



[Robina Foundation](#)

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ROBINA FOUNDATION
Board Meeting

Thursday, November 17, 2016
Conference Call

11:00 a.m. EST

10:00 a.m. CST

8:00 a.m. PST

ROBINA FOUNDATION

TO: Robina Board of Directors
FROM: Penny Hunt
RE: November 17, 2016 Board Meeting

I think you'll find that the agenda for this meeting is quite packed! We'll either have to talk fast or make quick decisions. Both present a challenge!

From my vantage point, all of the material in the Board Book is important, but please pay particular attention to:

Tab 4: "Pro Forma Including New 2016 Grants:" Mike Sullivan prepared this chart to provide information on Robina assets assuming payment of the new endowment grants and other outstanding commitments.

Tab 5: These three documents memorialize Robina's two grants to YLS and YLS's provision of an additional \$1 million to support human rights programming.

Tab 6: I had hoped to include grant agreements for Robina's two grants to CFR, but CFR's general counsel is still reviewing our draft documents. If these are finalized before the meeting, I will send them to you electronically.

Tab 7: Allina's Report on LifeCourse and Response to Robina Board Questions. This material should provide information to facilitate a decision about release of \$800,000 held back from Allina's most recent grant request and also to discuss possible future support.

My Executive Director's Report (**Tab 2**) includes background information on the development of a number of the documents in the Board Book.

Please feel free to contact me if you have questions or concerns in advance of the meeting.

Conference Call

10:00 a.m. to 12 Noon (CST)

1. Dial the Moderator's Access Number: 1-877-820-7831
2. Enter the Participant Passcode: 3167335# (must dial # key)

Time	Agenda Item	Tab #
10:00 a.m.	Welcome and Call to Order – Blatz	
10:05 a.m.	Minutes of August 30-31, 2016 Annual Board Meeting – Berresford – Action	1
10:10 a.m.	Executive Director's Report – Hunt	2
10:15 a.m.	Treasurer's Report – Lewis - Assets and Grants 2016 Third Quarter Financial Report from Mike Sullivan	3
10:25 a.m.	Grant Follow-up - Hunt - University of Minnesota Law School ➤ Gift Letter/Grant Agreements/Ratification of \$25M Grant - Action ➤ Reporting Requirements - Yale University ➤ Yale Law School ▪ Formal Approval of \$3M Grant ➡ ▪ Grant Agreements ▪ Reporting Requirements ➤ Gilder Lehrman Center – Grant Follow-Up - Council on Foreign Relations ➤ Grant Agreements – <i>Issue re: AW Interns</i> ➤ Timing of Grant Payments	4 5 6
11:10 a.m.	Abbott Northwestern/Allina – Action Report/Response to Board Questions	7
11:30 a.m.	Grantee Reports - Council on Foreign Relations ➤ <i>Expanded Diversity Initiative in Foreign Policy</i>: Annual Report with info on CFR's Organizational Diversity ➤ HIA: Update - University of Minnesota Law School ➤ <i>Scholarship Match Program</i>: Annual Report ➤ <i>Robina Institute on Criminal Law & Criminal Justice</i> Including <i>Sentencing Enhancements</i>: Annual Report - Yale University ➤ <i>Yale School of Drama</i>: Endowment Report	6 8 9
11:55 a.m.	Future Board Meeting Dates (2017 and 2018)	10
12:00 Noon	Adjournment	

1

MINUTES
August 30-31, 2016

2

EXECUTIVE DIRECTOR'S REPORT

3

TREASURER'S REPORT

4

GRANT FOLLOW-UP
University of Minnesota

5

GRANT FOLLOW-UP
Yale Law School/Gilder Lehrman Ctr.

6

GRANT FOLLOW-UP
Council on Foreign Relations

7

ABBOTT NORTHWESTERN/ALLINA

8

GRANTEE REPORT
University of Minnesota

9

GRANTEE REPORT
Yale School of Drama

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FUTURE BOARD MEETING DATES

**Robina Foundation Annual Meeting
Meeting Minutes
August 30 – 31, 2016**

The annual meeting of the Board of Directors of the Robina Foundation, a Minnesota nonprofit corporation, was held on August 30 and 31, 2016, at the offices of Faegre Baker Daniels in Minneapolis, MN.

August 30, 2016

Directors present: Gordon Aamoth, Susan Berresford, Kathleen Blatz, Peter Karoff, Steve Lewis, Marianne Short and Steve Schroeder.

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

Recorder: Rachel Ryder of Office Team.

Call to Order and Welcome

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

Minutes from May 17, 2016, Board Meeting

A motion made and seconded to approve the Minutes of the May 17, 2016, Board Meeting included in the Board Book was approved unanimously.

Executive Director's Report

Hunt called Board Members' attention to several items in her written report in the Board Book, including conversations she, Karoff, and Berresford had with a writer concerning capturing the Foundation's history and "lessons learned," and asked Blatz to summarize a meeting held with the new dean of the University of Minnesota Law School, Garry Jenkins.

Grantee Meeting / Report – Allina Health

Blatz welcomed Penny Wheeler, CEO of Allina Health, Paige Bingham, Director of LifeCourse, and Heather Britt, Division of Applied Research, to the meeting to discuss the status of LifeCourse and plans for the future. Wheeler focused on four keys to Allina's implementation of LifeCourse:

- Early, promising results of clinical study that wraps up on December 31: all the trends are moving in the right direction;
- Successful expansion of LifeCourse to 8 Allina sites and 2 community sites, including NorthPoint, a federally qualified site in North Minneapolis;
- Information learned from experts and payers;
- Importance of outside help from Robina for three years to bridge the gap until Allina will have a medicare advantage plan to provide public support based on value rather than fee for service. Allina is willing to match a commitment from Robina.

Britt emphasized utilization, quality of life, experience and total cost of care data, including savings estimated at \$949 per month for patients involved in LifeCourse versus those in the control group.

While Board Members acknowledged that end-of-life is a major social concern, they questioned whether CMS will pay for this type of system and how LifeCourse will be self-sustainable without outside funders. Board Members encouraged Allina to seek other outside funders who may be willing to support aspects of the initiative.

Foundation Finances

Blatz welcomed guests Jon Gennaro and Ben Webster from USbank and Robina's investment consultant Mike Sullivan to discuss the performance of Robina's assets and plans for the future. Gennaro and Webster described the previous year as a year of transition when the Foundation reduced the risk of its assets by selling most equities and began exiting illiquid assets. Remaining risk is in hedge funds and private equities, but in six months the Foundation will be out of most of those funds. Overall performance is ahead of the benchmark.

Following Gennaro and Webster's departure, the Board and Sullivan discussed funding scenarios prepared by Sullivan which focus on the timing of grant payments to the University of Minnesota Law School, Yale Law School and the Council on Foreign Relations. Sullivan explained the assumptions underlying the scenarios and the impact of the timing of grant payments, emphasizing that earlier funding would benefit both the Foundation and the Robina Grantees since Robina Grantees can invest funds to achieve a higher return on the investment.

Grantee Meeting/Report – University of Minnesota Law School

Blatz welcomed Dean Garry Jenkins of the University of Minnesota Law School and Ben Casper, head of the Center for New Americans. Jenkins, who began his tenure as dean less than a month ago, discussed the importance of the Center as a new model in experiential education combining theory, policy and practice. The Center's partnerships with nonprofits and law firms provide a unique connection with the community.

Jenkins discussed the challenges facing the Law School: fewer applications, competition among law schools, and a tight job market. Jenkins is optimistic that demand will increase in the next 10 to 15 years to provide an equilibrium between the number of law graduates and job opportunities and that the Law School's provision of real world policy and practice through programs like the Center will attract high quality students. Jenkins and Board Members agreed that highlighting the leadership training provided by law has the potential to benefit the Law School.

Casper highlighted the significant achievements of the Center in its third year of operation, the first year that students have completed a full three years of work with the Center. Both Jenkins and Casper stressed the value of an endowment grant to sustain the Center in the future.

Grantmaking Discussion

After Board Members reviewed the Foundation's Guidelines for the Final Phase of Robina Grantmaking and discussed the importance of determining a workable method to monitor grants after the Foundation has sunsetted, Board Members conducted an in-depth discussion of the current status of major grants to each Robina Grantee to prepare to make decisions tomorrow about funding.

The meeting was adjourned at 4:45 pm.

August 31, 2016

Directors present: Gordon Aamoth, Susan Berresford, Kathleen Blatz, Peter Karoff, Steve Lewis, Steve Schroeder and Marianne Short.

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

Recorder: Rachel Ryder of Office Team.

Call to Order

Blatz called the second day of the annual meeting to order and welcomed all Board Members.

Grantmaking Discussion

During the course of a lengthy discussion of each Robina Grantee and future grants, Board Members approved the following grants and identified messages to be delivered to the Council on Foreign Relations concerning previously approved grants to support the Chair in Global Governance and Franklin Williams Interns and to Allina regarding LifeCourse.

A motion made and seconded to provide a grant of \$24 million to the University of Minnesota Law School to support the Center for New Americans, subject to negotiation of an agreement which will include funding for scholarships or a chair was approved unanimously.

A motion made and seconded to provide a grant of \$10 million to Yale Law School to endow the Robina Human Rights Fellowship Initiative, subject to Yale Law School's commitment to provide an additional \$1 million in endowment funding by December 31, 2018.

Blatz agreed to talk with Noa Saryk about adding the Binger name to the chairs at the University of Minnesota Law School, Yale Law School and the Council on Foreign Relations and also the Center for New Americans.

Board Governance Discussion

Director Job Description: The revised Job Description in the Board Book was approved with the inclusion of the following language describing Board Members' responsibilities:

"Hire, support, and evaluate Robina Executive Director"

"Review and approve audit"

"Meet with grantees and listen to their priorities"

Board Members discussed the possibility of two audits: an audit of the Foundation to confirm adherence to applicable laws and a financial audit before the Foundation sunsets, perhaps in 2017 after the finalization of major grants.

Lead Directors: Board Members agreed that current lead director assignments should be retained for the coming year.

Action

Election of Officers

After discussion,

The Board of Directors unanimously elected Blatz to a one-year term as Chair (9/1/16 – 8/31/17) and Karoff to a one-year term as Vice Chair (9/1/16 – 8/31/17).

Election of Directors

After discussion,

Without dissent, the Board of Directors elected Short and Lewis to serve second three-year terms (9/1/16 – 8/31/19).

Board Members discussed and signed the Foundation's Conflict of Interest Policy.

Grant Reports

Council on Foreign Relations

Board Members reviewed CFR's eighth annual report highlighting work during the past year, noting that the Foundation has made its last payment, bringing the total support for *International Institutions and Global Governance* to approximately \$18 million.

Yale School of Drama

Board Members' discussion focused on the upcoming external review of the *Binger Center for New Theatre* and the Foundation's involvement in plans for the review. Hunt and Karoff will follow up with Dean Bundy to discuss the Foundation's role in reviewing potential participants in the review, development of the charge to the committee and the process for the review. Karoff will also discuss possible links with Yale Law School's Juncture program and with the work of the Gilder Lehrman Center.

Yale University – Gilder Lehrman Center

During a discussion of the Center's six-month report, Board Members recommended that Berresford, Karoff and Hunt visit the Center to talk about appropriate deliverables for the Center's work and to meet the new Associate Director, Michelle Zacks. Blatz noted that the Minnesota Historical Society could be an excellent forum for the work of the Gilder Lehrman Center and suggested that we encourage a joint effort.

Other Business

Board Members discussed issues related to sunseting and archiving the Foundation's work and asked that this be an agenda item for the November or February Board Meeting.

At the end of the meeting, Blatz asked Aamoth and Schroeder to step out of the meeting room. Board Members then discussed appropriate recognition of Aamoth and Schroeder's twelve years of service on the Robina Board.

The following motion was unanimously approved:

Whereas, in recognition of Gordy Aamoth and Steve Schroeder's twelve years of outstanding service and leadership on the Robina Foundation Board of Directors; and,

Whereas, their individual and collective contributions to the Robina Foundation helped to bring to life Jim Binger's vision for the Foundation; and

Whereas, both Gordy Aamoth and Steve Schroeder provided great stewardship to the Council on Foreign Relations and Allina, respectively, as Lead Directors and assisted the Board in deepening its relationships with all grantees;

Therefore, be it resolved that Gordy Aamoth and Steve Schroeder may each make a grant in the amount of \$25,000 to a charity of his choice that is aligned with the spirit and vision of Jim Binger as expressed in the Mission Statement of the Robina Foundation.

When Aamoth and Schroeder returned to the meeting, Blatz read the resolution and she and other Board Members thanked Aamoth and Schroeder for their service on the Board and their commitment to the Foundation's mission.

Executive Session

Board Members held a brief executive session to discuss compensation of the Executive Director.

February Meeting

Board Members expressed interest in conducting the February meeting in New York City at the offices of the Council on Foreign Relations, perhaps in conjunction with an event recognition of the Foundation's support of the Council at 100 Campaign. Hunt will explore that option.

Adjournment

There being no other business, the meeting was adjourned.

Respectfully Submitted,

Susan Berresford, Secretary

Date

**ROBINA FOUNDATION
BOARD OF DIRECTORS MEETING
November 17, 2016
EXECUTIVE DIRECTOR'S REPORT**

The August Annual Meeting was extremely productive, which meant that the months since then have been busy! Following is a summary of work to follow up on that meeting and prepare for this one.

University of Minnesota Law School

Kathleen and I met with Dean Jenkins on September 2 to discuss the Board's proposal concerning endowment support for the Center for New Americans as described in the meeting minutes. Following the meeting, Dean Jenkins put forth three options. After Board Members agreed to "Option C," Kathleen, Gina Kastel and I worked on agreements for the program endowment and the chair endowment with the University to memorialize Robina's support. Kathleen signed the grant letter summarizing Robina's \$25 million funding and two endowment agreements found at Tab 4 on October 13, and \$24.5 million was wire transferred to the University. You will note that the documents provide flexibility with respect to the reporting/monitoring of the grant. Determination of a workable method to monitor this and other endowment grants will be discussed by the Board.

As I reported, the University of Minnesota and the Law School were elated at the news of the grant. Attachment 1 is a letter we received from President Kaler. About a week after the grant was finalized, Dean Jenkins and I attended the University of Minnesota Homecoming football game with President Kaler. (The U squeaked out a win!) We both appreciated the opportunity to discuss the CNA with members of the Board of Regents and the U's Campaign Committee and the University of Minnesota Foundation, and Dean Jenkins had the opportunity to meet other community leaders and government officials.

Yale University

Yale Law School

To follow up on the Board's decision to provide endowment funding to support the Robina Human Rights Initiative and a chair in human rights (often called the "Silk Chair"), we worked to develop two agreements memorializing Robina's funding. Those agreements are found at Tab 5. We are currently working on a third agreement regarding YLS's commitment to provide an additional \$1 million in endowment funding to support human rights programming.

At the August meeting, Board Members recommended that Peter, Susan and I meet with Jim Silk and Dean Post at Yale Law School, David Blight at the Gilder Lehrman Center, and Dean Bundy at Yale School of Drama. We were unable to find a time for all three of us to go to Yale, but Susan and I met with YLS and GLC on October 20 (Peter participated in the discussion with YLS by phone), and Peter will meet with Dean Bundy in December (I will participate by phone). He may also meet with Jim Silk.

At the time of our meeting at YLS, our agreements were still under review, but Susan, Peter and I were able to talk with Dean Post, Jim Silk and Hope Metcalf, Executive

Director, Orville H. Schell, Jr. Center for International Human Rights, about current activities and plans for the future.

Silk stressed the profound influence the summer fellowships have on students' future and highlighted how Robina funding will permit YLS to expand its outreach to other law schools and human rights practitioners. Although the Law School's Juncture program was designed as a one-year program, Silk thinks it may continue longer and noted the high level of involvement of other parts of Yale.

→
Next fall - Silk ~~had~~ inaugural talk

Dean Post talked about plans to raise the additional \$1 million for the human rights program. Plans include launch of the fundraising next fall when Silk will give his formal lecture as holder of the chair. Silk and Post emphasized the importance of the data base developed with Robina funding, which now includes more than 1000 students involved in human rights while at YLS.

Gilder Lehrman Center

SFB
Comments? Susan and I met with David Blight and Michelle Zacks, Associate Director of the Gilder Lehrman Center. Patty Pedersen and Doug Barnes from the development office also attended. (Per Patty, President Salovey asked her to attend the meeting because Salovey has "strengthened his commitment to David and the GLC" in consideration of the on-campus/off-campus events during the past year, as well as the national dialogue.)

Professor Blight and Michelle Zacks explained her role, which includes managing five administrative fellows and organizing the Center's work.

Our discussion focused on GLC's work on modern slavery, including the formation of the "Modern Day Slavery Working Group," GLC's plans to expand its use of media to reach the biggest possible public, and an upcoming conference at Brown on "Slavery and Global Public History: New Challenges." Tab 5 includes material from GLC including the Goals, Strategies and Progress set for work in 2016-2017. Susan and I believe this should help us understand and monitor more effectively the work of the GLC.

Yale School of Drama

I believe I sent you some information related to the celebration of Yale Repertory Theater's 50th Anniversary held in October. The attached article (Attachment 2) is an interesting article from the New York Times on the celebration. Note reference to the Robina Foundation at the end of the article.

Council on Foreign Relations

At the direction of the Board, Nancy and I worked with CFR to arrange for Robina to hold the February meeting at CFR's offices in NYC and to combine our meeting with the investiture dinner for the Binger Chair in Global Governance. The investiture event will take place on Monday night, February 27. Gordy plans to attend that event.

I worked with Gina on drafts of agreements with CFR for Robina's funding of the Chair in Global Governance and Franklin Williams Interns. At the present time I have not received CFR's response to our drafts.

1 complete

Allina – LifeCourse

Following the August Board Meeting, I spoke with Paige Bingham and Heather Britt to deliver the messages members of the Board agreed upon at the meeting (see Attachment 3). As expected, the messages were sobering for the leadership of LifeCourse. The material at Tab 7 is Allina's response to Robina's feedback and questions.

Following my discussion with Paige and Heather, Paige expressed interest in meeting with Marianne, who is now the sole Lead Director for Allina. Paige described the purpose of the meeting as follows:

"We would like to connect with Marianne as a Robina Board member and someone keenly aware of how LifeCourse should be positioned to attract other philanthropic support. Also, Marianne's wisdom regarding national policy and the changing healthcare payment landscape would be extremely valuable."

MS
Comments? Marianne met with Paige and Heather on October 24. Marianne can fill us in on her discussion when the Board considers Allina's proposal.

Work with Mike Sullivan

Assess
Given the Board's decisions regarding significant endowment grants to the University of Minnesota Law School, Yale Law School and the Council on Foreign Relations, Nancy and I asked Mike Sullivan to ~~access~~ assess the impact of the grants on Robina's assets. Although Mike's determination includes a number of assumptions which may or may not prove to be accurate, his "Pro Forma Including New 2016 Grants" found immediately behind Tab 4 should help the Board understand the current status and make future decisions. *→ Need magnifying glass*

Miscellaneous

Plans for Grant Reporting/Monitoring

Gina Kastel and I discussed the possibility of Faegre Baker Daniels providing monitoring of Robina grants after the foundation sunsets. Per Gina, the law firm is not willing to perform that kind of on-going monitoring. The Board will discuss other options to explore at this meeting – and perhaps in the future.

Foundation History/Archiving

At Monday night's dinner in August and during the Board Meeting, Board members brainstormed ideas about what parts of the Foundation's history and work should be captured and how it might be captured. I have gathered notes from those various discussions and will summarize them for a more full-blown discussion at the February Board Meeting.

UNIVERSITY OF MINNESOTA

OFFICE OF THE PRESIDENT

202 MORRILL HALL | 100 CHURCH STREET S.E. | MINNEAPOLIS, MINNESOTA 55455-0110

November 3, 2016

Penny Hunt
Executive Director
Robina Foundation
80 South Eighth Street, Suite 4900
Minneapolis, Minnesota 55402

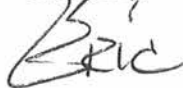
Dear Penny,

I was sorry to realize that my October 24 letter thanking you for your extraordinary commitment somehow made it to the mail before I had a chance to sign it. I'm writing again to follow up because I want to make sure you know that my gratitude is wholeheartedly genuine.

As I wrote in my previous letter, I am deeply thankful for the Robina Foundation's visionary new commitment to the University of Minnesota Law School, for the James H. Binger Center for New Americans. The Robina Foundation's transformational support will expand legal services offered to new Americans in our communities and enable the Law School to play an important role in shaping immigration law and policy. This commitment elevates the Robina Foundation's already significant partnership with the Law School to a new level, and it is a meaningful extension of Jim Binger's legacy as one of Minnesota's great business leaders and philanthropists.

Thank you again, and I hope that you have passed on my deepest gratitude to your board, on behalf of the Law School and the entire University of Minnesota community.

Sincerely,



Eric W. Kaler
President

EWK:mdb



The New York Times

Yale Rep Celebrates Its 50th Amid Nostalgia (and a Few Worries)

By FRANK RIZZO OCT. 10, 2016

NEW HAVEN — Leave it to Robert Brustein, the outspoken founding director of Yale Repertory Theater, to raise tough questions at a celebration of the theater's 50th anniversary this weekend.

Now 89, Mr. Brustein helped transform the university's School of Drama from a graduate program turning out academics into a full-fledged professional school that, working in association with Yale Rep (as the theater is known), produced luminaries like the Oscar-winning actress Meryl Streep and the Tony Award-winning playwright Christopher Durang.

Gathering onstage on Friday afternoon alongside the dancer-actor Carmen de Lavallade, the playwright Sarah Ruhl and other Yale Rep figures, past and present, Mr. Brustein reminisced about the early days of the theater. But later that night, at a celebratory banquet, he worried out loud about whether nonprofit theaters were straying from their original mission.

"It just seems to be going downhill, mostly because of the lack of funding," said Mr. Brustein, who, after leaving Yale in 1979, went on to found the American Repertory Theater at Harvard. "[The theaters] are becoming more commercial and now look more toward Broadway — which is the exact opposite of what their original intention was."

The Yale event was largely an exercise in nostalgia, bringing back to campus leading figures from the tenures of Yale Rep's four artistic directors and drama school deans. Scott Davenport Richards represented his father, Lloyd Richards, who led the theater and school from 1979 to 1991, and Stan Wojewodski Jr., who filled those roles from 1991 to 2002, also attended.

Participants remembered the struggle to create the Rep and shared favorite memories. (The actress Kimberly Scott teared up recalling, as a student, the chance to watch James Earl Jones rehearse for August Wilson's "Fences," which debuted at Yale Rep.) They also shared some regrets: Mr. Wojewodski, known for his often esoteric programming, said he wished he had pushed harder for even more challenging work.

But the recent deaths of two towering leaders in the regional theater movement — Zelda Fichandler, a founder of Arena Stage in Washington, and, just last week, Gordon Davidson, artistic director of the Mark Taper Forum in Los Angeles — also brought to mind questions about the legacies they and the Yale Rep founders would leave.

Rocco Landesman, a commercial producer and the former chairman of the National Endowment for the Arts, was a student of Mr. Brustein's at Yale. The picture he painted was even bleaker.



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ROBINA FOUNDATION

Talking points for conversation with Paige and with Penny, if appropriate

We appreciated your excellent presentation at Robina's Tuesday meeting. Your commitment and passion for the work of LifeCourse were very evident and impressive.

The LifeCourse research results you provided are quite compelling, particularly those related to Quality of Life, Care Experience, and Utilization of emergency departments, hospital days, ICUs and hospice –not to mention the savings evidenced by the Cost of Care results you recently received.

From the outset, Robina has been interested in the initiative's potential impact on policy and the health care system, which we all recognize are difficult and slow to change. Our interest continues to be supporting work that has the potential to impact policy.

We are impressed with Allina's commitment to LifeCourse as evidenced by Allina's current funding and the proposal that \$8 million in additional funding from Robina would be matched by \$8 million from Allina to bridge implementation of LifeCourse to 2020.

However, the reality is that the Robina Board is unable to consider additional funding at that level. Instead, we would like to begin a discussion aimed at determining a level of support that Robina is able to consider and Allina could match to fund work that has the potential to impact policy.

For purposes of this discussion, we ask that you give thought to how you might use an additional \$3 million from Robina with a match from Allina to expand the policy impact of LifeCourse.

Your response to this inquiry should be part of the report you are scheduled to submit for consideration at Robina's November board meeting. In addition, Robina Board Members have asked about your intent to seek other funders to support LifeCourse. Material you submit in November should include information about your fundraising strategies, as well.

The board was interested to learn about the NorthPoint site since inclusion of diverse patients in LifeCourse has been of interest to Robina board members from the outset of the initiative and since what Allina learns at NorthPoint may help others learn how best to address end-of-life issues with African Americans, especially since this learning will apply to other minority non-white populations.

Several follow-up questions about NorthPoint:

- What led to the inclusion of NorthPoint in the LifeCourse initiative?
- How will this program create in-depth understanding of this community? Does Allina plan to get regular feedback from the community? How?
- How will the program be evaluated beyond collection of data? (Board Members have the same question for all of the new sites that aren't part of the research study.)
- Does Allina plan to make a special investment in NorthPoint to learn about the effectiveness of the intervention in the community? If not, why not?
- Does Allina plan to seek outside funding for this initiative? (e.g. through Governor Dayton's "disparities" initiative or other funders that focus on North Minneapolis?) If so, we would like to learn about that in November.

**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
09/30/12	98,199,014	57,085,876	29,243,762
12/31/12	100,293,064	57,086,876	29,243,762
03/31/13	96,166,446	63,502,994	22,827,644
06/30/13	95,512,864	64,502,994	30,650,942
09/30/13	93,066,393	70,203,905	27,417,442
12/31/13	94,871,823	70,239,002	28,960,291
03/31/14	89,006,105	77,244,890	25,944,403
06/30/14	89,678,334	79,898,903	23,290,390
09/30/14	84,256,819	83,815,039	20,844,976
12/31/14	82,796,456	83,815,039	20,844,976
03/31/15	77,384,424	90,272,908	14,362,502
06/30/15	76,583,811	91,272,908	13,363,502
09/30/15	68,141,242	96,919,532	7,826,004
12/31/15	68,168,845	\$97,060,795	13,974,091
03/31/16	63,014,212	101,991,315	20,113,571
06/30/16	63,437,327	102,991,315	19,113,571
09/30/16	58,526,903	108,367,625	51,237,261 (1)

(1) Includes the following commitments:
\$800,000 to Allina's LifeCourse (timing to be determined)

\$5,000,000 (2016-2018) Endowed Chair in Global Governance; \$1,320,000 (2016) Six Franklin Williams Internships

\$922,980 (2017) U of M's *Sentencing Law Program Enhancements*; \$3,686,752 (2017-2020) *Public Interest Scholars*; \$600,000 (2017-2020) for *Bridge Fellowship Program*; and \$24,500,000 (2016) for *Center for New Americans*; \$366,000 (2017-2020) for *Class Agent Fundraising Pilot Program*;

\$1,041,529 (2016-2019) for Yale's *Gilder Lehrman Center for the Study of Slavery, Resistance and Abolition*; \$10,000,000 (2016) for *Robina Human Rights Fellowship Initiative Fund*; \$3,000,000 for *Binger Clinical Faculty Chair in Human Rights*

ROBINA FOUNDATION

ASSETS DETAIL

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	438,552	331,081
USbank Investment	74,687,548	74,324,421	76,039,563
Estate of Jim Binger	12,291,604	10,990,296	11,476,675
IRS Refund	12,445,745	12,445,745	12,445,745
Total	\$99,963,670	98,199,014	100,293,064
Assets	03/31/13	06/30/13	09/30/13
USbank Checking	235,329	121,792	141,307
USbank Investment	93,225,051	92,712,707	90,134,695
Estate of Jim Binger	2,706,066	2,678,365	2,790,391
IRS Refund	(5)		
Total	\$96,166,446	\$95,512,864	93,066,393
Assets	12/31/13	03/31/14	06/30/14
USbank Checking	218,896	96,503	180,943
USbank Investment	92,411,790	86,407,628	86,995,264
Estate of Jim Binger	2,241,137	2,208,474	2,208,627
Bazal Property	-	293,500	293,500
Total	\$94,871,823	89,006,105	89,678,334
Assets	09/30/14	12/31/14	03/31/15
USbank Checking	156,815	194,677	\$265,106
USbank Investment	83,728,078	82,272,092	76,790,061
Residual of JPMorgan	78,426	4,187	3,757
Bazal Property	293,500	293,500	325,500
Total	84,256,819	82,796,456	\$77,384,424
Assets	06/30/15	09/30/15	12/31/15
USbank Checking	227,826	171,332	\$184,426
USbank Investment	76,029,036	67,644,410	67,984,419
Residual of JPMorgan	1,449	-0-	-0-
Bazal Property	325,500	325,500	-0-
Total	76,583,811	68,141,242	68,168,845

Assets	03/31/16	06/30/16	09/30/16
USbank Checking	\$167,571	\$111,220	146,856
USbank Investment	62,846,641	63,326,107	58,380,047
Total	\$63,014,212	\$63,437,327	\$58,526,903

Robina Foundation

Quarterly Financial Report - Q3, 2016

Prepared by Michael F. Sullivan, Ph.D.

Indigo Consulting

September 30, 2016

Note:
before funds
GAT +
doesn't take
into account
YLS + CFR
grants.

Robina Foundation

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Robina Foundation

Executive Summary

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.

Observations and Recommendations

1. The value of our portfolio was \$58,526,903 on September 30, 2016.
2. In the third quarter, fund performance of 0.42% was lower than the benchmark of 0.73%. Since we have changed the allocation of our portfolio to an almost entirely cash basis, and we do not have a good benchmark comparison, this comparison should be discarded. Our performance exceeded the benchmark on an annualized basis for the 1 year time period and fell below the benchmark for the 3 year period.

	3 Month	Year to Date	1 Year	3 Year	5 Year	From Inception
Portfolio	0.42	3.38	4.06	2.18	5.35	3.23
Benchmark	0.73	2.38	3.98	2.39		

Robina Foundation

3. Grants for the second quarter were \$5,376,310. Combined with a market return of \$617,814 and operating expenses of \$151,928, our total assets decreased by \$4,910,424 during the third quarter.

	Q1	Q2	Q3	Q4	YTD
Beginning Balance:	\$68,168,845	\$63,014,212	\$63,437,327		\$68,168,845
Plus Earnings:	(\$107,258)	\$1,579,474	\$617,814		\$2,090,030
Less Grants:	(\$4,930,520)	(\$1,000,000)	(\$5,376,310)		(\$11,306,830)
Less Expenses:	(\$116,855)	(\$156,359)	(\$151,928)		(\$425,141)
Ending Balance:	\$63,014,212	\$63,437,327	\$58,526,903		\$58,526,903

4. Any grant decisions made after October 1, 2016 are not included in this report. However, we understand that the Robina Board has committed and distributed \$24,500,000 to the University of Minnesota Law School, and has committed (but not yet distributed) \$13,000,000 to Yale University and \$3,000,000 to the Council on Foreign Relations. Therefore, based upon previously anticipated grants and financial activity in the fourth quarter, and adding in the new spending commitments of \$40,500,000 our projected balance on December 31, 2016 is approximately \$16,000,000.

+ \$M
1.32

Robina Foundation

Executive Financial Summary

	2015	2016		
	Qtr4	Qtr1	Qtr2	Qtr3
Cash	\$1,769,178	\$560,983	\$37,759,744	\$38,693,142
Bonds	\$21,990,104	\$21,636,326	\$4,290,980	\$3,525,130
Risk Assets	\$44,409,562	\$40,816,903	\$21,386,603	\$16,308,632
Equities	\$24,968,438	\$24,567,339	\$4,727,563	\$4,779,792
Other	\$19,441,125	\$16,249,564	\$16,659,040	\$11,528,840
Grand Total	\$68,168,845	\$63,014,212	\$63,437,327	\$58,526,903

Robina Foundation

	2015	2016			
	Qtr4	Qtr1	Qtr2	Qtr3	Qtr4
Bond Hedge Funds, Real Estate, and Commodities					
Bond Hedge Funds					
Gam Absolute Return Bond Fund	\$3,338,950	\$3,234,478	\$3,374,093	\$3,450,470	
GCA Credit Opportunities Offshore	\$4,874,083	\$4,956,011	\$5,082,095	\$2,412,209	
Marathon Credit Opportunity Fund Ltd	\$3,169,015	\$0	\$0	\$0	
Bond Hedge Funds Total	\$11,382,049	\$8,190,488	\$8,456,189	\$5,862,679	
Real Estate					
IDR Core Equity Re Strategy 2010	\$8,059,076	\$8,059,076	\$8,202,852	\$5,666,161	
Other Bonds, Real Estate, and Comm. Total	\$19,441,125	\$16,249,564	\$16,659,040	\$11,528,840	
USBank Investments Total	\$67,984,419	\$62,846,641	\$63,326,107	\$58,380,947	

Robina Foundation

Asset Summary

	2015	2016			
	Qtr4	Qtr1	Qtr2	Qtr3	Qtr4
USBank Investments	\$67,984,419	\$62,846,641	\$63,326,107	\$58,380,047	
Robina Checking Account	\$184,426	\$167,571	\$111,220	\$146,856	
Grand Total	\$68,168,845	\$63,014,212	\$63,437,327	\$58,526,903	

Asset Allocation Report: 09/30/2016

	Actual (\$)	Actual (%)	Goal (\$)	Goal (%)
Cash				
USBank Cash/MM	\$38,546,286	66%		
USBank Checking	\$146,856	0%		
Cash Total	\$38,693,142	66%	\$49,747,868	85%
Fixed Income				
Bonds	\$3,525,130	6%		
Hedge Funds	\$5,862,679	10%		
Fixed Income Total	\$9,387,809	16%	\$5,852,690	10%
Risk Assets				
USBank Hedged and Private Equities	\$4,779,792	8%		
USBank Real Estate	\$5,666,161	10%		
Risk Assets Total	\$10,445,953	18%	\$2,926,345	5%
Grand Total	\$58,526,903	100%	\$58,526,903	100%

Grants Paid/Committed: 2016

	Qtr1	Qtr2	Qtr3	Qtr4	Grand Total
Allina Health System/Abbott Northwestern	\$2,500,000				\$2,500,000
Life Course/Late Life Supportive Care	\$2,500,000				\$2,500,000
Council on Foreign Relations	\$157,889		\$2,114,664	\$2,986,667	\$5,259,220
International Institutions and Global Governance (IIGG) Phase II			\$2,114,664		\$2,114,664
Expanded Diversity Initiative in Foreign Policy	\$157,889				\$157,889
The Council at 100 Campaign				\$1,666,667	\$1,666,667
Six Franklin Williams Internships				\$1,320,000	\$1,320,000
University of Minnesota Law School	\$1,889,451		\$3,261,646		\$5,151,097
Public Interest Scholars			\$1,074,188		\$1,074,188
Institute on Criminal Law and Justice	\$1,639,451				\$1,639,451
Support Scholarships	\$250,000				\$250,000
Sentencing Law Program Enhancements (CL&CJ)			\$896,097		\$896,097
Center for New Americans			\$1,057,361		\$1,057,361
Bridge Fellowship Program			\$150,000		\$150,000
Class Agent Pilot Program			\$84,000		\$84,000
Yale University	\$383,180	\$1,000,000			\$1,383,180
Yale Law School: Human Rights Fellowship Initiative Phase II		\$1,000,000			\$1,000,000
Gilder Lehrman Center	\$383,180				\$383,180
Grand Total	\$4,930,520	\$1,000,000	\$5,376,310¹	\$2,986,667	\$14,293,497

¹ The grand total of \$5,376,310 for the third quarter includes only grants committed prior to September 30, 2016.

