduction of applicable fees, which would reduce returns.
Information is deemed reliable but may be subject to change.

Please refer to important information provided on the Disclosures page in the Appendix section

 THE PRIVATE CLIENT RESERVE

MS going to work
w/ USBank to review
this page so understand
return better.

Need blended
index return
so can compare.

Hedged Equity and Hedged Debt Strategies Performance June 2012

Hedged funds - Mkt loss not as extreme. + Weight

	<u>YTD</u>	<u>1 Year</u>
Hedged Equity		
Fund of Fund Strategy: Global w/ U.S. Emphasis. Long Biased. HF Benchmark: HRFI Equity Hedge		
Pointer (QP), LP		
Performance	3.42%	0.0%
HFRI Equity Hedge Index	2.15%	-7.3%
Fund of Fund Strategy: U.S. focused, Low Net Market Exposure, Negative Market Correlation. HF Benchmark: 1-HRFI Equity Market Neutral		
Common Sense Partners, LP		
Performance	-2.14%	1.9%
HFRI Equity Market Neutral Index	1.22%	-2.3%
Hedged Debt		
Direct Strategy: Long/Short Global Rates, Credit, Currency. HF Benchmark: HFRX Relative Value Arbitrage		
GAM Absolute Return Bond Fund		
Performance	6.10%	5.2%
HFRX Relative Value Arbitrage Index	2.12%	-7.3%
Direct Strategy: Long/Short Corporate Credit with High Yield and Distressed Focus. HF Benchmark: HFRF Relative Value Inde		
GCA Credit Opportunities Master Fund, Ltd		
Performance	2.84%	3.7%
HFRI Relative Value Index	4.18%	1.3%
Direct Strategy: Long/Short Credit Opportunities & Distressed Credit. HF Benchmark: HFRF ED: Distressed/Restructuring		
Marathon Credit Opportunities Fund, LP		
Performance	4.46%	-2.3%
HFRI ED: Distressed/Restructuring Index	2.68%	-3.0%

Commodities and Private Real Estate Strategies Performance

June 2012

Commodity Funds

Strategy: Long Only Enhanced Index-tracking Goldman Sachs Commodity Index. Benchmark: GS Commodity Index

Oppenheimer Commodity Strategy Total Return Fund

Energy

Performance
GS Commodity Index

YTD

-8.38%
-7.23%

1 Year

-12.4%
-10.7%

Strategy: Long-Biased activity allocating to the representative Dow Jones-UBS Commodity Index commodity sectors. Benchmark: DJ-UBS Commodity Index

Invesco Balanced-Risk Commodity Strategy

Performance
DJ-UBS-Commodity Index

0.12%
-3.70%

-7.6%
-14.3%

Strategy: Enhanced Index tracking Dow Jones-UBS Commodity Index with ability to become Market Neutral on a sector level. Benchmark: DJ-UBS Commodity Index

Barclays Capital Voyager Multi-Strat (DJ-UBS) Index (Structured Note)

Performance
DJ-UBS Commodity Index

-1.18%
-3.70%

-9.5%
-14.3%

YTD (thru
1Q12)

1 Year (thru
1Q)

Private Real Estate Funds

Strategy: Private Core Equity Real Estate. Benchmark: NCREIF - ODCE Index

IDR - Core Equity RE Fund

Performance
NCREIF - ODCE Index (gross of fees)

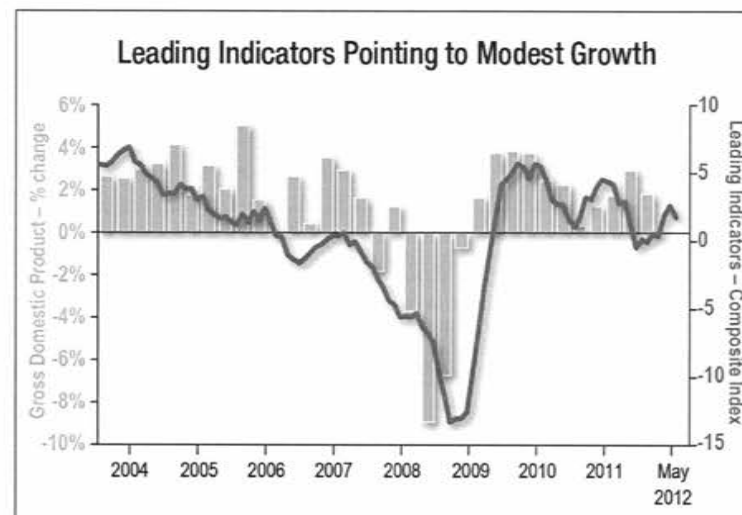
NA
2.82

13.69%
14.7%

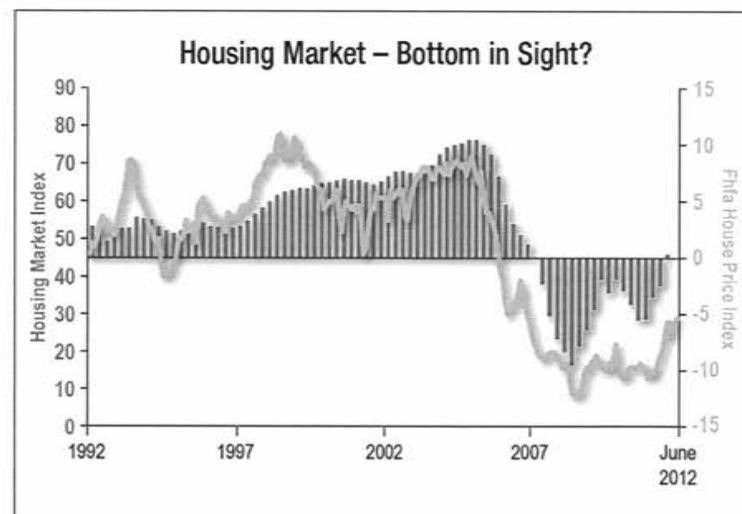
Commodities - Gd Y inflation

Outlook: The Global Economy – 3rd Quarter 2012

- In our view, U.S. economic growth is likely to average 2% growth over the next 18 months. Employment trends should remain modestly positive over the same time period, offering support to consumer spending in the face of continued consumer debt deleveraging. Investment trends should also support U.S. growth as businesses continue to invest to enhance productivity growth.
 - The primary detractor to U.S. growth may be government uncertainty as we grapple with the upcoming presidential election and growing national debt issues. In our view, much of the impending fiscal cliff (made up of 2013 tax increases and spending cuts) are likely to be mitigated, leaving a modest drag of growth over the next 18 months.
 - Housing is likely to be a modest positive for economic growth this year. Although there are still excess inventories, the employment trend should help household formation and support healing in the housing market.
- We see global inflation pressures easing over the remainder of 2012 as weak commodity prices filter through the economic system. Deleveraging in the U.S. and Europe, as well as excess labor and housing in these markets, may constrain core inflation. These deflationary pressures may also indicate whether any food and energy price inflation that is driven by commodities could be short term and transitory in nature as it will likely reduce consumption, rather than increase other costs in an economy.
- Europe will possibly struggle with recession into 2013 as fiscal austerity detracts from economic growth and European Central Bank (ECB) refinancing policies merely keep the banking system from failure rather than stimulate economic activity. Growth may require a significant change in the competitiveness of European labor, which is unlikely without massive deflation or a significant decline in the value of the European currency. In our opinion, odds seem to be rising of at least one nation leaving the European Monetary Union before policies which promote fiscal mutualization are put in place.
- We believe emerging market nations, such as China, India and Brazil, will spend much of 2012 easing monetary policies to create a “soft landing” for recent slowing economic growth.
 - It is quite possible that European turmoil is modestly suppressing emerging market country economic activity. A pivot to policies which spur consumption may offer greater success than further stimulus of export activity.