Long Term History and Projections

Grants Paid and Committed	2012	2013	2014	2015	2016	2017	2018	2019	2020	2008-2020
	Actual	Actual	Actual	Actual	Budget	Budget	Budget	Budget	Budget	Grand Total
Allina Health System/Abbott Northwestern	\$2,356,696	\$4,245,492	\$4,334,266	\$3,990,000	\$2,500,000	\$800,000				\$24,226,454
Care Guides										\$6,000,000
Life Course/Late Life Supportive Care	\$2,356,696	\$4,245,492	\$4,334,266	\$3,990,000	\$2,500,000	\$800,000				\$18,226,454
Council on Foreign Relations	\$2,700,466	\$3,298,507	\$3,363,971	\$3,510,402	\$5,259,220	\$1,666,667	\$1,666,667			\$29,900,650
Diversity Scan										\$15,000
Expanded Diversity Initiative in Foreign Policy	\$377,034	\$426,492	\$470,722	\$446,117	\$157,889					\$1,878,254
International Institutions and Global Governance (IIGG) Phase I										\$8,000,000
International Institutions and Global Governance (IIGG) Phase II	\$2,046,627	\$2,034,671	\$2,034,971	\$2,074,424	\$2,114,664					\$10,305,357
Online Video Project	\$276,805									\$696,555
Expanded Diversity Initiative in Foreign Policy - Additional Activities		\$837,344	\$858,278	\$141,263						\$1,836,885
Humanity in Action (Undergraduate Fellowship)				\$247,878						\$247,878
Humanity in Action Diplomacy and Diversity Fellowship				\$600,720						\$600,720
The Council at 100 Campaign					\$1,666,667	\$1,666,667	\$1,666,667			\$5,000,001
Six Franklin Williams Internships					\$1,320,000					\$1,320,000
University of Minnesota Law School	\$2,370,447	\$4,608,127	\$4,677,800	\$4,745,354	\$5,151,097	\$1,891,168	\$1,315,688	\$1,318,188	\$1,050,688	\$34,546,499
Faculty Retention and Other Initiatives										\$250,000
Institute on Criminal Law and Justice	\$847,190	\$1,494,134	\$1,750,900	\$1,771,752	\$1,639,451					\$7,503,427
Program on Law, Public Policy, and Society (LaPPS)	\$893,457									\$8,061,399
Public Interest Scholars	\$379,800	\$694,544	\$809,355	\$813,736	\$1,074,188	\$726,688	\$1,074,188	\$1,076,688	\$809,188	\$7,458,375
Support Scholarships	\$250,000	\$250,000	\$250,000	\$250,000	\$250,000					\$1,250,000
Sentencing Law Program Enhancements (CL&CJ)		\$820,056	\$844,658	\$869,997	\$896,097	\$922,980				\$4,353,788
Center for New Americans		\$1,349,393	\$1,022,887	\$1,039,869	\$1,057,361					\$4,469,510
Bridge Fellowship Program					\$150,000	\$150,000	\$150,000	\$150,000	\$150,000	\$750,000
Class Agent Pilot Program					\$84,000	\$91,500	\$91,500	\$91,500	\$91,500	\$450,000
Yale University	\$19,000,000	\$1,000,000	\$1,200,000	\$1,000,000	\$1,383,180	\$486,012	\$382,042	\$173,475		\$32,424,709
Yale Law School: Human Rights Fellowship Initiative Phase I										\$4,000,000
Yale Law School: Human Rights Fellowship Initiative Phase II	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000					\$5,000,000
Yale School of Drama: Binger Center for New Theatre Endowment	\$18,000,000									\$18,000,000
Yale School of Drama: Yale Center for New Theatre										\$3,800,000
Tom Crosby Memorial			\$200,000							\$200,000
Glider Lehrman Center					\$383,180	\$486,012	\$382,042	\$173,475		\$1,424,709
The Center for Victims of Torture	\$1,000									\$26,000
The Center for Victims of Torture	\$1,000									\$26,000
ArtPlace Initiative										\$500,000
Revitalizing Communities through Arts and Culture										\$500,000
Aspen Institute										\$130,575
Justice and Society Program										\$130,575
Grand Total	\$26,428,609	\$13,152,126	\$13,576,037	\$13,245,756	\$14,293,497	\$4,843,847	\$3,364,397	\$1,491,663	\$1,050,688	\$121,754,887
Outstanding Commitments					\$2,986,667	\$4,843,847	\$3,364,397	\$1,491,663	\$1,050,688	\$13,737,262
Financial Outlook	2012	2013	2014	2015	2016	2017	2018	2019	2020	
Beginning Year Net Assets	\$120,827,373	\$100,568,259	\$95,132,519	\$82,796,457	\$68,168,845	\$54,138,802	\$49,365,374	\$45,993,540	\$44,318,572	
Plus Revenues	\$6,569,313	\$8,170,242	\$1,855,443	-\$777,910	\$852,111	\$676,735	\$617,067	\$459,935	\$443,186	
Less Expenses, 3% P.A. Growth	-\$399,818	-\$453,856	-\$615,468	-\$603,946	-\$588,656	-\$606,316	-\$624,505	-\$643,240	-\$662,538	
Less Grants Paid	-\$26,428,609	-\$13,152,126	-\$13,576,037	-\$13,245,756	-\$14,293,497	-\$4,843,847	-\$3,364,397	-\$1,491,663	-\$1,050,688	
Year End Net Assets	\$100,568,259	\$95,132,519	\$82,796,457	\$68,168,845	\$54,138,802	\$49,365,374	\$45,993,540	\$44,318,572	\$43,048,532	
Return Assumptions	2012	2013	2014	2015	2016	2017	2018	2019	2020	
Asset Allocation					5.0%	5.0%	5.0%	0.0%	0.0%	
Market Portfolio					95.0%	95.0%	95.0%	100.0%	100.0%	
Fixed Income										
Expected Return					6.0%	6.0%	6.0%	6.0%	6.0%	
Market Portfolio					1.0%	1.0%	1.0%	1.0%	1.0%	
Fixed Income										
Total Portfolio Expected Return					1.3%	1.3%	1.3%	1.0%	1.0%	

Selected Period Performance
ROBINA FOUNDATION MGMT AGY

Account [REDACTED]

Period Ending: 09/30/2016

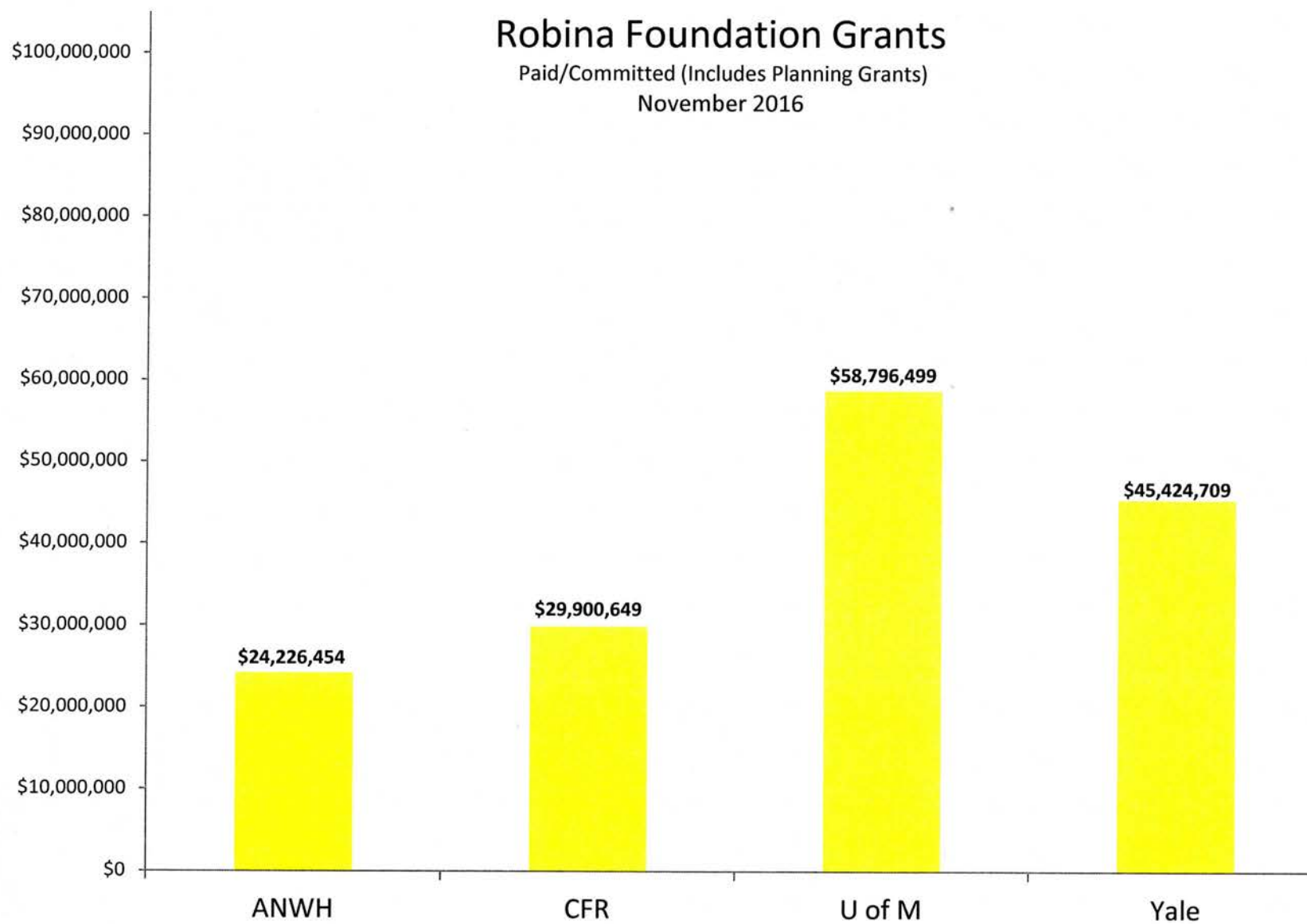
Sector	Market Value	3 Months	Year to Date (9 Months)	1 Year	3 Years	5 Years	Inception to Date (112 Months)
Total Portfolio Gross of Fees	58,370,918	.45	3.40	4.10	2.65	3.19	2.15
Total Managed Portfolio	51,974,567	.42	3.38	4.06	2.18	5.35	3.23
<i>Robina Custom Benchmark</i>		.73	2.38	3.98	2.39		
Total Managed Equity	4,016,276	3.39	3.85	7.67	4.99	10.12	
<i>Wilshire 5000 Index</i>		4.53	8.39	14.76	10.08	16.11	6.21
<i>MSCI EAFE Index (Net)</i>		6.43	1.73	6.52	.47	7.39	-.20
<i>MSCI EM Free Index (USD)</i>		9.03	16.02	16.78	-.56	3.03	1.17
Hedged Equity	4,016,276	3.39	-4.37	-2.54	5.83	4.28	
<i>HFRI Equity Hedge Index</i>		4.66	4.22	6.03	3.23	5.61	2.25
Domestic Fixed	2,530,840	.11	4.07	1.98	1.56	2.39	
<i>BARC 1-3 Yr Gov/Cr</i>		.02	1.68	1.31	1.09	1.05	2.47
Hedged Fixed Income	5,862,679	1.22	4.46	3.33	1.90	4.42	
<i>HFRI Rel Val (Tot)</i>		3.10	5.85	5.59	3.97	5.60	4.72
Foreign Fixed Income	1,012,171	.11	6.90	6.52	1.29	1.49	
Total Cash Equivalents	38,552,601	.05	.11	.16	.19	.19	.71
<i>Citigroup 3 Mo T-Bill Index</i>		.07	.19	.20	.09	.08	.55
Non-Mgd Equity	5,666,161	.00	3.31	6.23	11.26		
Non-Mgd Other	730,189	5.37	2.13	-9.05	-12.78	-28.15	

	2008	2009	2010	2011	2012	ROBINA FOUNDATION GRANTS PAID/COMMITTED				2017	2018	2019	2020	2021	TOTAL
ANWH															
Care Guides	1,253,535	2,373,233	2,373,232												6,000,000
LifeCourse: Late Life Supportive Care + Additional Funding					2,356,696	4,245,492	4,334,266								10,936,454
LifeCourse:2015 Transition Phase/2016 Completion of Research Study								3,990,000	2,500,000	800,000	Timing to be determined				7,290,000
														ANWH Total	24,226,454
CFR															
IIGG	2,000,000	2,000,000	2,000,000	2,000,000	2,046,627	2,034,671	2,034,971	2,074,424	2,114,664						18,305,357
Online Video Project				419,750	276,805										696,555
Expanded Diversity Initiative				15,000	377,034	426,492	470,722	446,117	157,889						1,893,254
Humanity in Action (Undergraduate) Fellowship								247,878						HIA	247,878
Expanded Diversity Initiative - Additional Activities						837,344	858,278	141,263							1,836,885
Humanity in Action Diplomacy and Diversity Fellowship								600,720						HIA	600,720
The Council at 100 Campaign									1,666,667	1,666,667	1,666,666	Timing to be determined			5,000,000
Six Franklin Williams Internships									1,320,000						1,320,000
														CFR Total	29,900,649
U of M															
LaPPS	1,400,000	1,436,750	1,480,338	2,850,854	893,457										8,061,399
Institute of Criminal Law & Justice					847,190	1,494,134	1,750,900	1,771,752	1,639,451						7,503,427
Sentencing Law Program Enhancements (CL&CJ)						820,056	844,658	869,997	896,097	922,980					4,353,788
Scholarships					250,000	250,000	250,000	250,000	250,000						1,250,000
Public Interest Scholars					379,800	694,544	809,355	813,736	1,074,188	726,688	1,074,188	1,076,688	809,188		7,458,375
Bridge Fellowship Program									150,000	150,000	150,000	150,000	150,000		750,000
Center for New Americans						1,349,393	1,022,887	1,039,869	1,057,361						4,469,510
Class Agent Pilot Program									84,000	91,500	91,500	91,500	91,500		450,000
Endow James H. Binger Center for New Americans									23,500,000		500,000				24,000,000
Endow James H. Binger Professorship in Clinical Law									1,000,000						1,000,000
														U of M Total	59,296,499
YALE															
Yale Drama															
CNT	750,000	750,000	1,350,000	950,000	18,000,000										21,800,000
Yale Law															
Human Rights	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000						9,000,000
Endow Robina Human Rights Fellowship Initiative									10,000,000						10,000,000
Endow Binger Clinical Faculty Chair in Human Rights									3,000,000						3,000,000
Yale University															
Thomas M. Crosby, Jr. Scholarship							200,000								200,000
Gilder Lehrman Center for the Study of Slavery, Resistance, and Abolition									383,180	486,012	382,042	173,475			1,424,709
														Yale Total	45,424,709
TOTAL	6,403,535	7,559,983	8,203,570	7,235,604	26,427,609	13,152,126	13,576,037	13,245,756	51,793,497	4,843,847	3,864,396	1,491,663	1,050,688		158,848,311
YEAR END NET ASSETS*				120,827,373	100,568,259	95,132,519	82,796,457	68,168,845	54,138,802	49,365,374	45,993,540	44,318,572	43,048,532		
*Estimated by Mike Sullivan based upon the projected grant programs and using asset allocation and assumed return assumptions.															
Planning Grants in 2005-2008 not included above: Abbott - \$125,000; CFR - \$50,000; U of M Law School - \$375,000; Yale University - \$50,000															
Misc Grants not included above:		ArtPlace Initiative: \$500,000		Aspen Institute: \$130,575		The Center for Victims of Torture: \$26,000		Tandem: \$25,000		Orthopaedic International Education: \$25,000					
Funds provided to Humanity in Action (HIA) Undergraduate Fellowship (\$247,878) and Diplomacy and Diversity Fellowship (\$600,720) after separation of CFR and HIA: \$848,598															
30-Sep-16															

Robina Foundation Grants

Paid/Committed (Includes Planning Grants)

November 2016



Pro Forma Including New 2016 Grants

Grants Paid and Committed	2008 Actual	2009 Actual	2010 Actual	2011 Actual	2012 Actual	2013 Actual	2014 Actual	2015 Actual	2016 Budget	2017 Budget	2018 Budget	2019 Budget	2020 Budget	2008-2020 Grand Total
Allina Health System/Abbott Northwestern	\$1,253,535	\$2,373,233	\$2,373,232		\$2,356,696	\$4,245,492	\$4,334,264	\$3,990,000	\$2,500,000	\$800,000				\$24,224,454
Care Guides	\$1,253,535	\$2,373,233	\$2,373,232											\$6,000,000
Life Course/Late Life Supportive Care					\$2,356,696	\$4,245,492	\$4,334,264	\$3,990,000	\$2,500,000	\$800,000				\$18,226,454
Council on Foreign Relations	\$2,000,000	\$2,000,000	\$2,000,000	\$2,434,750	\$2,700,466	\$3,298,507	\$3,363,971	\$3,510,402	\$5,259,220	\$1,666,667	\$1,666,667			\$29,900,650
Diversity Scan				\$15,000										\$15,000
Expanded Diversity Initiative in Foreign Policy					\$377,034	\$426,492	\$470,722	\$446,117	\$157,889					\$1,878,254
International Institutions and Global Governance (IIGG) Phase I	\$2,000,000	\$2,000,000	\$2,000,000	\$2,000,000										\$8,000,000
International Institutions and Global Governance (IIGG) Phase II					\$2,046,627	\$2,034,671	\$2,034,971	\$2,074,424	\$2,114,664					\$10,305,357
Online Video Project				\$419,750	\$276,805									\$696,555
Expanded Diversity Initiative in Foreign Policy - Additional Activities						\$837,344	\$858,278	\$141,263						\$1,836,885
Humanity in Action (Undergraduate Fellowship)								\$247,878						\$247,878
Humanity in Action Diplomacy and Diversity Fellowship								\$600,720						\$600,720
Six Franklin Williams Internships									\$1,320,000					\$1,320,000
Chair in Global Governance									\$1,666,667	\$1,666,667	\$1,666,667			\$5,000,001
University of Minnesota Law School	\$1,650,000	\$1,436,750	\$1,480,338	\$2,850,854	\$2,370,447	\$4,408,127	\$4,677,800	\$4,745,354	\$29,651,097	\$1,891,168	\$1,815,688	\$1,318,188	\$1,050,688	\$59,546,499
Faculty Retention and Other Initiatives	\$250,000								\$1,639,451					\$250,000
Institute on Criminal Law and Justice					\$847,190	\$1,494,134	\$1,750,900	\$1,771,752						\$7,503,427
Program on Law, Public Policy, and Society (LaPPS)	\$1,400,000	\$1,436,750	\$1,480,338	\$2,850,854	\$893,457									\$8,061,399
Public Interest Scholars					\$379,800	\$694,544	\$809,355	\$813,736	\$1,074,188	\$726,688	\$1,074,188	\$1,076,688	\$809,188	\$7,458,375
Support Scholarships					\$250,000	\$250,000	\$250,000	\$250,000	\$250,000					\$1,250,000
Sentencing Law Program Enhancements (CL&CJ)					\$250,000	\$820,056	\$844,658	\$869,997	\$896,097	\$922,980				\$4,353,788
Center for New Americans						\$1,349,393	\$1,022,887	\$1,039,869	\$1,057,361					\$4,469,510
Bridge Fellowship Program									\$150,000	\$150,000	\$150,000	\$150,000	\$150,000	\$750,000
Class Agent Pilot Program									\$84,000	\$91,500	\$91,500	\$91,500	\$91,500	\$450,000
U of M (James H. Binger Center for New Americans)									\$23,500,000	\$500,000				\$24,000,000
U of M (James H. Binger Professorship in Clinical Law)									\$1,000,000					\$1,000,000
Yale University	\$1,750,000	\$1,750,000	\$2,350,000	\$1,950,000	\$19,000,000	\$1,000,000	\$1,200,000	\$1,000,000	\$14,383,180	\$486,012	\$382,042	\$173,475		\$45,424,709
Yale Law School: Human Rights Fellowship Initiative Phase I	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000										\$4,000,000
Yale Law School: Human Rights Fellowship Initiative Phase II					\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000					\$5,000,000
Yale School of Drama: Binger Center for New Theatre Endowment					\$18,000,000									\$18,000,000
Yale School of Drama: Yale Center for New Theatre	\$750,000	\$750,000	\$1,350,000	\$950,000										\$3,800,000
Tom Crosby Memorial							\$200,000							\$200,000
Gilder Lehrman Center									\$383,180	\$486,012	\$382,042	\$173,475		\$1,424,709
Yale Law School (Robina Human Rights Initiative Endowment Fund)									\$10,000,000					\$10,000,000
Yales Law School (Binger Clinical Faculty Chair in Human Rights)									\$3,000,000					\$3,000,000
The Center for Victims of Torture	\$25,000				\$1,000									\$26,000
The Center for Victims of Torture	\$25,000				\$1,000									\$26,000
ArtPlace Initiative				\$500,000										\$500,000
Revitalizing Communities through Arts and Culture				\$500,000										\$500,000
Aspen Institute		\$130,575												\$130,575
Justice and Society Program		\$130,575												\$130,575
Tandem									\$25,000					\$25,000
Tandem Grant									\$25,000					\$25,000
Orthopaedic International Education									\$25,000					\$25,000
Orthopaedic International Education									\$25,000					\$25,000
Grand Total	\$6,678,535	\$7,690,558	\$8,203,570	\$7,735,604	\$26,428,609	\$13,152,126	\$13,576,037	\$13,245,756	\$51,843,497	\$4,843,847	\$3,864,397	\$1,491,663	\$1,050,688	\$159,804,887

Financial Outlook	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Beginning Year Net Assets					\$120,827,373	\$100,568,259	\$95,132,519	\$82,796,457	\$68,168,845	\$16,588,802	\$11,452,315	\$7,331,072	\$5,612,720
Plus Revenues					\$6,569,313	\$8,170,242	\$1,855,443	\$-777,910	\$852,111	\$207,360	\$143,154	\$73,311	\$56,127
Less Expenses, 3% P.A. Growth					\$-399,818	\$-453,856	\$-615,468	\$-603,946	\$-588,656	\$-500,000	\$-400,000	\$-300,000	\$-300,000
Less Grants Paid					\$-26,428,609	\$-13,152,126	\$-13,576,037	\$-13,245,756	\$-51,843,497	\$-4,843,847	\$-3,864,397	\$-1,491,663	\$-1,050,688
Year End Net Assets					\$120,827,373	\$100,568,259	\$95,132,519	\$82,796,457	\$68,168,845	\$16,588,802	\$11,452,315	\$7,331,072	\$5,612,720
Return Assumptions	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Asset Allocation													
Market Portfolio									5.0%	5.0%	5.0%	0.0%	0.0%
Fixed Income									95.0%	95.0%	95.0%	100.0%	100.0%
Expected Return													
Market Portfolio									6.0%	6.0%	6.0%	6.0%	6.0%
Fixed Income									1.0%	1.0%	1.0%	1.0%	1.0%
Total Portfolio Expected Return									1.3%	1.3%	1.3%	1.0%	1.0%

ROBINA FOUNDATION

80 South 8th Street, Suite 4900
Minneapolis, MN 55402
Phone: 612-333-2313
Fax: 612-333-0182
www.robinafoundation.org

October 13, 2016

Garry W. Jenkins
Dean & William S. Pattee Professor of Law
University of Minnesota Law School
381 Walter F. Mondale Hall
229-19th Avenue South
Minneapolis, Minnesota 55455

Dear Dean Jenkins,

On behalf of the Board of Directors of the Robina Foundation, it is my pleasure to inform you that a grant of \$25 million dollars has been awarded to the University of Minnesota Law School. The award shall be designated as follows:

- \$23.5 million to endow the James H. Binger Center for New Americans;
- \$1 million to endow the James H. Binger Professorship in Clinical Law to support a faculty member teaching in the James H. Binger Center for New Americans, regardless of rank; and
- \$500,000 to be used by the Law School for scholarship funding and/or a purpose approved by Robina Foundation.

We anticipate that the grant shall be paid as follows: \$24.5 million for the James H. Binger Center for New Americans and the James H. Binger Professorship on or before October 15, 2016, and the remaining \$500,000 to be paid on a date or dates to be determined by the Robina Foundation in consultation with the Law School, but it is anticipated that payment shall be made on or before June 15, 2020.

Sincerely,



Kathleen Blatz, Chair
Board of Directors, Robina Foundation



UNIVERSITY OF MINNESOTA FOUNDATION

Robina Foundation

Fund Agreement

Robina Foundation (the "Donor"), Regents of the University of Minnesota (the "University"), and the University of Minnesota Foundation (the "Foundation") enter into this Fund Agreement (the "Agreement") regarding the administration of the Fund described below to which a gift from the Donor to the Foundation will be directed.

Name:

The fund shall be named the *James H. Binger Center for New Americans Fund* (the "Fund").

Fund Purpose:

The purpose of the Fund is to provide financial support to the University of Minnesota Law School to support the operations of the James H. Binger Center for New Americans ("CNA"). The CNA brings about transformative change by creating a national model for the provision of comprehensive and cohesive legal services for immigrant communities through a variety of means, including improving federal immigration law and policy through impact litigation; protecting detainee rights and improving access to legal representation for refugees and immigrants; educating non-citizens about their legal rights; creating dynamic and comprehensive immigration clinics for students; and collaborating with others on immigration issues.

The Fund is intended to complement the charitable objectives of the fund created to support the James H. Binger Professorship in Clinical Law, and these two funds will be administered in a coordinated manner to support the leadership and operations of the CNA.

Funding Details:

The Donor's initial gift in the amount of \$23.5 million will be directed to the Fund. The Donor and others may make additional gifts to the Fund at any time. Additional gifts to the Fund will be reflected in the records of the Foundation.

Fund Type: Endowment

Stewardship and Recognition:

The Foundation and the University will provide the Donor with appropriate stewardship and recognition consistent with Foundation's and the University's policies. The Foundation may include information about the Donor's gift and the Fund in the Foundation's annual and other periodic reports, on its web page, and in legally required filings, such as its Form 990. The Foundation and the University will give the Donor the opportunity to review and comment on

draft press releases and similar announcements regarding the gift and the Fund before a press release or announcement is made.

Fund Administration:

The Fund will be administered and invested by the Foundation in accordance with the policies of the Foundation. Oversight and management of the Fund shall be the responsibility of the Foundation in consultation with the Dean of the Law School or his assignees. The assets of the Fund may be commingled with other assets of the Foundation for purposes of investment. Separate records and accounts will be kept of receipts and disbursements of the Fund.

As an endowment fund, the earnings attributable to the Fund and the annual amount appropriated by the Foundation and made available for distribution from the Fund will be determined by the Foundation's policies as defined by its Board of Trustees from time to time. Fund assets that the Foundation does not appropriate for distribution from the Fund in a given year shall continue to be held in the Fund and administered under this Agreement.

Reporting:

For a period to be designated by the Donor, the University will provide the Donor with an annual written report in a form and with information acceptable to the Donor that describes the activities and programs of the CNA as supported by the Fund. If requested by the Donor or the Donor's designated representative, the University will participate in evaluations and assessments funded by the Donor of the activities of the CNA, including third party evaluations and assessments.

In addition, the Foundation will provide an annual written report on the Fund's market value, principal, and accumulated spendable amount, in accordance with Foundation and University policies. If the Donor is no longer in existence, these reports shall be provided to the designated representative of the Donor or that person's designated successor as identified by the Donor in a writing filed with the Foundation that includes each designated representative's name and contact information.

Change in Circumstances:

If the Foundation's Board of Trustees determines that a change in circumstances has made the use of Fund distributions for the purpose described above impossible, impractical, or inexpedient, the Foundation shall use subsequent Fund distributions to support those University of Minnesota Law School activities that the Board determines will, as nearly as possible, accomplish the charitable purpose, objective and intention of the Donor and will satisfy the Donor's Mission, as further described below. The Board of Trustees will consult with appropriate University and Law School leadership regarding any determination of change in circumstances and any modification of Fund use and with the Donor or its designated representative (if any) prior to selecting an alternate use of distributions from the Fund.

The Foundation acknowledges that the Donor's Mission is to support charitable projects and programs that (a) evince or promote innovation and creativity; (b) are forward-thinking and futuristic; (c) are major projects and initiatives rather than day-to-day operations; and (d) are intended to have a significant and positive long-term impact.

Governing Law:

This Agreement shall be governed exclusively by Minnesota law, including the Uniform Prudent Management of Institutional Funds Act as adopted by Minnesota, and any successor statute (collectively "UPMIFA"). For purposes of UPMIFA, the Fund shall constitute an institutional fund.

Entire Agreement:

This Agreement constitutes the entire agreement of the parties related to this Fund administration, and this Agreement supersedes any oral and written agreements or communications related thereto.

Effective Date:

This Agreement is effective as of the 13 day of October, 2016

ROBINA FOUNDATION


By: Kathleen Blatz

Its: Chair, Board of Directors, Robina Foundation

REGENTS OF THE UNIVERSITY OF MINNESOTA


By: Gary W. Jenkins

Its: Dean, Law School

UNIVERSITY OF MINNESOTA FOUNDATION


By: Kathleen L. Pickard

Its: Vice President and CFO



UNIVERSITY OF MINNESOTA FOUNDATION

Robina Foundation

Fund Agreement

Robina Foundation (the "Donor"), Regents of the University of Minnesota (the "University"), and the University of Minnesota Foundation (the "Foundation") enter into this Fund Agreement (the "Agreement") regarding the administration of the Fund described below to which a gift from the Donor to the Foundation will be directed.

Name:

The fund shall be named the *James H. Binger Professorship in Clinical Law* (the "Fund").

The individual selected for this named position (the "Holder") will be referred to as holder of the *James H. Binger Professorship in Clinical Law* and may use the working title as the *James H. Binger Professor of Clinical Law* or *James H. Binger Clinical Professor of Law*, as appropriate.

Fund Purpose:

The purpose of the Fund is to assist the University in recruiting, supporting and retaining outstanding faculty members in the Law School. The individual holding the named position, regardless of academic rank, will be engaged in clinical instruction within the James H. Binger Center for New Americas ("CNA") with a focus on immigration, asylum, detainee rights, and/or refugee law and policy.

All individuals supported by this Fund will be recruited according to University and Law School policies and procedures in place at the time. The position and terms of appointment, typically six (6) years, and terms of renewal will be approved by the Dean of the Law School. The position may be held open or awarded on a temporary or interim basis as the situation warrants.

The Fund is intended to complement the charitable objectives of the James H. Binger Center for New Americans Fund, and these two funds will be administered in a coordinated manner to support the leadership and operations of the CNA.

At the time of establishment, the Fund shall comply with the requirements of the current University policies. If the Donor wishes to make a future change regarding the use of a fund in support of a named faculty position, it must comply with the requirements of the then-current University policies, including but not limited to minimum funding levels and naming restrictions in place at that time.

Funding Details:

The Donor's initial gift in the amount of \$1 million will be directed to the Fund. The Donor and others may make additional gifts to the Fund at any time. Additional gifts to the Fund will be reflected in the records of the Foundation.

Fund Type: Endowment**Stewardship and Recognition:**

The Foundation and the University will provide the Donor with appropriate stewardship and recognition consistent with Foundation's and the University's policies. The Foundation may include information about the Donor's gift and the Fund in the Foundation's annual and other periodic reports, on its web page, and in legally required filings, such as its Form 990. The Foundation and the University will give the Donor the opportunity to review and comment on draft press releases and similar announcements regarding the gift and the Fund before a press release or announcement is made.

Fund Administration:

The Fund will be administered and invested by the Foundation in accordance with the policies of the Foundation. Oversight and management of the Fund shall be the responsibility of the Foundation in consultation with the Dean of the Law School or his assignees. The assets of the Fund may be commingled with other assets of the Foundation for purposes of investment. Separate records and accounts will be kept of receipts and disbursements of the Fund.

As an endowment fund, the earnings attributable to the Fund and the annual amount appropriated by the Foundation and made available for distribution from the Fund will be determined by the Foundation's policies as defined by its Board of Trustees from time to time. Fund assets that the Foundation does not appropriate for distribution from the Fund in a given year shall continue to be held in the Fund and administered under this Agreement.

Reporting:

The University shall report on the uses of the Fund in conjunction with the annual report provided on the James H. Binger Center for New Americans Fund, subject to the terms of its Fund Agreement.

In addition, the Foundation will provide an annual written report on the Fund's market value, principal, and accumulated spendable amount, in accordance with Foundation and University policies. If the Donor is no longer in existence, these reports shall be provided to the designated representative of the Donor or that person's designated successor as identified by the Donor in a writing filed with the Foundation that includes each designated representative's name and contact information.

Change in Circumstances:

If the Foundation's Board of Trustees determines that a change in circumstances has made the use of Fund distributions for the purpose described above impossible, impractical, or inexpedient, the Foundation shall use subsequent Fund distributions to support those University of Minnesota Law School activities that the Board determines will, as nearly as possible, accomplish the charitable purpose, objective and intention of the Donor and will satisfy the Donor's Mission, as further described below. The Board of Trustees will consult with appropriate University and Law School leadership regarding any determination of change in circumstances and any modification of Fund use and with the Donor or its designated representative (if any) prior to selecting an alternate use of distributions from the Fund.

The Foundation acknowledges that the Donor's Mission is to support charitable projects and programs that (a) evince or promote innovation and creativity; (b) are forward-thinking and futuristic; (c) are major projects and initiatives rather than day-to-day operations; and (d) are intended to have a significant and positive long-term impact.

Governing Law:

This Agreement shall be governed exclusively by Minnesota law, including the Uniform Prudent Management of Institutional Funds Act as adopted by Minnesota, and any successor statute (collectively "UPMIFA"). For purposes of UPMIFA, the Fund shall constitute an institutional fund.

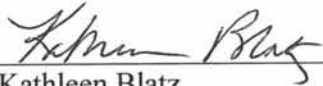
Entire Agreement:

This Agreement constitutes the entire agreement of the parties related to this Fund administration, and this Agreement supersedes any oral and written agreements or communications related thereto.

Effective Date:

This Agreement is effective as of the 13 day of October, 2016.

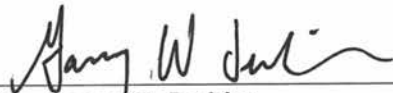
ROBINA FOUNDATION



By: Kathleen Blatz

Its: Chair, Board of Directors, Robina Foundation

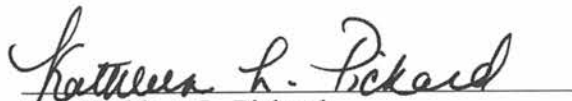
REGENTS OF THE UNIVERSITY OF MINNESOTA



By: Garry W. Jenkins

Its: Dean, Law School

UNIVERSITY OF MINNESOTA FOUNDATION



By: Kathleen L. Pickard

Its: Vice President and CFO

ROBINA FOUNDATION

GRANT AND ENDOWMENT AGREEMENT

Robina Foundation, a Minnesota nonprofit corporation (the "Foundation"), and Yale University ("Grantee") enter into this Grant and Endowment Agreement (the "Agreement") to establish the terms of an endowment Grant from the Foundation to the Grantee for the benefit of Yale Law School ("YLS").

1. **Description of Grant.** The Foundation shall make a grant of \$10 million (the "Grant") to the Grantee to establish the *Robina Human Rights Initiative Endowment Fund* (the "Fund"), which will be administered according to the terms of this Agreement. The Grant shall be paid on or before December 31, 2016.
2. **Use of the Fund.** Income generated from the Fund shall be used to sustain the Robina Human Rights Initiative at YLS. The annual income shall be distributed for these specific purposes: 1) to provide financial assistance to YLS students and graduates pursuing careers in human rights, including through academic-year scholarships, summer public interest fellowships, post-graduate fellowships, and law school loan repayment assistance; 2) to support visiting human rights faculty, scholars, and practitioners; and 3) to fund human rights-related research, clinical education, teaching and programming at YLS, particularly to enable innovation in human rights clinical education and student opportunities to gain direct human rights investigation and advocacy experience, and outreach to the broader Yale community, including support for human rights education and experience for Yale undergraduates.

The annual income produced by the Fund may be reserved for future use whenever the Dean of YLS determines that a temporary accumulation of income is advisable or appropriate. For purposes of this Agreement, "income" means the amount available for distribution from the Fund as determined in accordance with Grantee's endowment spending policy. The donor intends that the Fund provide continuous, stable, and sustainable spending in support of the purposes described above, in accordance with the University spending policy. The donor recognizes that the application of Yale's spending policy, combined with economic conditions, may cause the market value of the Fund to fluctuate above or below the historic book value of the Fund.

The Fund is intended to complement the charitable objectives of the *Binger Clinical Faculty Chair in Human Rights at Yale Law School*. These two funds will be administered in a coordinated manner to support the leadership and operations of the Human Rights Initiative at YLS.

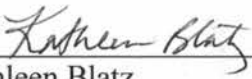
3. **Stewardship and Recognition.** Grantee will provide the Foundation with appropriate stewardship and recognition in a manner consistent with Grantee's policies. Grantee may include information about the Grant and the Fund in Grantee's annual and other periodic reports, on its web page, and in legally required filings, such as its Form 990. Grantee will give the Foundation an opportunity to review and comment on draft press releases and similar announcements regarding the Grant before the press release or announcement is made.
4. **Reporting.** For a period designated by the Foundation, the Grantee will provide the Foundation with an annual written report in a form acceptable to the Foundation that describes the Grantee's use of distributions from the Fund. This report must also include a description of the Fund's market value, principal, and accumulated spendable amount. If the Foundation is no longer in existence, this report must be provided to the designated representative of the Foundation or that person's designated successor. If requested by the Foundation or the Foundation's designated representative, the Grantee will participate in evaluations and assessments of the use of and expenditures from the Fund assets income, including third party evaluations and assessments.
5. **Investment of the Fund.** The Grantee or a committee duly authorized by the Grantee has sole discretion as to the investment and reinvestment of the assets of the Fund, including the selection of investment managers, and as to the selection of custodians of the assets of the Fund. Fund assets may be commingled with the Grantee's other assets for investment purposes provided that the separate identity of the Fund and the distributions from the Fund are at all times maintained.
6. **Change in Circumstances.** If at some future time, due to changed circumstances, in the judgment of the Grantee it becomes impractical, inexpedient or impossible to apply the distribution from the Fund to the purposes described above, the Grantee shall make such modifications to the use of the Fund as will appropriately recognize the interests of the Foundation, in coordination with the Grantee's priorities, in a manner that will (a) as nearly as possible, accomplish the charitable purpose, objective and intention of the Foundation in making the Grant, and (b) satisfy the Foundation's Mission, as further described below. If possible and practical, Grantee will consult with the Foundation or its designated representative (if any) prior to selecting any alternate use of distributions from the Fund.

The Grantee acknowledges that the Foundation's Mission is to support charitable projects and programs that (a) evince or promote innovation and creativity; (b) are forward-thinking and futuristic; (c) are major projects and initiatives rather than day-to-day operations; and (d) are intended to have a significant and positive long-term impact.

7. **Counterparts.** The parties may sign this Agreement in counterparts which, taken together, will constitute a fully executed original.

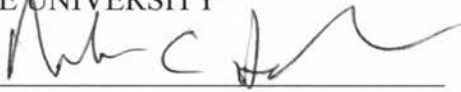
8. **Effective Date:** This Agreement is effective as of the 1 day of November, 2016.

ROBINA FOUNDATION



Kathleen Blatz
Chair, Board of Directors, Robina Foundation

YALE UNIVERSITY



Robert C. Post
Dean
Yale Law School



Joan E. O'Neill
Vice President for Alumni Affairs and Development
Yale University

**Memorandum of Understanding
Between the
Robina Foundation and Yale University
November 2, 2016**

This Memorandum of Understanding ("MOU") is made and entered into by and between the Robina Foundation ("Robina") and Yale University ("Yale" or "University"), for the benefit of Yale Law School ("YLS").

This MOU shall be attached to and part of the "Grant and Endowment Agreement" dated [DATE] between Robina and Yale, which established the *Robina Human Rights Initiative Endowment Fund* ("Robina Fund").

The purpose of this MOU is to establish supplementary terms and conditions to those prescribed in the Agreement noted above under which Robina will provide a grant of ten million dollars (\$10,000,000) to Yale.

1. YLS agrees to establish the *YLS Endowment for Human Rights Fund* ("YLS Fund") no later than December 31, 2018, with gifts from alumni and friends, and, if necessary, from YLS, totaling a minimum of one million dollars (\$1,000,000). The annual income from the YLS Fund shall be used to support and sustain YLS' human rights program.
2. YLS shall inform a Robina representative when the endowment has been fully funded as soon as practicable but no later than January 31, 2019.
3. Should the principal value of the YLS Fund be less than \$1,000,000 on December 31, 2018, YLS shall be prohibited from using future income from the Robina Fund until such time as the minimum funding level is achieved.
4. YLS agrees to provide a written narrative report on the use of the YLS Fund in a manner and time that is in keeping with the stewardship requirements described in the "Grant and Endowment Agreement" referenced above.
5. Robina understands and agrees that if expendable income from the YLS Fund grows beyond what is practical to use for the purpose stated above, the Dean of the Law School may use the excess income to support the academic priorities of the Law School.
6. Yale will administer the YLS Fund in accordance with the policies authorized by the Yale Corporation, as they may be modified from time to time. It is Robina's and Yale's intention that the YLS Fund provide continuous, stable and sustainable spending in support of the purposes described above, in accordance with University spending policy. Robina recognizes that the application of Yale's spending policy, combined with economic conditions, may cause the market value of the YLS Fund to fluctuate above or below the historic book value of the YLS Fund.

In the event that at some future time due to changed circumstances, in the judgment of the Yale Corporation, it becomes impractical to apply the distributions from the YLS Fund to the purpose described above, the Yale Corporation shall make such modifications to the use of the YLS Fund as will appropriately recognize the interests of Robina and YLS in coordination with University priorities.

Agreed To By:



Kathleen Blatz
Chair, Board of Directors
Robina Foundation

November 10, 2016
Date



Robert C. Post
Dean
Yale Law School

11/10/16
Date



Joan E. O'Neill
Vice President for Alumni Affairs and Development
Yale University

11/11/16
Date

ROBINA FOUNDATION

GRANT AND ENDOWMENT AGREEMENT

Robina Foundation, a Minnesota nonprofit corporation (the "Foundation"), and Yale University ("Grantee") enter into this Grant and Endowment Agreement (the "Agreement") to establish the terms of an endowment Grant from the Foundation to the Grantee for the benefit of Yale Law School ("YLS").

1. **Description of Grant.** The Foundation shall make a grant of \$3,000,000 (the "Grant") to the Grantee to endow the *Binger Clinical Faculty Chair in Human Rights at Yale Law School* (the "Chair"), which will be administered according to the terms of this Agreement. The Grant shall be paid on or before December 31, 2016.
2. **Use of the Fund.** Income generated from the Fund shall be used to support a clinical faculty member at Yale Law School who will teach human rights-related courses and clinics, and lead the Robina Human Rights Initiative. The annual income produced by the Fund may be reserved for future use whenever the Dean of the Law School determines that a temporary accumulation of income is advisable or appropriate. For purposes of this Agreement, "income" means the amount available for distribution from the Fund as determined in accordance with Grantee's endowment spending policy. The donor intends that the Fund provide continuous, stable, and sustainable spending in support of the purposes described above, in accordance with the University spending policy. The donor recognizes that the application of Yale's spending policy, combined with economic conditions, may cause the market value of the Fund to fluctuate above or below the historic book value of the Fund.

The Chair Fund is intended to complement the charitable objectives of the Robina Human Rights Initiative Endowment Fund. These two funds will be administered in a coordinated manner to support the leadership and operations of the Human Rights Initiative at YLS.

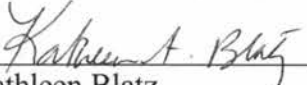
3. **Stewardship and Recognition.** Grantee will provide the Foundation with appropriate stewardship and recognition in a manner consistent with Grantee's policies. Grantee may include information about the Grant and the Fund in Grantee's annual and other periodic reports, on its web page, and in legally required filings, such as its Form 990. Grantee will give the Foundation an opportunity to review and comment on draft press releases and similar announcements regarding the Grant before the press release or announcement is made.
4. **Reporting.** For a period designated by the Foundation, the Grantee will provide the Foundation with an annual written report in a form acceptable to the Foundation that describes Grantee's use of distributions from the Fund. This report must also include a description of the Fund's market value, principal, and accumulated spendable amount. If the Foundation is no longer in existence, this report must be provided to the designated representative of the Foundation, or that person's designated successor. If requested by the Foundation or the Foundation's designated representative, the Grantee will participate in evaluations and assessments of the use of and expenditures from the Fund assets income, including third party evaluations and assessments.

5. **Investment of the Fund.** The Yale Corporation or a committee duly authorized by the Corporation has sole discretion as to the investment and reinvestment of the assets of the Fund, including the selection of investment managers, and as to the selection of custodians of the assets of the Fund. Fund assets may be commingled with the Grantee's other assets for investment purposes, provided that the separate identity of the Fund and the distributions from the Fund are at all times maintained.
6. **Change in Circumstances.** If at some future time, due to changed circumstances, in the judgment of the Grantee it becomes impractical, inexpedient, or impossible to apply the distribution from the Fund to the purposes described above, the Grantee shall make such modifications to the use of the Fund as will appropriately recognize the interests of the Foundation, in coordination with the Grantee's priorities, in a manner that will (a) as nearly as possible, accomplish the general purposes, objective and intention of the Foundation in making the Grant, and (b) satisfy the Foundation's Mission attached as further described below. If possible and practical, Grantee will consult with the Foundation or its designated representative (if any) prior to selecting any alternate use of distributions from the Fund.

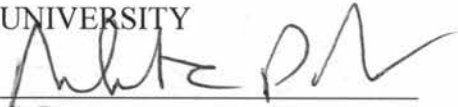
The Grantee acknowledges that the Foundation's Mission is to support charitable projects and programs that (a) evince or promote innovation and creativity; (b) are forward-thinking and futuristic; (c) are major projects and initiatives rather than day-to-day operations; and (d) are intended to have a significant and positive long-term impact.

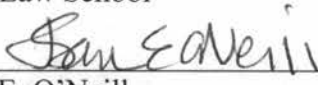
7. **Counterparts.** The parties may sign this Agreement in counterparts which, taken together, will constitute a fully executed original.
8. **Effective Date:** This Agreement is effective as of the 1 day of November, 2016.