Source: FactSet; data begins March 2004

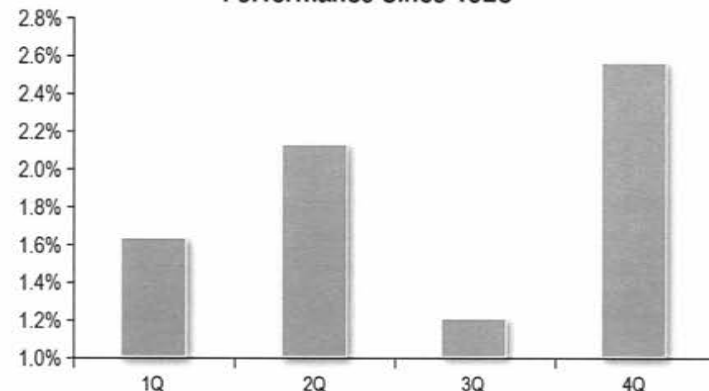


Source: FactSet; data begins July 1992

Outlook: Equity Markets – 3rd Quarter 2012

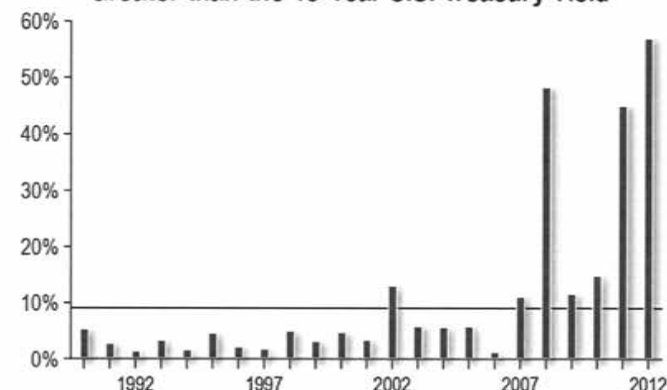
- Domestic equity volatility, while elevated, has been far lower than what has been witnessed in the non-U.S. equity markets. The market appears skeptical about the pace of global economic growth and that dynamic may influence top-line revenue growth of U.S. companies.
 - Accordingly, earnings and revenue estimates for the balance of 2012 are now being revised lower to reflect the uncertain economic environment. We have long indicated our view that 2012 earnings estimates for the S&P 500 were too high and believe the recession in the European Union (EU) is the catalyst for lower domestic estimates. We see earnings estimates in the \$97 to \$100 per share for the S&P 500 as realistic, as opposed to the current consensus estimate of \$105 per share.
 - We feel that many management teams will guide the investment community with cautious statements with regard to the operating environment during the second half of 2012 as 2Q earnings reports are made public. Europe, the outcome of the U.S. elections and the U.S. fiscal cliff all continue to represent unresolved issues.
- Balance sheets and cash flow remain strong indicating that a degree of macro economic weakness can be withstood without dramatic cost cutting or other measures being triggered. While dividend payout ratios now stand at close to low levels historically, the lack of clarity about future business conditions and various regulatory issues (taxes, healthcare, etc) are a headwind to more aggressive dividend increases.
 - The valuation of the domestic equity market is low compared to fixed income instruments. Dividend yields currently exceed the yield on the ten-year Treasury note which is a rare occurrence in terms of market history.

S&P 500 Average Quarterly Performance Since 1928



Source: Strategas Research Partners; data through 2Q 2012

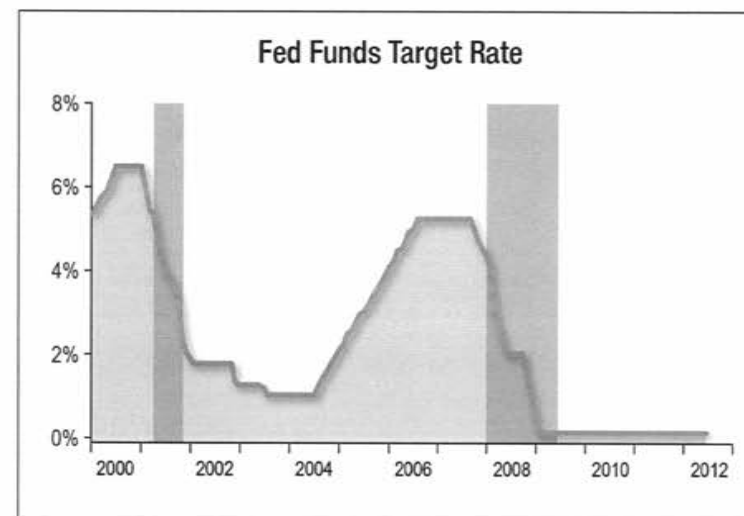
% of S&P 500 Stocks with Dividend Yields Greater than the 10-Year U.S. Treasury Yield



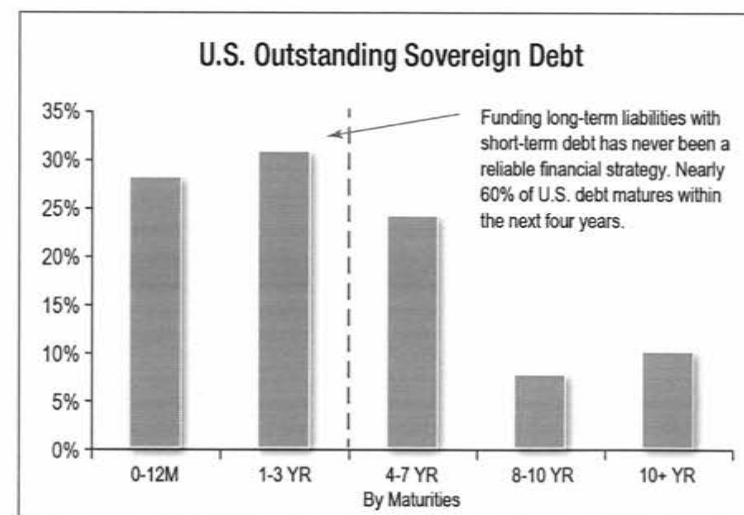
Source: Strategas Research Partners; data through 2Q 2012

Outlook: Fixed Income Markets – 3rd Quarter 2012

- In our view, the fundamental reasons for interest rates staying low and in a tight range remain in place due to a number of situations, including:
 - Employment has weakened and the excess slack in labor still exists, which keeps any risk of inflation rising low.
 - The likelihood of the Federal Reserve Bank (the Fed) implementing another round of quantitative easing is increasing, stabilizing the long end of the Treasury curve. The Federal Reserve Board did extend the time frame of Operation Twist through the end of 2012, providing a signal that the Fed is willing and able to take additional monetary steps in an effort to keep interest rates low on the long end of the yield curve.
 - The eurozone debt crisis continues to be headline news. Consequently, the U.S. Treasury market is still benefitting from a flight-to-quality bid.
- Although we do not see interest rates moving up in a straight line, we believe the lows in interest rates have probably been established for this year unless conditions warrant further easing moves by the Fed. We see the ten-year Treasury yield staying below 2% well into 3Q.
 - With the European debt crisis re-emerging, and a growing concern that Greek and Spain financial institutions are suffering deposit withdrawals, the flight-to-quality trade to U.S. Treasury securities is very apparent. Both domestic and international flows of funds are being influenced positively by the rising dollar as well, which we view as another positive for the U.S. bond market. This risk is apparent in the rapid increase in Spanish government debt yields.
 - A recent rise in yields relative to Treasuries leads us to favor investment grade corporate credits, as well as emerging market debt, which has an added benefit of strong credit quality characteristics. When appropriate for client portfolios, we suggest hedged fixed income strategies given the all-time historical low level of interest rates and the potential for these very active investment strategies to create value for investors.
- With municipal bond yields not keeping pace with the drop in Treasury rates, we see good relative value in municipal bonds, with many parts of the muni yield curve currently yielding in excess of 100% of benchmark Treasury bond yields.



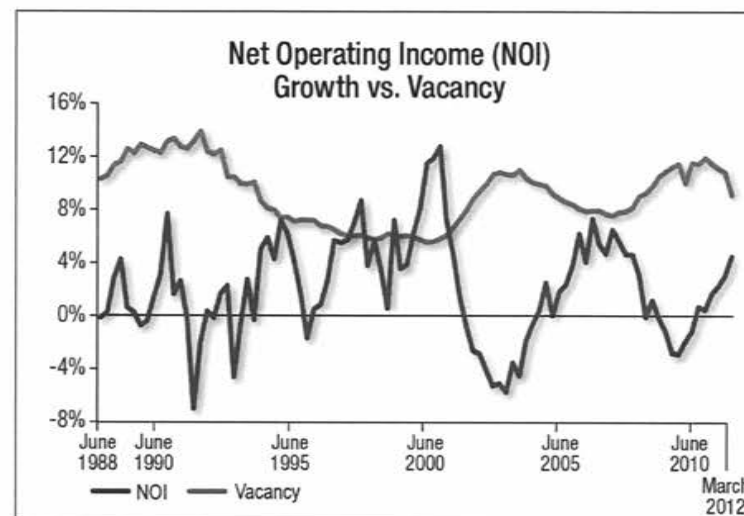
Source: Strategas Research Partners; data through 2Q 2012



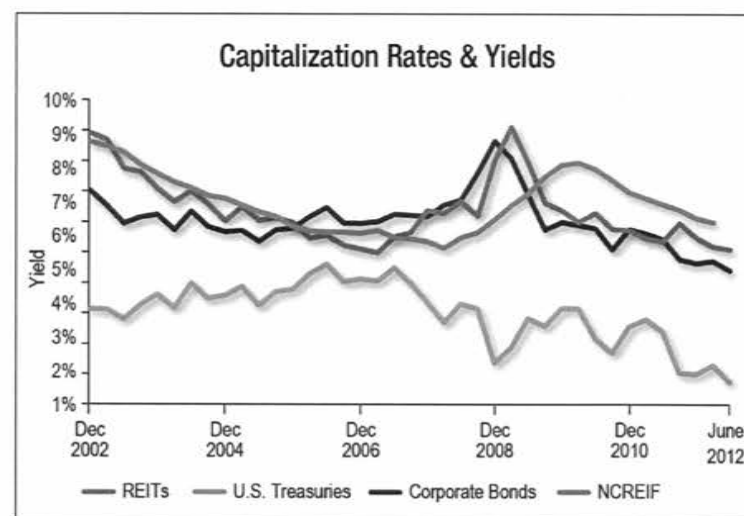
Source: Strategas Research Partners

Outlook: Real Estate Markets – 3rd Quarter 2012

- Commercial real estate fundamentals continue to improve, although the pace and overall level vary significantly by geography and property type. Occupancy has improved, net operating income (NOI) growth is positive, and new supply growth is limited. As of now, the macro-concerns and slowing economic growth have not impacted NOI growth, although this bears watching going forward.
- Capitalization (cap) rates have compressed to low levels, suggesting rich pricing. However, looking at cap rates in the context of the currently low interest environment, they do not appear to be as stretched. Spreads between cap rates and BBA-rated corporate bond yields are currently slightly above the average spread over the past ten years. Despite low cap rates, there is currently a positive spread between financing costs and acquisition yields, providing support to prices.
- Real Estate Investment Trusts (REITs) continue to see positive fund flows as investors seek out higher yielding investments. While REIT valuations, including implied cap rates and P/FFO multiples (price to funds from operations), appear stretched relative to the past ten-year period, REITs will likely remain in favor in a low interest rate environment. Valuations could come under pressure if the slowing macro environment leads to lower NOI growth going forward.