ROBINA FOUNDATION


Kathleen Blatz
Chair, Board of Directors,
Robina Foundation

YALE UNIVERSITY


Robert C. Post
Dean
Yale Law School


Joan E. O'Neill
Vice President for Alumni Affairs and Development
Yale University



The Gilder Lehrman Center for the Study of Slavery Resistance, and Abolition

AT THE WHITNEY AND BETTY MACMILLAN CENTER FOR INTERNATIONAL AND AREA STUDIES

Gilder Lehrman Center for the Study of Slavery, Resistance, and Abolition at Yale University
Robina Foundation Work Plan 2016-2017
Goals, Strategies, and Progress
October 2016

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mailing: PO Box 208206 New Haven, CT 06520 / courier: 230 Prospect Street New Haven, CT 06511

Gilder Lehrman Center for the Study of Slavery, Resistance, and Abolition at Yale University
Robina Foundation Work Plan, October 2016

Program Area: Human Trafficking and Modern Day Slavery (HTMDS)						
Goal	Strategy	Actions	Start date	Target audience	Outcome/Dissemination	Completion
Advance and deepen knowledge about contemporary forms of coerced labor	Establish cohort of GLC Fellows in Human Trafficking and Modern Day Slavery (HTMDS)	Recruited two full-year GLC teaching fellows: Wendy Hesford Tammy Ingram (first Robina Fellow in Modern Slavery at the GLC) Recruited one-month visiting scholar: Elena Shih	August 2016 (Hesford & Ingram) October 2016 (Shih)	Scholarly community; NGO sector; students	Course: Human Trafficking and Modern-Day Slavery (Hesford)	Fall 2016
					Course: Neo-Slavery in the Jim Crow South: Sex, Race, and Forced Labor After the Civil War (Ingram)	Spring 2017
					Publication: <i>Exceptional Rhetorics: Regulating Childhood and Children's Rights</i> (Hesford)	June 2018 (expected submission, Duke Univ. Press)
					Publication: <i>The Wickedest City in America: Sex, Race, and Organized Crime in the Jim Crow South</i> (Ingram)	May 2018 (contract expected)
					Publication: <i>The Price of Freedom: Moral and Political Economies of the Anti-Human Trafficking Movement in China, Thailand, and the United States</i> (Shih)	Dec. 2016 (expected submission, Univ. CA and Duke Univ. Presses)
Build field of scholarly research on HTMDS internationally; Train and equip leaders working to secure human rights against harms caused by HTMDS	Develop ties with individual scholars and academic research centers addressing HTMDS; create research-based guidelines, analysis and policy recommendations	Form Modern Slavery Working Group to act as hub for collaboration and to steer and advance the field	Summer 2016 (planning); Meetings: March 2017, Sept. 2017, March 2018, Sept. 2018	Research groups in U.K., U.S., and Australia	- Anchored by former GLC fellows Genevieve LeBaron and Jessica Pliley; - Specific outcomes determined by group. Possibilities include: field-defining edited volume on modern slavery; new web-based resources; position papers and articles in popular press; public conferences or institutes	Ongoing

Gilder Lehrman Center for the Study of Slavery, Resistance, and Abolition at Yale University
Robina Foundation Work Plan, October 2016

Program Area: Human Trafficking and Modern Day Slavery (cont.)						
Goal	Strategy	Actions	Start date	Target audience	Outcome/Dissemination	Completion
Bridge academic research and the general public by sharing scholars' knowledge with the broadest possible audience	Produce film on Modern Slavery & Human Trafficking	Short film (15-20 minutes) about supply chains: definitions, history, and scope of the problem of coerced labor	Planning under way, project to start in Jan. 2017; Bulk of filming will occur in March 2017	General public; activist community; scholars in related fields; secondary school teachers & students	- GLC website; Yale YouTube channel - CityWide Youth Coalition (New Haven youth-led social justice group) - openDemocracy-Beyond Slavery (UK-based web research portal) - Films for Action (online documentary distribution network) - Teaching for Change (distribution network for social justice curricula)	July 2017

Gilder Lehrman Center for the Study of Slavery, Resistance, and Abolition at Yale University
Robina Foundation Work Plan, October 2016

Program Area: New Media – Communications						
Goal	Strategy	Actions	Start date	Target audience	Outcome/Dissemination	Completion date
Bridge academic research and the general public by sharing scholars' knowledge with the broadest possible audience	Harness new digital media to benefit GLC mission; increase GLC productivity; Increase awareness of GLC programs; improve accessibility of GLC digital resources	New hire: Media Project Manager; part-time, two-year position	Posted Oct. 2016; start date: Dec. 2016	GLC audiences at large	- Manage production of digital resources, including short films, podcasts, and multimedia and digital research projects - Develop contracts and manage workflows - Enhance GLC website and social media communications - Solicit and incorporate feedback from variety of collaborators and stakeholders - Enhance and develop distribution networks	Dec. 2016- Dec. 2018
		GLC website development; refresh and update GLC web design	Sept. 2016	General public; teachers and students; researchers	- New organizational design and functionality - Continually updated information - New pages devoted to digital resources - New page devoted to Modern Day Slavery: http://glc.yale.edu/modern-slavery	February 2017
	Expand awareness of historical roots of contemporary human rights problems; bridge academic and popular interest in GLC concerns	Produced short documentary film about the legacies of the 14 th Amendment; series of brief clips	July 2016	Univ. and secondary school teachers and students; general public	GLC website; Yale YouTube channel http://glc.yale.edu/lectures/evening-lectures/20152016/equal-protection-origins-and-legacies-fourteenth-amendment	Oct. 2016
		Produce podcast series, <i>Slavery & Its Legacies: Conversations with GLC Fellows</i> . Short audio interviews with GLC Fellows about their work.	Sept. 2016	General public; university students & faculty	GLC website; Yale iTunes channel; social media	Dec. 2016 (Launch date)

Gilder Lehrman Center for the Study of Slavery, Resistance, and Abolition at Yale University
Robina Foundation Work Plan, October 2016

Program Area: New Media – Communications (cont.)						
Goal	Strategy	Actions	Start date	Target audience	Outcome/Dissemination	Completion date
Bridge academic research and the general public by sharing scholars' knowledge with the broadest possible audience	Increase use of GLC resources by secondary school teachers and students	Develop curricular resources based on: <i>The Right to Vote: Protection or Suppression Since 1965</i> —Panel discussion, and digital film; Convene teacher focus groups to develop curricular modules regarding efforts to abridge and to ensure electoral franchise	Sept. 2016 (planning); Nov. 3, 2016 (panel discussion)	Yale faculty & students; general public; voting rights activists; secondary school teachers and students	- Live panel discussion; digitized film of event - <u>Curricular modules</u> ; historical chronologies, discussion questions, digitized primary source documents, classroom activity suggestions - Web-based digital resources	March 2017
	Expand public awareness of historical roots of contemporary human rights problems	Film in planning: <i>Modern Slavery & Human Trafficking</i> Short film (15-20 minutes) about supply chains: definitions, history, and scope of the problem of coerced labor	Jan. 2017; Bulk of filming will occur in March 2017	General public; activist communities; scholars in related fields; secondary school teachers & students	- GLC website; Yale YouTube channel - CityWide Youth Coalition (New Haven youth-led social justice group) - openDemocracy-Beyond Slavery (UK-based web research portal) - Films for Action (online documentary distribution network) - Teaching for Change (distribution network for social justice curricula)	July 2017
	Enhance Yale's accountability for legacy of slavery; Highlight GLC's leadership on the topic	Digital research project: <i>Lost Voices</i> . Short historical narratives regarding slavery and slave trade based on Yale manuscripts and archival materials	Sept. 2016	Yale faculty & students; New Haven area community; Ivy League & other institutions of higher education	- Electronic database - Digitized resources and webpage - Maps & walking tours - Enhanced network of institutional accountability for legacies of slavery	May 2017 (launch date)

Gilder Lehrman Center for the Study of Slavery, Resistance, and Abolition at Yale University
Robina Foundation Work Plan, October 2016

Program Area: Teacher Outreach and Africa Teachers' Institute						
Goal	Strategy	Actions	Start date	Target audience	Outcome/Dissemination	Completion date
Enhance the intellectual lives of teachers on two continents; Create models for teaching national trauma & its aftermaths	Develop multiyear program: <i>History & Memory in South Africa, the United States, and Rwanda</i>	Week-long institutes over the course of three summers with cohort of ten teachers from each of three countries focused on learning and teaching about apartheid, slavery, and genocide	Sept. 2016 (planning); Summer 2017: South Africa; Summer 2018: U.S.; Summer 2019: Rwanda	Secondary school teachers & students-international	- Interactive web platform - Electronic networks for international exchange - Curricular materials and teaching modules - Video journals, visual documentation, and written reports	Dec. 2019
	Professional development for regional middle school and high school teachers	Teacher Workshop series: <i>New Histories of the African Diaspora</i> -- Monthly development workshops, including visiting guest lectures, documents for classroom use, and discussion	Sept. 2016; Sept. 2017	Secondary school teachers & students; Yale faculty, fellows, and students	- Intellectual enrichment - Enhanced teaching methodologies and resources	May 2017; May 2018
	Increase dissemination and use of Yale archival materials	Document-study workshops for teachers and students. Hands-on introduction to working with primary source documents, led by Yale archivists and graduate students	Sept. 2016; Sept. 2017	Secondary school teachers & students	- Intellectual enrichment - Enhanced teaching methodologies and resources	May 2017; May 2018

Gilder Lehrman Center for the Study of Slavery, Resistance, and Abolition at Yale University
Robina Foundation Work Plan, October 2016

Program Area: GLC Yale Public History Institute						
Goal	Strategy	Actions	Start date	Target audience	Outcome/Dissemination	Completion date
Bridge academic research and the general public by sharing scholars' knowledge with the broadest possible audience	Develop models for public history knowledge and interpretation	GLC- Yale Public History Institute: weeklong summer seminar to explore innovative ways to interpret African American history and culture for the broader public, led by eminent public historians and scholars	July 2016 July 2017	Practicing public historians; staff at cultural institutions; graduate students; public history audiences	- Professional networks for public historians - Enhanced historical knowledge for staff of museums and other cultural institutions - Enhanced interpretation skills - Exhibits and programming grounded in scholarly excellence	July 2016 July 2017

**Gilder Lehrman Center for the Study of Slavery, Resistance, and Abolition at Yale University
Staff Overview- October 2016**

Mission Statement:

The Gilder Lehrman Center for the Study of Slavery, Resistance, and Abolition, a part of the Whitney and Betty MacMillan Center for International and Area Studies at Yale University, is dedicated to the investigation and dissemination of knowledge concerning slavery and its legacies across all borders and all time. This includes the chattel slave system and its destruction as well as contemporary forms of coerced labor. The Center seeks to foster an improved understanding of the role of slavery, slave resistance, and abolition in the functioning of the modern world by promoting interaction and exchange between scholars, teachers, and public historians through publications, educational outreach, and other programs and events.

Director:

As of June 2004, David W. Blight succeeded Professor Emeritus David Brion Davis to become the director of the Gilder Lehrman Center. David is also the Class of 1954 Professor of American History at Yale University. Along with his work at the Center and in the History Department at Yale, he works in many capacities in the world of public history, including on boards of museums and historical societies. David is the author of countless publications including his upcoming, full biography of Frederick Douglass that will be published by Simon and Schuster by 2017.

Associate Director:

After four years with the GLC, Assistant Director David Spatz stepped down to return to Chicago to be with his spouse. David is currently a resident fellow at the Newberry Library where he is finishing up his book manuscript on the history of the Chicago highway system.

The Center's new Associate Director, Michelle Zacks, began work on August 1, 2016. With a Ph.D. in American Studies from the University of Hawai'i-Mānoa, Michelle worked most recently as a folklorist and public historian on Maryland's Eastern Shore of the Chesapeake Bay, focusing on African American history and culture. Having grown up in the New Haven area, Michelle is familiar with the region's social justice issues and its racial, class, and ethnic divides. She is passionate about building and sustaining bridges between academic scholarship and multiple general public audiences, activists, and students.

Director of Education:

Thomas Thurston, GLC Director of Education, was made a full-time staff member on September 1, 2016. In addition to his work in creating an annual, comprehensive bibliography of scholarly works on slavery and abolition for the journal *Slavery & Abolition* and his outreach work with teachers and students, this has allowed him more time to work on the international teaching institute on "History and Memory in South Africa, the United States, and Rwanda" and to take on some of the Center's new media work, including the GLC newsletter, website, Facebook page, and podcast interviews.

Administrative Assistant:

Melissa McGrath has been with the GLC since 2006. She holds a BA in journalism and commercial art from the University of Wisconsin, Madison. Before coming to the GLC, Melissa worked as a graphic designer in Minneapolis and New York City and more recently as a scenic artist for the Yale Repertory

Theatre. In June 2016, Melissa's hours were increased to help with the financial and logistical implementation of the Center's new programs and initiatives.

Media Project Manager:

In October 2016, the GLC began advertising for the position of a Media Project Manager. The Media Project Manager will produce a wide variety of digital media resources for the Center, including, for example, short films, podcasts, and multimedia and digital research projects. He or she also will be responsible for making these resources broadly accessible to teachers and the general public nationwide through the GLC website and new distribution networks. We are seeking someone who is familiar with both the Yale and New Haven communities and is comfortable working with a range of collaborators, inside and outside of the academy. The Media Project Manager will collect feedback from teachers, Yale and New Haven community members, and other stakeholders, and work with the GLC staff to develop resources based on that input.

Undergraduate Student Assistant:

In September 2016, the GLC hired a part-time student assistant, Yale junior Eva Branson. Eva is a History major and is enrolled in the university's Special Academic Program in Human Rights. Last summer she worked as an intern for the National Commission for the Fight Against Genocide in Kigali, Rwanda. In addition to helping with administrative tasks, Eva also contributes to program development for the GLC's Africa-U.S. Teachers' Institute.

Gilder Lehrman Center for the Study of Slavery, Resistance, and Abolition, Yale University
Modern Day Slavery Working Group

October 2016

Co-Chairs: Genevieve LeBaron (Univ. of Sheffield); Jessica Pliley (Texas State University)

Hosted by the GLC (David Blight, Director; Michelle Zacks, Associate Director)

→ First meeting: Friday-Saturday, March 3-4, 2017, Yale University, New Haven, CT, USA

Subsequent meetings: September 2017, March 2018, September 2018

The GLC Modern Day Slavery Working Group will provide a platform for interaction for a diverse group of top scholars drawn from the primary international research networks. Group members are experts on different dimensions of contemporary slavery and trafficking who share a commitment to big-picture thinking, rigorous scholarship, public engagement, and to carving out the policy relevance of their work. The group will focus on aspects of research on human trafficking and modern slavery that are key to its societal value, but rarely get discussed within existing networks focused on themes or topics. These issues include, but are not limited to: the links between scholarship, policy, and activism; methodologies for modern slavery research; the paucity of reliable data on contemporary forced labor; and opportunities for interdisciplinary cooperation. The Working Group will foster intellectual exchange between existing projects anchored within different disciplinary traditions and provide fertile ground to undertake new collaborative projects.

With the GLC providing the resources and locale for convening and Drs. LeBaron and Pliley providing leadership, the Working Group will decide for itself specific outcomes to be produced. Possibilities include a landmark, field-defining book on modern slavery; the creation of new web-based resources; or public conferences or institutes focused on the topic. The Working Group also will open up new channels of communication between scholars of contemporary slavery and the wider public, bridging the gap between cutting-edge, independent research and public understandings of slavery, such as through podcasts, film, and journalistic writing.

Invited members

Jean Allain (Queens University, Belfast)

Kevin Bales (Univ. of Nottingham)

Janie Chuang (American University)

Andrew Crane (Schulich School of Business, Toronto)

Grace Delgado (Univ. of California-Santa Cruz)

Anna Mae Duane (Univ. of Connecticut)

Kimberly Hoang (Univ. of Chicago)

Gunther Peck (Duke Univ.)

Joel Quirk (Univ. of Witwatersrand, South Africa)

→ JJ Rosenbaum (Yale Law School)

Elena Shih (Brown University)

Zoe Trodd (Univ. of Nottingham)

GILDER LEHRMAN CENTER MODERN SLAVERY FELLOWS

2012-2013

- **Claude d'Estrée** (Director of International Human Rights Degree Program and Director of Human Trafficking Clinic, Josef Korbel School of International Studies, University of Denver), "Methodological Problems in the Study of Forced Labour, Human Trafficking, and Modern Slavery: A Discussion"
Two months: November-December 2012

- **Jessica Piiley** (Associate Professor of History, Texas State University), "The FBI's Local White Slavery Corps: The Fight Against Sex Trafficking and the Growth of the Associative State, 1910-1919"
One year: August 2012-May 2013

Yale University Undergraduate Teaching, Spring 2013 Semester: "From White Slavery to Sex Trafficking"

Publications

Policing Sexuality: The Mann Act and the Making of the FBI (Harvard University Press, 2014).

"Vice Queens & White Slavery: The FBI's Crackdown on Elite Brothel Madams in 1930s New York City," *Journal of the History of Sexuality* 25, no. 1 (Jan 2016): 137-67.

General Audience Articles

"Sexual Surveillance and Moral Quarantines: A History of Anti-Trafficking," *Beyond Trafficking and Slavery, OpenDemocracy*, Apr. 27, 2015.

"Sex Trafficking and the Carceral State," *End Slavery Now: The Blog*, Mar. 15, 2015.

"Why is it Congress Seems Concerned with Families Only When Sex Trafficking is at Issue?" *TIME* Dec. 13, 2014.

Projects

Co-chair (with Genevieve LeBaron): GLC Modern Day Slavery Working Group, 2016-2018.

Advisor, UK Arts & Humanities Research Council Grant, "Trafficking, Smuggling and Illicit Migration in Gendered and Historical Perspective, c. 1870 – 2000," Julia Laite (PI) and Philippa Heatherington (PI).

Co-Organizer with Julia Laite (University of London, Birkbeck) and Philippa Hetherington (University of Sydney, now University College London) of Trafficking, Smuggling, and Illicit Migration in Historical Perspective Conference, Birkbeck, University of London, June 18-20, 2015.

2013-2014

- **Kerry Ward** (Associate Professor, Rice University), "Ground Zero: The explosion of anti-human trafficking initiatives in Houston, Texas"
One year: August 2013-May 2014
Yale University Undergraduate Teaching, Spring 2014 Semester: "Modern Slavery and Human Trafficking in Historical Perspective."
Forthcoming, *Suppressing Slavery at Sea: International Cooperation in Ending the Maritime Slave Trade*

2014-2015

- **Rebecca S. Prichard**, Lecturer in Theatre Studies, Essex University, "Carnevale" a play mixing slavery in 18th Century Venice and modern trafficking
One year: August 2014-May 2015
Yale University Undergraduate Teaching, Spring 2015 Semester: "Race and Gender in Performance."
Summer 2015: a pre-production reading performance of *Carnevale* with the Royal Shakespeare Company.

2015-2016

- **Genevieve LeBaron** (Vice-Chancellor's Fellow, Department of Politics, University of Sheffield), "Understanding and Governing the Contemporary Global Business of Forced Labor"
One year: September-October 2015; January-May 2016
Yale University Undergraduate Teaching, Spring 2016 Semester, Dept. of Political Science: "Forced Labor, Human Trafficking, and Slavery in the Global Economy."

Publications

Under contract: *Researching Forced Labour in the Global Economy: Methodological Challenges and Advances*, Proceedings of the British Academy series (Oxford: Oxford University Press, 2017).

Edited Collections:

With Neil Howard, *Forced Labour in the Global Economy* (London: openDemocracy, 2016).

With Joel Quirk, *On History: Forced Labour, Past and Present* (London: openDemocracy, 2016).

With Susan Ferguson, Sara Farris, and A. Dimitrakaki, *Social Reproduction Beyond the Household*, Special Issue of *Historical Materialism* 24 (2), 2016.

Book Chapters:

With Peter Dauvergne and Jane Lister, "The New Gatekeeper: Ethical Audits as a Mechanism of GVC Governance," in Claire Cutler and Thomas Dietz (eds), *The Politics of Transnational Governance by Contract* (Routledge, 2017).

"Women and Unfree Labour in the Global Political Economy," in Adrienne Roberts and Juanita Elias (eds), *Handbook of International Political Economy of Gender* (Edward Elgar, 2017).

"Slavery, Human Trafficking, and Forced Labour: Implications for International Development," in Jean Gruegel & Daniel Hammett (eds), *The Handbook of International Development* (London: Palgrave, 2016): 381-398.

"Prison Labor, Slavery, and the State," in Laura Brace & Julia O'Connell-Davidson (eds), *Slaveries Old & New*, Proceedings of the British Academy (Oxford: Oxford University Press, 2016).

Research Report:

With Jane Lister, *Ethical Audits and the Supply Chains of Global Corporations* (SPERI Global Political Economy Brief 1, 2016).

Projects

Co-chair (with Jessica Pliley): GLC Modern Day Slavery Working Group, 2016-2018.

Research Fellow and leader of Sheffield Political Economy Research Institute (SPERI) Programme on 'Labour and Work in the Global Political Economy': <http://speri.dept.shef.ac.uk/research-areas/labour-and-work-in-the-global-political-economy/>

Co-founder and editor of openDemocracy's *Beyond Trafficking and Slavery*:
<https://www.opendemocracy.net/beyondslavery>

2016-2017

- **Wendy Hesford**, Professor, Ohio State University, "Enslaved Girlhoods: Human Trafficking Law, Literature, and Abolitionist Rhetoric"
One year: August 2016-May 2017
Yale University Undergraduate Teaching, Fall 2016 Semester, Dept. of Women's, Gender, and Sexuality Studies: "Human Trafficking and Modern Slavery"
- **Tammy Ingram**, Assistant Professor, College of Charleston, "The Wickedest City in America: Sex, Race, and Organized Crime in the Jim Crow South"
First Robina Fellow in Modern Slavery at the Gilder Lehrman Center
One year: August 2016-May 2017
Yale University Undergraduate Teaching, Spring 2017 Semester, Dept. of History: "Neo-Slavery in the Jim Crow South: Sex, Race, and Forced Labor After the Civil War"
Interview with the MacMillan Center, "Welcoming Tammy Ingram, the First Robina Fellow for Modern Slavery": <http://macmillan.yale.edu/news/welcoming-tammy-ingram-first-robina-fellow-modern-slavery>
- **Elena Shih**, Assistant Professor, Brown University, "The Price of Freedom: Moral and Political Economies of Human Trafficking in China, Thailand, and the U.S."
One month: October 2016

COUNCIL *on* FOREIGN RELATIONS

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November 1, 2016

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

Dear Penny:

I am pleased to submit the progress report for the Council on Foreign Relations (CFR) Expanded Diversity Initiative in Foreign Policy. The report covers the period November 1, 2015, through October 31, 2016.

During the last year of the project, CFR has continued its collaborations with the International Career Advancement Program (ICAP) and the Global Access Pipeline (GAP) to broaden minority representation in the foreign policy community. The initiative's highlights include recruiting, placing, and mentoring an expanded class of Franklin Williams interns and arranging for CFR staff to participate in fifteen university career fairs around the country with significant minority student populations. CFR has also reconvened the CFR-ICAP-GAP joint planning committee to begin planning for the spring 2017 Conference on Diversity in International Affairs and hired Shira Schwartz as the diversity coordinator to manage the day-to-day activities of the initiative.

We are grateful for the Robina Foundation's generous support for the Expanded Diversity Initiative. It has enabled CFR to strengthen its long-standing efforts to foster racial and ethnic diversity in the U.S. foreign policy field. Please contact me if you have any questions or if you need additional information about this project report.

Sincerely,



James M. Lindsay
*Senior Vice President, Director of Studies,
and Maurice R. Greenberg Chair*
tel 202.509.8405 fax 212.434.9880
jlindsay@cfr.org

5-year grant: \$1,878,254
last payment: 2016

Expanded Diversity Initiative -
addl. activities:
\$1,836,885
last payment: 2015
last report - next year?

Expanded Diversity Initiative in Foreign Policy: CFR Activities

Annual Progress Report to the Robina Foundation

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Reporting Period: November 1, 2015 – October 31, 2016

Report Due: November 1, 2016

Executive Summary

The Expanded Diversity Initiative in Foreign Policy that the Council on Foreign Relations (CFR) launched in March 2012 seeks to identify talented members of underrepresented groups, expose them to opportunities in foreign policy, actively encourage them to consider working in the field, and help them develop personal networks that will further their careers. The initiative's goal is to make the foreign policy community in the United States more representative of American society as a whole.

The Expanded Diversity Initiative consists of three complementary activities: (1) expanding CFR's longstanding Franklin Williams Internship program to include additional minority students; (2) sponsoring an annual conference in partnership with the International Career Advancement Program (ICAP) and the Global Access Pipeline (GAP) to inform minority students and young professionals about foreign policy career possibilities; and (3) sending CFR staff to career fairs at colleges and universities with significant minority student populations. This report reviews these three activities.

CFR's efforts to increase the number of minority students choosing foreign policy careers will by definition yield demonstrable results only over a period of years. During its fourth year in operation, the Expanded Diversity Initiative is accomplishing its goal of exposing more minority students to foreign affairs in the hopes that they will eventually choose to make it a career. CFR successfully executed all of the proposed activities for year four. Specific program achievements include: exceeding the annual target number of Franklin Williams interns; deepening contacts with department chairs and professors at historically black colleges and universities, which should broaden the pool of applicants for CFR staff recruiting and the Franklin Williams Internship program; executing a successful Conference on Diversity in International Affairs; and expanding the Council's outreach to academic institutions with large minority populations.

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

The Expanded Diversity Initiative seeks to expand minority participation in foreign policy by encouraging members of underrepresented groups to pursue careers in international relations. The initiative identifies talented members of underrepresented groups, exposes them to career possibilities in foreign policy, actively encourages them to consider working in the field, and helps them develop personal networks that will further their careers. By sustaining these

activities over time the initiative looks to make the foreign policy community in the United States more representative American society as a whole.

This report covers the following activities supported by the Robina Foundation: (1) an expansion of CFR's current Franklin Williams Internship for college and graduate students from underrepresented groups; (2) a collaboration with ICAP and GAP to heighten awareness among minority students and young professionals about foreign policy career opportunities and to deepen their involvement in the foreign policy community through an annual Conference on Diversity in International Affairs; (3) increased CFR participation in college career fairs in New York, Washington, DC, and other select cities around the country; (4) establishing the position of diversity coordinator at CFR, and (5) additional activities for academic outreach and increased advertising using reallocated funds originally specified for the external review of the Expanded Diversity Initiative.

These forward-looking and practical activities build on CFR's extensive, longstanding, and ongoing efforts to promote diversity, leveraging CFR's demonstrated strengths in the foreign policy arena, and mobilizing the complementary skills and networks of outside organizations rather than building redundant infrastructure at CFR. The organizations CFR has worked with to carry out the Expanded Diversity Initiative all have considerable expertise on diversity issues.

ICAP seeks to bring greater diversity to staffing of senior management and policymaking positions in international public service and the global private sector through a selective mentorship program and a close-knit alumni network. ICAP's alumni association 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 in their careers, and many of them now hold senior foreign policy positions. GAP brings together an array of think tanks and nonprofit groups to enhance the quality and diversity of U.S. participation in international affairs; CFR is a founding member of the GAP consortium.

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

In the fourth year of the Expanded Diversity Initiative, CFR built on the success of the existing components. CFR continued recruiting, placing, and mentoring an expanded class of Franklin Williams interns and sent CFR staff to participate in university career fairs around the country with significant minority student populations. CFR planned and executed the 2016 Conference on Diversity in International Affairs with ICAP and GAP. CFR had a diversity coordinator to manage the day-to-day activities of the initiative. The Academic Outreach department expanded their participation in conferences that attract academics from underrepresented groups, and the Fellowships Affairs staff traveled to universities with diverse student bodies to publicize the visiting fellows program and CFR more broadly.

A. Franklin Williams Internship

The Expanded Diversity Initiative made it possible for CFR to expand its longstanding Franklin Williams Internship program to include additional underrepresented minority students. The internship, which seeks to give underrepresented minority students the exposure, knowledge, and skills needed to work in the foreign policy field, traditionally brought two interns to CFR each year. The goal of the diversity initiative was to recruit eight Franklin Williams interns annually, which includes three additional placements, and to track recruitment progress.

During the reporting period, the six fall 2015 Franklin Williams interns recruited and reported on in CFR's November 2015 progress report completed their internships with the Foreign Affairs Advertising, Education, Meetings, CFR.org, and Development departments, as well as the Africa Studies program within the David Rockefeller Studies Program. CFR's Human Resources (HR) department received more than 1,000 applications for the spring, summer, and fall 2016 Franklin Williams internships. CFR also considered diverse candidates from the general internship pool of over 1,000 applicants over the same period. CFR's HR department continued to actively market the internship on CFR's award-winning website, CFR.org, and with historically black colleges and universities through a variety of listservs that targeted minority students, as well as CFR's Human Resources Twitter handle. CFR also shared position announcements with all students that CFR staff met during the career fairs attended this year; many of these students came from underrepresented groups. CFR promoted the internship at the Conference on Diversity in International

Affairs and shared the internship posting with affiliates of the Global Access Pipeline. As a result of these efforts, CFR exceeded the goal and hired three Franklin Williams interns for the 2016 spring semester, six Franklin Williams interns for the 2016 summer semester, and two Franklin Williams intern during the 2016 fall semester. Appendix A provides the biographies of Franklin Williams interns placed since the last reporting period.

The students chosen as interns went through a rigorous selection process that consisted of a review of each candidate's academic standing along with interviews conducted by two or more members of CFR's mid-level or senior staff. The 2016 Franklin Williams spring and summer interns were placed in departments across CFR, including Global Communications and Media Relations, Interdepartmental Studies, CFR Digital, Independent Task Force Program and within the David Rockefeller Studies Program, where interns worked with teams including U.S. Foreign Policy, Global Business, Global Health, and within the Director of Studies' office. The fall 2016 Franklin Williams interns are currently working with Corporate Affairs, as well as the Global Health program within the David Rockefeller Studies Program.

While at CFR, Franklin Williams interns participated in skills-based seminars through CFR's Intern Professional Development program. Seminars included sessions on resume writing, library and research techniques, the basics of fundraising, editing and grammar skills, careers in foreign policy, and careers in the State Department. Franklin Williams interns were encouraged to sit in on CFR meetings of interest, and each intern traveled to the CFR office where they are non-resident (e.g., New York or Washington, DC) to attend an event and meet with team members. All fall 2015 and spring 2016 Franklin Williams interns were invited to the 2016 Conference on Diversity in International Affairs, where they received one-on-one career counseling and a mentor.

In addition to direct, hands-on exposure to different career paths in international relations, the Franklin Williams interns were encouraged by their supervisors to set and achieve individual professional development goals. These goals included developing familiarity with the policy issues surrounding a particular topic, publishing written work on a CFR blog, contributing to research, helping plan and staff events, using social media in a professional context, growing accustomed to a think tank's working environment, and maximizing the CFR network by speaking with members and staff about their career paths. All the interns reported to Human Resources staff in their exit interviews that they had met their stated goals and gained a better sense of their individual career goals and path as a result of their internship.

CFR's HR department has begun recruiting for the spring 2017 semester Franklin Williams interns and anticipates bringing on more Franklin Williams interns throughout next year.

B. Conference on Diversity in International Affairs

The Expanded Diversity Initiative made it possible for CFR to continue its collaboration with ICAP and GAP for the annual, two-day Conference on Diversity in International Affairs. CFR enlisted the support of both ICAP and GAP in the annual conference because their missions mirror the goals of CFR's Diversity Initiative: to increase the representation and preparedness of minority groups in the international arena. The conference builds on and extends the longstanding cooperation among the three organizations in working to promote diversity in the foreign policy community. The conference's goal is to connect students and professionals from diverse backgrounds to career opportunities in international affairs. With the understanding that the path toward increased diversity in international affairs must start with early exposure and extend through the creation of international leadership opportunities, the conference aims to engage a mix of students, mid-career professionals, and seasoned practitioners.

The 2016 Conference on Diversity in International Affairs was held at CFR's Washington, DC, office on April 15 and 16. The conference—which drew over two hundred participants from across the country, including young and mid-career professionals and college students—consisted of sessions on an array of topics. The guest list drew from college and graduate students from GAP's affiliate organizations, groups like One World Now! and Global Glimpse that start the pipeline by engaging underrepresented students in world issues from a young age. CFR also invited Franklin Williams interns from the past year. CFR made funding for travel available to these students. ICAP's alumni network and CFR's term member program attracted an impressive group of mid-career professionals working across

the foreign policy community. CFR invited established life members in the foreign policy community who have a particular interest in mentoring younger generations and promoting a more diverse foreign policy community.

The conference began with a networking reception and keynote address by Kalpen Modi, actor and former associate director for the White House Office of Public Engagement and a CFR term member. In a conversation with Reuben Brigety II, Adjunct Senior Fellow for African Peace and Security Issues at CFR and Dean of the George Washington University's Elliott School of International Affairs, Mr. Modi emphasized the importance of diversity in the policy community for both representation and inclusion purposes. He spoke about his experiences in both foreign affairs and Hollywood, and took questions from the audience that ranged from confronting macroaggression in the workplace to finding mentors that support careers and a career path. Mr. Modi also participated in the networking receptions that preceded and followed the keynote address, providing additional opportunities to speak with conference participants.

The conference also included plenary panels as well as smaller workshops and skill-building sessions. The workshops were designed to appeal to the various demographic groups that the conference brought together and to enhance participants' access to, and preparedness for, international careers. There were workshops geared toward college and graduate students seeking jobs in international affairs, mid-career professionals building their careers, and specialist workshops on foreign policy topics for seasoned practitioners. These smaller group environments allowed an intimate setting for discussion as well as direct skills training and feedback. Sessions included:

- A plenary panel on gender and violent extremism;
- A plenary panel on opportunities to be involved in international service, featuring Ambassador Ruth Davis, the first woman of color to be appointed as Director General of the Foreign Service and the first African-American Director of the Foreign Service Institute;
- Foreign policy workshops on global health, lessons learned from working in foreign policy, and regulating water sources;
- Career workshops on advising political campaigns, finding midcareer fellowships in international affairs, and developing a personal brand in the workplace.

The full 2016 conference agenda is included in Appendix B. A dedicated conference page on CFR.org includes video of the keynote and plenary sessions, as well as conference photos.

Special features of the conference included informal mentoring and one-on-one career counseling, including the 2015-2016 Franklin Williams interns, a target group of the Robina-funded initiative.

The conference stressed networking, including hosting a speed networking session as one of the breakout activities. CFR staff actively sought to introduce the attendees to one another during breaks in the sessions, and they worked to establish formal mentor relationships by pairing seventy-five students with professionals for mentoring in advance of the conference. The conference also offered thirty-five career counseling sessions with professional counselors from Washington, DC, area universities and professional organizations. These sessions were available by advance registration to all guests, and all Franklin Williams interns had a one-on-one session with a career counselor.

A measure of the conference's influence was the enthusiasm it generated on Twitter. Participants tweeted to the hashtag #CDIA2016; a review of the comments participants shared about the experience speaks to finding role models, career guidance, and inspiration. Additionally, a news story on the conference highlights was included in the summer 2016 edition of the *Chronicle*, CFR's member newsletter, which is distributed quarterly to CFR's roughly 5,000 members.

A survey that CFR commissioned with its partners following the conference found that participants were enthusiastic about their experience. Respondents expressed great satisfaction with the conference's quality. When asked to rate the conference overall, sixty nine percent of respondents answered that the conference was "excellent" and twenty six percent answered that it was "good." One of the respondents to the 2016 survey wrote: "I would say this was a highly effective and successful conference. The content was incredible, the logistical aspects (food, beverage, venue, times, etc) were great, and the speakers were engaging and real. I thought the session topics and workshops were relevant and very useful for the attendees and I wish I could've attended more of them (they ran concurrently). I was a huge fan

of the session 'Working in International Affairs as a Diverse Professional: Reflections from the Field.' The mentee I was assigned turned out to be an outstanding fit and I am so happy that I decided to partake as a mentor. Before the conference I was ready to shift my career to the corporate world, but after CDIA I feel re-energized and motivated to keep my dreams of being a Foreign Service Officer alive. Thank you for putting this conference together and I hope you continue to have it for years to come." Attendees found the conference to be a venue for networking with other students and professionals, with sixty three percent of respondents rating the networking opportunities as "excellent" and seventeen percent rating them as "good." In response to the question about the most useful part of the conference, one person noted that it was having the opportunity "to interact with other people of color, whether they were in the work force or students, in a relaxed yet professional setting. We had the opportunity to open up an honest dialogue and discuss surprisingly similar challenges we face as people of color and give each other advice." The conference provided a unique setting for people from diverse backgrounds to achieve that goal.

The survey respondents rated highly the keynote address on Friday evening by Mr. Modi, who received rave reviews from participants. All respondents who were present for the keynote said that the discussion with Mr. Modi was "excellent" or "good." One of the respondents wrote that they would like to see more "unconventional" speakers like Mr. Modi in the future, and many participants remarked on the strong dynamic between Mr. Modi and Dr. Brigety, the moderator. Another standout session was the plenary on opportunities for international service, with Ambassador Ruth Davis of the Foreign Service and Theresa Chaurand, Director, Intergovernmental and External Affairs for the Peace Corps. When asked to identify the most useful aspect of the conference, the respondents named networking, informative sessions, career counseling, practical advice, and mentoring. Appendix C contains the full 2016 survey findings

The 2017 conference, scheduled for April 28 and 29, 2017, in Washington, DC, will once again bring together diverse professionals and students for two days of seminars and networking on foreign policy, skill-building, and professional development. The CFR-ICAPAA-GAP joint planning committee will finalize the agenda for the conference this winter. Similar to previous conferences, the basic structure of the conference will include a keynote speaker, plenary sessions, skill-building workshops, foreign policy focused break-out sessions, career advisory opportunities, and a networking reception. In coordination with CFR's Meetings Program, the committee is in the process of identifying speakers and panelists.

C. Career Fairs

CFR continued to have a high level of involvement in attending career fairs, sending representatives to thirteen events during the reporting period. At these career fairs, representatives from CFR's HR department and David Rockefeller Studies Program actively recruited candidates for CFR opportunities, including the Franklin Williams internship. CFR representatives also provided foreign policy related reading materials to interested students.

CFR representatives attended the following career fairs during the reporting period:

- Atlanta University Career Consortium (AUCC): This fair included students from Morehouse College, Spelman College, and Clark Atlanta University.
- American University Career Fair (both fall and spring semesters)
- American University Job and Internship Fair
- Columbia University Career Fair
- Columbia University Undergraduate Career Fair
- CUNY Baruch College Social Impact Fair
- George Washington University Career Fair (both fall and spring semesters)
- Georgetown University
- Howard University Career Exploration Fair
- DC Career and Internship Connection Consortium
- University of California, Berkeley "Just in Time" Job Fair
- Stanford University Spring Career Fair
- The University of Texas at Austin Government and Non-profit Career Fair

These career fairs were chosen due to several factors, including their New York or Washington, DC, location (crucial for recruiting school-year Franklin Williams interns), their high percentages of minority students, and their reputations for strong programs in political science or related fields.

CFR sent human resources personnel to each career fair. In many cases CFR sent Studies program staff as well, so that the students could converse with a CFR research associate or mid-level staff member about their roles and the research that is done within Studies. Where applicable, CFR invited employees who are professors or alumni at the relevant university to join in representing CFR at the fair.

In addition to sending teams to career fairs, CFR representatives used these recruiting trips to meet with political science faculty and university administrators when possible. In these meetings, university representatives typically offered to alert CFR of highly qualified candidates for internships and career opportunities.

The informal networking opportunities that come along with attending the career fairs have already yielded results and are helping CFR build a long term pipeline for talent. For example, Breanna Wilkerson, a summer 2016 intern who worked interdepartmentally and is a Spelman College graduate, attended the AUCC Career Consortium where she met HR representatives. Breanna is only one of the many intern and staff member candidates CFR has met at career fairs over the years. Additionally, professors and career offices at various universities are sending top talent to HR for open positions, based on the connections developed while on campus for career fairs. These relations are reinforced by annual participation in events and visits to campuses. Relationship building with campus staff has been a highly productive mechanism to recruiting minority students for internships and full-time employment at CFR.

D. CFR Diversity Coordinator

CFR hired a diversity coordinator, Shira Schwartz, in October 2014, as previously reported. Ms. Schwartz works under the direct oversight of Dr. Lindsay, and in coordination with Jan Mowder Hughes, vice president for human resources and administration. Overall oversight of the diversity coordinator position resides with CFR President Richard N. Haass.

Ms. Schwartz managed the day-to-day activities of CFR's diversity initiative. She has been primarily responsible for: planning the annual Conference on Diversity in International Affairs in conjunction with CFR's partners, GAP and ICAP; supervising the deepening contacts with leaders at graduate schools of international relations and other members of CFR's community interested in advancing the diversity work; ensuring the integration of the Franklin Williams interns into the intellectual life of CFR; and attending, along with other CFR representatives, meetings and networking events with other think tanks on recruiting members of underrepresented groups. Ms. Schwartz has been an active member in the Think Tank Diversity Consortium, regularly attending meetings in Washington, DC, and participating in training opportunities sponsored by the group. She also has met with the Franklin Williams interns individually and offered to be a resource as they consider future career opportunities in the field of foreign affairs.

Ms. Schwartz also worked closely in the reporting period with Dr. Lindsay and other senior leaders within CFR to develop a page on CFR's website that outlines the organization's commitment to diversity and inclusion (<http://www.cfr.org/about/diversity-and-inclusion-at-cfr>). The site provides a landing page that outlines the Council's longstanding commitment and actions to increase diversity within the field of foreign affairs, attract new individuals to the work, and provide resources to people interested in these issues. This page will continue to be enhanced.

Ms. Schwartz's role consolidated responsibilities that were previously scattered across CFR staff working in different parts of the organization and who were already stretched handling their primary job responsibilities. It simplified CFR collaboration with organizations like GAP and ICAP by giving them a designated point of contact for their work with CFR. Consolidating the day-to-day management of the Expanded Diversity Initiative under one person ensures greater integration and harmonization of the various parts of the initiative, thereby increasing the chance that it will achieve its intended goals.