Source: NCREIF Property Index



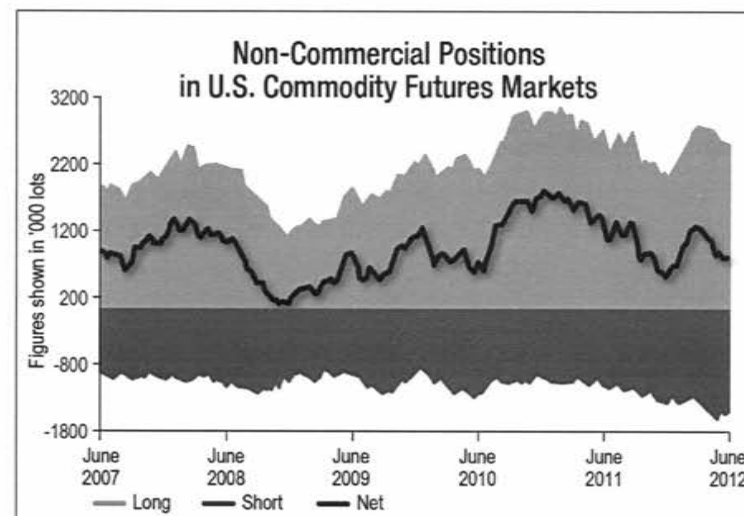
Sources: NCREIF, FactSet, ISI Group, Federal Reserve

Chart Details: REITs: Real Estate Investment Trusts; U.S. Treasuries: 10-year Treasury Bonds; Corporate Bonds: BofA Merrill Lynch 7-10 year Index; NCREIF: National Council of Real Estate Investment Fiduciaries; NCREIF Property Index: A quarterly time series composite total rate of return measure of investment performance of a large pool of individual commercial real estate properties acquired in the private market for investment purposes.

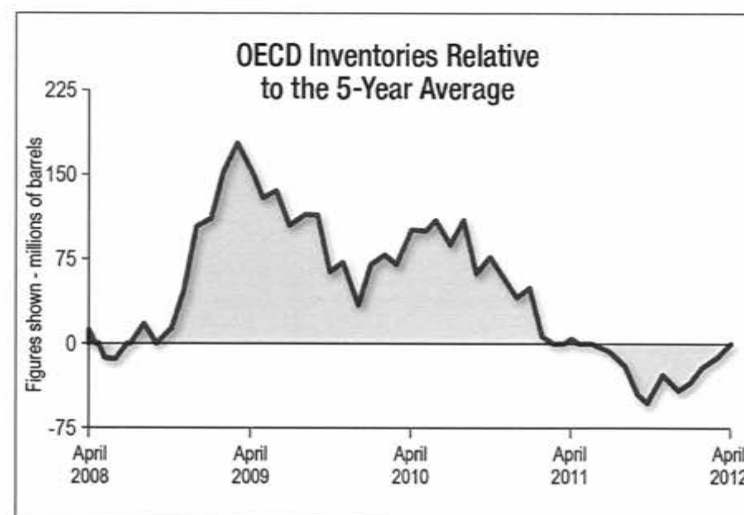
Please refer to important information provided on the Disclosures page in the Appendix section

Outlook: Commodities Markets – 3rd Quarter 2012

- Global growth has been moderating and this condition is likely to continue into 2013. However, monetary easing policies in emerging market countries, as well as Europe and the U.S., seem likely to counterbalance slowing growth and lead to some modest improvement for global commodity demand as they seek to spur growth. We think this demand condition should support price appreciation in specific commodities which offer constrained or diminished supply capacity. This may lead investors to a preference for active and direct strategies in their portfolio construction.
- Risks to our forecast can be found in the ongoing European debt crisis, as well as tensions in the Middle East, such as civil unrest in oil producing countries and conflict regarding Iran's nuclear ambitions. The escalation of Middle East tensions could lead to a price spike in global energy markets, while the devolution of the European debt crisis into a renewed banking crisis could lead to a collapse of commodity prices, along with a weaker global economy. In our view, the risks of the former far outweigh the latter. When suitable, investors may want to consider some exposure to oil prices through funds or structured notes.



Source: Commodities Futures Trading Commission (CFTC), Barclays Research



Source: International Energy Agency (IEA), Barclays Research

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**Important Disclosures and
Definitions of Terms and Indexes**

If you have questions regarding this information, or wish to receive definitions of any additional terms or indexes used in this report, please contact your Wealth Management Advisor or Portfolio Manager.

Disclosures (Page 1 of 2)

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- The factual information provided has been obtained from sources believed to be reliable, but is not guaranteed as to accuracy or completeness.
- U.S. Bank and its representatives do not provide tax or legal advice. Each client's tax and financial situation is unique. Clients should consult their tax and/or legal advisor for advice and information concerning their particular situation.
- **Past performance is no guarantee of future results.** All performance data, while deemed obtained from reliable sources, are not guaranteed for accuracy.
- Any index for which performance is shown is unmanaged and its performance does not include any management fees, transaction costs or other charges that may be incurred in connection with a client account, including any fund operating expenses. Any index or other benchmark whose return or risk figures are shown for comparison purposes may include different holdings, a different number of holdings, and a different degree of investment in individual securities, industries or economic sectors, and may have different risk return characteristics, than the fund to which it is compared. You cannot invest directly in an index.
- Based on our strategic approach to creating diversified portfolios, guidelines are in place concerning the construction of portfolios and how investments should be allocated to specific asset classes based on client goals, objectives and tolerance for risk. Not all recommended asset classes will be suitable for every portfolio. Hedged investment strategies are typically available via hedge funds which may not be appropriate for all clients due to the speculative nature and high degree of risk involved in these investments.
- **Mutual fund investing** involves risk; principal loss is possible. Investing in certain funds involves special risks, such as those related to investments in small- and mid-capitalization stocks, foreign, debt, and high-yield securities, and funds that focus their investments in a particular industry, or employ a long-short strategy. Please refer to the fund prospectus for additional details pertaining to these risks. An investment in **money market funds** is not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency. Although these funds seek to preserve the value of an investment at \$1.00 per share, it is possible to lose money by investing in these funds.
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Disclosures (Page 2 of 2)