E. Additional Activities.

Following the approved reallocation in spring 2015 of funds earmarked for the external review, CFR staff are actively increasing outreach to institutions with significant numbers of academics from underrepresented groups.

CFR's Academic Outreach team regularly sends staff representatives to the country's leading academic conferences which offer opportunities to connect with minority audiences. CFR's Academic Outreach staff identify and partner with existing academic networks that provide a multiplier effect for the Council's current activities and new initiatives in the area of increasing diversity among foreign policy professionals. In March 2016, with support from the Robina Foundation, CFR participated in the National Conference of Black Political Scientists (NCOBPS) annual meeting in Jackson, Mississippi. Following the 2015 gathering, NCOBPS invited CFR to host an event in conjunction with the conference. CFR underwrote the conference's closing lunch program which featured a keynote address by CFR Adjunct Senior Fellow for African Peace and Security Issues Reuben E. Brigety II on the problems and prospects for peace and security in Africa.

Academic Outreach representatives also staffed a booth over the course of the conference where they showcased CFR's resources for educators and students and offered free copies of CFR reports and informational materials. The booth was an opportunity for CFR staff to speak with many of the participants about how CFR resources could support their work, and to discuss opportunities for fellowships and involvement in CFR programming. Several individuals were identified as candidates for participating in CFR's annual College and University Educators Workshop, which is a professional development opportunity for educators at the post-secondary level that introduces them to the wealth of CFR resources ideal for classroom use, offers an opportunity to interact with CFR experts, and provides a forum to discuss best practices for teaching about global issues.

Over the past year, CFR's Fellowship Affairs team actively increased outreach to institutions with significant numbers of academics from underrepresented groups with funds provided by the Robina Foundation. In the fall of 2015, the director and deputy director of the fellowship program visited Ohio State University in Columbus, Ohio, and met with staff members in the Office of Diversity and Inclusion, including the assistant vice provost and executive director of strategic partnerships and mission, as well as numerous professors who focus on international affairs. They discussed CFR's fellowship programs and internship opportunities, as well as shared information on CFR's Model Diplomacy initiative. In late November 2015, the deputy director of the fellowship program visited the University of Texas at San Antonio in San Antonio, TX, a university with a diverse student population. She met with the director of international students and scholar services, as well as the director of the university's career center, and program coordinator of the East Asia Institute. The visit concluded with a discussion with professors who teach in the political science, public policy and engineering departments.

Finally, CFR used the funds allocated by the Robina Foundation to advertise its internship and fellowship opportunities in professional journals and conference programs that will likely reach members of underrepresented group. In this reporting period, that included an advertisement placed for the Franklin Williams internship and CFR fellowships in the Hispanic Association of Colleges and Universities (HACU) Program Book for the 30th Annual Conference in October 2016, as well as an advertisement for the Franklin Williams internship and CFR fellowships in the African Studies Review journal in September 2016.

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.

The Expanded Diversity Initiative achieved all of its program goals in year four and continued to build on the lessons learned from previous positive results. CFR continued its outreach to members of underrepresented groups, brought new Franklin Williams interns to its New York and Washington, DC, offices, and held a successful Conference on Diversity in International Affairs. Increasing the presence of minorities in the U.S. foreign policy community is a long-term proposition that will require the efforts of many organizations. CFR is pleased that its Expanded Diversity Initiative has attracted such great interest and served to catalyze the efforts of other groups.

The fourth year of the initiative produced three main lessons. The first is the impressive roles that Franklin Williams interns take on elsewhere in the field of international affairs after their internships at CFR. In particular, many are continuing to study foreign policy, no doubt inspired by the work they participated in at CFR and, in some cases,

directly as a result of their CFR affiliation. Luiza Monetti, who was a Franklin Williams intern in spring 2015, went to intern full-time at the United Nations in the Department of Field Support for peacekeeping missions. Alexander Diaz, who was a fall 2015 Franklin Williams intern went on to work at Google/YouTube as a public policy analyst. Afua Twumasi-Ankrah, who was a Franklin Williams intern in spring 2015, accepted a position of communications associate at an international development consulting firm. And finally, Sade Tuckett, a summer 2015 Franklin Williams intern, was selected as a 2016 Charles B. Rangel International Graduate Fellow. The Rangel Fellowship seeks to attract and prepare outstanding young people for careers as diplomats in the Foreign Service of the U.S. Department of State, particularly those from minority backgrounds. Ms. Tuckett applied to the Rangel Fellowship after Ms. Schwartz shared a notification about the application deadline that she received through the GAP listserv with the former Franklin Williams interns. Ms. Tuckett's future as a diplomat is a result of the strong network CFR has built with other organizations that have a similar mission to build a diverse pipeline.

Along similar lines, the second lesson is the opportunity to collaborate within CFR to build a long term pipeline of diverse leaders. The Education department, which leads the Model Diplomacy initiative, partnered with CFR's Human Resources department to create the CFR Campus Ambassador program. The program offers high-performing former CFR interns enhanced professional development and universal skills building opportunities beyond their on-site internship experience, while also introducing CFR materials to university campuses. CFR Campus Ambassadors connect their university community with the multitude of CFR resources designed to enhance research and to build global literacy by meeting with students, professors, and library professionals, among others, to discuss CFR resources and opportunities. Campus Ambassadors draw upon their experiences as on-site interns to strategically promote CFR resources at their home institutions. The program also aims to build the Campus Ambassadors' experience and skills through an extensive orientation, bi-monthly conference calls, and one-on-one coaching sessions with CFR staff members. CFR provides professional development for public speaking, business writing, marketing, and networking. When possible, the Campus Ambassadors represent CFR at career fairs. Franklin Williams interns were an ideal choice for the pilot program in 2016, given their interest in foreign policy, strong communication skills, and prior knowledge of CFR. Three of the first five Campus Ambassadors were former Franklin Williams interns, and they have all cultivated a more diverse applicant pool for CFR's internship and career opportunities, as well as expanded student and faculty engagement with CFR's educational resources.

The final lesson is the importance of securing diverse and engaging speakers for the conference on diversity in international affairs. In 2016, 98 percent of participants said that the overall quality of speakers at the conference was excellent or good, on par with the response from 2015 (97 percent). This correlates with an overall rating of the conference at 95 percent as excellent or good. One participant noted in response to the question about the most useful part of the conference: "Seeing professionals that look like me; it was very inspiring and renewed my motivations!" CFR, along with ICAP and GAP, will continue to prioritize identifying accomplished speakers from underrepresented background to provide role models for conference participants in the future.

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 completion of year four, the Expanded Diversity Initiative in Foreign Policy has successfully executed all of the proposed activities for the year. CFR combined the budgets for the Expanded Diversity Initiative in Foreign Policy and Expanded Diversity Initiative in Foreign Policy: Additional Activities since this is the first year we are not reporting on combined activities with Humanity in Action. The line-item difference in year four owes to three factors.

First, the variance in the internship program reflects exceeding the goal in placing more Franklin Williams interns than anticipated in the past year.

Second, the 2016 Conference on Diversity in International Affairs was able to attract local speakers and participants in Washington, DC, and we thus saved on travel costs. We will apply those savings to next year's conference.

Third, CFR's expenses for travel to career fairs were lower than budgeted. This is a result of HR staff securing air fare at discounted rates because the career fairs were identified well ahead of time, as well as the fact that CFR attended

many local career fairs in New York and Washington, DC, which is crucial for recruiting school-year Franklin Williams interns

We are only four months in to the Expanded Diversity Initiative in Foreign Policy: Revised and Realigned grant, and will continue to spend the balance through June 2017.

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.

The Robina Foundation-funded Expanded Diversity Initiative complements CFR's other, longstanding efforts to encourage members of underrepresented groups to participate in the foreign policy debate and consider careers in foreign policy.

CFR's "regular" diversity activities:
Franklin Williams Internship. CFR's Franklin Williams Internship, which supports salaries for two of the five annual interns, is funded through an endowment that was created in 1990 in honor of the late Ambassador Franklin H. Williams.

CFR Fellowships. CFR administers eleven fellowship programs. These programs enable promising early and mid-career government officials, private sector employees, and academics to spend up to a year broadening their perspective on foreign affairs and pursuing research at CFR or another institution. Individuals who spend their fellowship placed at CFR are considered visiting fellows, while those who spend the fellowship elsewhere are considered fellows not-in-residence.

CFR extensively markets its fellowship programs to organizations and networks with deep ties in minority communities. CFR reaches out to faculty at Georgia Institute of Technology, Howard University, Morehouse College, Spelman College, and Temple University, as well as to contacts at the Ron Brown Scholars Program, Posse Foundation Scholars Program, International Career Advancement Program, Charles B. Rangel International Affairs Program, Thurgood Marshall College Fund, the National Association for Equal Opportunity in Higher Education, and the National Conference of Black Political Scientists to ask these individuals to circulate CFR's call for applications and to identify possible fellowship candidates.

Additionally, CFR's Fellowship Affairs team markets the programs through U.S. Department of State affinity groups, such as the Congressional Black Caucus and Congressional Hispanic Caucus, that serve underrepresented groups as well as at conferences, such as the annual Hispanic Association of Colleges and Universities Conference and Conference on Diversity in International Affairs (hosted at CFR). They also hold CFR fellowships information sessions on Capitol Hill for the Charles B. Rangel international affairs fellows, Donald M. Payne international development fellows, and Hispanic Association of Colleges and Universities interns.

CFR Staff and Fellows. CFR is an equal opportunity employer, and it actively seeks candidates from diverse backgrounds. CFR policy forbids discrimination against any applicant or employee on the basis of age, race, creed, color, national origin, sexual orientation, military status, sex, disability, genetic predisposition or carrier status, or marital status. This policy applies to all employment and personnel practices, including recruitment, hiring, promotion, transfer, benefits administration, training, compensation, and termination.

Think Tank Diversity Consortium. CFR is a founding member of the Think Tank Diversity Consortium (TTDC), which aims to increase recruitment, retention, and advancement of people of diverse backgrounds, and to strengthen diversity and inclusion best practices within the think tank community. CFR is one of eleven think tanks in the consortium, which also includes the Aspen Institute, the Brookings Institution, the Carnegie Endowment for International Peace, the German Marshall Fund, and the Peterson Institute for International Economics. TTDC provides members with research and reports on the importance of diversity and inclusion, convenes roundtables to discuss best practices for promoting diversity in a think tank setting, and holds networking events for people of diverse backgrounds.

Academic Outreach. Through its Academic Initiative, CFR has made a special effort to reach out to historically black colleges, community colleges, and organizations that advance opportunities for minority groups.

One such group is Global Kids, a high-school and after-school program for youth living in neighborhoods populated by ethnic groups largely underrepresented academically, politically, and professionally and attending low-performing schools. Global Kids seeks to ensure that participants have the knowledge, skills, experiences, and values they need to succeed in school, participate effectively in the democratic process, and achieve leadership in their communities and on the global stage. CFR works with Global Kids on a range of programs to expose participants to international issues and career opportunities in foreign policy. The three-week Global Kids Summer Institute for high school students hosted by CFR at its New York headquarters convened a group of thirty students to CFR in July 2016 for a program that featured interactive presentations by CFR fellows and other experts on a variety of foreign policy topics. Throughout the school year, CFR organizes and hosts monthly Global Kids foreign policy roundtables, bringing together an average of forty-five students for each session to discuss historical background and current policy perspectives on pressing international issues. Each spring, CFR hosts the Global Kids annual gala at its New York headquarters.

CFR builds relationships with ethnically diverse educational institutions at the administrative, college and university, high school, and student levels. CFR organizes regular workshops for educators at the secondary and post-secondary level. The purpose of the workshops is to provide the opportunity for educators to participate in substantive briefings and group discussions, learn about the wide variety of CFR open-source resources, and discuss best practices for bringing international politics into the classroom. In 2016, professors from a number of community colleges, historically black colleges and universities, and Hispanic serving institutions across the country participated in the workshop including LaGuardia Community College, Northwest Arkansas Community College, Florida Agricultural and Manufacturing University, Morehouse College, Spelman College, Miami Dade College, Houston Community College System, and the University of California, Irvine, among others.

CFR also includes presidents from these institutions, as well as others (both public and private) with diverse student populations in its Higher Education Working Group. This group of college and university administrators gather at CFR's New York headquarters once a year to explore the role of higher education institutions in meeting the challenges posed by major global issues. Invitees have included the presidents of Tuskegee University, Spelman College, Morehouse College, select colleges within the City University of New York system, and community college system chancellors. The February 2016 meeting was attended by Luis Maldonado, chief advocacy officer for the Hispanic Association of Colleges and Universities.

CFR's Academic Initiative is funded by internal CFR funds and an outside grant from an individual donor. The Higher Education Working Group, held in cooperation with the Forum for Higher Education, is partially funded by a grant from TIAA.

Religion Outreach. Through the Religion and Foreign Policy (RFP) Initiative, CFR makes a concerted effort to connect with religious leaders and scholars of minority faiths on a broad range of public policy concerns at the intersection of religion and global affairs. In an effort to build and strengthen relationships with leaders of underrepresented faith traditions, Outreach initiative staff have organized meetings with representatives from the National Sikh Campaign, the Muslim Public Affairs Council, and the Women's Islamic Initiative in Spirituality and Equality to discuss areas of collaboration and strategies for engaging more Sikhs and Muslims in CFR's programming.

The initiative's conference call and roundtable series frequently cover issues related to cultural and religious pluralism, the rights of religious minorities, community efforts to counter extremism, immigrant integration, and global efforts to promote gender equity. Additionally, CFR has concentrated efforts on bringing more diverse voices to CFR as speakers for the conference call series, roundtable sessions, and workshop panels. Speakers at the past year's Religion and Foreign Policy Initiative-sponsored events have represented over fifteen different faith traditions. Recent speakers have included Permanent Observer of the Holy See to the UN Archbishop Bernardito C. Auza, United Methodist Church Bishop Minerva G. Carcaño, All Dulles Area Muslim Society Imam Mohamed Magid, and Yale Divinity School Professor Lamin Sanneh.

Each year, the RFP initiative convenes a workshop for congregational and lay leaders and scholars of religion to connect with policymakers, CFR fellows, and other experts. Forty different faith traditions were represented at the May 2016 workshop, which included panel discussions on the religious and cultural dynamics of campaign 2016, the global migration and refugee crisis, religion and diplomacy, and U.S. policy in sub-Saharan Africa.

The Religion and Foreign Policy Initiative is partially supported by a grant from the Ford Foundation and by unrestricted CFR funds.

Education. CFR's Education department is launching the CFR Campus initiative, designed to help students, educators, and the interested public develop the knowledge, skills, and perspective required to be informed citizens and successful professionals in today's interconnected world. The intent is to broaden CFR's reach to a more diverse audience, including students and faculty in established educational institutions, as well as lifelong learners. In addition to promoting existing educational CFR content and programming, Education is creating affordable, adaptable, and accessible resources for new audiences. The first of these original products is Model Diplomacy, a free interactive classroom resource that enables students to address pressing global issues by conducting realistic simulations in which they assume the roles of U.S. foreign policy decision-makers. Model Diplomacy launched in January 2016 and has already had 5,000 users across 70 countries at institutions with diverse populations, including military schools, Historically Black Colleges and Universities, community colleges, and other primarily minority-serving institutions as a result of our targeted marketing efforts. The next forthcoming new resource is a comprehensive set of multimedia modules on the fundamentals of international relations and foreign policy. A dedicated education portal, CFR Campus, will house all of CFR's educational content and programming and is slated for release in spring 2017. The Education initiative is supported by a gift from an individual donor and by internal CFR funds.

COUNCIL ON FOREIGN RELATIONS

Expanded Diversity Initiative in Foreign Policy and Additional Activities Expanded Diversity Initiative in Foreign Policy: Revised and Realigned Financial Statement Robina Foundation

	Combined Approved Budgets	Actual Expenses	Variance
Expanded Diversity Initiative in Foreign Policy and Expanded Diversity in Foreign Policy: Additional Activities			
Expanded Franklin Williams Internship Program	\$32,646	\$40,412	-\$7,766
Conference on Diversity in International Affairs (Collaboration with the International Career Advancement Association and the Global Access Pipeline)	\$77,355	\$59,401	\$17,954
CFR Participation in Career Fairs	\$20,197	\$10,931	\$9,266
Program Management	\$121,489	\$126,125	-\$4,636
External Review Committee/Reallocated Outreach Funds*	\$0	\$12,700	-\$12,700
Indirect Costs	\$37,753	\$37,435	\$318
Subtotal	\$289,440	\$287,004	\$2,436

Expanded Diversity Initiative in Foreign Policy: Revised and Realigned

Expanded Franklin Williams Internship Program	\$33,316	\$11,144	\$22,172
Conference on Diversity in International Affairs (Collaboration with the International Career Advancement Association and the Global Access Pipeline)	\$77,832	\$1,450	\$76,382
CFR Participation in Career Fairs	\$20,655	\$2,191	\$18,464
CFR Program Management	\$128,329	\$19,184	\$109,145
Indirect Costs	\$39,020	\$5,095	\$33,924
Subtotal	\$299,152	\$39,064	\$260,088

* These expenses are associated with outreach initiatives initiated last year.

Appendix A

Biographies of Franklin Williams Interns

Employed by CFR with a start date after November 2015

Kofi Gunu is the fall 2016 global health intern with the David Rockefeller Studies Program, supporting Thomas Bollyky in Washington, DC. He is a senior at Augustana University and he is expected to graduate in 2017 with a bachelor of arts in economics and government/international affairs. Kofi has previously interned for Senator Mike Rounds. He also served as an operations specialist at Great Western Bank and a global health intern for Sanford World Clinics.

Jackson Serio is the fall 2016 global business intern, supporting CFR's Corporate Program. Jackson is a junior at the Gabelli School of Business at Fordham University, where he will receive a bachelor of science degree in finance in 2018. Prior to beginning at CFR, Jackson was a global fixed income summer analyst at New York Life Investments – Mackay Shields. Jackson has also previously interned with the development team at New England Center for Children.

Biruktawit "Birdy" Assefa was the summer 2016 global health intern, based in CFR's Washington, DC, office. Birdy is a junior at Yale College, where she majors in political science with a global health concentration. Before her internship with CFR, Birdy was an undergraduate researcher at Yale's Women's Health Research Center. She has also served as the director of speaker relations for the Yale Undergraduate Association for African Peace and Development, and a research assistant for the Doris Duke Academy for Clinical Research.

Fernando Braga was a summer 2016 U.S. foreign policy intern with the David Rockefeller Studies Program, supporting Ambassador Robert K. Blackwill. He is a senior at Vassar College, studying International Studies, and will graduate in 2017. Fernando is a veteran, having served in the U.S. Army National Guard. Additionally, he has interned at Clarion Newspaper, served as a research assistant for a documentary filmmaker, and he worked as a track worker for the MTA.

Adriana Guardans-Godo was the summer 2016 Independent Task Force Program intern in Washington, DC. Adriana will graduate from Tufts University in May 2017 with a degree in international relations and history. Adriana has previously worked with the Rainforest Alliance as a gender task force intern, and she was also a creative assistant at Leitzes & Co. Adriana has participated in TEDxTUfts as the speak coach and social media manager, as well as the Education for Public Inquiry and International Citizenship as a student organizer.

Irene Mutwiri was the summer 2016 global business intern, supporting CFR's Corporate Program. She is a junior at the George Washington University, majoring in international affairs, with a security policy concentration. Irene will graduate in 2018 with a bachelor of arts. Prior to her CFR internship, Irene served as a corporate relations intern at the National Multiple Sclerosis Society, as a legislative correspondence intern at the office of Senator Paul Strauss, and a research intern at Gummybear International.

Rachel Simmons was the summer 2016 global communications and media relations intern. Rachel attends Vassar College, where she will receive her BA in International Studies in 2017. Rachel has served as a journalism intern for Janine di Giovanni, a civil rights analyst research intern at the U.S. Commission on Civil Rights, and a New York Times marketing ambassador.

Breanna Wilkerson was a summer 2016 interdepartmental intern. She is a May 2016 graduate of Spelman College with a BA in comparative women's studies and a minor in public health. Prior to joining

CFR, Breanna served as a global health fellow at USAID, a research fellow at the Environmental Protection Agency, and was the founder of Spelman's GlobeMed chapter.

Diego Rosette was the spring 2016 intern for CFR Editorial. Diego attends Columbia University where he will graduate in May 2017 with a bachelor of arts in political science. Diego is a staff writer at the *Columbia Spectator* and he has previously worked as a columnist/blogger for a Hispanic multimedia site called VOXXI. Diego has also served as a law clerk for the R&S International Law Group, a summer fellow for Organizing for America, and an intern for Congresswoman Ileana Ros-Lehtinen.

Olivia Bethea was the spring 2016 intern for the David Rockefeller Studies Program, working in the Director of Studies Office. Olivia will graduate from the University of Maryland - College Park with a dual degree in government and politics and French language and literature in the spring of 2017. Olivia previously interned in Dakar, Senegal with the African Assembly for the Defense of Human Rights. She has also interned and then worked as an administrative assistant with the department of homeland security U.S. customs and border protection office.

Myriam Tchatchouang was the spring 2016 global communications and media relations intern. Myriam attends American University where she will receive her masters of arts in ethics, peace, and global affairs in 2017. She graduated from Howard University in 2013 with a bachelor of arts in journalism. Prior to her graduate studies, Myriam was a volunteer coordinator at AmeriCorps/ St. Bernard Project, and she has also interned with Amnesty International with their media relations team.

Conference on Diversity in International Affairs

Friday, April 15, 2016

REGISTRATION AND RECEPTION

5:30 p.m. – 6:00 p.m.

WELCOME REMARKS

6:00 p.m. – 6:10 p.m.

Jan Mowder Hughes, Vice President, Human Resources and Administration, Council on Foreign Relations

KEYNOTE ADDRESS

6:10 p.m. – 7:25 p.m.

Kalpen Modi, Actor; Former Associate Director, White House Office of Public Engagement

Presider: **Reuben Brigety II**, Adjunct Senior Fellow for African Peace and Security Issues, Council on Foreign Relations; Dean, Elliott School of International Affairs, George Washington University; Former U.S. Representative to the African Union

NETWORKING RECEPTION

7:25 p.m. – 8:30 p.m.

Saturday, April 16, 2016

REGISTRATION AND BREAKFAST

9:00 a.m. – 10:30 a.m.

WELCOME MESSAGE

Roma Kaundal, Deputy Director, Strategic Partnerships, Council on Foreign Relations

10:40 a.m. – 10:45 a.m.

PLENARY ONE

10:45 a.m. – 12:00 Noon

Gender and Violent Extremism: The Role of Women as Victims and Perpetrators

This plenary will discuss the increasing occurrence and involvement of female suicide bombers and supporters of terrorist extremist groups across the globe.

John Campbell, Ralph Bunche Senior Fellow for Africa Policy Studies, Council on Foreign Relations; Former United States Ambassador to Nigeria

Catherine Powell, Fellow, Women and Foreign Policy, Council on Foreign Relations; Former Director, Human rights, National Security Council

Presider: **Shireen Hunter**, Visiting Scholar, Center for Muslim-Christian Understanding, Georgetown University

LUNCH RECEPTION

12:00 noon – 12:45 p.m.

BREAKOUT SESSION ONE

12:45 p.m. – 2:00 p.m.

Ebola, Zika, and Public Health Crises: How to Respond

With an increase of global health epidemics, this session questions the role the U.S. should play in health crises. The panelists will discuss how global health diplomacy can be a tool for social change and the best ways to be prepared for or prevent pandemics in the future

Eric Aguiar, Partner, Aisling Capital

Kate Schecter, Chief Executive Officer, World Neighbors
Presider: **Rosita Najmi**, Program Officer, Bill & Melinda Gates Foundation

Working in International Affairs as a Diverse Professional: Reflections from the Field

While the field of international affairs has diversified over the course of the last decade, the demographic makeup of international affairs professionals is still relatively homogenous when it comes to race, class, and gender. Panelists will reflect on how their personal identities may have influenced their professional experiences working in the field.

Lia Miller-Spicer, Foreign Service Officer, U.S. Department of State

Jane Rhee, Policy Planning Staff, Bureau of Public Affairs, U.S. Department of State

Advising Political Campaigns

Join panelists who have experience working on local, state, or national campaigns discuss why they became got interested in joining a political campaign, how they joined, what their role was, and the aftermath. Additionally speakers will discuss political shifts and how to adapt to new administration priorities.

Brandon Andrews, Consultant, Values Partnerships

Maria Meier, Senior Advisor, Office of Sen. Harry Reid and Director of the Senate Diversity Initiative

Cleve Mesidor, Global Solutions Consultant, The Raben Group

Kristal Quarker-Hartsfield, National Director, the Republican National Committee

Presider: **Morgan McClain-McKinney**, Program Manager, USAID

Honing Your Writing Skills for Professional Success

This interactive seminar will focus on identifying and strengthening writing skills, critical to success in international careers. After the initial presentations, the group will break into smaller groups to work on interactive exercises.

Ruth A. Davis, Former Director General, United States Foreign Service

Elise Kleinwaks, Diplomat in Residence, U.S. Department of State

Erin Skelly, Associate Director of Admissions, Johns Hopkins University Paul H. Nitze School of Advanced International Studies

Patricia Scroggs, Director, Charles Rangel Fellowship Program

2:00 p.m. – 2:15 p.m.

Break

PLENARY TWO

2:15 p.m. – 3:30 p.m.

Making A Difference: Opportunities for International Service

This plenary will discuss options for international service, as well as how those experiences can lead to a successful career in public service.

Ruth A. Davis, Former Director General, United States Foreign Service

Teresa Chaurand, Director, Intergovernmental and External Affairs, United States Peace Corps

Presider: **Nicole Y. Lamb-Hale**, Senior Vice President, Albright Stonebridge Group

3:30 p.m. – 3:45 p.m.

Break

BREAKOUT SESSION TWO

3:45 p.m. – 5:00 p.m.

The Future of Water

This panel will explore the role of governments in regulating water sources including what international institutions and policies need to be put in place to work towards more sustainable practices in regulating the use of this resource.

Claire Casey, Managing Director, Garten Rothkopf

Emily Rand, Water and Sanitation Specialist at the World Bank's Water Global Practice, Water and Sanitation Program

Presider: **Kendra Gaither**, Senior Director, Policy, Americas, U.S. Chamber of Commerce

Mid-Career Fellowships

This panel will explore some of the mid-career opportunities available to foreign affairs practitioners, including application tips, timelines, and suggestions for a strong candidacy.

Farrah Barrios, Office of the Dep. Admin., Capacity Building and Development, USDA Foreign Agricultural Service (FAS)

Carl Carr, Managing Director, Momentum Advisors

Mariana Yazbek, Program Manager, Seminars, Aspen Institute

Presider: **Lesley Anne Warner**, Professional Staff Member, U.S. House of Representatives, Foreign Affairs Committee; CFR Term Member

Speed Networking

In this session, facilitators will lead participants into an exciting and fruitful exercise intended to expand your network and enhance your networking skills.

Kristin Hayden, Founder, One World Now!

Nicole Rumeau, Senior Project Manager, STARTALK

Virtual Branding and Storytelling

Panelists with expertise in online personal and professional branding will provide best practices on creating an authentic and unique presence online.

Nisha Chittal, Social Media and Community, MSNBC

Jennifer Myers, Vice President, Marketing and Communications, YWCA USA

Teresa Welsh, Foreign Affairs Reporter, U.S. News & World Report

Presider: **Trisha King**, Program Associate, Aspen Institute Business & Society Program

CAREER COUNSELING SESSIONS

BY APPOINTMENT ONLY

SATURDAY, APRIL 16

10:00 a.m. – 4:45 p.m.

One-on-one career counseling sessions are available by appointment only. If you are registered to meet with a career counselor, please arrive at the designated room five minutes prior to the start of your session.

David Fletcher

Director, Career Development,
School of International Service,
American University

1st Floor Lounge

M. Nickleson (Nick) Battle, Jr.

Sr. Human Resources Officer,
German Marshall Fund

2nd Floor Small Conference room

Margaret (Maggie) New

President, The Middleburg Group, LLC

2nd Floor Green Room

Lana Knox

Assistant Director of Bridge Programs,
American University

7th Floor Small Conference Room

Maria Pinto Carland

Senior Advisor and Career Counselor, ICAP

7th Floor Board Room

Which of the following best describes your current status?

	Number of Response(s)	Response Ratio
CFR Member	1	1.5%
College Student	14	21.5%
Graduate Student	13	20.0%
ICAP Alum, ICAP Senior Mentor, or ICAP Staff	7	10.8%
Leader of a GAP Member Organization	1	1.5%
Professional	29	44.6%
Total	65	

How would you rate the conference overall?

Excellent	45	69%
Good	17	26%
Fair	3	5%
Total	65	

Please add any additional comments about the overall conference experience.

Excellent program for learning, networking, and participating in foreign relations careers!

Excellent sessions, great conversations, well-executed

Great event that has such a powerful purpose!

Great keynote event. Delicious food, vibrant crowd, stimulating environment. Thanks for a wonderful evening!

Great networking opportunity, exciting to be in a room filled with "people who actually look like America" working in international affairs

I am thankful for the service and work of this organization to disseminate information to minorities interested in international affairs.

I enjoyed my time with my mentee.

I found the Mid-Career Fellowships helpful. I hope we can have more discussion with professionals who do not have a federal government background.

I think it would be helpful to provide potential contact information in the packets so that individuals in the conference could reach out and find one another if for any reason they were not able to get contact info.

I think the conference went really well. Of potential improvements I think a networking reflection or happy hour would help people who feel like they may not have made enough connections during the actual event.

I thought it was well paced, with moments to break, rest and connect where needed. Also I thought the several Ambassadors and the ICAP fellows were a great presence. Aside from being great speakers, all those I approached were happy to connect and advise. I had a great experience and hope that I can both attend again and possibly invite others as well.

I wish it could've been more interactive with the participants.

I wish the conference could either be longer or allowed for more time for mingling. There was not enough time for participants to engage with each other in between sessions. My suggestion would be to end the conference with the networking event when people would have had a chance to get to know each other more and know who they really want to talk with. Other than that, fifteen minutes in between the sessions (and sometimes less than that depending on if the sessions started and finished on time) was insufficient to make meaningful connection and learn from the other participants.

I would say this was a highly effective and successful conference. The content was incredible, the logistical aspects (food, beverage, venue, times, etc.) were great, and the speakers were engaging and real. I thought the session topics and workshops were relevant and very useful for the attendees and I wish I could've attended more of them (they ran concurrently). I was a huge fan of the session "Working in International Affairs as a Diverse Professional: Reflections from the Field". The mentee I was assigned turned out to be an outstanding fit and I am so happy that I decided to partake as a mentor. Before the conference I was ready to shift my career to the corporate world, but after CDIA I feel re-energized and motivated to keep my dreams of being a Foreign Service Officer alive. Thank you for putting this conference together and I hope you continue to have it for years to come.

It seems as if most people were in their mid careers looking for more people to help them and we're not as interested in talking to the youth like they said.

It was a great experience. I am grateful for the opportunity. I met interesting people during the two days.

It was a great opportunity to mix with, inspire and be inspired by the next generation!

Longer networking time for students

Many of the panels about working in International Affairs were staffed by Foreign Service Officers. I'd appreciate the perspectives of others working in International Affairs in a variety of sectors.

Many of the sessions revolved around issues in international development (i.e. panels on women and gender equality, water issues, etc.) which are all important. However, I would love to see the conference include panels next year involving minorities working on hard security issues (i.e. nuclear weapons, the impact of the arms trade, or drug trafficking, or even how to work alongside military colleagues as an international relations professional). International security is an area where more minorities definitely need to be represented, but I felt that the focus of the conference was geared toward encouraging minorities to enter the development field. I would like exposure to the other areas of international affairs that minorities should work in.

My overall experience at the conference was excellent. I believe the opening networking session and discussion were appropriate and instrumental in setting the atmosphere for the rest of the conference. However, I believe that there could have been better coordination between the advisors/mentors and students. Perhaps I was one of the few students to not receive an email, but I think students should not be notified beforehand whether they have been selected for a mentor and/or advising session.

Not very realistic?? It felt like panelists/speakers were minimizing the effect of racism/sexism. My fellow students and I all really appreciated Ruth Davis for keeping it real. I was also a little iffy on the Women and Gender Violence talk. While I understand that the speakers had first hand accounts and years (years and years) of research, in the end, the topic -- women of color -- was still being discussed by a white man. It was a very good talk, but I'm a bit critical of it, in all honesty.

Overall, great conference. However, when moderating questions, please ensure moderators only take one question at a time to provide panelist with more time for relevant and potent answers. It is better to have a

Overall, the conference was really good. The messages fit the audience well. I would like to have seen more representation by and conversations with USAID 'folks'. Also, what about World Bank, IMF, IDB, UN, etc?

Should these institutions not be a part of the conversation, especially here in DC?

Perhaps try not to coincide with IMF & World Bank meetings or major events of that nature which students and prospective mentors would be attending.

Stellar variety of panels and panelists such that it was difficult to choose between them. One thing I would have like more of is time to network and mingle, but not at the cost of the excellent programming. Perhaps a semi-official happy hour afterwards, or tacking an extra hour onto the end of day two. But even without that, well done!

The conference made it possible to listen to important international issues and discussions about careers in foreign service. I wish that the lunch set up was more organized and I wish that the conference didn't end so abruptly. Also for the mentor meetings, there should have been a designated area or time in the schedule for mentors and mentees to meet instead of having them reach out to each other on their own.

The conference was a bit chilly, the mentor-mentee idea was phenomenal

There were no pens, the food wasn't good, the plenary on women and terrorism was controversial and offensive at times. Additionally, the conference is almost "preaching to the choir" or "helping the rich get richer." Everyone who's invited to the conference is already privileged in one way or another. I think it would be good to partner with schools or have students be nominated to attend that haven't already been fortunate enough to win a Rangel fellowship or work for the Department of State.

This was my first time attending. The overall conference was well organized and enjoyable, although I did not find either of the breakout sessions I attended to be beneficial. My most concern was the "branding yourself" break out session, which, in fact, devolved into nothing related to the original description. It was quite disappointing.

Wish it could have been longer and perhaps with some dedicated booths for sponsors and presenters so that attendees could receive more information.

What was the most useful aspect of the conference?

Able to ask questions to practitioners knowledgeable about work in the field

Advising political campaigns

All of the conference was useful.

Bringing different people to one room and presenting different areas to discuss.

career advising and mentoring

career counseling & plenary sessions

career counseling session

Career Counseling Session, specifically resume critique

discussions on diversity and mid-career fellowships

Diversity Inclusion with regards to audience and speakers.

Getting to interact with other people of color, whether they were in the work force or students, in a relaxed yet professional setting. We had the opportunity to open up an honest dialogue and discuss surprisingly similar challenges we face as people of color and give each other advice.

Great facilitation by CFR for hospitality- greeting, name tags, food, beverages, and various amenities.

Hearing first hand from professionals and practitioners in international affairs.

Hearing from diverse professionals about how they've navigated their career.

I enjoyed the plenary sessions.
 I felt that hearing many sides of the international affairs field really helped bring a sense of community for those all in involved at the conference.
 I think the panels and the professionals who attended who very engaging and extremely helpful
 Listening to the discussions
 Listening to the insights of very influential people.
 mentor/advisor
 Mid-Career Session
 My mentor Rashida Peterson was then and there at the conference as well as now a great match maker in terms of introducing me to all the right people.
 Networking
 Networking
 Networking and hearing from influential speakers who have experience in foreign policy
 Networking and mentoring opportunities
 Networking and the workshop on writing
 networking opportunities
 Networking portion
 Networking Reception and Speed Networking Breakout Session
 Networking with like-minded, diverse professionals in one setting
 Networking with other professionals from diverse but interrelated fields.
 Networking.
 Networking.
 Presentation.
 Resume review and career advice
 Seeing professionals that look like me; it was very inspiring and renewed my motivations!
 Structure of plenaries and break out sessions
 Targeted workshops/panels
 The conversations with senior professionals.
 The exposure that students are afforded to meet and connect with organizations and professionals.
 The individual consultation with a career counselor
 The key note speaker and discussion on race was a great discussion
 The networking environment with other like-minded professionals was phenomenal.
 The networking opportunities
 The opportunity to network in a semi-private environment.
 The opportunity to network with like-minded people.
 The opportunity to speak with and network with career professionals.
 The sessions, because the content was so incredible.
 The speakers were exceptional!
 The speed networking
 The workshops
 The writing workshop.

Please share something you learned from attending this conference.

A lot: That there is a place for people like me in the professional world, that I can achieve my goals, to consider getting a twitter, how to use social media professionally, etc.
 Although diversity within the field of international affairs and the U.S. Foreign Service has increased, the purpose of this objective is not just to fill a numerical quota but to attract and retain a skilled and varied workforce that can serve as an exemplary model to societies across the globe.
 Better strategies for writing. how terrorism differs between men and women
 Everybody wants to be a part of the greater good.
 Great interactions with professionals and young people alike!
 how diverse the field is and how there are so many transferable skills
 How much diversity there is across the different groups/fellowships that attended the event.

I became more aware of relevant global issues.
 I can always stay engaged in the IA sector even though I do not work in DC. When you are thinking of professional growth, reach out to mentors in the area for better feedback.
 I enjoyed learning from the State Department representative during the professional writing break out session.
 I feel like I got more insight into the realities of working in diplomacy positions.
 I learned a great deal from the Virtual Branding session.
 I learned a lot career wise and that there were very specific roles in the international field.
 I learned about career opportunities in the fields of International Relations and Political Science.
 I learned building relationships and building skills should go hand in hand to have an international career.
 I learned how best to deliver elevator pitch (through practice) and useful professional writing tips.
 I learned more about fellowships including those through CFR
 I learned so much about violent extremism against women
 I learned that faculty diversity plays a key role in helping normalize diversity in the field.
 I learned that individuals, even those who have reached a professional level of work, still feel the need for improvement and potential job switching, which is something refreshing to see.
 I learned that people in high up positions in IR have done many things to get there and are very approachable
 I learned the value of connecting with people doing/interested in similar work as myself.
 I realized how important cultural diversity in foreign affairs really is.
 I was able to work on my networking skills.
 I was reminded that there is not straight pathway once you are in the Foreign Service-you really are a generalist and have to be prepared to do any of the jobs.
 ICAP is an experience that I hope to apply to.
 Learned about available mid-career fellowships
 Mid-career fellowships
 More about the Obama administrations diversity policies
 My resume should be two pages
 New perspectives on workplace communication to develop an inclusive culture.
 opportunities and organizations for people with like-minded background/interest that i can sign up for in the future
 POC events are more fun than non-POC events
 Some additional information on the political campaign staff positions
 That even if you've been out of school for a few years, you can still apply for the Pickering and Rangel Fellowship
 That there is a strong network of minorities in international relations, many of whom are willing to help one another navigate professional waters.
 That writing skills are important in all fields.
 The different ways of growing your career and the importance of extra-curricular opportunities or fellowships such as ICAP and others that are out there for mid-career professionals.
 The importance of building my network to advance my career
 The need for mentoring and further coaching of students to assist them into transitioning into careers.
 The need of diversity in the foreign service
 The off-the-record session on advising campaigns was very helpful
 The task of foreign policy advisors for political campaigns
 There is not one set path to working in international affairs, government, or social activism. For example, Kalpen Modi was an actor for a few years before he worked in the Obama Administration. Then there was a
 There is something for everyone in international affairs.
 There's no one clear path into getting a job in foreign service. Be good at what you do and don't let anyone stop you.
 We may have different backgrounds as black/brown, but share many of the same challenges professionally/personally.
 While a competitive field I may very well be able to find a fit for me within any of these agencies.

What suggestions do you have about the conference for our future planning?

Add speakers from USAID, USDA, and Dept. of Commerce. They also have Foreign Service Officers
 Allow for more time for workshops such as career counseling and mentorship.
 Allow more time for networking at breaks and lunch (45 min). We felt quite rushed at the breaks and often had staff ringing bells excessively when some individuals were networking or discussing issues pertinent to jobs or career changes when the breaks were concluding. Also perhaps we can identify a post-conference location so folks can transition there after the panels end to continue networking/reconnecting so that our hosts can close out for the day and not feel compelled to flash the lights repeatedly to get folks to depart the space.

Although I love having options, it would have been great to attend more of the sessions therefore you could have the conference be longer and not have as many competing/concurrent sessions.

Any chance to have more employer representatives from international relations organizations at the conference to talk with attendees? Perhaps an employer expo with the World Bank, IMF, Peace Corps, USAID, State, UN, CFR, Brookings, GMF, Atlantic Council, Aspen, etc.

As stated earlier, they should have a networking happy hour in the end that would allow for reflection and also decompression after a long day.

Breaks were full of valuable networking, but frequently seemed a bit rushed--especially eating and networking over lunch.

Consider making the conference three days to spread the sessions and have more opportunities to socialize/network with the participants.

Considering making the break out sessions shorter but offering more of them.

Expand programming, include more workshops as well.

For all the materials distributed I recommend binding all documents together.

Great facilitation to structure networking

have more mentors in speed networking session

I have no suggestions about the conference for future planning.

I hope that I am invited again next year and that I might be able to invite others.

I think it would be good to have a place of information to show which organizations were at the conference and what they were there to represent so that everyone in the conference could have a better sense of who they were networking with. Granted the organizations were all listed, I would say a short blurb of information about each organization would help immensely.

I wish the conference brings potential people who are interested in international students who are based in the U.S. currently.

Include a closing reception.

Increase the time participants have to speak and network with each other. The session topics may not always be relevant for all participants (for example a participant in the Latin American education reform space most likely will not get tremendous value from a session on Middle Eastern security concerns) so enabling them to speak more with other participants and career professionals also attending the conference will be the best benefit to them.

Introduce topics outside of the international development career field, such as security issues

invite more non-gov international affairs/relations speakers

It would be great if it were longer (Friday-Sunday). There were other sessions that I wanted to attend so it would be great if they were spread out over another day.

It would be great if there were group discussions after the main panels.

This way participants could interact more with each other and the information presented could be discussed with people from different backgrounds and with different points of view.

Keep the same basic structure/schedule for the program, and continue to ensure variety in event topics. Increase outreach about conference to college students.

Keep up the good work! I love attending the conference.

Longer networking time, the opportunity to Table about programs.

Maintain the diverse caliber of humble leaders in the field willing to share with and support the next generation of international affairs professionals and all will be well.

Making the conference open to more people... it would be nice if everyone at the conference could have a session with a "coach" there were only a limited number of spots..

More networking/reception/discussion events.

More thoughtful selection of relevant break out sessions and panelists. DC has a wealth of talent and experience I am certain this event could have drawn from.

More workshop options, and better vegetarian food options. Too much carbs not enough vegetables.

More?? The first plenary needed a more efficient moderator. Again, I understand the thinking, but a lot of questions went unanswered, and some questions deserved more answer time (the spotlight, if you will).

Morning event should be afternoon event instead - too early!

n/a

None.

One of the most important workshops, I felt, was "Being a Diverse Professional in International Affairs." However, the panel itself was not diverse enough. All three women were Foreign Service Officers for State. International Affairs is vast and there should have been someone from a think tank, private sector, etc. It sent the message that State Department is the only type of playing field for International Affairs, when that is not the reality, especially in DC. Also, all three of them were Pickering Fellows and for those in the audience who are not looking to be in the foreign service or would no longer be able to get this fellowship, this could have been discouraging.

Perhaps more categorization of participants based on interests and sector. For instance designate some speakers or events as being of interest for those who wish to explore private sector options, or the foreign service, academia, etc.

Please have a variety of foreign affairs agencies represented on panels and such - it was very Department of State heavy and as a State employee I would have liked USAID and other presence.

Promote more interaction among participants. Question and answer panels are good, but having participants more involved would make the experience even better.

Rather than focusing on a specific topic (such as CVE), it may be interesting to focus on introducing different agencies/industries in international relations and highlighting their progress/challenges in increasing diversity

See additional comments re scheduling

See my answer above regarding inclusion of more diverse (organizations and institutions) in the conversations.

Similar to the Mid-Professional fellowship opportunity, there should be a section for students both graduate and undergraduate.

temperature control, it was too cold.

The morning session about women and conflict was poorly moderated, overly generic, unsubstantive, and often offensive. Catherine Powell was its saving grace.

The networking sessions was shockingly the least rewarding portion of the conference. It would be more beneficial to network with professionals and people older than me, rather than undergraduate students and my peers.

There should be more participant interaction. In addition, the conference should have had a closing ceremony. It ended too abruptly.

Think of ways to make the unstructured networking time more efficient (e.g. arrange room by or list next to names in packet of the field or career level of attendees).

Try to find mentors that related to the career paths of the mentees otherwise it makes for a very awkward talk.

Please rank each of the events that you attended on Friday. Please answer only for those events which you attended.

	Excellent	Good	Fair	N/A	
Friday Night Reception		33	15	2	15
		51%	23%	3%	23%
Keynote address, Kalpen Modi, Actor; Former Associate Director in the Office of Public Engagement, White House		42	11		12
		65%	17%		18%

Please add any additional comments about Friday's events.

Did not attend

Do not change any of this. It was perfect

Food was good, so was the keynote speech, very entertaining and informative at the same time . Networking seemed as if people wanted to stay in their own groups.

Hope to attend some year.

I did not attend Friday's events

I was not in attendance.

I'm afraid I arrived a little bit late, so I don't have much to give feedback on!

Incredible!

More unconventional speakers like this in the future!

n/a

None

None.

The event ended right at 8:30 p.m. Staff literally started shuffling participants out at the time. I understand that staff did not want to stay there all night but the networking time and ability to learn from others in similar work is the highlight of the conference. We as participants do not usually see people who look like us in these careers and these spaces so the opportunity to see and speak with such individuals is paramount.

I felt that the time to do so was insufficient and did not understand why staff had to usher participants out of the building right at 8:30 p.m.

The reception was very engaging.

These events were a nice intro to the conference. The interview with Kalpen Modi was an ideal keynote from which to launch the conversations of the following day.

This was enjoyable. The dynamic between the moderator and keynote speaker was good.

Please rank each of the workshops and plenaries that you attended on Saturday. Please answer only for those events which you attended.

	Excellent	Good	Fair	N/A
Plenary 1: Gender and Violent Extremism: The Role of Women as Victims and Perpetrators	23 35%	21 32%	8 12%	13 20%
Plenary 2: Making A Difference: Opportunities for International Service	32 49%	16 25%	2 3%	15 23%
Ebola, Zika, and Public Health Crisis: How to Respond (Round 1 Break Out Session)	5 8%	3 5%	1 2%	56 86%
Working in International Affairs as a Diverse Professional: Reflections from the Field (Round 1 Break Out Session)	18 28%	11 17%	3 5%	33 51%
Advising Political Campaigns (Round 1 Break Out Session)	9 14%	5 8%	1 2%	50 77%
Honing Your Writing Skills for Professional Success (Round 1 Break Out Session)	7 11%	3 5%	3 5%	52 80%
The Future of Water (Round 2 Break Out Session)	2 3%	1 2%	1 2%	61 94%
Mid-Career Fellowships (Round 2 Break Out Session)	17 26%	3 5%	2 3%	43 66%
Speed Networking (Round 2 Break Out Session)	10 15%	8 12%	6 9%	41 63%
Virtual Branding & Storytelling (Round 2 Break Out Session)	5 8%	6 9%	9 14%	45 69%

Please add any additional comments about Saturday's activities.

A closing ceremony should have taken place. In addition, there was no time for mentors and mentees to meet.

All the activities that I went to were great. I just wish the speed networking round could have been longer or had more even mentor-mentee relationships as it was mentee-sided.

Although the discussion was excellent and informative, I was not clear about the relevance of the first plenary discussion on gender and violence to the purpose of the conference.

Always excited to work as a resume reviewer for young and mid career professionals.

Breakout sessions were good, giving participants the choice to follow topics of their interest. I think the first plenary could have been better moderated, as the topic seemed to veer off into CVE in general as opposed to gender, which was supposed to be the main topic of the discussion.

First Break out session was not representative of all the foreign affairs agencies with Foreign Service careers - this would have been nice! Speed networking was absolutely amazing!

Honing your writing skills break out session was good but it mostly aimed at undergraduate students and at those who are looking for fellowship. As a graduate student who is looking to improve my writing for cover letter purposes and writing samples, I didn't find the session relevant to my needs but overall it was good.

I did not like the speednetworking event because there were not enough professionals for me to meet any during the event. I wish I had gone to one of the other ones.

I really enjoyed the writing workshop and took a lot away from it

Interesting and diverse panels.

loved the session with catherine powell and john campbell!

Much better than the first day due to more diverse topics.

n/a

N/A

None.

Saturday, like Friday, was superbly planned and executed. I just wish there was more time.

Speed networking was great!

The balance between workshops and breaks was excellent; I stayed focus throughout the entire conference but had sufficient food and bathroom time.

The networking session was good, however could have been improved with 4 minute 'dates' as opposed to 2 minutes.

The only suggestion would make is to restructure how panelists take questions.

The speed-networking event was good but could have been great, had it been, well, less speedy. It could also have been improved by increasing the spacing between participants, as the volume level hindered communication.

Virtual Branding and Storytelling wasn't what I had expected. I didn't quite pick up the story telling part.

Virtual branding seems to have been the least effective use of my time.

What additional topics would you recommend for the conference in the future?

1. Expand the conversation to cover other internationally oriented organizations such as World Bank, IMF, UN, IDB, etc.

2. Have someone available to speak about Payne fellowships as well as Wrangel, etc.

3. Talk about 'inclusion' as well as a 'diversity' in international affairs. "Diversity is being invited to the party; inclusion is being asked to dance". With that thought in mind, have speakers who have been involved in 'diverse' organizations felt 'included'? If so, what did that look like? If they felt 'excluded', how did that exclusion manifest? What can be done about that?

1. How to sell yourself and your skillset in DC (what employers look for and how to market your experiences and background to meet these DC expectations); 2. Stress Management: How to cope being a diverse hire and dealing with microaggressions in the workplace

A lack of diversity in the IR profession as a U.S. National Security concern

after graduation opportunities panel, finding and maintaining a mentor, having a competitive application, finding your story

Any current issues

Careers with USAID, USDA, and Commerce Panel

Cyber security and diplomacy

Disabilities in international affairs or government.

education (literacy and math skills)

Etiquette and Diplomatic Language.

Gender inequality and the role that a more interconnected world could play in it

Government hiring strategies vs applications in the private sector.

Guidance for career shifters. Folks transitioning into intl affairs from another field who may not be eligible for fellowships.

Have a session or two that relate more to young professionals (1-3 years out of school) or professionals in transition from one field to another.

help with usa jobs/ difficult applications

How to highlight your diversity in international relations in job and internship interviews

How to make a career change (strategy)

How best to network and communicate with potential mentors

How best to make yourself competitive in global marketplace (what skillsets need developing)

How to stay engaged if you work outside of DC

I was hoping to hear about USAID's work as well.

International development, education, and the progress of democracy in sub-Saharan Africa

More sessions on security.

More topics that link the private sector with the public sector. Often times government affairs and the foreign service seem isolated with the private sectors, when in reality they are inseparable whether it be oil prices, interest rates, the bond market, or other macroeconomic measures.

N/A

n/a

pursuing details as leadership opportunities (i.e. details to White House, NSC or other agencies)

Questions I had (to consider for future topics?): How navigate the political agenda of US relations with other distractions (e.g US military actions and how they're perceived, impressions on US media overseas -- jersey shore, 16 and pregnant)

see previous answers

The climate crisis.

There was diffinetely nothing about technology nor was there anyone who knew a lot about my field. A lot of people were interested in being an ambassador, so probably a UN member would be helpful.

Unconscious bias; women in the workplace; more topics focused on navigating workplaces where diversity is not reflected

What is the role of international students, who attend schools in the U.S., in positively influencing U.S. foreign policy with their origin country?

Working in International Affairs Across Multiple Sectors - Public, Private, Multilateral

Please rate, if applicable, each of the following aspects of the conference.

	Excellent	Good	Fair	Needs Improvement
Overall Quality of the Speakers	47 72%		17 26%	1 2%
Topics and Issues Covered	39 60%		21 32%	3 5%
Length of Conference and Breakout Sessions	32 49%		29 45%	3 5%
Value of Information Provided and Analysis Offered by Speakers	47 72%		13 20%	3 5%
Quality of Food	43 66%		16 25%	4 6%
Quality of Conference Site	50 77%		14 22%	1 2%
Registration Website	32 49%		29 45%	4 6%
One-on-One Career Counseling	29 45%		16 25%	5 8%
Networking Opportunities	41 63%		11 17%	8 12%
Mentoring Opportunities	23 35%		18 28%	10 15%

Please add any additional comments about other aspects of the conference.

At times it could be difficult rendezvous with our mentors

Everything was excellent but I cannot emphasize enough how more time needs to be devoted to networking and mentoring opportunities. There was insufficient time to make meaningful connections with other participants.

I didn't have the opportunity to talk with a counselor, though I would've liked to. I think it is good that we were set up with mentors, however I believe it should be set up by interest. I was paired with someone who is in a completely different field than me.

I think that the transitions between the sessions could be a little longer for networking purposes.

I was assigned a mentor but she never contacted me and did not show up to the event. I felt like that was a really wasted opportunity.

I wasn't even told that my mentor did not show up. Also, some time should have been allocated for mentors and mentees to meet. In addition, one-on-one career counseling didn't even happen. Lastly, networking opportunities didn't work as well because it was only possible during the time we should be eating.

I would have liked the conference and breakout sessions to be a bit longer, this way there would be less rushing and more time to thoroughly cover the material.

I would've liked longer breakout sessions as it often felt that everyone wanted to keep continuing but time would be cut short as the sessions were ending.

It would be great to have more mentoring/leadership sessions for mid-senior career professionals.

My mentor showed up at 3pm on Saturday, which made it a bit hard to network during the conference (though she made up for it afterwards!)

N/A

n/a

Networking opportunities works best when you have mentors who are already on the job market. If you have a majority of students in a room, the networking or the speed networking event may not be productive.

Never had one. While there was a meeting for networking, there was another for mid-professional fellowship. So most of the mentors were in the mid-professional and the mentees in the networking.

None

Overall, the conference was well-planned and executed. The registration process was user-friendly. Access to the venue was not a cumbersome process. The choices of speakers and moderators were thoughtful and appropriate for the purpose and target audience.

The mentoring program is very valuable, having build in time explicitly set for mentoring would be nice.

There was not much time to meet with mentees. Should have been built into the schedule.

We selected breakout sessions several weeks before the conference, but no reminders were sent and we were not required to attend those panels. The selection process should be more clear if it is being used to estimate attendance, or it should be replaced with simple descriptions if the selection is completely arbitrary.

Were you able to connect with your assigned mentor or mentee?

Yes	33	50.8%
No	19	29.2%
N/A	9	13.8%
Other	2	3.1%
No Responses	2	3.1%
Total	65	

Did the conference achieve the goal of connecting professionals and students from diverse backgrounds with career opportunities in international affairs? Are there specific suggestions on how we can better achieve that goal for future planning?

A little

As mentioned, a little more time for networking, particularly for those not attending the ICAP reception.

I believe so but there can always be improvements to helping make sure that students are gaining further exposure to careers and professionals.

I think professionals should wear clear indicators that they are professionals and not students

I would say we were able to see a diverse amount of people but needs more opportunities to be able to talk to them or figure out who is who (description of contact information on pamphlet , or group people by their organizations rather than alphabetically)

It achieved the goal. Well done.

N/A

N/A

No. There should be more allocated time for that to happen.

Personally I felt as though the conference gave me ample opportunities to connect with people in the field I would like to pursue. It could also be I was able to connect with certain panelist before the conference began.
Somewhat. I think that if the event was more structured and we got to know who the participants better through activities would have made this event more meaningful.
The time is not enough to connect, particularly because I came in on Friday from work, already tired. I think having a Sunday session would also be great.
There were multiple breakouts I wanted to attend happening simultaneously. I would suggest three breakout slots instead with only two options.
Yes
Yes
yes
Yes
Yes
Yes
Yes
Yes it achieved this goal but I would suggest building some more interactive sessions so that the only opportunity to engage isn't at Q&A. Obviously the speed networking session was highly interactive so maybe that should be a plenary for all as part of Friday or Saturday evening.
Yes it did!
Yes it did. I think even having a career fair of sorts sometime within the conference could link the professionals better to the students and vice versa.
Yes the conference did achieve the goal of connecting those present to careers in the sense that there were many professional programs mentioned and connections made that could one day lead to concrete
Yes!
Yes!
Yes! better matching of mentors/ mentees by subject area/ interest
Yes! However, people often stick to groups they're comfortable with. I think it would be good to have breakout sessions based on interest and have a mini-speed networking where people are encouraged to talk with others that they don't know.
Yes, but perhaps in the future it would be good to have more representation from outside government. Defense contractors, private industry involved in CSR, advisory boards for NGOs, or investment firms, etc.
Yes, however I was unsure of whether the conference was targeting minorities in undergrad, minorities in grad school going onto entry-level IR fields, or current mid-career minority professionals at State, government, NGO, or private sectors. For each of the break out sessions, I would add an event that targets each of the different age ranges/experience levels to make it more relevant, particularly for those already working within IR.
Yes, I believe that the conference achieved this goal, considering the exceptional representation of minority students from both within and outside of the DC area. However, I believe that more minority students can benefit from conferences such as this one, in part as a result of greater outreach to students of their background. I only heard about the conference - at the last minute - through an affiliate of my scholarship program and had not heard of the conference prior to this year.
Yes, it achieved the goal.
Yes, the goal was achieved!
Yes, the goal was achieved.
Yes.
Yes.
yes.
Yes.
Yes.
yes.
Yes. But the more diverse it is the better. I think overall it was great. I am sure the next conference will even be so much better.
Yes. However, the conference would be much stronger and more valuable if it better enabled attendees to signal their needs/interests to one another so that they could make more consequential and beneficial connections with one another.
Yes. N/A
Yes. There are many student groups at universities in DC for diversity in international relations. Doing more structured outreach before/beyond the conference would be an invaluable resource for the students and would definitely strengthen the pipeline into international relations careers.

Are there any other comments/observations that you would like to share?

An excellent event with remarkably high-quality location, food, drink, staff, and volunteers. The suggestions above are minor, as this was an extremely well put together event!

better lunch saturday (more substantive food), less AC

Great conference! Really enjoyed the whole atmosphere the entire weekend. It was great to also have so much information packets to take back on future opportunities in either fellowships or other things.
I have already shared above.

I loved this event.

If there would be anyway to make it slightly more geographically diverse that would add to an already great mix of people.

In the case that all students expressing interest cannot be accommodated at the CDIA, it would be beneficial to inform students about similar conferences and programs occurring within the same time frame.

It was a great conference. Please continue with the effort to diversify foreign affairs.

It was very unclear to the participants about what was happening at all times.

Keep up the good work!!!!

N/A

n/a

no

No. Thank you so much for such a wonderful opportunity!

None.

Other than CFR, Aspen Institute, and a few other organizations, there did not seem to be many representatives from the think tank/policy foundation world.

Overall, a very rewarding opportunity.

Please have the reception when the event ends, not on Friday.

Please keep this conference alive! It is sorely needed in the international affairs industry. Thanks for doing it in the first place.

Such a pleasure to be in a space surrounded by the diversity of america with a common interest. It is a rare opportunity that I treasure.

Thank you for taking the time to put on this conference each year! It is a wonderful gathering of diverse individuals and I love going each year!

Thank you!

COUNCIL ON FOREIGN RELATIONS DIVERSITY PROFILE FOR THE ROBINA FOUNDATION

October 31, 2016

The Council on Foreign Relations (CFR) strives for diversity among its members, staff, and Board of Directors, and in its programming for students, educators and religious groups. CFR defines diversity broadly, including racial, ethnic, gender, political, religious, sexual orientation, geographical, and professional considerations. CFR classifies minorities using the guidelines established by the Equal Employment Opportunity Commission: Black or African American; Hispanic or Latino; Native Hawaiian or other Pacific Islander; Asian; American Indian or Alaska Native. CFR has undertaken numerous diversity initiatives in its ninety-five-year history. In addition to its ongoing work to improve diversity within the institution, CFR works with a range of other organizations on initiatives that seek to foster diversity in the foreign policy field.

Since first reporting to the Robina Foundation on diversity in 2011, CFR has increased the diversity of its membership, staff, fellows, and Board of Directors. Several points to highlight:

- More minorities have become CFR members. The biggest gains are in the term member program for mid-career professionals. The percentage of minority term members rose from 26 percent in 2011 to 28 percent in 2016.
- The number of minorities on CFR's staff rose by 26 percent between 2011 and 2016, and the number of women on CFR staff rose by 13 during the same period. The number of minorities on CFR's professional staff rose by 122 percent between 2011 and 2016, while the number of women on the professional staff rose by 63 percent. The number of women who are full-time or adjunct fellows in the David Rockefeller Studies Program rose by 67 percent.
- CFR has more women and minorities serving on its Board of Directors today than it did five years ago.

This diversity profile consists of two parts. The first part reviews the diversity of CFR's membership, staff, and Board of Directors. The second part reviews the range of diversity initiatives that CFR pursues, both on its own and in cooperation with other organizations, to encourage members of underrepresented groups to explore international issues and pursue careers in foreign policy.

I. CFR DIVERSITY PROFILE

CFR's diversity can be assessed in terms of its membership, its staff, and its Board of Directors.

A. CFR Membership

CFR is at its core a membership organization. The membership is an increasingly diverse group by any metric—gender, ethnicity, professional background, location, and expertise. With over 4,200 life members and 800 term members, CFR membership is divided almost equally among those living in New York, Washington, DC, and across the country and abroad. CFR members include government officials, renowned scholars, business leaders, acclaimed journalists, prominent lawyers, and distinguished nonprofit professionals. Today, women constitute 28 percent of CFR's overall membership and African Americans, Asians, Hispanics, and other minority groups constitute 16 percent. Term members are distinguished young men and women selected when they are between the ages of thirty and thirty-six for five-year membership terms. Many term members later join CFR as life members; the term member program therefore serves as a leading indicator of the diversity to CFR's future life membership. Whereas women make up 28 percent of overall membership, 38 percent of term members are women. Similarly, there are more minorities in term membership (28 percent) than in life membership (14 percent).

Since 2011, the percentage of term members who are minorities has increased from 26 to 28 percent. In terms of CFR's overall membership, the percentage of minorities has increased from 15 to 16 percent, and the percentage of women has increased from 26 to 28 percent.

* (With CFR's commitment to maintaining a robust membership, an advisory committee was formed in 2016 to focus efforts on broadening diversity within both life and term membership applicant pools.

B. CFR Staff

The diversity of CFR staff can be assessed along several dimensions: 1) the overall CFR staff; 2) the staff of the David Rockefeller Studies Program, CFR's in-house "think tank"; 3) CFR's Fellowship Program; and 4) the Franklin Williams Internship.

1. Overall CFR Staff

CFR is an equal opportunity employer, and it actively seeks candidates from diverse backgrounds. CFR policy forbids discrimination against any applicant or employee on the basis of age, race, creed, color, national origin, sexual orientation, military status, sex, disability, genetic predisposition or carrier status, or marital status. This policy applies to all employment and personnel practices, including recruitment, hiring, promotion, transfer, benefits administration, training, compensation, and termination.

The breakdown of overall CFR staff, professional staff, and support staff in October 2016 is as follows:

	2011		2014		2016	
	Number	Percentage	Number	Percentage	Number	Percentage
Overall CFR Staff						
Women	141	55%	174	56%	160	52%
Minority	70	28%	86	27%	88	29%
Total Staff	251		316		308	
Professional Staff						
Women	63	54%	98	54%	103	51%
Minority	23	20%	41	23%	51	25%
Total Professional Staff	117		181		201	
Support Staff						
Women	78	58%	76	56%	57	53%
Minorities	47	35%	45	33%	37	35%
Total Support Staff	134		135		107	

Currently, 52 percent of CFR's staff are women and 29 percent are minorities. One hundred and three of CFR's 201 professional staff are women, and fifty-one are African-American, Asian, or Hispanic. (CFR defines professional staff as mid-level through senior management positions, ranging from assistant

directors through vice presidents.) Fifty-seven of CFR's 107 support staff members are women, and thirty-seven are African-American, Asian, or Hispanic. (CFR defines support staff as positions below the level of mid-management, including research associates and program associates.) CFR's senior management consists of seven women and five men.

The percentage of women on CFR's overall staff declined by three percentage points between 2011 and 2016 (from 55 to 52 percent), and the percentage of minorities rose by one percentage point over the same period (from 28 to 29 percent).

The percentage of women on CFR's professional staff declined by three percentage points between 2011 and 2016 (from 54 to 51 percent), and the percentage of minorities rose by five percentage points over the same period (from 20 percent to 25 percent).

The percentage of women on CFR's support staff fell by five percentage points between 2011 and 2016 (from 58 to 53 percent), and the percentage of minorities has remained steady over the same period (at 35 percent).

2. David Rockefeller Studies Program

The staff of the David Rockefeller Studies Program are a subset of the overall CFR staff just discussed. The most visible members of the Studies Program are the twenty-nine full-time fellows. Their efforts are complemented by thirty-five adjunct fellows who typically hold full-time positions elsewhere and provide project-specific services to CFR. CFR actively recruits fellows from underrepresented populations. The pool of all candidates qualified to be fellows is small and the number of qualified candidates from underrepresented populations is smaller still. This makes successfully hiring minorities a tremendous challenge, and it is among the reasons that CFR launched the Expanded Diversity Initiative. The breakdown of the full-time and adjunct fellows is as follows:

	2011		2014		2016	
	Number	Percentage	Number	Percentage	Number	Percentage
Full-Time Fellows	31		42		29	
Minority	4	13%	4	10%	1	3%
Women	8	26%	14	33%	9	31%
Adjunct Fellows	24		19		35	
Minority	2	8%	1	5%	6	17%
Women	4	17%	3	16%	11	31%
Total Fellows	55		61		64	

The number of women who are full-time or adjunct fellows rose from twelve to twenty between 2011 and 2016, an increase of 67 percent. The number of minorities who are full-time or adjunct fellows rose from six to seven over the same time period.

3. Fellowship Affairs

CFR administers eleven fellowship programs. These programs enable promising early and mid-career government officials, private sector employees, and academics to spend up to a year broadening their perspective on foreign affairs and pursuing research at CFR or another institution. Individuals who spend their fellowship placed at CFR are considered in-resident visiting fellows, while those who spend the fellowship elsewhere are considered fellows not-in-residence. (Fellows who are not-in-residence are not included in the staff totals discussed above.)

CFR extensively markets its fellowship programs to organizations and networks with deep ties in minority communities. CFR reaches out to faculty at Atlanta Metropolitan State College, Clark Atlanta University, CUNY City College of New York, Georgia Institute of Technology, Howard University, Morehouse College, Spelman College, Temple University, and the University of California - Los Angeles, and closely engages with contacts at the Ron Brown Scholars Program, International Career Advancement Program, Global Access Pipeline, Charles B. Rangel International Affairs Program, Thurgood Marshall College Fund, the National Association for Equal Opportunity in Higher Education, and the National Conference of Black Political Scientists to identify possible fellowship candidates.

Additionally, CFR's Fellowship Affairs team markets the programs through U.S. Department of State affinity groups, such as the Congressional Black Caucus and Congressional Hispanic Caucus, that serve underrepresented groups. CFR markets its fellowship programs at conferences, such as the annual Hispanic Association of Colleges and Universities Conference, Historically Black Colleges and Universities Conference, and the Conference on Diversity in International Affairs (hosted at CFR). The fellowship affairs staff also hosted information sessions on Capitol Hill for Charles B. Rangel international affairs fellows, Donald M. Payne international development fellows, and Hispanic Association of Colleges and Universities interns. They also met with faculty and staff at Historically Black Colleges in Atlanta, Georgia, and at the annual Historically Black Colleges and Universities Conference in Arlington, VA.

As is the case with full-time Studies fellows, the pool of eligible applicants for specific fellowship programs is small. Several of the fellowship programs require expertise on specific topics, such as nuclear security or U.S.-Japan and U.S.-Canada relations, while others target specific professionals, such as journalists and tenured academics. In the case of the six military and intelligence fellows, the sponsoring organization, not CFR, determines who will hold the fellowship.

2016-2017 Fellows	Minority	Women	Total
Visiting at CFR	1	4	11
Not-in-residence	2	3	15
Total	3	7	26

Three minorities, up from one in the previous year, and seven women hold visiting or non-resident visiting fellow positions in the 2016-2017 fellowship year. CFR continues to make it a priority to identify and recruit minorities and women to apply for its fellowships, and the Expanded Diversity Initiative has enabled CFR to broaden and deepen its contacts in minority communities. CFR also continues to maintain a diverse composition of its fellowship selection committees. For example, the current International Affairs Fellowship selection committee includes five women and nine men, of which five are minorities. In 2016-2017, the committee included six women and eight men, of which three were minorities. Committee members help with recruiting a diverse applicant pool by tapping into their own networks.

4. Franklin Williams Internship

CFR's commitment to promoting a diverse workforce and encouraging minorities to pursue careers in foreign policy extends to its internship program. The CFR Internship Program offers outstanding opportunities for college undergraduates and graduate students to spend a semester at CFR. Competition is fierce, with thousands of applicants for a small number of internships available in New York and Washington, DC, each year.

CFR's Franklin Williams internship is designed specifically to provide opportunities for underrepresented populations in New York and Washington, DC, to participate in the internship program. CFR established the internship in 1990 in honor of the late Ambassador Franklin H. Williams, a distinguished foreign policy expert and former CFR director who helped to form several organizations that advance opportunities for American minority groups, including the Association of Black American Ambassadors.

Minority college undergraduates and graduate students who are studying international relations or a related field are strongly encouraged to apply for the Franklin Williams internship. With the support of the Robina Foundation, CFR has increased the annual number of Franklin Williams interns from two to twelve in CFR's 2016 fiscal year, with eight placed thus far in the 2017 fiscal year. All CFR interns have the opportunity to attend CFR's Meetings Program events and to participate in CFR's Intern Professional Development program, which seeks to further develop the knowledge and skills of interns as a foundation for future work in the foreign policy arena. In addition, Franklin Williams interns travel to New York or Washington, DC, to see all aspects of CFR's operations, and they are invited to participate in the annual Conference on Diversity in International Affairs.

C. CFR Board of Directors

CFR expanded its Board of Directors in 2006 in large part to increase diversity in CFR's leadership. CFR continues to work to recruit women and minorities to join its Board. Currently ten of the thirty-six Board members are women. Five of the thirty-six Board members are minorities.

Since 2011, the percent of women and minorities on CFR's board has stayed level. Women have accounted for an average of 31 percent of the Board during this time period, and minorities have accounted for 16 percent.

II. CFR'S DIVERSITY INITIATIVES

CFR pursues a range of diversity initiatives on its own and in cooperation with other organizations.

A. CFR Outreach Program

CFR Outreach activities concentrate on two broad categories of constituents that provide a multiplier effect in disseminating CFR's resources and bringing foreign policy discourse into new communities. These are academics, including both educators and students, and religious and congregational leaders and scholars. CFR outreach activities and resources include monthly eNewsletters that reach 43,000 educators and over 17,500 religious leaders across the country, online teaching notes, interactive conference calls with foreign policy experts, and invitations to CFR-sponsored events. By targeting these two audiences, the Outreach initiatives connect CFR with a wider and more representative cross section of the American population.

B. Global Kids

CFR has hosted the Global Kids Summer Institute since 2006. Global Kids is a nonprofit educational organization that offers in-school and after-school programs for high-school students from low-performing schools in neighborhoods populated by ethnic groups largely underrepresented academically, politically, and professionally. Global Kids seeks to ensure that participants have the knowledge, skills, experiences, and values they need to succeed in school, participate effectively in the democratic process, and achieve leadership in their communities and on the global stage. CFR works with Global Kids on a range of programs to expose participants to international issues and career opportunities in foreign policy. The three-week Global Kids Summer Institute for high school students hosted by CFR at its New York headquarters convened a group of thirty students to CFR in 2016 for a program that featured interactive presentations by CFR fellows and other experts on a variety of foreign policy topics. Throughout the school year, CFR organizes and hosts monthly Global Kids foreign policy roundtables, bringing together an average of forty-five students for each session to discuss historical background and current policy perspectives on pressing international issues. Each spring, CFR hosts the Global Kids annual gala at its New York headquarters.

C. Global Access Pipeline Project

CFR is actively involved in the Global Access Pipeline (GAP) project, a consortium of organizations that seeks to enhance the quality and diversity of U.S. participation in international affairs. GAP encourages collaboration among internationally-oriented programs for the underrepresented, from the pre-collegiate level through mid-career professional development programs, and links these to diversity efforts at leading research and policy institutions such as CFR. Along with the alumni association of the International Career Advancement Program (ICAP), CFR and GAP organize an annual two-day Conference on Diversity in International Affairs with the support of the Robina Foundation. The 2016 conference convened over 200 students, mid-career professionals, and seasoned practitioners from across the country at CFR's Washington, DC, office on April 15 and April 16. The conference included a keynote address by Kalpen Modi, actor and former associate director for the White House Office of Public Engagement; a networking reception; plenary panels; one-on-one career counseling; and smaller workshops and skill-building sessions. The 2017 conference will be held on April 28-29 at CFR's Washington, DC, office. Given that increased diversity in international affairs must start with early exposure and extend through the creation of international leadership opportunities, the conference will engage a mix of students and mid-career professionals.

D. International Career Advancement Association

The International Career Advancement Program (ICAP) seeks to bring greater diversity to staffing of senior management and policy-making positions in international public service and the global private sector. CFR collaborates with the ICAP and the Global Access Pipeline to organize an annual, two-day joint conference on diversity in international affairs. CFR also cooperates on other efforts and initiatives that ICAP is pursuing. CFR has nominated three staff members to participate in the week-long ICAP professional development program for mid-career and senior professionals over the past five years. All three were selected from highly competitive pools of candidates. The 2016 participant was Aimee Carter, the managing director of corporate affairs.

E. Think Tank Diversity Consortium

CFR is a founding member of the Think Tank Diversity Consortium (TTDC), which aims to increase recruitment, retention, and advancement of people of diverse backgrounds, and to strengthen diversity and inclusion best practices within the think tank and policy community. CFR is one of eleven think tanks in

the consortium, which also includes the Aspen Institute, the Brookings Institution, the Carnegie Endowment for International Peace, the CNA Corporation, the German Marshall Fund, the Joint Center for Political and Economic Studies, the Peterson Institute for International Economics, the United Nations Foundation, and the Urban Institute. TTDC provides members access to research, surveys, and reports on the importance of diversity and inclusion, convenes roundtables with TTDC members to discuss best practices for promoting diversity in a think tank setting, and holds networking events for people of diverse backgrounds.

G. Colin Powell Center for Policy Studies at the City College of New York

CFR has an on-going relationship with the Colin Powell School for Civic and Global Leadership at the City College of New York. Established in 1997, the Colin Powell School is committed to the values of service and leadership and serves students from diverse national and ethnic backgrounds. CFR hosts students from the Powell School for an annual briefing led by CFR scholars and staff. Additionally, students and faculty are invited to attend select CFR meetings over the course of the program year.

H. Outreach to Historically Black Colleges and Ethnically Diverse Institutions

CFR, through its Academic Initiative, has made a special effort to reach out to historically black colleges, community colleges, and organizations that advance opportunities for minority groups. CFR regularly sends representatives to the country's leading academic conferences which offer opportunities to connect with minority audiences. In March 2016, CFR participated in the National Conference of Black Political Scientists (NCOBPS) annual meeting in Jackson, Mississippi, staffing a booth and underwriting a lunch program featuring CFR Adjunct Senior Fellow for African Peace and Security Issues Reuben E. Brigety II. In October 2016, CFR representatives attended the Hispanic Association of Colleges & Universities Annual Conference which brings together over 488 member colleges and universities and school districts committed to Hispanic higher education success. CFR showcased resources at the Historically Black Colleges and Universities (HBCU) Faculty Development Network Annual Meeting in New Orleans from October 20 to 22, 2016. CFR also attends career fairs at Historically Black Colleges and Universities.

I. Outreach to the Academic Community

CFR builds relationships with ethnically diverse educational institutions at the administrative, college and university, high school, and student levels.

CFR organizes regular workshops for educators at the secondary and post-secondary level. The purpose of the workshops is to provide the opportunity for educators to participate in substantive briefings and group discussions, learn about the wide variety of CFR open-source resources, and discuss best practices for bringing international politics into the classroom. In 2016, professors from historically black institutions such as Howard University, Atlanta Metropolitan State College, Morehouse College, Florida Agricultural and Manufacturing University, and Spelman College, participated in the tertiary-level educators workshop, as well as professors of color from other U.S. institutions.

CFR also includes presidents from these institutions, as well as others (both public and private) with diverse student populations in its Higher Education Working Group. This group of college and university administrators gather at CFR's New York headquarters once a year to explore the role of higher education institutions in meeting the challenges posed by major global issues.

J. Religious Diversity

CFR makes a concerted effort to engage emerging religious leaders and scholars from a range of religious traditions. CFR is exploring inroads into faith communities by participating in conferences and sending

representatives to the January 2016 National Association of Evangelicals Christian Leadership Conference, the May 2016 National Council of Churches Christian Unity Gathering, the June 2016 Association of Catholic Colleges and Universities Rome Seminar, and the September 2016 Religion and Diplomacy Conference. CFR also collaborated with the Conference of Presidents of Major American Jewish Organizations to host a panel discussion on pressing foreign policy challenges featuring CFR President Richard N. Haass in July 2016. Additionally, CFR has concentrated efforts on bringing more diverse voices to CFR as speakers for conference call series, roundtable sessions, and workshop panels. Speakers at recent Religion and Foreign Policy Initiative-sponsored events represented over fifteen different faith traditions.

In an effort to build and strengthen relationships with leaders of underrepresented faith traditions, Outreach initiative staff have organized meetings with representatives from the National Sikh Campaign, the Muslim Public Affairs Council, and the Women's Islamic Initiative in Spirituality and Equality to discuss areas of collaboration and strategies for engaging more Sikhs and Muslims in CFR's programming.

The initiative also spearheaded a large seminary outreach project to establish relationships with theology school administrators throughout North America. CFR researched deans and presidents of leading seminaries and divinity schools and distributed a targeted mailing with CFR resources to 192 seminary administrators. The mailing has generated a great deal of interest in the initiative among this community and allowed CFR to expand its reach to seminary administrators, professors, and students.

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Humanity in Action Report on Activities Funded by the Robina Foundation November 1, 2016

Reporting date: November 1, 2016

Reporting period: October 6, 2015 – November 1, 2016

Submitted by: Judith S. Goldstein (Executive Director) and Anthony Chase (Director of Programs)

Humanity in Action is pleased to share a report with the Robina Foundation on our progress developing, implementing and evaluating two major fellowship programs funded fully or in part by the Foundation: the Diplomacy and Diversity Fellowship and the Humanity in Action Fellowship programs in Europe. This report focuses on the period of October 6, 2015 – November 1, 2016. The conclusion will include some broader remarks and reporting on the Robina Foundation's support and impact over the past five years.

The report will be divided into five sections: (1) report on the Diplomacy and Diversity Fellowship, (2) report on the Humanity in Action Fellowship, (3) report on network, impact and conclusion, (4) two income and expense statements for the programs, and (5) a series of supporting documents and materials attached in PDF.

I. Report on the Diplomacy and Diversity Fellowship

A. Summary

The Diplomacy and Diversity Fellowship is a transatlantic educational program for 24 American and European graduate students. The program explores a range of issues in international affairs, including diplomacy, economics, national security, international development, culture, education and human rights. Many of the subjects the fellows examine relate to diversity pluralism and democracy.

Our broad educational mandate is to introduce emerging American and European foreign policy professionals to a range of crucial issues in international affairs. Within that mandate, we have three specific objectives: to increase diversity in the field of international affairs; sustain the commitment to international work on the part of minority groups; and expand research, graduate instruction and public discourse about the importance of pluralism in international fields.

The 2016 Diplomacy and Diversity Fellowship took place in Washington, Berlin, Warsaw and Athens from May 29 – June 26, 2016.

B. 2016 Application and Application Questions

As in prior years, the application for the 2016 program included the following components: CV/Resume; response to the 2014 program schedule; idea for a research article on an issue relating to foreign affairs, democracy, diversity and pluralism; response essay; personal statement; research interests; and two letters of recommendation. The prompts for the personal statement and response essay were as follows.

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Personal Statement Prompt: "Please describe two events in your life: one in which your values changed and one in which your politics changed."

Response Essay Prompt: Please read two essays in the October 22, 2015, issue of *The New York Review of Books* by Charles Glass and Hugh Eakin. After reading the two pieces, write an essay suggesting a policy to address the migration crisis or an aspect of it. You must choose one of the following governmental offices and write from the perspective of that office. However, your policy position should be yours (one that you actually believe in) and not necessarily one being promoted by the current occupants of these offices.

- A high official in the European External Action Service
- A high official in the foreign ministry of a national European government of your choice
- A senior member of the Policy Planning Staff in the U.S. Department of State
- A senior diplomat stationed at a U.S. Embassy in Europe or North Africa

In addition to the Eakin and Glass pieces, reference four additional sources that have influenced your position. These may be books, policy papers or major essays like the two listed above.

C. 2016 Outreach

In August 2015, Humanity in Action staff began the organization's annual outreach initiative to disseminate information about the Diplomacy and Diversity Fellowship as well as the Call for Applications. The 2015 outreach cycle resembled that of 2015. The outreach initiative targeted American and European institutions of higher education, professional and student organizations, international and foreign policy organizations and numerous contacts at other relevant institutions and organizations. We were greatly assisted in our outreach initiative by Humanity in Action Senior Fellows, alumni of our programs.

We identified a number of target institutions for the 2015 Diplomacy and Diversity Fellowship contacted each institution through campus visits, personal telephone calls and/or targeted email correspondence.

We sent the program announcement and Call for Applications through multiple email campaigns to the following sets of contacts:

- 1,640 university administrators and faculty members in the United States;
- 267 student leaders in US graduate student affinity groups, such as the Student of Color Alliance at Georgetown University;
- 527 graduate students who asked to be notified when the application was released;
- 1,068 university administrators and faculty members in Europe;
- 1,294 Humanity in Action Fellows, Senior Fellows and staff members;
- 349 friends of Humanity in Action, mainly in the United States.
- 66 members of Humanity in Action's international Boards.

D. 2016 Program Development: Addition of Warsaw

The largest programmatic change in 2016 was the extension of the program to Warsaw, Poland. The expansion of the program to Warsaw enabled the Fellows to explore the increasing importance of Poland in European Union affairs and the unique political story of post-Second World War Poland's democratic and economic advancements as well as the recent rise in nationalism.