- **Equity securities** are subject to stock market fluctuations that occur in response to economic and business developments. **Stocks of small- and mid-cap companies** pose special risks, including possible illiquidity and greater price volatility than stocks of larger, more established companies. **Growth investments** focus on stocks of companies whose earnings/profitability are accelerating in the short term or have grown consistently over the long term. Such investments provide minimal dividends which could otherwise cushion stock prices in a market decline. Investors should carefully consider the additional risks involved in growth investments. **Value investments** focus on stocks of income-producing companies whose price is low relative to one or more valuation factors, such as earnings or book value. Investors should carefully consider the additional risks involved in value investments. **International investing** involves risks not typically associated with domestic investing, including risks of adverse currency fluctuations, potential political and economic instability, different accounting standards, foreign government regulations, currency exchange rates, limited liquidity, and volatile prices. Investing in **emerging markets** may involve greater risks than investing in more developed countries. In addition, concentration of investments in a single region may result in greater volatility. Investments in **real estate** can be subject to fluctuations in the value of the underlying properties, the effect of economic conditions on real estate values, changes in interest rates and risks related to renting properties, such as rental defaults. **Fixed-income investments** are subject to various risks, including changes in interest rates, credit quality, market valuations, liquidity, prepayments, early redemption, corporate events, tax ramifications, and other factors. Investment in debt securities typically decrease in value when interest rates rise. The risk is usually greater for longer-term debt securities. Investments in lower-rated and non-rated securities present a greater risk of loss to principal and interest than higher-rated securities. Foreign investing entails additional risks, including currency fluctuations, political and economic instability, accounting changes, and foreign taxation. Securities may be less liquid and more volatile. Investments in **high-yield bonds** offer the potential for high current income and attractive total return, but involve certain risks. Changes in economic conditions or other circumstances may adversely affect a bond issuer's ability to make principal and interest payments. An **inflation protected security** is a special type of note or bond designed to offer protection from inflation. Interest payments vary with the rate of inflation. These securities offer a lower return compared to other similar investments. The principal value may increase or decrease with the rate of inflation. **Alternative investments** very often use speculative investment and trading strategies. There is no guarantee that the investment program will be successful. Alternative investments are designed only for sophisticated investors who are able to tolerate the full loss of an investment. These products are not suitable for every investor, even if the investor does meet the financial requirements. It is important to consult with your investment professional to determine how these investments might fit your asset allocation, risk profile, and tax situation. There are special risks associated with an investment in **commodities**, including market price fluctuations, regulatory changes, interest rate changes, credit risk, economic changes, and the impact of adverse political or financial factors. An investment in a **hedge fund** involves a substantially more complicated set of risk factors than traditional investments in stocks and bonds. Hedge funds are speculative and involve a high degree of risk. **Private Equity** consists of investors and funds that make investments directly into private companies or conduct buyouts of public companies that result in a delisting of public equity. Potential investors should remember that investments in private equity are illiquid by nature and typically represent a long-term binding commitment. The investments made by private equity funds are not readily marketable and the valuation procedures for these positions are often subjective in nature. **Structured products** are subject to market risk and/or principal loss if sold prior to maturity or if the issuer defaults on the security. Structured Products Pricing Supplements and Prospectuses should be reviewed by the client prior to approving or directing an investment in these securities. Clients should contact their Portfolio Manager directly to request and review Structured Product Pricing Supplements and Prospectuses for each structured product they may wish to purchase.

Definitions of Report Terms & Frequently Used Indexes (Page 1 of 3)

- **Accredited Investor** – Private placement securities generally require that investors be accredited due to the additional risks and speculative nature of the securities. For individuals, the criteria is met by any natural person whose individual net worth or joint net worth with that person's spouse, at the time of purchase, exceeds \$1,000,000, excluding the value of the primary residence of such natural person, calculated by subtracting from the estimated fair market value of the property the amount of debt secured by the property, up to the estimated fair market value of the property.
- **Alpha** – A statistic measuring that portion of a stock, fund or composite's total return attributable to specific or non-market risk. Alpha measures non-market return and indicates how much value has been added or lost. A positive Alpha indicates the fund or composite has performed better than its Beta would predict (i.e., the manager has added value above the benchmark). A negative Alpha indicates a fund or composite has underperformed given the composite's Beta.
- **Alternative Investments** – As used by U.S. Bank, an investment considered to be outside of the traditional asset classes of long-only stocks, bonds and cash. Examples of alternative investments include hedge funds, private equity, options, and financial derivatives.
- **Beta** – Beta is a measure of the volatility, or systematic risk, of a security or a portfolio in comparison to the market as a whole. A Beta of 1 indicates that the security's price will move with the market. A beta of less than 1 means the security will be less volatile than the market. A Beta greater than 1 indicates that the security's price will be more volatile than the market.
- **Consumer Price Index (CPI)** – A measure of the average change in prices over time in a market basket of goods and services and is one of the most frequently used statistics for identifying periods of inflation and deflation.
- **Price/Earnings Ratio (P/E)** – The P/E ratio of a company is calculated by dividing the price of the company's stock by its trailing 12-month earnings per share. A high P/E usually indicates that the market is paying a premium for current earnings because it believes in the firm's ability to grow its earnings. A low P/E indicates the market has less confidence that the company's earnings will increase. Within a portfolio, P/E is the weighted average of the price/earnings ratios of the stocks in the portfolio.
- **Qualified Purchaser** – Private placement securities generally require that investors be accredited due to the additional risks and speculative nature of the securities. For individuals, the criteria is met by a net worth of more than \$5 million in investments.
- **R-Squared** – A statistical measure that represents the percentage of a fund or security's movements that can be explained by movements in a benchmark index. For fixed income securities, the benchmark is the Treasury bill and for equities, the benchmark is the S&P 500 Index.
- **Sharpe Ratio** – Measures risk-adjusted performance. Intended to tell whether a portfolio's returns are due to smart investment decisions or a result of excess risk. The greater a portfolio's Sharpe ratio, the better its risk-adjusted performance has been. A negative Sharpe ratio indicates that a riskless asset would perform better than the security being analyzed.
- **Sortino Ratio** – Intended to differentiate between good and bad volatility. Similar to the Sharpe ratio, except it uses downside deviation for the denominator instead of standard deviation, the use of which doesn't discriminate between up and down volatility.
- **Spread** – The difference between the yields of two bonds with differing credit ratings (most often, a corporate bond with a certain amount of risk is compared to a standard traditionally lower risk Treasury bond); the bond spread will show the additional yield that could be earned from a bond which has a higher risk.
- **Standard Deviation** – It is applied to the annual rate of return of an investment to measure the investment's volatility. Also known as historical volatility; it is used by investors as a gauge for the amount of expected volatility.
- **Tracking Error** – A divergence between the price behavior of a position or a portfolio and the price behavior of a benchmark. This is often in the context of a hedge or mutual fund that did not work as effectively as intended, creating an unexpected profit or loss instead.
- **Traditional Investments** – As used by U.S. Bank, an investment made in equity, fixed income or cash securities, mutual funds, or exchange-traded funds (ETFs) where the investor buys at a price with the goal that the investment will go up in value.

Definitions of Report Terms & Frequently Used Indexes (Page 2 of 3)

- **Traditional Investments** – As used by U.S. Bank, an investment made in equity, fixed income or cash securities, mutual funds, or exchange-traded funds (ETFs) where the investor buys at a price with the goal that the investment will go up in value.
- **Treynor Ratio** – A ratio developed to measure returns earned in excess of that which could have been earned on a riskless investment. Also known as the "reward-to-volatility" ratio.
- **Turnover Ratio** – The percentage of a mutual fund or other investment vehicle's holdings that have been "turned over" or replaced with other holdings in a given year.
- **U.S. Treasury Bills** – Short-term debt securities issued by the U.S. Government and are considered to be the most marketable money market security.
- **Yield** – The annual rate of return on an investment, expressed as a percentage. For bonds, it is the coupon rate divided by the market price. For stocks, it is the annual dividend divided by the market price.

- **BofA Merrill Lynch U.S. 7-10 Year Index** – Tracks the performance of U.S. dollar denominated investment grade rated corporate debt publicly issued in the U.S. domestic market and includes all securities with a remaining term to maturity of greater than or equal to 7 years and less than 10 years.
- **BofA Merrill Lynch U.S. Corporate Master Index** – Tracks the performance of U.S. dollar denominated investment grade corporate debt publicly issued in the U.S. domestic market.
- **BofA Merrill Lynch U.S. High Yield Master II Index** – Commonly used benchmark index for high yield corporate bonds and tracks the performance of U.S. dollar denominated below investment grade rated corporate debt publicly issued in the U.S. domestic market.
- **Barclays Capital Aggregate Bond Index** – Measures the investment grade, U.S. dollar-denominated, fixed-rate taxable bond market, including Treasuries, government-related and corporate securities, mortgage-backed securities, asset-backed securities, and commercial mortgage-backed securities.
- **Barclays Capital Corporate Bond Index** – Includes all publicly issued, fixed-rate, nonconvertible, dollar-denominated, SEC-registered, investment-grade corporate debt.
- **Barclays Capital Government Index** – Includes U.S. government and government agency securities (other than mortgage securities) with maturities of one year or more.
- **Barclays High Yield Bond Index** – Consists of all domestic and corporate bonds rated Ba and below with a minimum outstanding amount of \$150 million and maturing in over one year.
- **Barclays Capital Intermediate Aggregate Index** – Consists of 1-10 year Government bonds, 1-10 year Corporate bonds, all Mortgages, and all Asset-Backed Securities within the Aggregate Index.
- **Barclays Capital Intermediate Government/Credit Index** – Based on all publicly issued intermediate government and corporate debt securities with maturities of 1-10 years and represents asset types which are subject to risk, including loss of principal.
- **Barclays Capital Municipal Bond Index** – Comprised of fixed-rate, investment-grade, tax-exempt bonds with maturities of one year or more.
- **Dow Jones Industrial Average (DJIA)** – The price-weighted average of 30 significant U.S. stocks traded on the New York Stock Exchange and NASDAQ. The DJIA is the oldest and single most watched index in the world.
- **Lipper Money Market Index** – Comprised of funds that invest in high-quality financial instruments rated in top grades with dollar-weighted average maturities of less than 90 days.
- **Moody's/REAL Commercial Property Price Index (CPPI)** – Data is based on actual transactions of commercial real estate compiled by Real Capital Analytics. Provides a timely and accurate indication of price changes for commercial property market as a whole.
- **Morgan Stanley Capital EAFE Index (MSCI EAFE)** – Includes approximately 1,000 companies representing the stock markets of 21 countries in Europe, Australasia and the Far East.

Definitions of Report Terms & Frequently Used Indexes (Page 3 of 3)

- **MSCI ACWI (All Country World Index)** – Designed to measure the equity market performance of developed and emerging markets.
- **MSCI ACW Ex-US (All Country World Index, excluding U.S.)** – Tracks the performance of stocks representing developed and emerging markets around the world that collectively comprise most foreign stock markets. U.S. stocks are excluded from the index.
- **MSCI Emerging Markets Index** – Designed to measure equity market performance in global emerging markets.
- **MSCI U.S. REIT Index** – Represents approximately 85% of the U.S. REIT (Real Estate Investment Trust) universe.
- **NAREIT Index** – Includes REITs (Real Estate Investment Trusts) listed on the New York Stock Exchange, NASDAQ, and American Stock Exchange.
- **NASDAQ Composite Index** – A market- capitalization-weighted average of roughly 5,000 stocks that are electronically traded in the NASDAQ market.
- **Russell 1000 Index** – Measures the performance of the 1,000 largest companies in the Russell 3000 Index, and is representative of the U.S. large capitalization securities market.
- **Russell 2000 Index** – Measures the performance of the 2,000 smallest companies in the Russell 3000 Index, and is representative of the U.S. small capitalization securities market.
- **Russell 3000 Index** – Measures the performance of the 3,000 largest U.S. securities based on total market capitalization.
- **S&P 500 Index** – Consists of 500 widely traded stocks that are considered to represent the performance of the U.S. stock market.
- **S&P/Case-Shiller Home Price Indexes** – A group of indexes that tracks changes in home prices throughout the United States. Case-Shiller produces indexes representing certain metropolitan statistical areas (MSA) as well as a national index.
- **S&P GSCI Commodity Index** – A composite index of commodity sector returns that is broadly diversified across the spectrum of commodities.
- **S&P MidCap 400 Index** – The most widely used index for mid-sized companies and covers over 7% of the U.S. equities market.
- **S&P SmallCap 600 Index** – Designed to be an efficient portfolio of companies that represent an accurate measure of small U.S. companies, reflecting risk and return characteristics of the broader small-cap universe.
- **S&P 500/Citigroup Growth Index** – Consists of those stocks within the S&P 500 that exhibit strong growth characteristics and are then numerically ranked based on three growth factors and four value factors to determine the constituents of the index and their ranking.
- **S&P 500/Citigroup Value Index** – Consists of those stocks within the S&P 500 that exhibit strong value characteristics and are then numerically ranked based on four value factors and three growth factors to determine the constituents of the index and their ranking.

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June 8, 2012

Ms. Penny Hunt
Executive Director
Robina Foundation
80 South 8th Street
Suite 4900
Minneapolis, MN 55402

Dear Penny:

I am delighted to write you with an update on the workshop that CFR held last week for participants in Humanity in Action's (HIA) summer program. I am pleased to report that the workshop was a tremendous success.

The workshop kicked off on the evening of Monday, May 28 with a private dinner for the thirty HIA participants. This gave them a chance to meet each other and begin to build a bond.

The HIA participants spent all day Tuesday at CFR's Washington, DC office. They had the opportunity to hear from and talk with experts from CFR and elsewhere on topics ranging from the current eurozone crisis to demographic trends on the continent to Europe's ties to its former colonies. (I have enclosed a copy of the workshop agenda and the bios of the distinguished experts who participated in the workshop.) Kristen Silverberg, former U.S. ambassador to the European Union, gave the luncheon keynote address. The HIA students asked her not only about her experiences negotiating with EU officials, but also about her own career path, which took her from law school to the Supreme Court, a high-powered law firm, the White House, the State Department, and eventually Brussels.

We concluded the panel session on Tuesday with a session on possible foreign policy careers. Three CFR term members (that is, under the age of 40) with wide-ranging experience in law, business, and government discussed their own career trajectories and offered the HIA participants candid advice about finding a first job, excelling at work, and cultivating mentors. The discussion even turned to more personal topics, like balancing career ambitions with family considerations and financial constraints. The students enjoyed this session and the comfortable environment it created, asking candid questions and airing concerns.

Penny Hunt
June 8, 2012
Page 2

We capped off Tuesday with a dinner and networking reception. Peter Fischer, the economics minister at the German embassy in Washington, spoke on how the eurozone crisis has not dampened the broader appeal of Europe. More than seventy CFR members and staff attended the reception, a sign of how much enthusiasm there is across CFR for the enhancing diversity initiative. My team worked hard to introduce HIA participants to CFR members and staff, and I suspect that those conversations started what are likely to be lasting connections.

The workshop closed on Wednesday with tours of the Pentagon and the State Department for the HIA participants. Senior defense officials briefed them on U.S. military strategy in Europe as well as on the importance of soft power in projecting American influence. Over at State, a senior advisor in the Bureau of European and Eurasian Affairs discussed U.S. priorities in the region.

Judy Goldstein, HIA's executive director, wrote me after the workshop ended to say: "It was a first-rate send off for the Fellows in terms of the issues that they will be dealing with—diversity in its broadest implications. In just a day and a half you covered so many important topics and gave the Fellows invaluable insights on policies, challenges and careers."

We are grateful for the Robina Foundation's support for the workshop and for CFR more generally. I hope that you are as excited as I am about this new partnership with HIA and the work we are doing to help persuade talented young people with diverse backgrounds to consider a career in international affairs. As always, please do not hesitate to contact me with any questions you might have.

Sincerely,



James M. Lindsay
*Senior Vice President, Director of Studies,
and Maurice R. Greenberg Chair*
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cc: Gordon Aamoth, Susan Beresford

AGENDA

Europe's Challenges and Opportunities

Tuesday, May 29, 2012

Council on Foreign Relations, Washington, DC

8:30 – 9:00 a.m. Breakfast Reception

9:00 – 9:05 a.m. Welcoming Remarks

James M. Lindsay, Senior Vice President, Director of Studies, and Maurice R. Greenberg Chair, Council on Foreign Relations

9:05 – 10:00 a.m. Session One: European Security and Politics

Spencer Boyer, Visiting Senior Fellow, Center for Transatlantic Relations, Paul H. Nitze School of Advanced International Studies

Heather Conley, Senior Fellow and Director, Europe Program, Center for Strategic and International Studies

Presider: **Frank Klotz**, Senior Fellow for Strategic Studies and Arms Control, Council on Foreign Relations

10:00 – 10:15 a.m. Break

10:15 – 11:15 a.m. Session Two: The Economic Crisis and Europe

Sebastian Mallaby, Director of the Maurice R. Greenberg Center for Geoeconomic Studies and Paul A. Volcker Senior Fellow for International Economics, Council on Foreign Relations

Presider: **James M. Lindsay**, Senior Vice President, Director of Studies, and Maurice R. Greenberg Chair, Council on Foreign Relations

11:15 a.m. – 12:20 p.m. Session Three: The Peoples of Europe

Nida Gelazis, Senior Associate, European Studies, Woodrow Wilson International Center for Scholars

Clarence Lusane, Professor and Program Director, Comparative and Regional Studies Program, School of International Service, American University

Harris Mylonas, Assistant Professor of Political Science and International Affairs, George Washington University

Presider: **Victoria Taylor**, International Affairs Fellow, Council on Foreign Relations

12:20 – 1:00 p.m. Lunch Buffet

1:00 – 2:00 p.m. Session Four: Keynote Address

Kristen Silverberg, President, United Against a Nuclear Iran

Presider: **James M. Lindsay**, Senior Vice President, Director of Studies, and Maurice R. Greenberg Chair, Council on Foreign Relations

2:00 – 2:15 p.m. Break

2:15 – 3:15 p.m. Session Five: The European Orbit

Priscilla Clapp, *Senior Advisor, Asia Society*

Jendayi Frazer, *Adjunct Senior Fellow for Africa Studies, Council on Foreign Relations*

Presider: **Hans Binnendijk**, *Vice President for Research, National Defense University*

3:15 – 3:30 p.m. Break

3:30 – 5:00 p.m. Session Six: Foreign Policy Careers

Kimberly McClure, *Foreign Service Officer, U.S. Department of State*

Mark Vlasic, *Senior Fellow and Adjunct Professor of Law, Georgetown University*

Carmencita Whonder, *Policy Director, Brownstein Hyatt Farber Schreck, LLP*

Presider: **Kate Collins**, *Assistant Director, Studies, Council on Foreign Relations*

5:00 – 6:00 p.m. Break

6:00 – 7:30 p.m. Dinner and Networking Reception with Informal Remarks

Peter Fischer, *Economic Minister, German Embassy in Washington, DC*

Presider: **James M. Lindsay**, *Senior Vice President, Director of Studies, and Maurice R. Greenberg Chair, Council on Foreign Relations*

Wednesday, May 30, 2012

9:00 – 10:30 a.m. Briefings with the staff of the secretary of the Air Force and tour of the Pentagon

11:30 a.m. – 12:30 p.m. Briefings with the Bureau of European and Eurasian Affairs, Department of State

Speaker and Presider Biographies

Hans Binnendijk

Hans Binnendijk is currently the vice president for research of the National Defense University (NDU) and the Theodore Roosevelt chair in national security policy. He is also director of the Institute for National Strategic Studies (INSS), and the founding director of the Center for Technology and National Security Policy at NDU.