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Please see the Program Schedule in the appendices for details regarding the program curriculum.

E. Selection of 2016 Diplomacy and Diversity Fellows

Following an extensive application review process, we ultimately selected 17 graduate students attending American universities and seven graduate students attending European universities. In accordance with the parameters of the grant, we selected 10 graduate students from underrepresented American backgrounds, seven graduate students from other ethnic backgrounds attending American universities, and seven graduate students or recent graduates from European countries in which Humanity in Action has programs.

The 24 Fellows represented the following universities: American University, Columbia University, The Geneva Graduate Institute for International and Development Studies, Harvard University, Sciences Po Paris, The George Washington University, Tufts University, University of Amsterdam, University of California – Berkeley, University of East Anglia, University of Massachusetts – Amherst, University of Michigan, University of Nevada, Las Vegas, University of Oxford, University of Sarajevo, University of Southern Mississippi, University of Texas – Austin, University of Warsaw and Uppsala University. The 2016 cohort of Fellows included 11 men and 13 women.

With 165 applications globally, the acceptance rate for the 2016 Diplomacy and Diversity Fellowship was 15 percent. American applicants comprised 46 percent of the applicant pool while European applicants comprised 54 percent. The average age of applicants was 26.

F. Preparation Given to Fellows

Fellows were given mandatory and non-mandatory readings to review four weeks ahead of the Fellowship. Readings included both academic and journalistic pieces on the following topics, among others: New and non-traditional actors in foreign affairs; the European Union's role in diplomacy; transatlantic relations; diversity, integration and discrimination; security and conflict; new technologies and innovation; corporate diplomacy; LGBT global rights; migration; philanthropy; and human rights.

Because the selected Fellows represented such a broad range of fields of expertise, ranging from history to business, Humanity in Action it considered crucial to provide them with introductory material to the major subjects to be explored on the program. For example, some Fellows came from public health backgrounds and lacked background knowledge on EU institutions. The Fellows also shared their own additions to the reading list through a group email list created by Humanity in Action staff.

G. The 2016 Program Schedule

Speakers: Ultimately, we scheduled 47 speakers and workshop facilitators in the 4-week program. In general, speakers gave remarks for 15-20 minutes followed by an extended Q&A discussion with the Fellows, often moderated by a staff member or a Fellow. Some of the outstanding speakers included the following:

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- *David E. Sanger* (Chief Washington Correspondent, The New York Times) on Obama's foreign policy
- *Kate Martin* (Senior Fellow, Center for American Progress) on terrorism and civil liberties
- *Randy W. Berry* (Special Envoy for the Human Rights of LGBTI Persons, U.S. Department of State) on LGBT rights
- *Ambassador Janusz Reiter* on Polish-German relations
- *Konstanty Gebert* (Journalist) on contemporary Polish affairs
- *Nivedita Prasad* (Alice Salomon University) on the refugee crisis
- *Ambassador Klaus Scharioth* on postwar German foreign policy

Session Format

The sessions ranged in format: lecture, seminar, extended Q&A discussions, group discussions, workshops, tours and site visits. The vast majority of sessions were content-oriented focusing on one or more policy issues. Other session types included career advice-giving and skills workshops. Approximately one-third of the sessions included moderators or discussants.

Consistent with other Humanity in Action programs, the Fellows were eager to engage in the sessions. There was rarely enough time for the number of questions the group wanted to ask and, following each session, speakers were typically mobbed with additional questions. One piece of feedback we are tentatively considering for future editions of the program would be to reduce the overall number of sessions to allow for more time with each speaker and facilitator.

H. Articles

Each Fellow in the Diplomacy and Diversity Fellowship is obliged to write a research article about an issue of his or her choice that pertains to international affairs and diplomacy. This is a major component of the program. The program's sessions serve as the basis or point-of-departure for the articles. We have instructed the Fellows to use a mix of literature review research and interviews with experts and foreign policy practitioners as the basis of their writing. The articles must be new works, although they may correspond to the Fellows' ongoing graduate research. Humanity in Action plans to publish the articles in a Web compilation and possibly, depending on finances, in a printed format.

The Fellows are now engaged in a peer review process, providing feedback to one another while they develop, research and write their articles. We are in the process of pairing each Fellow with an external reviewer (a qualified expert from Humanity in Action's community) who will provide critical feedback. Humanity in Action staff will also share feedback and instructions for revisions. We expect that the articles will be ready for publication in spring 2017. We have included *Shifting Paradigms*, the publication of the 2015 cohort's articles, as an appendix.

H. The Humanity in Action Community- Large and Small Networks

Through the Diplomacy and Diversity Fellowship, participants gain access to both a small and a large network. The small network is the cohort of 24 Fellows. This group shares great experience: they have experienced the same intense program where they encountered the same questions and challenging subjects. They know one another both intellectually and

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personally. There is a great deal of trust in a network of this small size and intensity. The intensity of the program—both intellectually and socially—leads to strong social bonds. Not unlike the Humanity in Action Fellowship, the Diplomacy and Diversity Fellowship is an “intellectual boot camp.”

The large network is the broader Humanity in Action community of 1,600 Senior Fellows—alumni of our programs. Members of this network share many of the similar experiences and the Humanity in Action pedagogical approach. Even though they experienced different programs, the Senior Fellows have a set of core convictions to human rights, diversity and active citizenship.

II. Report on the Humanity in Action Fellowship Programs

A. Introduction

The Humanity in Action Fellowship programs in Europe are Humanity in Action's flagship programs and engage undergraduate students and recent graduates. In contrast, the Diplomacy and Diversity Fellowship engages graduate students.

The Humanity in Action Fellowship programs bring together international groups of students to study human rights and minority rights issues. During the programs, Fellows produce original research or engage in grassroots projects that explore how and why individuals and societies resist intolerance and stand up for democratic values. 115 Fellows are selected for the Fellowship including 40 Fellows who are students and recent graduates from American universities and colleges and 75 university students and recent graduates from Humanity in Action's European partnering countries.

The Fellowship begins in Washington, DC, with an orientation in late May. The 40 American Fellows participate in this intensive workshop that includes panels and discussion on international affairs, human rights and citizenship.

Fellows then participate in month-long fellowships in Amsterdam, Berlin, Copenhagen, Sarajevo or Warsaw for the month of June where they explore the topics of human rights, diversity, and social justice within the specific context of each program city's national history and contemporary issues. Although the exploration of specific national histories and cultures is central to Humanity in Action's educational pedagogy, all of the Humanity in Action's Fellowship programs consider the broader international ramifications and legacies that continue to impact contemporary issues.

The program ends with an international conference that takes place in a select location where all of our Fellows from all our program cities convene. The conference features keynotes, workshops and discussions led by experts, activists and Humanity in Action Senior Fellows. This gathering of the Humanity in Action community offers a unique intergenerational and collective educational experience on issues of human rights and minority rights.

Humanity in Action's pedagogical approach is intellectually demanding, rigorous in pace, and highly interactive. Intensive and challenging, the Humanity in Action Fellowship features daily lectures and discussions with leading academics, journalists, politicians and activists, as well as site visits to government agencies, non-profit organizations, museums and memorials. The international composition of each program combined with the breadth of topics and experts included, presents a unique opportunity for Humanity in Action Fellows to deepen their

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capacity to understand perspectives derive from different nationalities, histories, experiences and backgrounds.

B. Outreach for the 2016 Programs

On September 30, 2015, Humanity in Action launched the Call for Applications for the 2016 Humanity in Action Fellowship programs in Europe. At the same time, our staff began our annual outreach initiative, supported by the Robina Foundation. Applications were due on January 7, 2016.

We distributed the Call for Applications through several methods, including mass email correspondence, personal correspondence, in-person meetings, phone calls and social media campaigns on Facebook and Twitter. In recent years, Humanity in Action expanded its comprehensive list of colleges and universities with diverse student populations as well as identified key campus fellowship offices, student groups, and academic departments that attract minority students at these institutions.

We sent the program announcement and the Call for Applications through multiple email campaigns to the following sets of contacts:

- 625 American Humanity in Action Fellows and Senior Fellows;
- 29 American Humanity in Action Board members;
- 25 Staff members;
- 1,366 students who asked to be notified when the application was released;
- 282 university minority student affinity groups;
- 4,292 university administrators and faculty members.

Humanity in Action also continued its close work with partner organizations that provide higher educational opportunities for minority students, including the Posse Foundation, the Udall Foundation and Prep 4 Prep.

C. Selection of Minority Participants in the 2015 Humanity in Action Fellowship

The Robina Foundation's generous support made it possible for 15 students from U.S. minority backgrounds to participate in Humanity in Action's 2016 fellowship programs. Humanity in Action selected a total of 40 students from American universities for the 2016 programs.

2016 Robina-Supported Fellows: Humanity in Action selected the following students and recent graduates as CFR/Robina-supported Fellows.

- Kelvin "Kweku" Ampem-Darko (Dutch Program)
- Ernest Britt (Bosnian Program)
- Courtney Brunson (German Program)
- Heidi Chiu (Danish Program)
- Angie Del Arca (Polish Program)
- Alexandria "Allie" Dyer (Bosnian Program)
- Tod Etheredge (Danish Program)
- Carlos Flores (Polish Program)
- Ashley Lawrie (Dutch Program)
- Angie Liao (Polish Program)
- Joy Liu (Polish Program)
- Tasneem Maner (Sarajevo Program)

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- Lincoln Mitchell (Danish Program)
- Georgia Soares (Bosnian Program)
- Kareem Watson (German Program)

Please see the Bluebook in the appendices for more biographical and demographic information about the 15 selected Fellows.

Application and Selection Criteria: Humanity in Action Fellows are selected on a highly competitive basis for their high academic standing, active participation in human rights issues and outstanding recommendations from academics and other professionals known to the applicants. Each applicant must submit: a personal statement, an essay responding to several readings, two letters of recommendation, a transcript, and a resume or CV.

The 2016 applicant pool was extremely competitive with an 8 percent acceptance rate. In 2016, Humanity in Action received applications from 234 universities. Forty-seven percent of applicants identified as African American, Latino and/or Asian/Pacific Islander. The average age was 21. The applicant pool was predominantly women (79% female, 20% male, 1% other).

D. 2016 Humanity in Action Fellowship

Thanks to generous funding of the Robina Foundation, the 15 aforementioned students participated in 2016 Humanity in Action Fellowship. All come from diverse socioeconomic backgrounds, thrive academically and are committed to civic engagement.

The students spent four weeks in one of five European cities—Amsterdam, Berlin, Copenhagen, Sarajevo, or Warsaw—working with European students exploring ways to promote racial, ethnic, and religious tolerance in diverse societies. Each program was highly interdisciplinary, featuring daily lectures and discussions with renowned academics, journalists, politicians, and activists, as well as site visits to government agencies, nonprofit and community organizations, museums, and memorials.

Please see the Program Agendas in the appendices for details regarding the program curricula.

E. Annual International Conference

The Humanity in Action Fellowship concludes with the annual International Conference where all of the Fellows from each program come together with Humanity in Action Senior Fellows, staff, board members, and distinguished speakers and guests come together for a 3-day intensive exploration of historical and contemporary human rights and minority rights issues within the context of the city where the conference is held. Through seminars, workshops and site visits, the International Conference offers participants a collective, intergenerational educational experience that meaningful bonds and strengthens Humanity in Action growing community

The Seventh Annual Humanity in Action International Conference was held in Athens, Greece. The conference investigated a range of critical issues concerning Greece's political and economic situations. Greece is currently at the forefront of multiple intersecting crises – foremost the migration crisis, as Greece is the first destination for hundreds of thousands of migrants and refugees, as well as a hub for human trafficking. Greece is also in the midst of a financial crisis as the country's institutions and civil society continue to fracture under the pressure of the recession in Europe and the country's ties to the European Union.

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The conference also featured skill building workshops, site visits and networking events for Humanity in Action's international community. The conference featured keynotes, workshops and discussions led by scholars, public servants, activists and Humanity in Action Senior Fellows.

F. Action Projects

All Humanity in Action Fellows are obligated to plan and implement an Action Project—a hands-on initiative inspired by their fellowship experience. Action Projects give Fellows the opportunity to take what they learned during their Humanity in Action Fellowship and use that knowledge to address real-life issues in their own communities. The projects reflect each Fellow's unique experience and interests. Action Projects may take many different forms, including community service, public advocacy, art projects, lectures, conferences and social entrepreneurship. The 2016 Fellows are now in the midst of planning their Action Projects, and we look forward to sharing news about their progress and impact in the coming months.

G. Ongoing Professional Opportunities with Humanity in Action

To encourage Fellows to stay engaged in foreign affairs issues after their participation in the fellowship, Humanity in Action provides professional and educational opportunities for its Senior Fellows, allowing them to gain experience in policy-making, advocacy and international relations. Humanity in Action offers several unique opportunities for ongoing professional education, training and networking. These include the Lantos-Humanity in Action Congressional Fellowship in the U.S. Congress in Washington, the Pat Cox-Humanity in Action Fellowship in the European Parliament in Brussels and the NAACP-Humanity in Action Fellowship in Baltimore. In addition, Humanity in Action organizes and sponsors special trainings and workshops on subjects like conflict management, mediation and creative and artistic activism. In March 2017, Humanity in Action will launch its first ever Executive Education Leadership Program through a special partnership with The New School. The program will draw upon The New School's acclaimed faculty in design and management and will focus on ethical dilemmas in professional leadership. Numerous Robina-supported Fellows have participated in these programs, particularly the Lantos and Pat Cox programs, over the past five years and continue to do so.

Each fall, Humanity in Action hosts its annual New York Conference for alumni of its programs. Recent featured speakers include Cornell Brooks (President and CEO, NAACP), Karen J. Greenberg (Director, Center on National Security, Fordham University), and Danielle Goonan (Senior Manager II, Grant Portfolios, Walmart Foundation; Humanity in Action Senior Fellow). The 2016 New York Conference took place on October 21 and 22 at The New School in Manhattan.

IV. Network, Impact and Conclusion

The Robina Foundation has made a major impact in Humanity in Action's work through its two generous grants over the past five years. Beginning in 2012, the Robina Foundation began supporting Humanity in Action through a grant to the Council on Foreign Relations. The 2012 grant supported the expansion of CFR and Humanity in Action's diversity outreach initiatives.

The Foundation's significant investment in Humanity in Action since 2012 has led to serious outcomes and successes in diversifying the American foreign policy community. The funding has enabled Humanity in Action to expand its outreach initiatives to universities across the

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United States and to target student populations that are often left out of international education initiatives, especially those focusing on foreign policy.

In five years, Humanity in Action has identified and supported the career development of 145 high-achieving U.S. undergraduates and recent graduates through their participation in Humanity in Action's fellowship programs. Of these 145 Fellows, 73 were U.S. undergraduate and recent graduates from minority backgrounds who took part in the Humanity in Action Fellowship programs in Europe. An additional 30 Fellows were U.S. graduate students from minority backgrounds enrolled in international affairs Master's or doctoral programs who took part in the Diplomacy and Diversity Fellowship.

As we have reported over the past several years, the Fellows have found Humanity in Action's programs to be immensely rigorous and rewarding - intellectually, professionally and personally. The Robina-supported Fellows are active members of Humanity in Action's international network. They attend our International Conferences and our New York Conference. They serve as program speakers and expert reviewers on new Fellows' research papers. They read applications for new fellowship applicants and interview candidates. And they attend Humanity in Action study trips in cities like Detroit and Athens. The Robina-supported Fellows care deeply about giving back to the next generation of Fellows coming through the ranks of Humanity in Action, particularly those of minority background. And, more broadly, the Robina-supported Fellows care deeply about advancing diversity and minority rights through their wide ranging career paths in national security, diplomacy, international NGOs, cultural organizations, trade associations, political office, institutions of higher education, and advocacy organizations.

Although the Robina Foundation grant and collaboration with the Council on Foreign Relations is concluding this year, this five-year engagement will have a lasting impact on Humanity in Action. Through this support, we have built a high-level outreach operation which will continue to enable Humanity in Action to recruit high-achieving American minorities for the programs - to support their careers and to help make the American foreign policy community better match the diversity found across the United States. We will also continue to hold issues of foreign policy and international collaboration and cooperation at the center of our programs and, indeed, many of the individual and institutional relationships we have build through the Diplomacy and Diversity Fellowship will continue to shape our fellowships in programmatic and strategic terms. And, finally, we will continue to support the career advancement of the 145 Robina-supported Fellows through their engagement in our Senior Fellow programming.

The generous support from the Robina Foundation has been instrumental in extending Humanity in Action's educational approach and values. Humanity in Action is extraordinary grateful. The Foundation's support has enabled Humanity in Action to expand its programs relating to foreign policy and diplomacy. By funding the Humanity in Action Fellowship for undergraduate students and the Diplomacy and Diversity Fellowship for graduate students, the Robina Foundation has contributed in a lasting way to the diversification of future foreign policy leaders. Participants who come from diverse populations are essential for Humanity in Action's educational programs about minority rights and democratic societies - and they are essential for successful U.S. engagement in the world.

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Appendices

1. Applicant Demographic Information - Diplomacy and Diversity Fellowship (2016)
2. Bluebook - Diplomacy and Diversity Fellows and Robina-Supported Humanity in Action Fellows (2016)
3. Program Schedule - Diplomacy and Diversity Fellowship (2016)
4. Conference Agenda and Booklet - International Conference in Athens, Greece (2016)
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7. Orientation Schedule - Humanity in Action Fellowship (2016)
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APPROVED BUDGET vs. ACTUALS
Diversity Initiative in Foreign Policy:
Diversity and Diplomacy Graduate Program

Robina Partnership with Humanity in Action:

Program on Diversity and Diplomacy

Summer Program Workshop

a. Student participation in summer program (program stipend)	35,721	35,700	21
b. Travel for 17 American student participants to Washington, DC program (air, hotel, meals, transport)	56,416	55,879	537
c.Travel for 7 European student participants to Washington, DC program(air, hotel, meals,transport)	27,410	27,011	399
d. Travel for 17 American student participants to Paris program (air, hotel, meals, transport)	86,621	85,111	1,510
e. Travel for 7 European student participants to Paris program (air, hotel, meals, transport)	28,205	26,987	1,218
f. HIA staff travel to Washington, DC (air, hotel, meals, transport)	12,812	13,250	(438)
g. HIA staff travel to Paris program (air, hotel, meals, transport)	26,276	27,654	(1,378)
h. Catering, rental for Washington, DC, program	10,202	9,950	252
i. Catering, rental for Paris program	12,292	13,500	(1,208)
j. Miscellaneous cost (museum fees, additional taxis)	6,724	6,321	403
k. HIA program costs (supplies, print material, and books)	10,381	11,289	(908)
Total	313,060	312,652	408

Outreach and Planning

l. Minority student outreach trips (10)	5,778	5,400	378
m. HIA staff outreach and planning trips - domestic (air, hotel, meals, transport)	9,048	9,245	(197)
n. HIA staff outreach and planning trips - international (air, hotel, meals, transport)	10,128	9,831	297
o. Recruitment in Europe	52,531	54,202	(1,671)
Total	77,485	78,678	(1,193)

Program Management and Administration: Salaries, Benefits, Stipends, Administration

p. HIA administrative costs (salaries, stipends)	174,166	174,166	-
q. HIA administrative costs (insurance, legal, rent)	56,836	57,416	(580)
Total	231,002	231,582	(580)

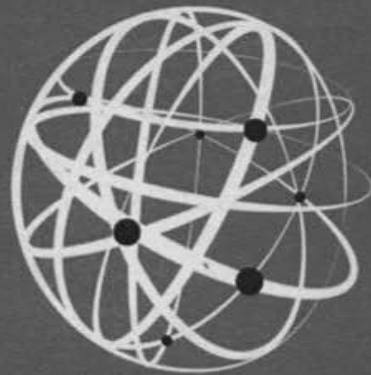
TOTAL ROBINA PARTNERSHIP WITH HUMANITY IN ACTION

Year 3 - 2015/2016		
Approved Budget	Actuals	Remaining Budget/Variances Favorable/(Unfavorable)
35,721	35,700	21
56,416	55,879	537
27,410	27,011	399
86,621	85,111	1,510
28,205	26,987	1,218
12,812	13,250	(438)
26,276	27,654	(1,378)
10,202	9,950	252
12,292	13,500	(1,208)
6,724	6,321	403
10,381	11,289	(908)
313,060	312,652	408
5,778	5,400	378
9,048	9,245	(197)
10,128	9,831	297
52,531	54,202	(1,671)
77,485	78,678	(1,193)
174,166	174,166	-
56,836	57,416	(580)
231,002	231,582	(580)
621,547	622,912	(1,365)

Humanity in Action, Inc. Fellowship Programs
Minority Outreach Initiative

Year 5_ November 1,2015 through October 31 ,2016
Actual vs. Grant Budget

<u>Description</u>	<u>Grant Budget</u>	<u>Actual Incurred</u>	<u>Variance</u>	<u>Explanation of Variances Greater Than \$1,000</u>
<i>Summer Program (Minority Outreach):</i>				
# of Minority Students Supported by Grant	15	15	-	
Financial Support Agreed Upon	127,345	127,345	-	
Outreach related HIA staff travel costs	11,249	11,769	(520)	immaterial variance
Program Assessment	5,306	5,500	(194)	immaterial variance
Administrative cost allocation	58,366	58,366	-	
<i>Two Day Workshop:</i>				
Travel, Meals, Catering, etc.	45,612	44,963	649	immaterial variance
Total Yr. 5 Grant	247,878	247,943	(65)	



**DIPLOMACY
& DIVERSITY
FELLOWSHIP**

2016 APLICANT DEMOGRAPHICS

WHERE DO APPLICATIONS COME FROM?

165 APPLICATIONS



27% AMERICAN 54% EUROPEAN



WHO APPLIES TO THE FELLOWSHIP?

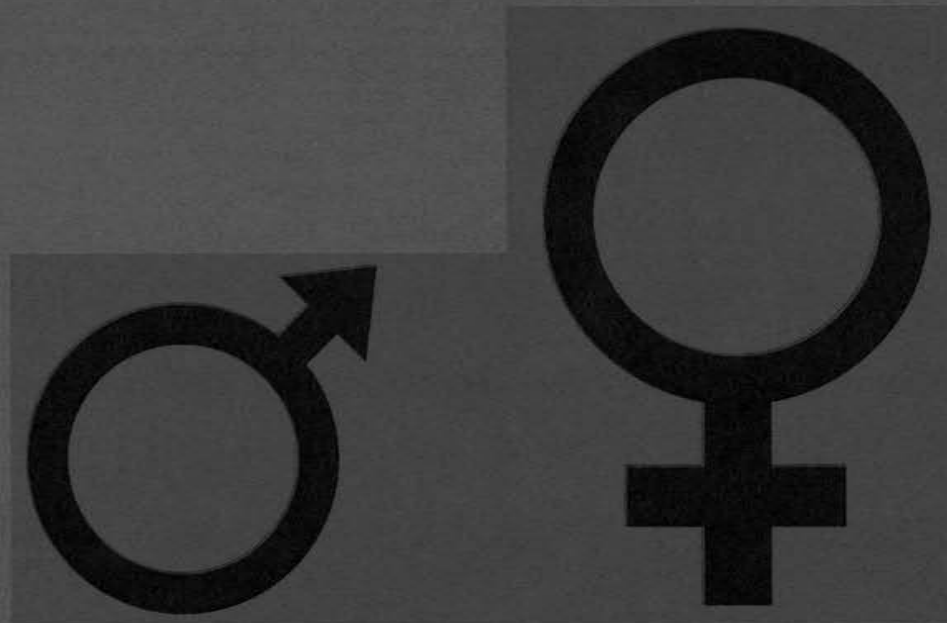
DEGREE PROGRAM

MA	58%
PhD	14%
JD/LLM	12%
MPA/MPP	7%
MS	7%
MPH	2%



WHO APPLIES TO THE FELLOWSHIP?

AVERAGE AGE 26



26% MALE

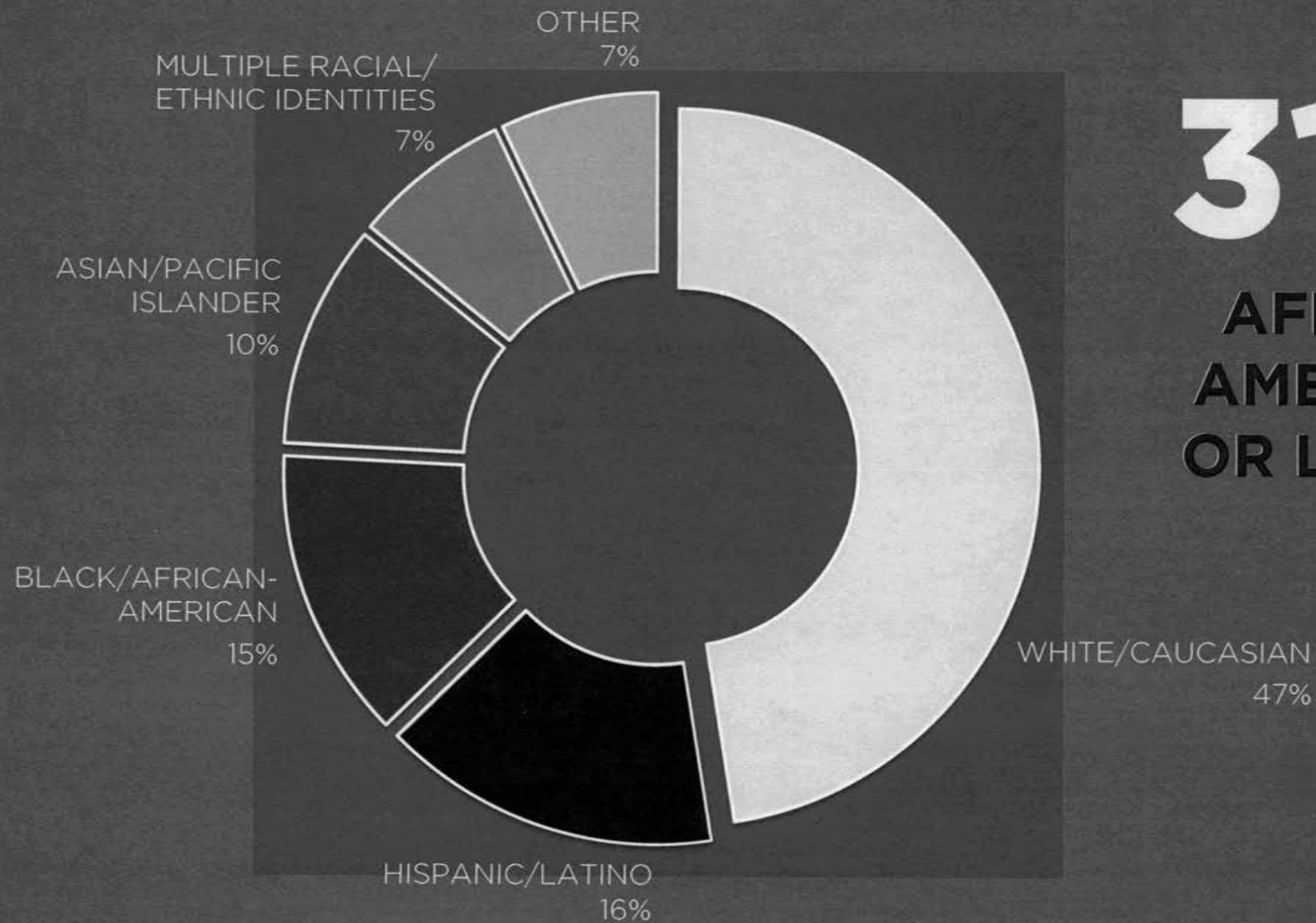
71% FEMALE

2% OTHER



APPLICANT DEMOGRAPHICS

WHO APPLIES TO THE FELLOWSHIP?



31%

AFRICAN-AMERICAN OR LATINO

ETHNIC DIVERSITY OF AMERICAN APPLICANTS



APPLICANT DEMOGRAPHICS

WHERE IS HOME FOR OUR APPLICANTS?

46

**Countries
Represented**

23

**Dual
Citizens**



WHERE DO APPLICATIONS COME FROM?

107 UNIVERSITIES

**40
AMERICAN**

**67
INTERNATIONAL**

GREATEST NUMBER OF APPLICANTS FROM:

8 AMERICAN UNIVERSITY

7 COLUMBIA UNIVERSITY

5 HARVARD UNIVERSITY

4 UNIVERSITY OF CALIFORNIA, BERKELEY

3 GEORGETOWN UNIVERSITY

UNIVERSITY OF WARSAW 6

SCIENCES PO PARIS 5

HUMBOLDT UNIVERSITY 3

ADAM MICKIEWICZ UNIVERSITY 3

UNIVERSITY OF CARDINAL STEFAN WYSYNSKI 3



WHERE DO OUR APPLICANTS STUDY?



WHAT FIELDS OF STUDY DO OUR APPLICANTS REPRESENT?



**2016 ROBINA FOUNDATION SUPPORTED
HUMANITY IN ACTION FELLOWS**

UNDERGRADUATE FELLOWS



Kelvin "Kweku" Ampem-Darko (Dutch Program)

Black/African American (Non-Hispanic), Wheaton College

Hailing from Cape Coast, Ghana, Kelvin Ampem-Darko is currently a rising senior at Wheaton College, MA with a major in Neuroscience and a minor in Hispanic Studies. Influenced by his background, he has worked as the Intercultural Board Chair of his campus to bring visibility to issues facing minority students on campus. Prior to this, he volunteered in a public school and three hospitals in Quito, Ecuador in an effort to address healthcare challenges facing the Quechuan indigenous population. This served as the motivation for learning about the Romani (Gypsy) population during his semester abroad in Granada, Spain. As an early admission candidate to the Icahn School of Medicine at Mount Sinai, Kelvin hopes to begin a career as a physician in underserved areas. His main hobbies include reading fiction, volunteering in nursing homes and most recently, longboarding.



Ernest Britt (Bosnian Program)

Male, Black/African American (Non-Hispanic), Duke University

Ernest is a recent graduate of Duke University where he earned degrees in political science and English with a minor in Spanish studies. As evidenced by his involvement with Duke's Black Student Alliance and experience on campaigns in Florida (his home state), Charleston, S.C., and Washington, D.C., Ernest is passionate about social justice and politics. His research on voter disenfranchisement and work producing a documentary on voting rights for the Southern Coalition of Social Justice taught him the power of narrative in addressing these issues. More recently, he helped organize Duke Law School's first civil rights conference and promoted student civic engagement through the Sanford School of Public Policy. Ernest will begin work at a political media firm in D.C. this summer, and in the future he hopes to continue exploring the intersection of new media & politics or attend law school to specialize in civil rights/election law.



Courtney Brunson (German Program)

Female, Black/African American (Non-Hispanic), Mount Holyoke College

Born and raised in Fort Lauderdale, Florida, Courtney Brunson is a recent graduate from Mount Holyoke College. She majored in International Relations and has minors in Philosophy and Law, Public Policy & Human Rights. As a member of the Posse Foundation's third Civic Engagement cohort on campus, Courtney participated in various student organizations including serving as the President of the Debate Society, the President of the Student Government Association, and the Director General of her campus's Model United Nations conference. She also worked as an Administrative Fellow for her college's Community Based Learning program and created a diversity peer program called MoZone that trains students on discussing diversity a meaningful and productive way. Professionally, she has interned for Women In Distress, Planned Parenthood, and the political offices of Congresswoman Debbie Wasserman

Schultz and Senator Elizabeth Warren. After graduation, Courtney hopes to work in public service in Washington, D.C.



Heidi Chiu (Danish Program)

Asian/Pacific Islander, Washington University in St. Louis

A daughter of Chinese immigrants, Heidi was born and raised in Flushing, Queens. She is a senior at Washington University in St. Louis who has been spending her past (and last) semester in Nepal, where conversations with advocates for indigenous rights and government accountability have urged a deeper curiosity about transnational social movements. Beyond feeling connected to Asia and communities formed from diaspora, Heidi is connected to St. Louis. In St. Louis, she has worked with peers to organize an Asian American Studies program at her college, with local coalitions to revitalize local parks and strengthen urban agriculture policy, and with the Ferguson Commission to develop policy recommendations that address systemic racial inequities. She looks forward to stretching her conception of the world with a community similarly wishing to shape a more equitable and empathetic world.



Angie Del Arca (Polish Program)

Hispanic/Latino, Bard College

A New Orleans native, Angie Del Arca recently graduated from Bard College with a degree in Film & Electronic Arts. She spent a semester abroad in Berlin, Germany and quickly discovered her passion for traveling and cultural exchange. Angie is a Posse Scholar, Gilman International scholar, and has won several awards in addition to Humanity In Action. As the co-founder of the Bard immigration group, Angie has worked to engage the Bard community in dialogue about immigration and how it intersects with other issues. For the past three years she served as a homework tutor for first-generation immigrants in Rhinebeck, NY. Angie also volunteers as a facilitator with the Community Expressive Arts Project, where she leads workshops off-campus. Angie plans to combine her passion for film and social justice by directing films highlighting the unique stories that are often underrepresented in our society.



Alexandria "Allie" Dyer (Bosnian Program)

Other, Colgate University

Alexandria "Allie" Dyer is a graduate of Colgate University with a major in Peace and Conflict Studies as well as a focus in premedicine. Upon graduation, Allie taught food and garden-based science classes with Native youth as a FoodCorps Service Member in her hometown of Portland, Oregon. Currently, she is a Fulbright Student Scholar to Ghana where she is researching the hair salon as a space for women's health education. Both of these experiences, as well as her studies, have solidified the importance of creating space for history and community in wellness and health work. She plans to pursue a career as a public health physician that works for justice and equity in the local and global health system.



Tod Etheredge (Danish Program)

Black/African American (Non-Hispanic), Morehouse College

Tod Steven Etheredge, III is a graduating senior at Morehouse College and is in Morehouse's Honors Program. Tod is an International Studies major with a minor in Mandarin Chinese. Tod is a member of the Alpha Lambda Delta, Sigma Iota Rho, and Omicron Delta Kappa Honor Societies. Tod has traveled extensively during his undergraduate years. His travels include going to China, South Africa, Zimbabwe, and Israel. Tod is both a 2015 Charles B. Rangel Scholar and a 2015 Oprah Winfrey South African Leadership Program Fellow. Tod is currently a Presidential Fellow with the Center for the Study of Presidency and Congress (CSPC). He conducts research on U.S. aid in Sub-Saharan Africa. Tod volunteers and serves the local community through MedShare, Books for Africa, and the Atlanta Special Olympics. In his free time Tod enjoys kayaking, archery, and hanging with friends and family.



Carlos Flores (Polish Program)

Hispanic/Latino, Harvard University

Born in California but raised in Honduras for a significant part of his life, Carlos Flores is a rising junior at Harvard University with a major in Government. Since 2013, Carlos has worked with several Honduran-based media outlets (online and televised) that cover human rights and political issues. His coverage has included crime/corruption cases in Honduras, migration at the US-Mexico border, and hearings at the U.S. Supreme Court. He also works with several NGOs that campaign for the elimination of impunity in Honduras and has contributed research for Honduras' civil society reports for the U.N.'s Universal Periodic Review. Next year, Carlos plans to return to Honduras, where he will be using media to gather evidence to facilitate the prosecution of human rights abuses in domestic and international judicial institutions. After Harvard, Carlos plans to obtain a Master's degree and study human rights/environmental law.



Ashley Lawrie (Dutch Program)

Other, Agnes Scott College

Raised in Guyana, Ashley Lawrie is a recent graduate of Agnes Scott College, where she double majored in History and Religious Studies, with a minor in Film and Media Studies. She studied abroad in Spain, Ireland and as a Benjamin A. Gilman Scholar in Morocco. At her alma mater, a women's college, she was engaged in a number of leadership roles for various campus cultural organizations, which significantly impacted her development as a global citizen. With a dedication to intercultural dialogue and public service, her future academic interests include studies in International and World History, with an emphasis on Caribbean and Mediterranean regional and national identity formation.



Angie Liao (Polish Program)

Asian/Pacific Islander, New York University

Angie Liao is a rising senior at New York University. In her former life, she attended the Kirov Academy boarding school in Washington, D.C. and trained intensively to be a professional ballet dancer. In years following, she has found a new path of passion: human rights. In her first year at NYU, Angie was named a Global Human Rights Fellow. She traveled to Beijing to work with migrant workers and researched China's civil and political rights situation. While studying abroad in Sydney, she worked closely with Australia's asylum seeker population through the National Immigration Support Services, where she founded an English literacy program, for which she received a President's Service Award this spring. She has been honored to present original research on justice and rights around the world at conferences in Washington, D.C., Beijing, Seoul, and Sri Lanka. She dreams of returning to Sri Lanka on a Fulbright after graduating.



Joy Liu (Polish Program)

Asian/Pacific Islander, Duke University

Joy Liu is a 2014 graduate of Duke University, where she double majored in Biology and Public Policy Studies. Since graduation, she has been working on palliative care research in Singapore. She is interested in medicine (particularly end-of-life issues), global health, and health policy. Exploring these interests have taken her to parts of East Africa, Asia, and South America on global health research and service. She has also worked on health equity domestically as an intern for the federal Office of Minority Health and campus leader for the student arm of Partners in Health. She will be starting medical school in the fall. Joy was born in China and calls Southern California home. In her free time, she loves to read, write, draw, and travel.



Tasneem Maner (Sarajevo Program)

Asian/Pacific Islander, Villanova University

Tasneem Maner is a Presidential Scholar studying Biology and Humanities at Villanova University. As an activist on campus she has facilitated diversity and inclusion programming around Black Lives Matter movements, protests against violence, and religious minority awareness events. She cofounded the Interfaith Coalition, organized the first interfaith service trip, and reinitiated the Muslim Student Association at her Catholic University. She seeks to empower American Muslims and counter Islamophobia. In addition to her communication work and institutional programming, she models Muslim women's clothing-lines to encourage young Muslim women to be proud of their identities. Next fall she will begin doctorate studies in optometry, and plans to focus her career on treating underserved communities. Her mission is to develop programs that focus on sensitivity training, enhancing the standard of vision-care, and dissolving drug misuse and doctor-patient disconnect in minority and low-income communities.



Lincoln Mitchell (Danish Program)

Black/African American (Non-Hispanic), Yale University

Born and raised in Bristow, Oklahoma, Lincoln Mitchell graduated in 2015 from Yale University with majors in Political Science and African American Studies. Interested in how the criminal justice system and inequitable access to education create barriers to opportunity for youth of color, Lincoln's work in college focused on youth mentorship, immigrant worker rights, and prisoner rights. After graduating, Lincoln taught university English in Bogotá, Colombia through the Fulbright Program. Next year, Lincoln will attend Stanford Law School where he will focus on criminal defense and immigration issues. In his spare time Lincoln enjoys playing soccer and tennis, cooking, improving his Spanish, writing short stories, and listening to R&B and Soul.



Georgia Soares (Bosnian Program)

Hispanic/Latino, University of Southern California

Georgia was born and raised in Brazil and moved to the United States in 2011. She is a senior majoring in English (Creative Writing) and double-minoring in French and Comparative Literature at USC. She has conducted literature research since her freshman year, being the awardee of a USC SURF grant, the Provost's Fellowship, and the Mellon Mays Undergraduate Fellowship. After studying abroad in Paris, France, Georgia interned at the Consulate General of France in Los Angeles. She has served as the editor of USC's Scribe Journal, a columnist for the Wall Street Journal, and a Brazil expert researcher for the Global Film Project at the USC Annenberg Media, Diversity and Social Change Lab. Georgia is a member of Phi Beta Kappa and the USC Academy for Polymathic Study. Georgia plans on pursuing a PhD in Comparative Literature after teaching English in Nice, France under the TAPIF program.



Kareem Watson (German Program)

Black/African American (Non-Hispanic), Hamilton College

In the year 1994 on independence day, Kareem Watson and his twin brother were born in Brooklyn, NY. Kareem is a soon to be graduate from Hamilton College and pursues a career path in social justice and activism. He holds an appreciation for the humanities and while at Hamilton has majored in Public Policy, in order to further his education in affecting the lives of the underprivileged. Kareem involves himself in volunteer work and is part of the Caribbean Student Association and Feminist of Color Collective, two student run clubs on campus. His interests include a love for hip-hop, spoken word, as well as practicing theatre and visual arts. Kareem plans on pursuing a career in social activism and philanthropy.

GRADUATE FELLOWS - DIPLOMACY & DIVERSITY



Lizbeth Arias

Hispanic/Latino, University of Nevada, Las Vegas

Lizbeth Arias is an Education Abroad Advisor for the Office of International Programs at the University of Nevada, Las Vegas, where she is also completing her Master's in international relations. Prior to her graduate and professional work at UNLV, Lizbeth served as a Bolden Scholar for the D.C. office of Senator Harry Reid, participated in an international leadership program at the University of Liverpool in England, and pursued intensive Mandarin studies at the Southwest University for Nationalities in China. Lizbeth enjoys making pizza at home, attending concerts when she's not studying, and finding last minute flights to places she's never been.



Renata Barreto

Hispanic/Latino, University of California, Berkeley

Renata Barreto is a graduate student in the jurisprudence and social policy Ph.D. program at Berkeley Law. Her research focuses on international law, technology, and social movements with an emphasis on quantitative methods. She completed her undergraduate education at Reed College, where she majored in international and comparative policy studies. Renata is the recipient of the Eugene-Cota Robles Fellowship and the American Political Science Association's Minority Fellowship. Additionally, she has worked at the Public Policy Institute of California as an intern evaluating the efficacy of the state penal system's reform. She is fluent in Spanish, French, and Portuguese.