He previously served on the National Security Council as special assistant to the president and senior director for defense policy and arms control (1999-2001). From 1994 to 1999, Dr. Binnendijk was director of the Institute for National Strategic Studies at the National Defense University. Prior to that, he was principal deputy director and acting director of the State Department's policy planning staff (1993-1994). He also served as deputy staff director and legislative director of the Senate Foreign Relations Committee (1980-1985). He has received numerous awards for his government service, including two Distinguished Public Service Awards and a Superior Service Award.

In academia, Dr. Binnendijk was director of the Institute for the Study of Diplomacy at Georgetown University, where he was also the Marshall B. Coyne research professor at the Edmund A. Walsh School of Foreign Service (1991-1993). He was deputy director and director of studies at London's International Institute for Strategic Studies and editor of *Survival* from 1988-1991. He is author or co-author of more than one hundred articles, editorials and reports. His most recent book is *Seeing the Elephant: The U.S. Role in Global Security* (Potomac Books: 2006).

Dr. Binnendijk serves on the board of overseers of the Fletcher School of Law and Diplomacy, on the Studies Committee of the Council on Foreign Relations, and as vice chairman of the board of Humanity in Action. He previously served on the U.S. committee of the International Institute for Strategic Studies and the CSIS International Research Council. He has received the Cross of the Order of Merit from the Federal Republic of Germany.

Dr. Binnendijk is a 1968 graduate of the University of Pennsylvania. He received his MALD and his PhD in international relations from the Fletcher School of Law and Diplomacy at Tufts University.

Spencer P. Boyer

Spencer P. Boyer is a visiting senior fellow at the Center for Transatlantic Relations at the Paul H. Nitze School of Advanced International Studies (SAIS) at Johns Hopkins University. From August 2009 to December 2011, he served in the Obama administration as a deputy assistant secretary of state in the Bureau of European and Eurasian Affairs. Mr. Boyer's work in the bureau focused on western Europe, public diplomacy, and public affairs. Prior to joining the State Department, Mr. Boyer was the director of international law and diplomacy in the national security and international policy department of the Center for American Progress, a Washington-based think tank.

Mr. Boyer is a graduate of Wesleyan University and received his JD from New York University School of Law, where he specialized in public international law and the work of international organizations. While at NYU, he also obtained a master's degree in French studies, with a concentration in French politics, history, and economy. Mr. Boyer began his professional career as an associate with the international law firm of Jones, Day, Reavis & Pogue in Washington, DC. Subsequently, he worked in The Hague as a law clerk to the president of the international criminal tribunal for the former Yugoslavia, in Zurich as a staff attorney at the Claims Resolution Tribunal for Dormant Accounts in Switzerland, and in Paris as counsel at the International Court of Arbitration. He has also served as the executive director and war powers initiative director at the Constitution Project, based at Georgetown University's Public Policy Institute.

Mr. Boyer has been a guest analyst with numerous international, national, and local news outlets, including CNN, BBC, MSNBC, FOX, ABC, and Voice of America, and is widely published on foreign affairs matters. He is co-editor of *Power and Superpower: Global Leadership and Exceptionalism in the 21st Century* (The Century Foundation Press, 2007). Among other professional distinctions, Mr. Boyer served on the Independent Task Force on U.S. Nuclear Weapons Policy at the Council on Foreign Relations and was a Wasserstein public interest fellow at Harvard Law School.

Mr. Boyer is a member of the bars of the District of Columbia, New York, and New Jersey, and a member of the Council on Foreign Relations.

Priscilla A. Clapp

Priscilla A. Clapp is a retired minister-counselor in the U.S. Foreign Service. She currently engages in foreign policy analysis and programs with several institutions and is a senior advisor to the Asia Society.

During her thirty-year career with the U.S. government, Ms. Clapp served as chief of mission and permanent charge d'affaires at the U.S. embassy in Burma (1999-2002), deputy chief of mission in the U.S. embassy in South Africa (1993-96), principal deputy assistant secretary of state for refugee programs (1989-1993), deputy political counselor in the U.S. embassy in Moscow (1986-88), and chief of political-military affairs in the U.S. embassy in Japan (1981-85). She also worked on the State Department's policy planning staff, in its East Asian, Political Military, and International Organizations bureaus, and with the U.S. Arms Control and Disarmament Agency. She speaks Russian, Japanese, French, and some Burmese.

Prior to government service, Ms. Clapp spent ten years in foreign policy and arms control research, with the MIT Center for International Studies and as a research associate at the Brookings Institution. She is a member of the Council on Foreign Relations and the International Institute for Strategic Studies.

Ms. Clapp's books include: with Morton Halperin, *Bureaucratic Politics and Foreign Policy* (Brookings, 2006), with I.M. Destler et al., *Managing an Alliance: the Politics of U.S.-Japanese Relations* (Brookings, 1976), and with Morton Halperin, *U.S.-Japanese Relations in the 1970's* (Harvard, 1974). She is the author of numerous publications on Burma and U.S. Burma policy with the U.S. Institute of Peace, the Brookings Institution, the East-West Center, Australia National University, the Asia Society, and others. Her most recent publications include: "Prospects for Rapprochement Between the United States and Myanmar," in *Contemporary Southeast Asia*, December 2010, and, with Suzanne DiMaggio, "Advancing Myanmar's Transition: A Way Forward for U.S. Policy," Asia Society Policy Brief, February 13, 2012.

Heather A. Conley

Heather A. Conley is senior fellow and director of the Europe program at the Center for Strategic and International Studies (CSIS). Prior to joining CSIS, Ms. Conley was a senior adviser to the Center for European Policy Analysis.

From 2005 to 2008, Ms. Conley was the executive director of the office of the chairman of the board at the American National Red Cross. From 2001 to 2005, she served as deputy assistant secretary of state in the Bureau for European and Eurasian Affairs with responsibilities for U.S. bilateral relations with the fifteen countries of northern and central Europe. From 1994 to 2001, she was a senior associate with an international consulting firm led by former U.S. deputy secretary of state Richard L. Armitage.

Ms. Conley began her career in the Bureau of Political-Military Affairs at the U.S. Department of State where she served as the State Department liaison for the U.S. Department of Defense's Global Humanitarian Assistance Program (HAP). Following this assignment, she was selected to serve as special assistant to the coordinator of U.S. assistance to the newly independent states of the former Soviet Union.

Ms. Conley received her BA in international studies from West Virginia Wesleyan College and her MA in international relations from the Johns Hopkins University School of Advanced International Studies (SAIS).

Jendayi Frazer

Jendayi Frazer is adjunct senior fellow for Africa studies at the Council on Foreign Relations (CFR). Ambassador Frazer is also distinguished public service professor at Carnegie Mellon University, with joint appointments in the department of social and decision sciences and in the H. John Heinz College's School of Public Policy and Management. Her current research focuses on strengthening regional security cooperation and economic and political integration in Africa. She is the director of Carnegie Mellon's Center for International Policy and Innovation (CIPI), which focuses on utilizing technology and applying innovative solutions to core issues of development and governance in Africa. The author of and contributor to a number of articles, journals, and books, she is the co-editor of *Preventing Electoral Violence in Africa* (2011), which grows out of her work with CIPI.

Dr. Frazer served as the U.S. assistant secretary of state for African affairs from 2005 to 2009. She was special assistant to the president and senior director for African affairs at the National Security Council from 2001 until her swearing-in as the first woman U.S. ambassador to South Africa in 2004. She previously served in government from 1998 to 1999 as a CFR International Affairs Fellow, first at the Pentagon as a political-military planner with the Joint Chiefs of Staff, working on West Africa during Nigeria's transition to civilian rule, and then as director for African affairs at the National Security Council, working on central and east Africa. Ambassador Frazer was also an assistant professor of public policy at the Harvard Kennedy School and assistant professor at the University of Denver's Graduate School of International Studies.

She has been awarded the Distinguished Service Medal, the highest award bestowed by the secretary of state in recognition of her public service. In 2010, she was given the distinction of Dame Grand Commander in the Humane Order of African Redemption by Liberian president Ellen Johnson Sirleaf. She was also honored with the 2008 Distinguished Leadership Award from the African Presidential Archives & Research Center at Boston University.

Ambassador Frazer received her BA in political science and African and Afro-American studies, MA in international policy studies and international development education, and PhD in political science, all from Stanford University.

Nida Gelazis

Nida Gelazis is senior associate of the European studies program at the Woodrow Wilson International Center for Scholars, in Washington, DC. At the Wilson Center since 2003, she has worked to create a setting for dialogue between policymakers, academics, and other public actors on some of the most pressing policy questions in Europe today, with particular emphasis on the legal, social, and economic consequences of European Union (EU) expansion; the aftermath and legacies of the Balkan conflicts; European energy cooperation, and the emerging questions of minority rights and migration in a changing European context. She directed the work of the working group on the western Balkans, which aimed at building cooperative relationships between European and American policy professionals on the European integration of the western Balkans.