George Bogden

University of Oxford

George Bogden currently serves as a J. William Fulbright-Hillary Rodham Clinton Fellow in Kosovo. In this capacity, he is an embedded special assistant in the country's Ministry of Trade and Industry, providing support on matters pertaining to treaty succession and international commercial policy. George is also a D.Phil. candidate in international relations at the University of Oxford, where he was awarded a Clarendon Scholarship. Before beginning his graduate studies, he received his B.A. in political science from Yale, serving as the university's Fox International Fellow in Istanbul the following year. He has completed internships in the U.S. House of Representatives and the State Department, as well as in non-governmental organizations and research institutions in Washington D.C., Ankara, and Istanbul.



Tanja Dittfeld

University of East Anglia

Tanja Dittfeld has recently returned to Denmark from working in Zambia at a local partner organization to the Swedish international organization We Effect with the primary responsibility of gender mainstreaming. Prior to this position, Tanja has also lived in Uganda twice whereby the first time was to work for a local NGO as a HIV/AIDS counsellor, while the second time was to conduct a Sida-financed minor field study on the lived experiences of LGBTI individuals. In August 2015, Tanja received her MSc in development studies from Lund University in Sweden. In October 2016, Tanja is to commence her PhD studies at the School of International Development at University of East Anglia in England.



Tamikka Forbes

American Indian/Alaskan Native Black/African American
(Non-Hispanic) White/Caucasian, American University

Tamikka Forbes is a member of the U.S. Foreign Service, where she most recently served on a domestic assignment with the executive office for African Affairs. She also served overseas in Nouakchott, Mauritania. She completed her master's in international communication strategy at American University, where her research came to focus on radicalization, and preventing violent extremism. Prior to the State Department, Tamikka worked at an alternate dispute resolution firm in Los Angeles. She earned her BA in humanities from Loyola Marymount, Los Angeles. She studied previously in Germany and Brazil, and speaks French and German. She is a native Californian.



Andreas Holzinger

Sciences Po Paris and the Freie Universität Berlin

Andreas Holzinger is currently working as a part-time analyst at Roland Berger, focusing on public sector strategy consulting. He is a dual-degree Masters candidate at Sciences Po Paris and the Freie Universität Berlin in international affairs, exploring the intersection of international development and human rights. A fellow of the German National Academic Foundation, Andreas graduated with a trilingual B.A. in social sciences with honors from Sciences Po. He has held policy and research positions in both national and multilateral institutions, and volunteered with non-profits in Europe, Asia, and North America. Most recently, he conducted policy research and fieldwork in Benin and Ghana as a fellow of the Open Society Foundations, focusing on institutional reform and civil society in the sub-region.

2016 ROBINA FOUNDATION SUPPORTED HUMANITY IN ACTION FELLOWS



Kyla Johnson

Black/African American (Non-Hispanic), The George Washington University

Kyla Johnson brings a wealth of knowledge and experience to the Diplomacy and Diversity Fellowship. She began her career in international development as a Peace Corps Volunteer in Mozambique where she spent three years working on HIV/AIDS and malaria outreach. After her Peace Corps service, she was selected as a 2014 LGTVP ICats Fellow, placed with Educate Girls, an NGO based in Mumbai, India. Her most recent position was with Dimagi, a social enterprise working at the intersection of international development and technology. Kyla is currently pursuing an M.A. in global communication, specializing in public diplomacy, at the Elliott School of International Affairs at The George Washington University. Kyla is a native of Detroit, Mich.



Alen Kerić

University of Sarajevo and University of Bologna

Alen Kerić is a recent graduate with an MA in human rights and democracy in South-East Europe from the University of Sarajevo and University of Bologna. His MA thesis explored the relationship between LGBTIQ and Catholic communities in Croatia, while interning at the Women's Room, Center for Sexual Rights - Croatia's only counseling center for victims of sexual violence. Prior to his graduate studies, Alen obtained a BA in performance and media studies from Beloit College. He is socially engaged and political artist, performing in mediums of theatre, dance and performance art. His current general interests include studies on identity, race, class, gender, performativity, refugees, Islamophobia and corporate social responsibility. He was born and raised in Konjic, Bosnia and Herzegovina.



Jennifer Kuklenski

University of Southern Mississippi

Jennifer Kuklenski is an instructor in the Department of Social Responsibility at Northland College and teaches courses in multicultural development and strategic management. Jennifer also held teaching appointments in economics at Gogebic Community College and international political relations at the University of Maryland University College – Europe. She possesses over ten years of experience as an Air Force Intelligence Analyst and has served on Crisis Actions Teams in support of regional and international operations. Jennifer received her MA in international security from the University of Arizona and is completing her Ph.D. in international development at the University of Southern Mississippi. Her research interests include democratic development, demographic shifts associated with post-disaster migration, and conflict management in multicultural societies.

2016 ROBINA FOUNDATION SUPPORTED HUMANITY IN ACTION FELLOWS



Matthew Kustenbauder

Harvard University

Matthew Kustenbauder works at the U.S. Department of State as staff assistant to the Consul General in São Paulo, Brazil. His onward assignment is to the U.S. Consulate in Karachi, Pakistan. Matthew holds an M.Div. and M.A. from Yale University. He also received an A.M. degree from Harvard University, where he is a doctoral candidate in history. Matthew is a Dan David Prize Scholar and was a Fulbright Fellow to South Africa. He is the proud father of an eight-year-old boy, Liam, and husband of Humanity in Action Senior Fellow David Bargueno. He grew up on a dairy farm in Pennsylvania.



Nina Łazarczyk

Uppsala University

Nina Łazarczyk currently works as National Coordinator at Centre for Antitrust and Regulatory Studies at University of Warsaw. She is a feminist activist and journalist. Nina received her MSSc in Peace and Conflict Studies from Uppsala University. She completed an internship at Nordic Africa Institute. Prior to coming to Uppsala, Nina had completed internships at Stockholm International Peace Research Institute, Stockholm Institute of Transition Economics and the Polish Ministry of Foreign Affairs. Nina holds her bachelor's degree in European studies as well as multidisciplinary linguistic studies with the specialization in English, French and Spanish from University of Warsaw.



Kathryn McDonald

The George Washington University

Kathryn McDonald is an LLM candidate at The George Washington University Law School, specializing in international and comparative law. Prior to her time in Washington, DC, Kathryn was an associate at a large law firm in Minneapolis with an expansive international practice. Most recently, Kathryn was a Legal Fellow in the Office of Global Criminal Justice at the U.S. Department of State. There she engaged with government actors, civil society, and multilateral bodies, including the UN Security Council, on issues of post-conflict transitional justice. Her graduate research builds on this experience and evaluates witness protection mechanisms in hybrid courts trying atrocity crimes such as genocide and crimes against humanity. Kathryn is also a certified yoga instructor and former collegiate athlete.



Moises Mendoza

Hispanic/Latino, Columbia University

Moises Mendoza graduated in 2016 with a master of international affairs from Columbia University and a master of public policy from the Hertie School of Governance. He also holds a bachelor's degree from Georgetown University. In Fall 2016, he will join the Department of State as a Foreign Service Officer. Moises has previously worked in the German Bundestag and the European Commission and also worked as a journalist in the United States and Europe where he was a Fulbright scholar.



Xianzhi Meng

Asian/Pacific Islander, University of Massachusetts, Amherst

Xianzhi Lafond is currently a doctoral candidate at University of Massachusetts, Amherst. She is a writer, translator and editor, and is currently an assistant editor with Tsinghua Studies of Western Philosophy, Tsinghua University, China. She received a BA in english language and literature and a MA in literary theory and philosophy from universities in China. In addition, she received a second MA in American studies from Heidelberg University in Germany. After receiving her Ph.D., Xianzhi plans to join the School of International and Public Affairs at Columbia University in order to prepare for a career at the United Nations to promote human rights and education for underrepresented people. Additionally, she speaks multiple languages including English, Chinese, Japanese and German.



Ashley Portillo

Hispanic/Latino, Columbia University

Ashley Portillo is a master of international affairs candidate in human rights and conflict resolution at Columbia University's School of International and Public Affairs. A former U.S. Peace Corps volunteer, she taught English and implemented literacy programs in Bataan and Northern Samar, Philippines. Currently, she works as the Program Assistant for the Academy of Medical and Public Health Services in Brooklyn and finds great purpose in helping the neighborhood's largely immigrant residents learn about their rights to healthcare access. Ashley was born and raised in Orange County, California and received a B.A. in both Latin American studies and international relations at UC San Diego. Her research interests include women's reproductive rights and the lack of women's participation in peace negotiations.

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Oskar Raczynski
University of Warsaw

Oskar works at the Danish Royal Embassy in Poland as a Research Officer in the political department and as a Principal Investigator in a research grant funded by the Ministry of Science, which explores the new forms of international forced migration and their implications for international security and law. He gained experience i.a. in SKS Legal (a law firm), Helsinki Foundation for Human Rights and AIESEC. As a Paderewski Scholar in 2015, he interned at Institute of International Finance in Washington, DC. Oskar is about to graduate with degrees in international relations and Law from the University of Warsaw. He enjoys living in the vibrant capital of Poland.



Hanya Riedl
Graduate Institute for International and Development Studies, Geneva

Hanya Riedl is a MA candidate in international law at the Graduate Institute for International and Development Studies in Geneva. Alongside her studies, she currently supports the UNICEF Regional Office for CEE/CIS in its advocacy for child-sensitive economic and social policies and, highly topical, for rights of refugee children. Previous work experience, including at the Permanent Mission of Germany to the UN and the Manhattan District Attorney's Office, allowed Hanya to explore topics ranging from disarmament to criminal justice and from corporate compliance to human rights. Hanya completed her bachelor's degree in political science and economics at Columbia University in New York. Being German-Taiwanese, Hanya grew up in Bayreuth and spent a gap year after high school in Taipei.



John Scott
Harvard University

John Scott is an master of public health student at the Harvard TH Chan School of Public Health. He is developing a veterans organization, is active with several veterans initiatives, and is working with the Dana Farber Global Health Initiative to build an oncology center in Yerevan, Armenia. John is also an attorney with experience in antitrust and medical malpractice law. He is a former military judge advocate, U.S. Marine, and Veteran of Afghanistan. John is an alumnus of UC Berkeley and Stanford Law School.



Rohit Sudarshan

Asian/Pacific Islander, Tufts University

Rohit Sudarshan recently graduated from The Fletcher School of Law and Diplomacy where he studied international business relations. Prior to attending graduate school, Rohit worked as a Legislative Fellow at the Ohio House of Representatives and as a Teacher and Dean of Students at Breakthrough Collaborative, a teaching nonprofit. He graduated with a degree in political science from Kenyon College. At the Fletcher School, he focused on migration studies by studying the social and economic impacts of remittances with a specific focus on migrants from Southeast Asia. He was born in Newcastle but raised in Cincinnati, OH.



Roya Talibova

Other, University of Michigan

Roya Talibova is a dual degree PhD student in political science and statistics at the University of Michigan interested in dynamics of armed conflicts. Prior to PhD program, Roya was a program coordinator for the Future of Diplomacy Project at Harvard University. Between 2009-2012, Roya was a Senior Advisor on United States at the Office of the President of Azerbaijan Republic. She has previously worked at the Department of Political Affairs at the United Nations and served as a Spokesperson for the UN Millennium Development Goals. Roya received her MPA from the John F. Kennedy School of Government at Harvard University, MA in international relations from Seton Hall University, and BA in international relations from the Azerbaijan University of Foreign Languages.



Jessica Tollette

Black/African American (Non-Hispanic), Harvard University

Jessica Tollette is a PhD Candidate in the department of Sociology at Harvard University where she focuses on race and immigration. Prior to entering graduate school, Jessica worked for two years as a management consultant at the Monitor Group where she focused on marketing consulting and led the North American undergraduate diversity recruiting efforts for the firm. She received her bachelor's of arts in communication with a minor in Hispanic studies from the University of Pennsylvania. She was also a Fulbright Scholar to Spain where she conducted her dissertation research on race and immigrant integration in Madrid. She was born and raised in Laguna Niguel California but has lived in Philadelphia, New York, Boston and currently resides in Madrid.



David Truong

Asian/Pacific Islander, Harvard University

David Truong is a second year master in public policy student at the Harvard Kennedy School of Government, concentrating in social and urban policy. As a Pickering Foreign Affairs Fellow, he will join the Foreign Service upon graduating from HKS. Previously, he has interned at the State Department in the Bureau of Democracy, Human Rights, and Labor and at the Embassy in Kuala Lumpur, Malaysia. David received his undergraduate degree in political science at Yale University and is deeply passionate about social justice issues, particularly around poverty and racial inequality. He was born and bred in Texas.



Mike Videler

University of Amsterdam

Mike Videler is a research associate with the Public International Law & Policy Group, a global pro bono law firm advising states and non-state actors on peace negotiations, constitution drafting, and war crimes prosecution. He is also an LLM candidate at the University of Amsterdam, where he works as a research assistant. Previously, Mike worked for the SIM Netherlands Institute of Human Rights and interned with the Netherlands Permanent Representation to the UN at Geneva, where he worked on the UN Human Rights Council. Mike holds a BA in liberal arts from University College Utrecht and an LLB from Utrecht University, and spent a semester abroad at Sciences Po Paris. A native to the Netherlands, he currently lives in Amsterdam.



Suong Vong

Asian/Pacific Islander, University of Texas at Austin

Suong Vong works at the USDA Food and Nutrition Service (FNS) as the Regional Civil Rights Director for the Southwest Region, where she oversees Civil Rights compliance for all 15 of FNS's nutrition assistance programs. Suong has worked in county, state, and federal governments and served as a Peace Corps Volunteer in Samoa. Suong holds a bachelor's degree in East Asian studies and Asian American studies from the University of California, Los Angeles and is currently a masters of public affairs candidate at the Lyndon B. Johnson School of Public Affairs at the University of Texas at Austin.

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Appendix 3

Program Schedule - Diplomacy and Diversity Fellowship (2016)

WASHINGTON

May 29

Welcome to Washington and Humanity in Action

The Diplomacy and Diversity Fellowship begins with two Humanity in Action traditions. The first is dinner at the home of Judy and Stanley Hallet in northwest Washington. Judy and Stanley – both longtime supporters of Humanity in Action – have hosted opening dinners for our Fellows for more than a decade. Stanley, an architect, and Judy, a documentarian filmmaker, examine social and environmental conditions through their creative work. The second tradition is called "Bring An Object." In this exercise, each Fellow and staff member introduce themselves by showing and explaining an object that illustrates the individual's connection to Humanity in Action's issues – human rights, diversity or international affairs. The objects and stories can be funny, poignant or anything in between.

- Introductions and drinks with Judith S. Goldstein, Anthony Chase, Monika Mazur-Rafal, Antje Scheidler and Carlos Gonzalez (Humanity in Action)
- Dinner

May 30 (Memorial Day)

American Power and Myths

Our program begins on Memorial Day with an exploration of American power and American myth – seen both from afar and from Washington. We are concerned here with the central concepts, myths and truths that make up the 'Idea of America' as a beacon – or failure – of liberal democracy. In the morning, we will contemplate American wealth and poverty seen through the groundbreaking photography and life of Jacob A. Riis – now on show at the opulent Library of Congress. Riis's photographs captured the extreme poverty of New York's tenements and undermined the myth of American opportunity and a nation being welcoming of immigrants. In the afternoon, Judith S. Goldstein will discuss the paradox of American exceptionalism on the global stage. David E. Sanger, the Washington bureau chief for The New York Times, will then turn to contemporary affairs to discuss Washington as a powerhub and the challenges and limits to American power, especially under the Obama administration. DeLessin "Roo" George Warren will then join us by video to introduce our next site visit – an inventive audio tour of the Presidential Portrait Gallery that reframes U.S. history to consider the systematic oppression of indigenous peoples. We will end the evening with a dinner with Humanity in Action Senior Fellows who live in Washington and work law, policy, development and other fields.

- Site Visit: Tour of exhibition "Jacob Riis: Revealing 'How the Other Half Lives'" with Deborah Dakin (Docent, Library of Congress)
- Introduction
- Lunch and group discussion led by Carlos Gonzalez (Humanity in Action)
- The Paradox of American Exceptionalism with Judith S. Goldstein (Founder and Executive Director, Humanity in Action)
- Challenges to American Power with David E. Sanger (Chief Washington Correspondent, The New York Times)
- Video Presentation: Presidential Mythology and Indigenous History with DeLessin "Roo" George Warren (Humanity in Action Senior Fellow)

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- Site Visit: Presidential Portrait Gallery with Audio Guide developed by DeLessin “Roo” George Warren
- Dinner with Humanity in Action Senior Fellows

May 31

War and Memory

U.S. foreign relations have largely been defined by national security and military might. On the second day of our programming, we will turn our attention to security, memory and the changing attitudes of Americans toward military engagement abroad. We will begin at the Smithsonian for American history by catching a glimpse of the Star-Spangled Banner, the enormous garrison flag that flew over Fort McHenry in Baltimore during the War of 1812 with the British and would later become an American icon. We will then tour parts of an expansive exhibit on Americans at war beginning with the Vietnam war. While in the exhibit, think about the interplay between military engagement abroad and domestic affairs and cultural change at home. Think of the museum as the official showcasing of American history. What is missing, and what kind of story does the U.S. government want to tell? We will then walk across the National Mall to meet Paul D. Spreiregen, an architect, to view the Lincoln and Vietnam Veterans memorials and to discuss the memorialization of complex wartime histories and spatial design in Washington more broadly. We will then turn to thorny questions of civil liberties and counterterrorism in modern warfare and particular policy changes under recent U.S. administrations.

- Exhibition: “The Price of Freedom – Americans at War”
- Walk across the National Mall
- Site Visits: The Lincoln Memorial and the Vietnam Veterans Memorial
- The Vietnam Veterans Memorial, Context and Perspective with Paul D. Spreiregen (architect and author)
- War and Civil Liberties in the Age of Terrorism with Kate Martin (Senior Fellow, Center for American Progress)
- Group Discussion led by Jennifer Kuklenski and Roya Talibova

June 1

Development and Human Rights

We will examine issues in development from three particular perspectives. First, we will meet with Nageeb Sumar of the Gates Foundation to discuss the influence of private wealth in international development. How can philanthropists tackle challenges that governments cannot? What democratic questions of governance do these dynamics raise? We will explore particular case at the intersection of human rights and development – the cost of homophobia for economic development with a discussion with Randy W. Berry, the first-ever U.S. Special Envoy for the Human Rights of LGBTI Persons, and a panel of experts from government, international finance and civil society. In the afternoon, we will turn to local challenges in development by visiting Anacostia, an economically depressed neighborhood of the District of Columbia. We will view a major exhibit at the Smithsonian Anacostia Community Museum about the period of economic, political and social change in Washington in the 1960s and 70s with Marjorie Lightman, one of the curators of the exhibit.

- Introduction
- The Power of Philanthropy in Development Aid with Nageeb Sumar (Deputy Director for Philanthropic Partnerships, Bill & Melinda Gates Foundation)
- Challenges and Opportunities: The State of the Global LGBTI Rights Movement with Randy W. Berry (Special Envoy for the Human Rights of LGBTI Persons, U.S. Department of State)

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- Panel Discussion: Toward a **More Inclusive Development** Agenda: Sexual Minorities and International Development with Ajit Joshi (Senior LGBT and Inclusive Development Advisor, USAID), Ty Cobb (Director of HRC Global, Human Rights Campaign) and Robert Oelrichs (Senior Health Specialist, The World Bank) facilitated by Andreas Holzinger (Humanity in Action Fellow)
- Exhibition Tour: "Twelve Years that Shook and Shaped Washington: 1963-1975"
- Discussion on Development and Political Change in Washington with Dr. Marjorie Lightman (Partner, QED Associates)

June 2

Diplomacy and Ethics

Thursday, June 2, is devoted to examining moral questions and ethical dilemmas in diplomacy and leadership. We will meet with Carl Gettinger, a former Foreign Service Officer, whose postings in El Salvador and Iraq forced him to confront the differences in his values and the interests of larger institutions. William Keyes will speak about the daily ethical dilemmas faced in leadership and will lead a discussion about what challenges our group is already confronting in our individual professional lives. In the afternoon, we will return to diplomacy by speaking with Arsalan Suleman whose office in the U.S. Department of State seeks to engage religious groups, particularly Muslim communities, in the U.S. foreign policy process. In the evening, we will reconvene for a group dinner at Dukem, an Ethiopian restaurant which has become a Washington landmark.

- The Moral of the Story: An American Diplomat in Troubled Spots with Carl Gettinger (former Foreign Service Officer, U.S. Department of State)
- Ethics and Leadership with William Keyes (President, Institute for Responsible Citizenship)
- Diplomatic Engagement with Muslim Communities Abroad with Arsalan Suleman (Acting Special Envoy to the Organization of Islamic Cooperation, U.S. Department of State)
- Group discussion led by Lizbeth Arias and John Scott
- Presentations and discussions of Fellows' research

June 3

Issues in the 2016 Election

Friday, June 3 - the closing day of our Washington programming - we turn to the U.S. election and will discuss the international ramifications of U.S. domestic politics. Three core issues stand out - international trade, immigration and the crisis within the Republican party. We will start by discussing the radical change in political culture concerning international trade deals with Lori Wallach one of the foremost experts on trade in the United States who directs a division of Public Citizen, a consumer advocacy organization founded by Ralph Nader. Angela Maria Kelley, an immigration expert at the Center for American Progress, will lead a discussion about the contentious politics of immigration in the presidential election. We will take a diversion in the middle of the day to consider a different (s)election - the selection of a new Secretary General of the U.N. with Mark Goldberg, a Humanity in Action Senior Fellow. Finally, we will meet with Alexis Levinson, a reporter with The National Review, one of the most influential conservative magazines in the country, to discuss the state of the U.S. presidential race and what a Trump Presidency might mean both for the future of U.S. foreign relations and the Republican Party.

- The U.S. Bipartisan Revolt on International Trade with Lori Wallach (Director, Public Citizen's Global Trade Watch)
- Immigration, Border Walls and Fear in the U.S. Election with Angela Maria Kelley (Executive Director, Center for American Progress Action Fund; Senior Vice President, Center for American Progress)

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- The Other (S)election: **The Selection of the Next U.N. Secretary General** and the Future of the United Nations with Mark Goldberg (Humanity in Action Senior Fellow; Managing Editor, UN Dispatch)
- Envisioning a Donald J. Trump Presidency with Alexis Levinson (Senior Political Reporter, The National Review)
- Group Discussion led by George Bogden and Xianzhi Meng

June 4

Departure for Europe

Saturday morning and afternoon are free. We will depart for Berlin via Paris from Washington Dulles International Airport (IAD) in the early evening.

BERLIN

June 5

Welcome to Berlin and Humanity in Action Germany

The arrival day in Berlin offers an excursion into the time of the Cold War when the German capital was still divided by the Berlin Wall. The open air exhibition, "Berlin Wall Memorial," extends along almost a mile of the former border strip and conveys an impression of how the border fortifications developed until the end of the 1980s. We will get a better understanding of the history of Germany's division. The evening presentation with Henry Alt-Haaker, a Humanity in Action Senior Fellow and Board Member, will address Germany's current political structure and discourses to pave the ground for the coming days.

Optional:

- Visit the Berlin Wall Memorial with Miriamne Fields (tour guide)

Evening:

- Germany 101 with Henry Alt-Haaker (Board Member, Humanity in Action Germany)

June 6

Excursion into History

*During the Berlin part of the program, the Diplomacy and Diversity Fellowship will have its temporary home base in the women's cooperative *WeiberWirtschaft*, which has been assisting women in establishing their own businesses for two decades. Women entrepreneurs have benefited from comprehensive start-up and business management support, direct communication channels and the opportunities arising from close networking and collaboration made available through the cooperative arrangement. Before moving to current affairs, we will discuss Germany's colonial past, a topic that is often forgotten but needs to be addressed in order to fully grasp the subsequent historical periods. In the evening, Dr. Dirk Schmalenbach, Chairman of the German Board of Directors, and his wife, Alexandra Erloff, will welcome us in their home. This will be good opportunity to meet with board members, several of whom are also Humanity in Action Senior Fellows.*

- Introduction to the Berlin Program with Antje Scheidler (Humanity in Action)
- Coloniality and Institutional Racism with Joshua Kwesi Aikins (political scientist)
- Group Discussion led by Jessica Tollette and Mike Videler
- Welcome reception with board members with Dr. Dirk Schmalenbach (Chair of the Board of Directors, Humanity in Action Germany), Alexandra Erloff and guests

June 7

Remembrance in Germany and Antisemitism

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Half of the day will be devoted to exploring one of the central areas of Berlin with a number of memorials dedicated to the victims of the Nazi dictatorship. This part of German history – the Second World War, the Shoah, the persecution and murder of political opponents and many minority groups – has been formative for German identity for the last several generations. We hope that visiting the memorials will enable us to reflect on various means of expressing remembrance and the educational impact on its visitors. In the evening, we will discuss antisemitism in Europe today, a phenomenon that the Fundamental Rights Agency of the European Union (FRA) has researched with a survey. The results, published in 2013, stated that “two thirds of respondents to FRA’s survey on discrimination and hate crime against Jews in eight EU Member States considered antisemitism to be a problem in the EU country they live in. Three quarters of respondents said that antisemitism had worsened over the past five years. Respondents also reported incidents of violence and harassment.”

- Walking Tour in the Memorial Area for the Victims of Nazi Dictatorship: Jews, Sinti and Roma, homosexuals, victims of National Socialist “euthanasia” killings
- Individual Audio-Tour at the Information Center of the Memorial to the Murdered Jews of Europe
- Group Discussion led by Kathryn McDonald and Alen Keric
- Antisemitism Today - Opportunities and Limits of State Interventions with Nikola Gillhoff (Vice Special Representative for Relations with Jewish Organizations and Issues relating to Antisemitism, Federal Foreign Office)
- Wrap-up of the day

June 8

History’s Impact on Foreign Policy and Visit to the Bundestag

After having dealt with different periods of Germany’s history, the leading question today will be how this history has shaped Germany’s foreign policy. What lessons has Germany learned and applied to its interactions with other countries, nations and supranational entities? What choices in international relations can be seen against the background of Germany’s history? Who could be a better speaker to discuss these questions with us than Dr. Klaus Scharioth, who was a member of the German Foreign Service for more than 35 years (1976- 2011) and who served from 2006-2011 as German Ambassador to the U.S.? In the afternoon we will visit Berlin’s power hub, the German Bundestag, where we will meet with Dr. Karamba Diaby, a Member of Parliament from East Germany. He focuses on social unity in East and West Germany, advancement through education as well as the promotion of diversity as an asset. By learning about Dr. Diaby’s political career, we will get an insider’s perspective on various political dynamics and discourses in German society. Visiting the dome of the Reichstag – especially in the evening – provides a spectacular view over the city. It is a moment that should not be missed.

In the evening, Humanity in Action will host a public lecture by Konstanty Gebert, a journalist from Poland and a special advisor on international affairs with Humanity in Action. He will share his perspectives on the political and practical realities of what Europe today refers to as its ‘refugee crisis.’ Convinced that mass population movements will continue to form part of Europe’s reality, Gebert will speak about the significance these movements have and will have on our understanding of ‘ownership’ and ‘rights.’ All of our Fellows are cordially invited to attend.

- Introduction into the Day
- Spotlight Session: The Health Sector: Sharing Experiences from Working on HIV/AIDS with Kyla Johnson and Tanja Dittfeld (Humanity in Action Fellows)
- Germany’s Foreign Policy and How it is Impacted by the Country’s History with Dr. Klaus Scharioth (Former German Ambassador to the United States)

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- Conversation with Dr. Karamba Diaby (Member of the German Bundestag, Social Democratic Party)
- Group Discussion led by Matthew Kustenbauder and Moises Mendoza

Optional:

- Public Lecture: Migration as the New Normal with Konstanty Gebert (International Columnist, Gazeta Wyborcza; Special Advisor on International Affairs, Humanity in Action)

Evening:

- Berlin at Night, Visiting the Dome of the Reichstag

June 9

Seeking Refuge and Asylum in Europe

Humanity in Action runs parallel Fellowship programs. This day is dedicated to bringing the Fellows from the Berlin Fellowship and the Diplomacy and Diversity Fellowship together. We will take a closer look at the challenges that the current migration flows pose and discuss various responses from within society - from volunteering to hate speech, from welcome culture to discrimination.

The Humanity in Action network is international by nature and Berlin is a permanent, temporary or transitory home for many alumni. Therefore the evening is reserved for networking and continued conversations with Humanity in Action Senior Fellows.

- Introduction with Luisa Maria Schweizer and Antje Scheidler (Humanity in Action Germany)
- Seeking Refuge and Asylum in Germany: Human Rights Violations meet Counter Activities with Dr. Nivedita Prasad (Professor, Alice Salomon, University of Applied Science)
- Realities of Newcomers and Refugees in Rural Areas: Between a Welcoming Culture and Racist Attacks Konstanze Ameer (Amadeu Antonio Foundation, Project "Aktion Schutzschild")
- Panel Discussion: Europe's Refugee Crisis - No Time for Easy Answers with Maximilian Popp (Journalist, Der Spiegel), Ramy Al-Asheq (Editor-in-Chief, ABWAB Newspaper) and Astrid Ziebarth (Migration Fellow, Europe Program, The German Marshall Fund of the United States) moderated by Linnea Riensberg (Board Member and Senior Fellow, Humanity in Action)
- Group discussion led by Hanya Riedl and Rohit Sudarshan
- Wrap-up of the day
- Dinner with Senior Fellows

June 10

Protecting Cultural Property

The images of recently destroyed or damaged cultural property in Syria were deeply disturbing and added another dimension - a cultural heritage perspective - to the Syrian civil war. Today, we will be visiting Berlin's Archeological Centre and discuss the issue with two experts - representing both academic and policy perspectives. Be prepared to see some ancient cuneiform artifacts. The afternoon is dedicated to working on the articles that all Fellows write as requirement of the fellowship program. Our in-house editor, Johannes Lukas Gartner from the German office, will join us for the session. In the evening, the Gallery Kai Dikhas invites us for a vernissage featuring the work of David Weiss. The gallery is specialized in Romani and Sinti contemporary art.

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- Protecting Cultural Property: Opportunities and Limits of Law, Diplomacy and Research with Prof. Markus Hilgert (Director, Museum of the Ancient Near East) and Dr. Robert Peters (Legal Officer, Office of the Federal Commissioner for Culture and the Media)
- Site Visit: Tour of the Depository
- Group Discussion led by Kyla Johnson and Nina Lazarczyk
- Working session on Fellows' research articles with Johannes Lukas Gartner (Program Coordinator, Humanity in Action Germany)
- Wrap-up of the day

Optional:

- Vernissage at the Gallery Kai Dikhas - Gallery for Contemporary Art of the Roma and Sinti in the AUFBAU HAUS presenting art by David Weiss

June 11

Afternoon Skills Workshop

Speaking in public, addressing unknown or large audiences, is reason for many to feel uneasy. However, public speaking is a crucial tool in many professions and one of the keys to success. The training session on June 11 aims to help with understanding and practicing the four most important pillars (attention, meaning, multi-sensory and emotion) needed to maximize one's impact when speaking to an audience. At the end of the training, participants will have an understanding of their preferred communication style and they will have gained awareness on how to connect with various audiences to leave a lasting impression. The workshop is exercise intensive and covers the importance of structure, voice, body language, presence and the use of multi-sensory/emotionally stimulating communication.

- Workshop: Advanced Public Speaking with Mona Shair-Wloch (Key2dvance)

June 12

Free day

June 13

Transatlantic Relations

This last day of the Berlin program is dedicated to questions of radicalism and violent extremism for which we look forward to our own Fellow Tamikka Forbes sharing insights from her research with us. We will also take time to reflect on the program before the Berlin part concludes with a real highlight - a visit to the Embassy of the United States and a discussion on transatlantic relations with Ambassador John B. Emerson.

- Spotlight Session: Radicalization and Preventing and Countering Violent Extremism with Tamikka Forbes (Humanity in Action Fellow)
- Feedback and reflections on the program
- Briefing with the U.S. Ambassador to the Federal Republic of Germany, John B. Emerson (U.S. Ambassador)
- Farewell dinner

June 14

Traveling to Poland

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WARSAW

June 14

Welcome to Warsaw and Humanity in Action Poland

The last day in Berlin and the first day in Warsaw is the time for transition between both program components. We plan a dinner and warm welcome by the Board Members of Humanity in Action Poland. Apart from this, let's decompress!

- Welcome Dinner hosted by Janusz Reiter and Eugeniusz Smolar (Board Members, Humanity in Action Poland)

June 15

Poland Today

The Humanity in Action program in Warsaw consists of two interrelated parts referring to the key subjects of Diplomacy and Diversity. The first programming day focusses on the role of Poland in the region and its foreign policy priorities after 1989, which will be presented by Eugeniusz Smolar, a foreign policy expert and one of our Polish board members. A special attention will be devoted to the shift in Polish foreign policy after the last parliamentary elections on November 2015. Konstanty Gebert, a journalist and Humanity in Action advisor, will discuss the successes and failures in Poland's systemic transformation. Poland used to be acknowledged as a country of successful transformation into democracy, market economy and civic society. But the transition was not free from mistakes and people left alone in a completely new reality to which they were not prepared. Thus, some Poles contested the post-solidarity reality. This frustration was visible in the last parliamentary elections, in which the Law and Justice Party won with a significant majority of seats enabling to form one party government. After the fellows discussion we will explore Warsaw: looking for traces of the past in today's city landscape.

- Introduction with Monika Mazur-Rafał (Humanity in Action Poland)
- Contemporary Poland in the Region with Eugeniusz Smolar (Board Member, Humanity in Action Poland)
- Poland After 1989 v. Poland Today: Democratization and Systemic Transformation with Konstanty Gebert (International Columnist, Gazeta Wyborcza; Special Advisor on International Affairs, Humanity in Action)
- Group Discussion led by Suong Vong and Andreas Holzinger
- Wrap-up of the day
- Walking Tour, Part I with Adrian Gryczuk (tour guide)

June 16

War and Memory: Impact of Lost Diversity

The goal of the day is to explore the relevance of the Second World War and the Holocaust for contemporary Poland. We will start the day with a meeting with Professor Kirshenblatt-Gimblett, who had a leading role in designing the core exhibition of the Museum of the History of Polish Jews POLIN. The exhibit presents Poles and Jews living together over centuries with periods of cooperation and periods of immense challenges. Due to the Holocaust, shift of borders, mass movements of people during and after the war, socialist Poland was installed as an ethnically homogenous country. The regime presented itself as a positive feature and tried to destroy any form of diversity. Over 44 years, the society has been living in a closed country. Only after the system change in 1989 it was already officially acknowledged that minority representatives are welcomed in free Poland. Since then, we observe a growing interest in different cultures as well as efforts to revive lost diversity coming back to the roots of multicultural society from before the war. There is, however, also a trend to perceive low but

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growing diversity as a risk for the society. Low diversity can also be a challenge as it was visible during the last election campaign and the debate on a possible reception of refugees from the crisis areas in Middle East, when there was a wave of frustration, intolerance and hate speech in public and private discussion among Poles. In the last session, we will explore the challenges resulting from the rise of the extreme in Europe with Larry Olomofe from ODIHR.

- Introduction with Monika Mazur-Rafal
- Introduction to the Core Exhibition with Prof. Barbara Kirshenblatt-Gimblett (Chief Curator of the Core Exhibition, POLIN)
- Core Exhibition Visit, individual walk with audio guides
- Group Discussion led by Ashley Portillo and Tamikka Forbes
- The Rise of the Extreme: Challenges of Hate Speech and Hate Crime with Larry Olomofe (Adviser on Combating Racism and Xenophobia, Office for Democratic Institutions and Human Rights (ODIHR))
- Wrap-up
- Networking Dinner with Senior Fellows

June 17

Borders, Security & Diplomacy

Poland with its geopolitical situation between the East and West, Germany and Russia has long been exposed to security threats. Therefore, after 1989, security of borders, especially with Germany, was the key issue. In turn, Germany as Exportweltmeister has been deeply interested in enlarging the security zone. Thus, both countries had a mutual interest in developing their friendly relations beyond the heritage of the Second World War. Janusz Reiter, who as at that time Ambassador of Poland to Germany, was actively engaged in this reconciliation process. Later on Germany became advocate of Poland in EU structures, which was instrumental for the Poland's EU accession. Next, Poland as the EU member state is also interested in enlarging its security zone. It supports Ukraine in its EU ambitions and in transforming the country into democracy and market economy. Ambassador Magdziak-Miszewska will talk about relations between Poland and Ukraine, challenging neighborhood with Russia and will also focus on the Ukrainian crisis. Beyond bilateral relations, Poland is also responsible for securing the EU external border. Finally, the refugee crisis in Europe made clear how unprepared the EU as a whole was to such types of changes, also due to different expectations of its member states. Ewa Moncure will present the mandate of Frontex and its actions, which exemplifies challenges in reaching a compromise among EU member states and their different interests.

- Introduction to the Day with Monika Mazur-Rafal
- The European Union: The Paradigm of a 'Fortress' v. Human Rights Standards with Ewa Moncure (Spokesperson, Frontex)
- Polish-German Relations: Reconciliation, Cooperation and Challenges with Janusz Reiter (former Ambassador; Humanity in Poland Board Member)
- Poland as a EU Border Country Between the West and East with Agnieszka Magdziak-Miszewska (former Ambassador; defense and Eastern policy expert)
- Group Discussion led by Oskar Raczycki and John Scott
- Wrap-up

June 18

Exploring Warsaw

- Sightseeing of Warsaw: Praga District (Part II) with Adrian Grycuk (tour guide)
- BBQ, in case of good weather

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June 19

Day off

June 20

Security v. Human Rights

Apart from traditional security challenges, modern democracies face new forms of threats to their stability and prosperity. In the globalized world the new 'battlefields' are (among others) the internet and movements of people. Thus, Agnieszka Kosowicz will present the discourse in Poland regarding a possible reception of refugees and the real facts and figures. What role have Poland's international agreements played? Mrs. Kosowicz will also present the challenges of the refugees living in Poland for some time already. Next, Katarzyna Szymielewicz will engage us into a conversation about potential infringements of privacy rights and ways of preserving the ownership over own private data in the age of social media. The last session touches upon the real controversy in Polish public life, namely cooperation of Polish highest authorities with CIA in conducting interrogation of alleged terrorists involved in 9/11 including usage of tortures against the Polish Constitution and binding international agreements signed by Poland. There will be a panel discussion of Mrs. Grabowska-Moroz and Mrs. Piasecka on how to draw a line between security and human rights.

- Introduction with Monika Mazur-Rafał
- Migration Crisis in Europe: Challenges in Poland with Agnieszka Kosowicz (President, Polish Migration Forum)
- Security v. Privacy Rights in Modern Democracy with Katarzyna Szymielewicz (President, Panoptikon Foundation)
- CIA Renditions in Poland: How to Draw a Line Between Security and Human Rights? with Barbara Grabowska-Moroz (Helsinki Foundation of Human Rights) and Paulina Piasecka (Terrorism Research Center, Collegium Civitas)
- Group Discussion led by Renata Barreto and David Truong
- Wrap-up

June 21

Looking for a Compromise in International Set-up

The last day of our programming in Warsaw is devoted to skills training. In the globalized and interdependent world achieving a compromise is becoming more and more difficult. After the training on public speaking in Berlin, we will hold a skills workshop on negotiation. In the evening, we will attend the presentations of the social campaigns against discrimination and hate speech developed by the Humanity in Action Fellows in the Warsaw program. Finally, we will have a closing dinner together.

- International Negotiations: Skills Training with Wojciech Sacha (institutional negotiation trainer and public policy expert)
- 8 Ideas for Social Campaigns against Hate Speech
- Farewell Dinner

June 22

Departure to Athens

ATHENS

June 23-25

Seventh Annual Humanity in Action International Conference in Athens, Greece

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The Humanity in Action International Conference is the annual gathering of Humanity in Action Fellows, Senior Fellows, Board members, friends and partner organizations.

The Seventh Annual International Conference, titled "Europe at a Crossroads: Voices from Athens," will investigate a range of critical issues concerning Greece's political and economic situations. Over the course of four days, the conference will examine Greece's position at the forefront of multiple intersecting crises – foremost the migration crisis, as Greece is the first destination for hundreds of thousands of migrants and refugees, as well as a hub for human trafficking. The conference will also address Greece's financial crisis, as the country's institutions and civil society continue to fracture under the pressure of the recession in Europe and the country's ties to the European Union.

The conference will include keynotes, discussions and workshops with leading Greek and international experts. It will also feature the annual Senior Fellow Reunion Dinner, skills training sessions, networking opportunities and tours within Athens.

June 26

Departure from Athens

The International Conference and the Diplomacy and Diversity Fellowship formally conclude on the evening of June 25. Fellows will make their journeys back to their home cities beginning in the morning of June 26.