Previously, she was managing editor of the *East European Constitutional Review* at the University of Chicago Law School and at the Constitutional and Legislative Policy Institute in Budapest, as well as a research associate for the east European program at the Robert Schuman Centre for Advanced Studies, at the European University Institute in Florence.

Nida holds a BA from the University of Chicago and an LLM degree from the European University Institute, where her research focused on the impact of EU conditionality on human rights and minority rights in accession states. She has published a number of articles and book chapters on democratic state-building, constitutionalism, judicial reform, EU enlargement, international migration and minority rights, and co-edited the book *Cities after the Fall of Communism: Reshaping Cultural Landscapes and European Identity*.

Frank Klotz

Frank Klotz is senior fellow for strategic studies and arms control at the Council on Foreign Relations (CFR). Lieutenant General Klotz (USAF, Ret.) is the former commander of Air Force Global Strike Command. In that position, he established and then led a brand new 23,000-person organization that merged responsibility for all U.S. nuclear-capable bombers and land-based missiles under a single chain-of-command.

Earlier in his military career, General Klotz served as the defense attaché at U.S. Embassy Moscow during a particularly eventful period in U.S.-Russian relations. As the senior American military officer based in Russia, he advised the ambassador and senior U.S. officials on a wide range of bilateral defense issues, including financial support for securing weapons of mass destruction and cooperation in Arctic search and rescue.

Later, as the director for nuclear policy and arms control on the National Security Council staff, he represented the White House in the talks that led to the signing of the 2002 Moscow Treaty to reduce strategic nuclear weapons. He subsequently coordinated the executive branch's negotiations with the Senate Foreign Relations Committee to ratify the Moscow Treaty, resulting in a 95-0 vote in favor by the full Senate.

From 2005 to 2007, General Klotz was the vice commander of Air Force Space Command, a 39,400-person organization with responsibility for developing, acquiring, and operating a global network of launch, satellite control, and missile warning facilities. He was awarded the prestigious General Thomas D. White trophy by the Air Force Association for the most outstanding contribution to progress in aerospace in 2006.

General Klotz has spoken extensively on defense and space topics to audiences throughout the United States, as well as abroad. He is the author of *Space, Commerce and National Security* (Council on Foreign Relations Press, 1998) and *America on the Ice: Antarctic Policy Issues* (National Defense University Press, 1990).

A distinguished graduate of the U.S. Air Force Academy, General Klotz attended Oxford University as a Rhodes Scholar, where he earned an MPhil in international relations and a DPhil in politics. He is also a graduate of the National War College in Washington, DC.

James M. Lindsay

James M. Lindsay is senior vice president, director of studies, and Maurice R. Greenberg chair at the Council on Foreign Relations (CFR) where he oversees the work of the more than six dozen fellows in the David Rockefeller Studies Program. He is a leading authority on the American foreign policymaking process and the domestic politics of American foreign policy.

Dr. Lindsay previously served as vice president, director of studies, and Maurice R. Greenberg chair at CFR from 2003-2006. Before returning to CFR in 2009, he was the inaugural director of the Robert S. Strauss Center for International Security and Law at The University of Texas at Austin, where he held the Tom Slick chair for international affairs at the Lyndon B. Johnson School of Public Affairs. Before joining CFR the first time, he served as deputy director and senior fellow in the foreign policy studies program at the Brookings Institution. From 1987 until 1999, he was a professor of political science at the University of Iowa. In 1996-1997 he was director for multilateral issues and global affairs on the staff of the National Security Council.

Dr. Lindsay has written widely on various aspects of American foreign policy and international relations. His book with Ivo H. Daalder, *America Unbound: The Bush Revolution in Foreign Policy* (Brookings Institution Press, 2003), was awarded the 2003 Lionel Gelber Prize, named a finalist for the Arthur S. Ross Book Award, and selected as a top book of 2003 by *The Economist*. His other books include *Agenda for the Nation* (with Henry J. Aaron and Pietro S. Nivola, Brookings Institution Press, 2003), which was named an "Outstanding Academic Book of 2004" by Choice Magazine; and *Congress and the Politics of U.S. Foreign Policy* (Johns Hopkins University Press, 1994). He has also contributed articles to the op-ed pages of many major newspapers, including the *New York Times*, *Washington Post*, and *Los Angeles Times*. He writes the blog, "The Water's Edge," which discusses the politics of American foreign policy and the domestic underpinnings of American global power.

Dr. Lindsay holds an AB in economics and political science from the University of Michigan and an MA, MPhil, and PhD from Yale University.

Dr. Clarence Lusane

Dr. Clarence Lusane is a full professor of political science and international relations, and the program director of the comparative and regional studies program in the School of International Service at American University. He is also an author, activist, scholar, lecturer, and journalist. For more than thirty years, he has written about and been active in national and international human rights, anti-racism politics, U.S. foreign policy, and social issues such as education, crime, and drug policy.

Dr. Lusane spent two and one-half years living in London conducting research on racism and human rights in Europe, and working with European governments, institutions such as the European Union, the Council of Europe, and many non-governmental organizations. He is the former co-chair of the civil society committee for the U.S.-Brazil Joint Action Plan to Eliminate Racial Discrimination, a bilateral agreement involving governments and civil society. He has been an official election observer most recently in the Democratic Republic of the Congo.

Dr. Lusane has lectured and presented scholarly papers at a wide range of colleges and universities and has also lectured on U.S. race relations in over fifty nations. He taught previously at Columbia University.

Dr. Lusane's most recent book is *The Black History of the White House*. The book has been nominated for numerous awards and he has given two presentations on the book at the White House. Among his other books are *Colin Powell and Condoleezza Rice: Foreign Policy, Race, and the New American Century* (2006), and *Hitler's Black Victims: The Experiences of Afro-Germans, Africans, Afro-Europeans and African Americans During the Nazi Era* (2002)

Dr. Lusane has been a political consultant to the Congressional Black Caucus Foundation and to a number of elected officials and nonprofit organizations. He currently provides briefings on U.S. federalism to State Department international visitors and is also a senior policy advisor to TransAfrica.

Dr. Lusane is currently conducting research on the intersection of jazz and international relations; post-Castro race relations in Cuba; and the impact of President Barack Obama's election on the global discourse on race.

Sebastian Mallaby

Sebastian Mallaby is director of the Maurice R. Greenberg Center for Geoeconomic Studies (CGS) and Paul A. Volcker senior fellow for international economics at the Council on Foreign Relations (CFR). An experienced journalist and public speaker, Mr. Mallaby is also a contributing editor for the *Financial Times* and served previously as a columnist and editorial board member at the *Washington Post*. His interests cover a wide variety of domestic and international issues, including financial markets, the implications of the rise of newly emerging powers, and the intersection of economics and international relations. In addition to his monthly column for the *Financial Times*, his recent writing has been published in the *New York Times*, the *Wall Street Journal*, and the *Atlantic Monthly*.

Mr. Mallaby's latest book *More Money Than God: Hedge Funds and the Making of a New Elite* was released in June 2010. *New York Times* columnist David Brooks has called it "superb." *Washington Post* columnist Steve Pearlstein has called it "the definitive history of the hedge fund history, a compelling narrative full of larger-than-life characters and dramatic tales of their financial triumphs and reversals." *More Money Than God* was the recipient of the 2011 Loeb Prize, a finalist in the *Financial Times*/Goldman Sachs prize, and a *New York Times* bestseller. Mr. Mallaby's previous books are *The World's Banker* (2004), a portrait of the World Bank under James Wolfensohn, which was named as an "Editor's Choice" by the *New York Times*; and *After Apartheid* (1992), which was named by the *New York Times* as a "Notable Book." An essay in the *Financial Times* said of *The World's Banker*, "Mallaby's book may well be the most hilarious depiction of a big organization and its controversial boss since Michael Lewis's, *Liar's Poker*."

Before joining the *Post* in 1999, Mr. Mallaby spent thirteen years with the *Economist*. While at the *Economist*, he worked in London, where he wrote about foreign policy and international finance; in Africa, where he covered Nelson Mandela's release and the collapse of apartheid; and in Japan, where he covered the breakdown of the country's political and economic consensus. Between 1997 and 1999, Mr. Mallaby was the *Economist*'s Washington bureau chief and wrote the magazine's weekly Lexington column on American politics and foreign policy. His *Foreign Affairs* essay on failed states in 2002 was cited by commentators in the *New York Times*, *Financial Times*, and *Time Magazine*. He is a two-time Pulitzer Prize finalist: once for editorials on Darfur and once for a series on economic inequality.

Mr. Mallaby was educated at Oxford. He graduated in 1986 with a First Class degree in modern history.

Kimberly McClure

Kimberly McClure is a nine-year foreign service officer with the U.S. Department of State and currently works on the "100,000 Strong" initiative, an Obama administration initiative launched in 2010 that seeks to increase significantly the number of American students studying in China.

While traveling frequently to China in her current role, Ms. McClure has spent most of her career working on South Asia policy in India, Afghanistan, Pakistan, and Washington. Following two-year assignments to Mumbai, India, and Kabul, Afghanistan, she worked as special assistant to Ambassador Richard Holbrooke, the U.S. special representative for Afghanistan and Pakistan; completed an International Affairs Fellowship with the Council on Foreign Relations; and completed assignments in the U.S. State Department's Bureau of Human Resources and Operations Center. As an international affairs fellow, Ms. McClure worked with Global Kids to launch a program for underserved youth in Washington, DC that introduces them to global issues, international careers, and study abroad. She has also served as an observer on the Council on Foreign Relations' Education Task Force. She also serves as co-chair of the Global Access Pipeline, a consortium of over thirty-five organizations working to increase diversity in the field of international affairs.

Ms. McClure holds a BA in international relations from Stanford University and a master's degree in public policy from Harvard University's Kennedy School of Government. She has lived in Brazil, Egypt, India, and Afghanistan, and speaks Portuguese, Spanish, and Dari.

Harris Mylonas

Harris Mylonas is a political scientist interested in the processes of nation- and state-building, immigrant and refugee incorporation policies, the politicization of cultural differences, and political development. Dr. Mylonas joined the George Washington University faculty in fall 2009 as an assistant professor of political science and international affairs. He teaches courses on nationalism, European integration, nation-building in the Balkans, and qualitative research methods. For the 2008-2009 and 2011-2012 academic years, he was an academy scholar at the Harvard Academy for International and Area Studies.

Dr. Mylonas's forthcoming book, *The Politics of Nation-Building: Making Co-Nationals, Refugees, and Minorities* (Cambridge University Press), identifies the conditions in which the ruling political elites of a state target non-core groups with assimilationist policies instead of granting them minority rights or excluding them from the state. He is currently working on a second book project—tentatively entitled *The Politics of Ethnic Return Migration*—which focuses on state policies developed either to attract or to incorporate people returning to their country of origin, allegiance, or citizenship.

Dr. Mylonas's recent publications include an article on third-party nation-building in occupied territories in *Ethnopolitics* (with Keith Darden), an article on Greece in the *European Journal of Political Research*, a chapter on nation-building in western Macedonia in the edited volume *Rethinking Violence: State and Non-State Actors in Conflict* (BCSIA International Security Series, MIT Press), an article on electoral competition in sub-Saharan Africa elections in *Comparative Political Studies* (with Nasos Roussias), and a chapter on Greek repatriation policies in *Immigrants and Minorities: Discourse and Policies* (Vivliorama/KEMO, with Elpida Vogli). He has also written opinion pieces on international affairs which have appeared on CNN.com and in the *Los Angeles Times*, the *Guardian*, *Foreign Policy*, and *Newsweek Japan*, among others.

Dr. Mylonas received his PhD from Yale University in 2008.

Kristen Silverberg

Kristen Silverberg is the former U.S. ambassador to the European Union. From 2005 to 2008, she served as assistant secretary of state for international organization affairs. She previously held a number of positions in the White House, including deputy assistant to the president and advisor to the chief of staff. In 2003, she served as a senior advisor to Ambassador L. Paul Bremer in Baghdad, Iraq.

Ambassador Silverberg formerly practiced law at Williams and Connolly, LLP in Washington, DC. She was a law clerk to Justice Clarence Thomas of the U.S. Supreme Court and Judge David Sentelle of the U.S. Court of Appeals. She graduated from Harvard College and the University of Texas School of Law. She serves on the board of directors of Vorbeck Materials and the board of trustees of the American College of Greece.

Ambassador Silverberg currently serves as the president of United Against Nuclear Iran and as a senior resident fellow at the German Marshall Fund. She was selected by the World Economic Forum as a Young Global Leader of 2009. She received the Secretary of Defense Award for Outstanding Public Service and an award from the University of Texas as an Outstanding Young Alum.

Victoria Taylor

Victoria Taylor is an international affairs fellow in residence at the Council on Foreign Relations (CFR) in Washington, DC. She is a career foreign service officer at the U.S. Department of State.

Ms. Taylor joins CFR from the Department of State's Office of Southern European Affairs. As the Turkey desk and southern European economic affairs officer, she managed a wide range of bilateral policy issues with Turkey and has worked to promote U.S. economic interests in Turkey, Greece, and Cyprus. From 2008 to 2009, Ms. Taylor worked in the Office of Iranian Affairs, where she managed the nonproliferation and Iranian foreign policy portfolio. Since joining the State Department in 2003, she has served as an economic officer in the U.S. embassy in Tunis, Tunisia (2006-2008); as the political and economic officer in the U.S. consulate in Lahore, Pakistan (2006); and as a vice consul at the U.S. embassy in Islamabad, Pakistan (2004-2005).

Ms. Taylor holds a BA in international relations and diplomatic history from the University of Pennsylvania and an MSc from the London School of Economics and Political Science in development studies. She speaks French, Mandarin, and Urdu.

Mark V. Vlasic

Mark V. Vlasic has served as a soldier, a lawyer, a professor, and a diplomat, and has worked for the White House, the Pentagon, the World Bank, the United Nations, and a large international law firm. He is currently a senior fellow and adjunct professor of law at Georgetown University and a principal at Madison Law & Strategy Group PLLC, where he heads the firm's international practice. He also serves as a senior advisor to Madison Strategies LLP.

Prior to his return to academia and private practice, Mr. Vlasic was a public sector specialist at the World Bank Group, where he served as head of operations of the Stolen Asset Recovery (StAR) Initiative. A member of StAR's management team, He was responsible for country engagements on four continents, furthered bilateral relations with major financial centers, foreign governments, and civil society organizations, and worked on cases involving Sani Abacha of Nigeria and Jean-Claude Duvalier of Haiti, among others.

Before joining the World Bank, Mr. Vlasic was selected and appointed by the president to serve as a White House fellow. As part of his nonpartisan fellowship, he served as a special assistant to the secretary of defense (focused on foreign policy issues and bilateral relations) and helped advise the president's special envoy to Sudan. In recognition of his contributions to the department, he was awarded the Secretary of Defense Medal for Exceptional Public Service by Secretary Robert M. Gates, the highest non-career award in the office of the secretary of defense.

Prior to his government service, Mr. Vlasic practiced law in the litigation, public policy, banking, and international trade practice groups at Gibson, Dunn & Crutcher LLP, and served as a prosecution attorney at the United Nations International Criminal Tribunal for the former Yugoslavia in The Hague.

An adjunct professor of law at Georgetown University Law Center and senior fellow at Georgetown's Institute for Law, Science & Global Security, Mr. Vlasic has provided advice to the U.S. National Intelligence Council and the Central Intelligence Agency, and has lectured at numerous academic institutions on both sides of the Atlantic. He also serves on the board of directors of the White House Fellows Association & Foundation, the NCAC Fulbright Association, and the Humanity in Action Foundation.

Carmencita N. Whonder

Carmencita N. Whonder is a policy director in the Washington, DC office of Brownstein Hyatt Farber Schreck, LLP where she is a member of the government relations department. She provides strategic public policy advice to clients primarily in the financial services and housing sectors before the U.S. Congress and executive branch agencies. Prior to joining Brownstein, Ms. Whonder served as the staff director for the Senate subcommittee on housing, transportation, and community development and as the principal adviser on the Senate Banking, Housing and Urban Affairs Committee to United States Senator Charles E. Schumer (D-NY). During the 109th Congress she held the position of minority staff director for the Senate subcommittee on economic policy. For four years, she was responsible for issues including banking, financial institutions, securities and commodities markets, economic and monetary policy, the Committee on Foreign Investment in the United States, insurance, consumer protection, housing and community development, and trade.

Ms. Whonder previously worked as a leadership education counselor for Gates Millennium Scholars Program, a \$1 billion education initiative of the Gates Foundation administered by the United Negro College Fund. Prior to that, she worked in Geneva, Switzerland at the World Intellectual Property Organization, a United Nations specialized agency, focusing on Internet and domain name disputes and trade and investment in least developed countries. Additionally, she previously worked for the U.S. ambassador to the UN Commission on the Status of Women at the Center for Policy Alternatives, assisting her to develop two transatlantic summits: the first summit on the role of women in the political and policy arenas in Belfast, Northern Ireland and the second summit on the role of women in the economy at Downing Street in London, England.

Ms. Whonder holds a bachelor's degree from Howard University, a master's degree from the Johns Hopkins University School of Advanced International Studies (SAIS), and a certificate from the Universidad de Pontificia de Salamanca in Salamanca, Spain. She is a term member of the Council on Foreign Relations, an Aspen Institute Socrates Society scholar, a member of the Young Leaders Circle and an associate with the Milken Institute. Currently, she is a member of the board of directors of the DC Jazz Festival, an advisory committee member of the Reading Connection, and a member of the leadership committee of Manna, Inc.