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APPLICANT DEMOGRAPHICS
2016 APPLICATION CYCLE

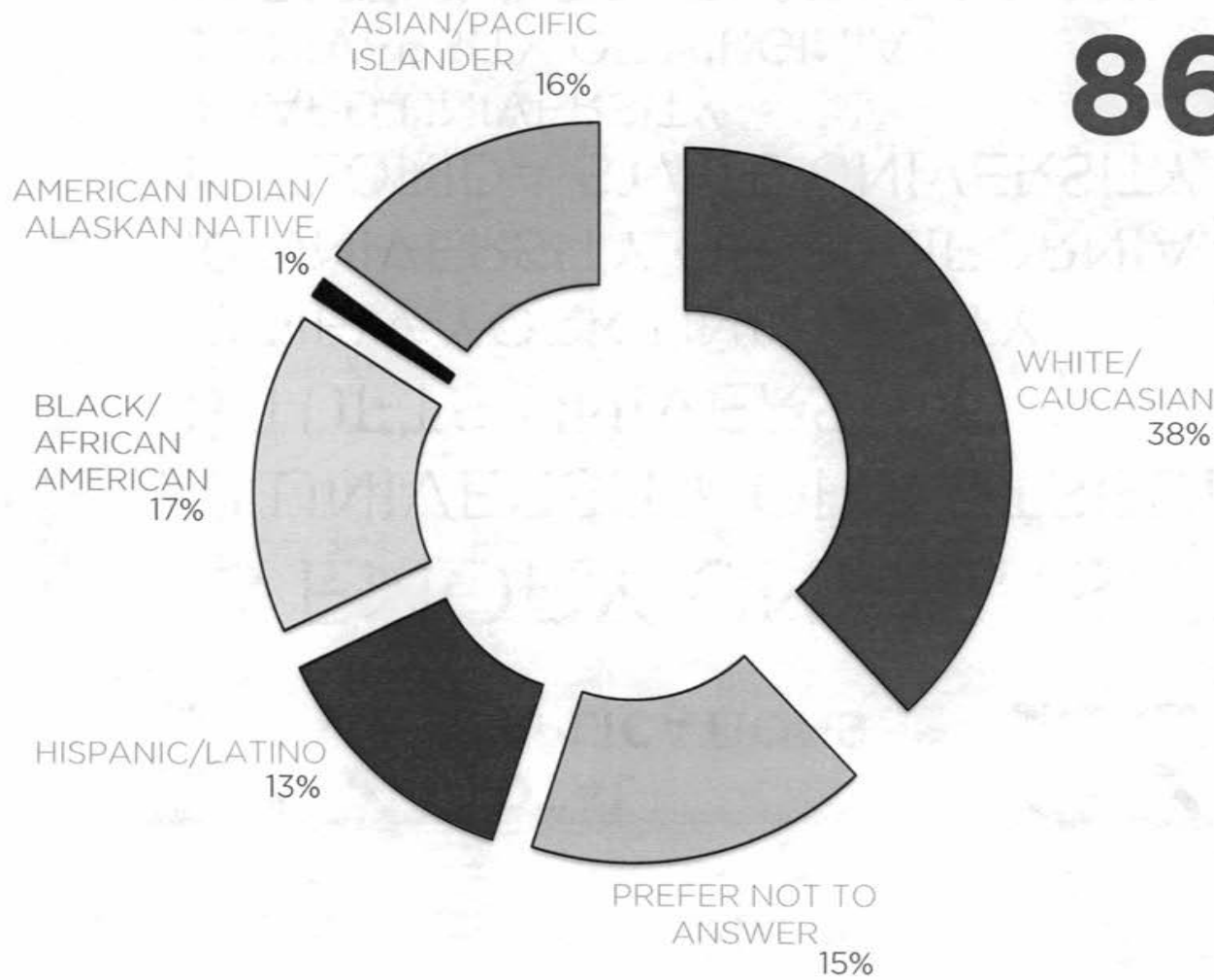
WHO APPLIES TO HUMANITY IN ACTION?



AVERAGE AGE : 21

20% MALE 79% FEMALE

WHO APPLIES TO HUMANITY IN ACTION?



86

AFRICAN-AMERICAN
APPLICANTS

47%

AFRICAN-AMERICAN,
LATINO, OR
ASIAN/PACIFIC
ISLANDER

WHERE DO APPLICATIONS COME FROM?

513 **TOTAL
APPLICATIONS**

234 **UNIVERSITIES**

13 EMORY UNIVERSITY

12 UNIVERSITY OF PITTSBURGH

11 TUFTS UNIVERSITY

10 NEW YORK UNIVERSITY

10 UNIVERSITY OF CALIFORNIA, LOS ANGELES

10 FLORIDA STATE UNIVERSITY

9 BARD UNIVERSITY

9 UNIVERSITY OF VIRGINIA

8 STATE UNIVERSITY OF NEW YORK, BINGHAMTON

8 UNIVERSITY OF PENNSYLVANIA

7 YALE UNIVERSITY

WHERE DO APPLICATIONS COME FROM?



HUMANITY IN ACTION

2016 Humanity in Action Fellows

Humanity in Action Summer Fellowship

Ashley Lawrie, U.S. Fellow in the Dutch Program

Dear Ms. Koser Kaya and Mr. Karbank,

I hope that this letter finds you both doing well. Firstly, a special thank you to the Humanity in Action Program and Humanity in Action (Amsterdam) for the opportunity to partake in and contribute to an endeavor that has had a meaningful impact on myself and countless other committed citizens over the years. I wanted to be a part of this program from the time I first heard of it, less than mid-way through my college journey. I have long considered myself a 'Citizen of the World' and knew that this Fellowship would help me to expand that identity. I knew that the Fellowship would have a profound impact on me, as I had still, to a large extent, grappled with what it was that I wanted my life purpose to encompass. When I was accepted as an HIA Fellow this past Spring, I felt ready. I had a reasonably open mind, which I felt I balanced fairly well with my strong personally held values and beliefs. I had a solid educational foundation from my college years and given the nature of alma mater, Agnes Scott College, a good understanding of the realms of contemporary global social justice. This program was going to be everything I thought it would be and it would mold my career path. I was wrong.

During my time in Amsterdam and in Athens, the backdrop of my education and life experiences were certainly useful. However, the program and more importantly, the people within it, provided me with the biggest impact. Our group consisted of a diverse spectrum of life experiences and people willing to share those experiences. In retrospect, while I loved the entire programming and felt that the readings, speakers and site visits were complimentary of each other and fitting to the overall goals, one of my favorite aspects of the program was the Fellows' talks. I believe that the positive group cohesion that we experienced resulted from our first weekend where we established ground rules and then the follow up of our presentations. The freedom to choose the topic that we wanted to present enabled a more diverse contribution and heightened the impact of the program I believe. Ideally, the foundational weekend experience at the Farm and Fellows' talks are aspects that I would like to see retained.

The structure of the program was well developed, tackling what appeared to be the most currently pressing issues facing The Netherlands and to a wider extent, Europe. The Refugee theme was a bit long and though understandably so, I would have liked a bit of time to be devoted to other themes such as women's rights/affairs, children's issues, educational inequality, etc. The internship was a very useful component and could have benefited a bit, as was the case for the duration of the program, if the differing nationalities had a foundational backdrop of each other's countries. For example, there was a lot that the Dutch Fellows wanted to understand about the US, such as the structure of the US Electoral system and process, given that this is an election year and a very unusual one at that. While program logistics may necessitate that Fellows do that sort of research on their own time given time limitations of the intensive programming, I think briefly touching on certain themes perhaps in one day early in the program, may be beneficial, for e.g. how the American election system works in an election year, how did the Greek

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economic and refugee crisis unravel, what was the whole Bosnian crisis about, etc. Basically, the pressing backdrop issues in the participating countries at the time of the fellowship because I found that rather than this being a Fellowship to cover the issues within your assigned host city and country, it really did become a cultural exchange of what both the US and EU are facing, which was excellent. Fortunately, the gap in background knowledge was largely aided by the Fellow talks. While these seem like basic things, I think often we find that people coming from different walks of life enter into programs like HIA with differing understandings or background knowledge. One such example for me was that I never knew of the correlation between ethnicity and curricula selection and structuring in Bosnia and by extension the extent of the lingering effects of conflicts of the 1990's. The Fellow talks were therefore vital in offering valuable background knowledge. I think having speakers with unusual views may have been beneficial also, though certainly controversial.

In many ways, this Fellowship met my expectations – meeting people from all walks of life, having great conversations and hopefully returning home a bit changed. Yet, I was wrong. This wasn't all that HIA did for me. It was more than that. I learnt about the contemporary issues and I learnt the logistics, the academic aspects one may say. But my education really came primarily in my personal introspection. The program administrators, interns and my fellow Fellows turned me around to 'face the mirror,' meteorically speaking. In many ways, they unconsciously (both to them and myself at the time) 'held my hand' as I internalized that I was not in many ways the person I always was, quite a process for someone who dislikes change.

I recently read a quote by an anonymous author that read, "...and when you come home, home may still be the same, and yes you may go back to the same old job, but something in your mind will have changed. And trust me, that changes everything." All around me, my HIA friends, indeed my new family, were learning or had learned to take control of varying situations. Their narratives and this experience showed me that while I had gotten so caught up with 'life,' I had almost forgotten that I wanted to have an impact on the world. Had not my favorite quote, once upon a time been from the Hindu scriptures and stressed the necessity of action? HIA reminded me to start thinking again of the work that I wanted to do in Guyana and so many other things. Equally meaningful was the unexpected impact my host family had on my life. They stabilized me. They were the most tranquil people I had met in a long time. In the midst of a hectic way of my life back here in the US, they re-instilled in me the lessons of coming home to simple bonding. I loved my time with my HIA team, but just as much, going home to my 'parents' everyday was something I looked forward to doing when that time came. They taught me so much about being 'home.' The turned pages in their HIA booklet everyday showed me that they were following what I was studying at a given time. They were an integral part of my HIA education and if ever I was to become a parent, I would have hoped that I could be like them. In many ways, this Fellowship happened at a right time in my life. The people were not fully what I expected. I expected formal academic perspectives and policy discussions, but it was their simple personal narratives that carried the greatest impact for me. We had so much laughter, so many emotions, so much Albert Heijn. I hope to continue to work with HIA. The experience was not fully what I expected. It encompassed so much more. Thanks to you all.

With warmest regards,
Ashley Lawrie

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Tasneem Maner, U.S. Fellow in the Bosnian Program

Dear Mr. Neil Karbank and Ms. Lamija Tanovic,

As a 2016 Sarajevo Fellow, I would like to take this opportunity to thank you sincerely for a wonderful Humanity in Action experience.

A few days after I returned from my trip, my mom said to me "I feel like even my own perception of the world has changed from your travels." During the duration of my trip, I shared the articles about Bosnian political and social situations with her. I updated her occasionally with new facts that I learned about Bosnian cuisine and culture. From across an ocean, she got excited over cevapi and learned for the first time about the three major ethnic groups in Bosnia and Herzegovina (BiH) and their implications in genocide. If she was that in awe of my experience, I cannot even begin to explain how life changing this experience has been for me. Additionally, I have already realized the power of communication and sharing the knowledge I have gained. With friends and relatives I have peaked new interest in Bosnia, a country that generally felt it was forgotten by the world in times of war.

I believe Bosnia was a beautiful addition to the HIA Summer Fellowship Program. By adding Sarajevo to the host cities, it adds diversity to the educational experiences and broadens the program beyond Western Europe and America. It was interesting to hear both the BiH's considerations for wanting to join the European Union while also hearing about the imperfections of the European Union during the Athens conference, for example. The country itself is gorgeous and holds rich culture in its architecture, abundant mountains, cafes, and nightlife. Additionally, Sarajevo is small enough for the fellows to easily maneuver the entire city within the month of the Fellowship. I think this city is the perfect size and enriching space for the HIA summer program, and we would even run into our speakers multiple times during our explorations of the towns.

Coming back to America, and having time to process all that occurred during the Fellowship, I greatly appreciate the enormity of all the things we did and learned. There was incredible organization on part of the staff and program coordinators, from getting us personalized transportation cards, to delicious lunches, to have us meet with multiple important speakers in every location we traveled to. I also think a generous variety of topics were explored and this definitely achieved the HIA goal of global understanding and a comprehensive look at BiH. Our coordinators had lecturers speak about everything from basic Balkan history to collective war memory to ethnic divisions that still exist today with "2 schools under 1 roof" to art/ theater/ music to women's and LGBTQ rights in Bosnia and more. Again, coming back to America, and being able to share my personal experiences with all of these topics has proved to correct misperceptions. I realize how lucky I am to have been able to pray at memorial sites and sit in the classrooms of Bosnian universities.

While I understand that HIA is an educational program, and inviting multiple speakers to talk to the fellows is a great learning experience, I personally would critique that a majority lecture-style program is not as beneficial as a more varied and workshop-based program. After attending the HIA Sarajevo Fellowship 2016, I and other fellows have talked about how the most enriching speakers were the ones who focused more on discussions and organized workshops (like Nedim Kulenovic', Ivana Kesic, and the panel on women's rights in Bosnia) rather than those who lectured as us for most of the allotted 2-hour time period. While it is understandable that emphasis would be placed on speakers of higher status (like the BiH Higher Representative and the Sarajevo Mayor's Office), in the long-run I feel that these lectures were not as educationally beneficial as the lectures from teachers, NGO employees, and other similar

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speakers who did not shy away from sharing personal details or answering all of our questions. Additionally, time is spent traveling to and/or accommodating for “important” speakers and this often made the day very tightly-packed, forcing us to rush from one session to another without having time to process and understand the materials we received and further exhausting the fellows.

Still, I applaud the fellowship staff and students for their ability to take initiative and fill in whatever gaps in the program they perceived. Jamin and Maida, the Sarajevo Program Coordinators, always efficiently handled stressful setbacks. I am thankful to them and equally thankful and impressed with all of the fellows. While group reflection and discussion sessions were not scheduled into this program, the fellows took it upon themselves to organize such programming for each other. When we learned that we would be visiting Srebrenica, a site of mass genocide, and would need to have a structured space to process the history and current emotional repercussions, the fellows organized an entire session before the Srebrenica site visit themselves. We watched a documentary about the genocide and then held facilitated discussions together. The Fellows also organized a private hike with Nicolas Moll, one of the speakers, to explore the war trenches in the hills surrounding Sarajevo. The native Bosnian fellows were absolutely fundamental to this experience, as they taught me the most through their personal stories and guidance during our travels together. Berina Verasevic took time to teach me Bosnian, and took the other fellows to art shows and film screenings in Sarajevo. Sarah Freeman-Woolpert, who has been conducting research in Bosnia for the past few months, invited us to help her teach English to youth in Bosnia weekly. These are the most memorable and intellectually enriching moments of my fellowship experience, and therefore, I hope that this (volunteering with NGOs in Sarajevo, visiting more exhibitions, staying longer in cities like Mostar and Stolac) is scheduled into future fellowship programming in replacement of numerous lecturers.

I would like to extend my gratitude to all who made this fellowship experience possible for me, including the speakers who volunteered their time, the host family that accommodated me, all HIA staff internationally and in America, and the HIA Board of Directors. This was truly and opportunity of a lifetime. My perception of the world has been enhanced greatly, and I look forward to using all I have learned to continue activist work and stay connected to the HIA community.

Sincerely,

Tasneem Maner

Diplomacy and Diversity Fellowship

Tanja Dittfield, Danish Fellow

Dear Ms. Mazur-Rafał, Mr. Karbank and Mr. Schmalenbach,

First and foremost, thank you for devoting your time to be on the Board of Humanity in Action. Currently, I find myself at a crossroad in life, and I want to say that your dedication to HIA has not only contributed to me having had the opportunity to participate in the Diplomacy and Diversity Fellowship. You have also provided a needed source of inspiration for me to think longer and harder about in what direction to go – geographically, professionally and personally – than ever before.

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Granted, I am not accustomed to writing letters to Board Members, thus let me begin with a short outline of what follows in my letter for me not to lose you along the way and for you to understand what HIA meant to me. My letter is divided into three main parts whereby the first, in brief, explains where I was (meta)physically, when I applied and got accepted to HIA; the second, sketches my main experiences during the fellowship and last part hints to where I am today.

PROLOGUE

Roughly one year ago, I graduated from Lund University in Sweden with a MSc in Development Studies, after which I went straight to Zambia to work with HIV/AIDS and gender-based violence at a local NGO. It was after a trip to drought plagued and poverty stricken Malawi during Christmas, halfway into my stay in Zambia, that I decided to apply for the Diplomacy and Diversity Fellowship with the main incentive of increasing my understanding of complex diplomatic issues. While I was aware that the fellowship would not be Africa focused per se, I assumed that the fellowship would help me challenge and advance my knowledge, perspectives and attitudes towards complex international issues such as the ones I had witnessed in Malawi and Zambia. Needless to say, I had the privilege of being selected for the Diplomacy and Diversity Fellowship. This despite Zambia's characteristically poor internet connectivity that turned my personal interview with Ms. Mazur-Rafal and Ms. Scheidler into a 'Big Brother' kind of experience in that they could see me, but I not them. Either way, when the acceptance e-mail ticked into my e-mail inbox, I was certain that it was a decline to my application. Thus, I found myself in a state of disbelief of being a 2016 Fellow until I arrived in Washington.

TO BE OR NOT TO BE AN IMPOSTER ON A FELLOWSHIP

In Washington, my disbelief was replaced by an 'imposter syndrome', a label I was introduced to by one of my peers during the fellowship. In other words, in the backdrop of meeting my peers, I struggled to understand having been selected to become one out of this cohort of high-achieving people. Irrespective of the persistent fear of being exposed as a "fraud" (the imposter syndrome) involuntarily induced by my peers, the interactions and collaborative learning with them was the most enjoyable part of the fellowship to me. My peers' knowledge and experiences as well as the respectful and constructive way in which the fellows engaged in discussions with each other, despite potential disagreements, continuously impressed and motivated me. From the programming side, I therefore appreciate the vast amount of time scheduled for Q&A sessions and group discussions, but I would have enjoyed more spotlight sessions held by my peers. I make this suggestion having myself given a spotlight session about my experiences of working with HIV/AIDS in East- and Southern Africa during, and this really helped diminish my imposter syndrome. My peers' interest and response during and after my presentation somehow validated that I have achievements worth internalising, and hence furthered my confidence to engage more actively in the co-generative dialogues throughout the fellowship. Put differently, I am convinced that more spotlight sessions could further support future fellows' personal growth and the overall group dynamic.

Throughout the fellowship, I was additionally impressed with the variety in discussions and site visits with experts and practitioners from foreign ministries, governmental agencies, NGOs, universities, the private sector, media outlets and foreign policy organisations. However, given that HIA's mission for the Diplomacy and Diversity Fellowship is to promote constructive diplomacy in a changing world through innovative and inclusive approaches, I would suggest that more (trans)national activists were to be included in future fellowships. The reason being that the sine qua non of activism is doing, and activists often have a different possibility of navigating and negotiating (inter)national issues compared to development professionals in the non-profit and public sector. Moreover, I think approaching

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(inter)national diversity issues increasingly becomes dependent upon a dialogue between activists and diplomats. In Washington, Special Envoy for the Human Rights of LGBT Persons in the US State Department, Randy W. Berry, for instance narrated to us how he was dependent on dialogue with the LGBT movement in Uganda for him to diplomatically address the human rights violations of LGBT individuals in the country. Thus, I think the innovation component in HIA's mission statement could be strengthened in potential future fellowships related to diplomacy and diversity by including an even stronger focus on social change agents such as activists.

One of the things that I found most enthralling about the planning and execution of the fellowship programme was the continued dialectic emphasised between historical events and the making of contemporary (American German, Polish and Greek) national identities. The red thread throughout the fellowship programme was to me the compelling and current refugee crisis. While the fellowship truly covered a wide range of aspects of the crisis, I was surprised that there was virtually no attention devoted to understanding or discussing the (historical) root causes of the refugee crisis or ways to mitigate them. I believe that to address the refugee crisis constructively or in correspondence with human rights norms, the dialectic that HIA otherwise pinpoints between past and present needs to also permeate our approach to the crisis. Thus, if HIA decides to include a focus on the refugee crisis in next year's conference in Berlin, I would argue that a focus on root causes of its coming into being and persisting would be beneficial.

EPILOGUE

Was HIA what I expected? No!

HIA was so much more – it was not just a way to challenge and expand my knowledge of the dynamic in international issues and come to terms with my imposter syndrome. It was an opportunity to form a network amongst and with people who believe that an increasingly diverse world is not a threat to who we were or are, but an opportunity for more collaborative learning that takes us across and beyond nation states and nation borders – not just on a fellowship but in our everyday lives.

While Washington, Berlin, Warsaw and Athens already seem like a long time ago now, I would sincerely cherish the opportunity of becoming active in the HIA network (trans)nationally. With the motivation in place, I just need HIA to meet me halfway by providing me with inspiration aka information on possible ways of 'doing'.

Thank you for taking the time to read my letter.

Best Regards,

Tanja Dittfeld

Moises Mendoza, U.S. Fellow

Dear Mr. Karbank, Ms. Mazur-Rafał and Mr. Schmalenbach,

I write to share my impressions of the month I spent this year as a Diplomacy and Diversity Fellow traveling to Washington, D.C., Berlin, Warsaw and Athens.

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First, a few words about me and why I applied to be a part of the HIA family: I recently graduated from Columbia University and the Hertie School of Governance with master's degrees, supported by the Department of State. In September, I will be joining the U.S. Foreign Service as a diplomat. However, I felt that my graduate studies were lacking in a few fundamental areas. First, while I learned many technical aspects of public administration and international affairs, I never learned about ethics, how to make decisions under difficult circumstances or about doing the right thing. Though these skills seem simple and self-evident, this is apparently not the case for many government workers. In fact, I have always wondered why, in an organization with such stringent rules and regulations, so many federal government workers end up mired in scandal. I wanted to be a part of the fellowship to explore ethical dilemmas and how to make the right decision at moments of crisis.

Secondly, despite studying human rights for part of my graduate school studies, I felt that I never went as in-depth as I wanted to on several issues that mattered to me, including racism and the rights of minorities. I saw the fellowship as a chance to engage in deep and meaningful discussions on these issues in a way I never had time to as a student. I hoped that the fellowship would give me a broader perspective on important issues and would make me a more effective representative of the United States.

I am happy to report that my experience was a positive one. Although I am sad that this was the last year of the Diplomacy and Diversity Fellowship, I know that the fellowship had a positive impact on my life and it has motivated me to make a difference and to be deeply involved in the HIA community in the future.

There is only one word I would use to describe the organization of the program and the professionalism staff who put it together and accompanied us during our month together: Excellent. HIA has clearly hired its staff members very carefully and they were able to put together an outstanding experience for us that is worthy of the best of what HIA stands for. We were exposed to many different perspectives on matters ranging from the U.S. Presidential election to the Holocaust and the current status of minority groups in the United States and Europe. What I most appreciated about the staff members we encountered is they let our group make sense of important issues in our own way. They often provided frameworks for discussions, but they trusted our integrity and intellectual capacities enough to allow us to ourselves work through what the implications of what we were encountering.

Our discussions and speakers dealt with many of the issues that I was most interested in tackling. We met one retired U.S. Foreign Service Officer who talked about difficult ethical decisions he had to make while serving as a diplomat. We talked to academics and practitioners who helped us come to a better understanding of the societal injustices that people of color and LGBT people were facing in both the United States and Europe. We engaged in deep and probing discussions amongst ourselves about everything that we encountered. I was impressed by the other fellows' sense of purpose and earnestness in attacking some of the most important questions and challenges facing our societies today.

I would recommend very few changes to this fellowship if Humanity in Action were to continue it in the future. One thing I might have liked to see, is more speakers from conservative social and political perspectives who would have challenged the fellows' social points of view, which tended to be relatively similar. However, I realize that it may be difficult to obtain such speakers for a fellowship that is primarily focused on human rights and issues of injustice. I might similarly like to see more variety in the political perspectives that fellows come from.

What I most appreciate about Humanity in Action is how it stays connected to fellows after their experiences with their summer programs are over. This is very unusual among similar fellowships and

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reflects the sort of lifelong connections and friendships that are clearly very important to Humanity in Action. In the future, I plan to be an active senior fellow who plays a role in the HIA community. I was very honored and pleased to have the opportunity to participate in the Diplomacy and Diversity Fellowship this summer, which exceeded my expectations. I know it will make me a better, more effective U.S. Foreign Service Officer and I hope I contributed my own small part to making this fellowship a success.

**2016 HUMANITY IN ACTION FELLOWSHIP
ORIENTATION SCHEDULE
WASHINGTON, DC: MAY 24- 26**

TUESDAY, MAY 24

Check in

Location: The Beacon Hotel (1615 Rhode Island Ave NW, Washington, DC 20036)

3:00 PM All Fellows arrive at hotel no later than 3:00 PM

3:45 PM Departure for the Hallet's Home

Location: Stanley and Judy Hallet's Home (4542 28th St NW, Washington, DC 20008)

4:30 PM Introductions

5:30 PM Performance and conversation with Senior Fellow DeLesslin "Roo"
George-Warren followed by dinner

WEDNESDAY, MAY 25

Location: United States Holocaust Memorial Museum (100 Raoul Wallenberg Pl SW, Washington, DC 20024)

9:00 AM Arrival at the Museum

9:30 AM - 12:00 PM Tour of the Museum

12:00 - 1:00 PM Lunch

1:00 - 5:00 PM Talk with Sarah Ogilvie, Chief Program Officer and Judy Goldstein

Location: Beacon Hotel Conference Room (1615 Rhode Island Ave NW, Washington, DC 20036)

5:30 PM Discussion with Michelle Issadore on Humanity in Action's Harassment Policy

THURSDAY, MAY 26

Preparation for departure to Europe

Check out - *Fellows can store their luggage in Portage Services*

Location: The Beacon Hotel (1615 Rhode Island Ave NW, Washington, DC 20036)

Location: United States Holocaust Memorial Museum (100 Raoul Wallenberg Pl SW, Washington, DC 20024)

8:30 AM - 12:30 PM Orientation: Discussions on the fellowship programming and Humanity in Action's expectations for Fellows with Judy Goldstein and Anthony Chase

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Appendix 8

Program Schedule – Humanity in Action Fellowship (2016)

Amsterdam

Program Description

The Humanity in Action Amsterdam Fellowship offers a diverse yet thorough perspective on minority issues in The Netherlands. Our aim is to facilitate a collective exploration of the social and political roots of discrimination in The Netherlands and to provide a forum for the discussion of potential solutions. The Amsterdam Fellowship is highly interdisciplinary and bridges the gap between theory and practice by connecting Fellows with academics and journalists, as well as NGOs and grassroots activists.

The intellectual touchstone for Humanity in Action and the start of Humanity in Action The Netherlands has always been the study of the Holocaust – the most devastating example of the collapse of democracy and the denial of rights to minorities. In the first week, Fellows will discuss the role the Dutch took during this period: perpetrators, resistance fighters, victims and bystanders. Fellows will also look at how The Netherlands has dealt with this period over the course of history.

From this starting point, the Amsterdam Fellowship will continue to discuss more contemporary themes such as immigration and integration in The Netherlands, refugee issues, institutional racism, xenophobia, LGBTQIA rights, Islamophobia, diversity, disability and women's rights. We strive for an intersectional approach to all of these issues, as we are looking at the overlap and interconnectedness of these topics. The underlying rationale behind this being that you cannot discuss one topic without considering the others. As the theme of institutionalized racism in The Netherlands has been a highly debated topic in Dutch society over the past few years, it has become an important theme in the program. In 2016, we focused on the refugee issue, as that was the most pressing issue at the time. To be able to focus on the most recent developments, the programmatic content continues to be developed until the very start of the program.

The program staff in The Netherlands considers dialogue between its very diverse, transatlantic Fellows to be one of the most important ingredients of the Humanity in Action experience. We therefore stimulate group discussions and Fellows' contributions. However, these can only be positive and constructive if everyone feels respected, even when we disagree. Discussions often differ per country. Therefore, we will decide together how to create a safe space for all participants. We hope that Fellows will work with us to make sure that it will remain this way throughout the program. Every Fellow will be invited to contribute to the program with a 'Fellow Talk' – a presentation of half an hour on a subject close to their hearts or one that they feel is missing in the program.

Organizationally, the Amsterdam Fellowship is divided into two phases. The first phase is an input phase: Fellows will meet with selected leading experts and the brightest commentators and researchers in The Netherlands. We will visit various sites and initiatives, but will also spend a lot of time in our lecture room. In the second phase of the program, Fellows will be working at an NGO on a topic related to what they had experienced in the previous weeks. This is very much a

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collaborative, international effort: the group will be divided into teams. After your two days of working with 'their' NGO, Fellows will be given time to write a report about it.

In the Amsterdam Fellowship, we will explore different ways of learning. Beside 'old-school' lectures, we will offer workshops, trainings, discussion groups, site visits, tours through Amsterdam by bike or on foot, museum visits, canal tours, theatre performances, public lectures and soccer clinics. In addition to the official program, there will be smaller and less formal events, organized in cooperation with the Dutch Humanity in Action Senior Fellow Network.

2016 Agenda

May 27

Arrival fellows from the United States, Bosnia and Herzegovina and Greece. Fellows will sleep at their host families for the first night.

May 28

Introduction Weekend

We will be starting the program together in a holiday farm at a one hour drive from Amsterdam. We'll get to know each other a little bit, some workshops will be organized and we can test each other's performance skills at the campfire.

Location: Holiday Farm Nieuwkarspel, Middenkoogweg 1A, 1738 DW in Waarland

- Introduction staff, getting to know each other
- Workshop: Making the most of it: creating a safe space and supporting each other's learning process Lenka Hora Adema (mediation expert, facilitator, process designer and organizational coach)
- Preparation dinner, with chef Ola Al Khatib

May 29

Location: Holiday Farm Nieuwkarspel, Middenkoogweg 1A, 1738 DW in Waarland

- Workshop: Talking to 'Racists' by Maja Nenadovic (coach, political consultant, researcher, human rights and advocacy trainer and identity de/construction educator)
This rhetorical self-defense workshop helps participants build resiliency, as well as the ability to respond to discriminatory remarks. In such situations, distress, heightened emotional state or plain shock can sometimes leave us tongue-tied. The rhetorical self-defense class teaches preparedness, and different methods of responding. It tries to replace the silence or tongue-tied shock with empowered, discourse-altering responses.
- Workshop: Talking to 'Racists', part two.

May 30

Intersectionality and Refugees

Location: Amnesty International/HIA, Keizersgracht 177, Rosa Parkszaal (Ground Floor)

- Intersectionality: a travelling concept, Lecture by Nancy Jouwe (cultural historian)
- Documentary: The Island of all together (23 min)
- Personal story from a Syrian Human Rights Defender Shevan (human rights activist, refugee)
- Fellow's talk 1 with Qali Nur
- Europe: protection of human rights in times of the refugee crisis, Eduard Nazarski (director Amnesty International The Netherlands)
- The crisis of European refugee law with Thomas Spijkerboer (professor in migration law)
- Fellow's talk 2 with Ola Al Khatib
- Reflection on the day (group)

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May 31

Irregular Migrants/Asylum in The Netherlands, Bystanders and Guilty Landscapes

Locations: Amnesty International/HIA, Keizersgracht 177, Rosa Parkszaal (Ground Floor) (Morning)
Anne Frank House, Westermarkt 10, Amsterdam (Afternoon)

- Fellow's talk with Chryssa Sotiriou, Cameron Kinker and Sahar Afzal
- Documentary: WE ARE HERE! (65 min)
- Q&A with Alexandra Jansse (documentary director) and two members of the WE ARE HERE group
- Visit Anne Frank Museum
- First introductions to the museum by Cihan Tekeli (Anne Frank House and Senior Fellow). About 1 hour to visit the museum and Q&A with Cihan and Inger afterwards.
- Places of memory, guilty landscapes, Rob van der Laarse (founding director Amsterdam School for Heritage, Memory and Material Culture)

June 1

World War II

Location: Former Dutch concentration camp/Memorial Site Westerbork, Oosthalen 8, Hooghalen (Drenthe)

- Personal story of a survivor with Fanny Heymann
- Shuttle bus to the camp
- Tour through the camp with Educational Department Memorial Centre
- Visit museum Memorial Centre

June 2

Privilege and Discrimination, Hidden history of slavery in Amsterdam

Location: Amnesty International/HIA, Keizersgracht 177, Rosa Parkszaal (Ground Floor)

- Introducing the day
- Fellow's talk with Ashley Lawrie
- Workshop: Privilege and identity with Glenn Helberg (psychiatrist and Chair Caribbean Dutch Network)
- Fellow's talk with Nejra Mulaomerovi
- Black Heritage Tour by boat and foot - African presence seen from historical buildings and landmarks from the 16th century to the present day Jennifer Tosch (owner BHAT tours)

June 3

Racism, Inclusive Leadership, Ethnic Profiling and Theatre

Location: Amnesty International/HIA, Keizersgracht 177, Rosa Parkszaal (Ground Floor)

- Introducing the day
- Fellow's talk with Merel de Herder
- Documentary: Black Face (15 min), Roger Ross Williams
- Anti-Black Pete Activism with Kno'ledge (Anti Black Pete activist and Chair Nederland wordt Beter)
- Fellow's talk with Eunelda Cairo
- Lunch with Judy Goldstein
- Inclusive leadership; life strategies for professional goals with Astrid Elburg (strategic consultant, executive coach and leadership trainer)
- Police discrimination in The Netherlands with Sinan Cankaya (cultural anthropologist)
- Non-Dutchies go to Final Statement: Re-Creating Europe
- Dutchies go to: Theatreplay: Nobody Home

June 4

Dinner Discussion - Summer Edition

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Location: Benjamin Asante's home, Utrecht

Dr. Gerard van der Ree is a lecturer in International Relations at University College, Utrecht. He will be speaking about the fragility of the male ego, using insights from feminist and social theory to explore the dynamics of power. In particular, he will address the question of what it is like to be privileged and wield social power in our everyday lives, and what the mechanisms are through which we attempt to protect our social positions on a daily basis. By discussing the ways in which we attempt to protect our fragile ego's, he will open up the floor for sharing stories of how social power affects us and how to address it.

Following Dr. van der Ree, there will be a brief presentation by Lillian dam Bracia (former UCU student) & Pien Den Hollander on their recently well-acclaimed public art project 'Limbo Citizen'. In Utrecht, the 'Limbo Citizen' art project was exhibited in the Cathedral allowing spectators to walk through an interactive documentary on the perspectives of four individual migrants in the Netherlands. Stories from one undocumented migrant from Ghana, a refugee from Syria, an economic migrant from Kenya, and a student from India are coming to the fore. Following dam Bracia her own difficulties with extending her residence permit in the Netherlands, she recalls this experience a "limbo that is caused by a lack of stability and structure."

- Fragility of the male ego with Gerard van der Ree (Lecturer International Relations UCU)
- Limbo Citizen with Lilian dam Bracia
- Brazilian drinks
- Travel back to Amsterdam

June 5

Day off

June 6

Democracy, Bosnia, Human Rights Law, Soccer and Public Seminar on Refugees

People on the run, people on the move – the current developments in migration law from a European and national level and the power of the media

Location: Amnesty International/HIA, Keizersgracht 177, Rosa Parkszaal (Ground Floor)

- Introducing the Day
- Resilient democracy with Bastiaan Rijpkema (lecturer, Leiden University)
- Fellow's talk with Mehrgol Tiv and Anouk van Eekeren
- Let's talk about Bosnia with Nejra Mulaomerovic and Sasa Buljevic
- Human Rights Law in practise
- Jelle Klaas (human rights lawyer) and Laurens Meijer (Senior Fellow)
- Soccer Clinic with Rocky Hehakaija (street soccer player and NGO Favela Street)
- Public Seminar Refugees
- People on the run, People on the move: The current developments in migration law from a European and national level and the power of the media featuring: Bram van Oijk (Ministry of Foreign Affairs; migration), Rajin Alqallih (Syrian refugee, UNHCR, Erasmus University) and Baba Tarawally (refugee & writer)

June 7

Visit The Hague: City of Peace and Justice

- ICTY's Achievements and Impact in the former Yugoslavia with Petar Finci (Outreach Program, ICTY)
- Exchange with a Human Rights Defender with Marieke van der Vliet (program coordinator Justice and Peace)
- Travel to New World Campus

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- Breeding ground for sustainable innovation with Diederik Bosscha (Director, New World Campus)

June 8

Greece, LGBTQI Rights and Identity

Location: Amnesty International/HIA, Keizersgracht 177, Rosa Parkszaal (Ground Floor)

- Introducing the Day
- Let's talk about Greece with Chryssa Sotiriou and Maria Louiza Kalogerakou
- Fellow's talk with Kelvin Ampem-Darko
- "My identity, whose construction?" with Tugba Oztemir (Master's Student, Activist and Educator)
- Fellow's talk with Oumou van Rijen
- Workshop: Homonationalism with Tara Nduma Flach (activist and educator)
- Gender walking tour through Amsterdam Bear Silver (trans activist)
- Optional vegan meal at squatter house Vrankrijk with Bear

June 9

Arts and Diversity, Underprivileged Neighbourhoods and Urban Violence

Location: Amnesty International/HIA, Keizersgracht 177, Rosa Parkszaal (Ground Floor)

- Introducing the Day
- Fellow's talk with Gage Garretson
- Workshop: Daughter of Diaspora with Patricia Kaersenhout (artist)
- Fellow's talk with Zohara Mahmoud
- Foundation Connect with Said Bensellam (youth worker)
- Urban violence, unruly politics with Femke Kaulingfreks (anthropologist, political philosopher)

June 10

Betzavta Training

Location: Amnesty International/HIA, Keizersgracht 177, Rosa Parkszaal (Ground Floor)

Betzavta methodology, a method to relate principles of democracy to everyday decision making. Betzavta enables an experiential way to learn about democracy and the democratic process. The principles and concepts behind democracy – equality, freedom, majorities, minorities – are applied in the group context, allowing the individual to reflect on his/her role in a group. Rather than learning about democracy as a theory, Betzavta allows you to practice it, challenging each person on the difference between what they say and how they behave.

Betzavta, an interactive and experience-based method whose goal is to build and strengthen people's awareness of themselves and their effect on others. This self-awareness plus awareness of others is achieved through a training based on Democracy education, where the goal is to recognize every person's equal right to freedom. The trainings bring together the personal and societal, the individual and the system and works to uncover all that is between ("mellem" in Danish) people, cultures and societies.

- Introducing the Day
- Fellow's talk with Rick Otten
- Workshop, round 1
- Workshop, round 2
- Talk about next week: working with NGOs
- Reflections of the week with HIA staff

Optional program (3 people):

- Dinner with Frieda Menco in her home. Talk with her about her past, while you are having a drink and a meal at her house (fellows and HIA will arrange the dinner)

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June 11-12
Weekend off

June 13

Disability Rights and Identity

Location: Amnesty International/HIA, Keizersgracht 177, Rosa Parkszaal (Ground Floor)

- Introducing the Day
- Fellow's talk with Huseyin Sakalli
- Deaf-Blind Reality with Gijs Bruggeman, SWDA, Foundation for the Welfare of Deaf People
- Fellow's talk with Lisa Muloma
- Fellow's talk with Maria Kalogerakou
- Raising awareness on disability rights in The Netherlands with Pauline Gransier (disability rights activist)
- Fellow's talk with Katherine Clifton
- Plural identity with Mounir Samuel (Egyptian-Dutch political scientist, journalist and author)

June 14-15

NGO's Day 1 and 2

Volunteer all day at your NGO. Every group makes prior appointments on times and expectations with the NGO.

- FAWAKA Nederland
- College van de Rechten van de Mens
- Wereldhuis
- Castrum Peregrini
- Stichting Verre Bergen
- Faces of Change
- Daklozendag
- SPARK
- Critical Mass
- Butterfly Works

Optional program on the 14th:

- Dinner with Frieda Menco. Meet Frieda Menco in her home. Talk with her about her past (Frieda lived in concentration camp Auschwitz), while you are having a drink and a meal at her house (fellows have to take care of the dinner)

June 16

NGO Day 3

Finish work for your NGO and write a report

June 17

Finish work for your NGO and write a report

Location: Consulate General of the United States of America, Museumplein 19

- Reception Consulate General of the United States of America with Marjon Kamrani, Human Rights Specialist

Evening

Fawaka Event organized by the fellows, location and time to be announced

June 18

Optional program

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- Walk 10 KM during 'The Night of the Refugees' in a Humanity in Action Team and donate to the organization.

June 19

Day off

June 20

Fellow's Talk and Social Entrepreneurship

Location: Amnesty International/HIA, Keizersgracht 177, Rosa Parkszaal (Ground Floor)

- Introducing the Day
- Fellow's talk and Sasa Buljevic, Leah van Ees
- Baking Power, a social enterprise with Tine Bakia and Marsha Baah
- Fellow's talk with Merve Mert, Femke Zeven
- Work on your presentations for tomorrow

Evening

- Host family dinner (location to be announced)

June 21

Presentation Day

- Presentations of reports
- Drinks with NGO's

June 22

Day off and packing

June 23-26

Seventh Annual International Conference in Athens

Atlanta

Program Description

After two successful years examining diversity and civil rights in America through the lens of the American South, in its third year the John Lewis Fellowship is expanding its thematic focus to restorative justice in Atlanta, Georgia. In partnership with the National Center for Civil and Human Rights, Humanity in Action intends to refocus the Atlanta program around the way one city is dealing with histories of division, discrimination and racism. As such, Fellows will explore what restorative justice would mean in Atlanta in the coming years; how to build a community that encourages knowledge of and responsibility for past injustices and looks toward greater unity through both a common understanding of the past and rectifications in the future.

The four-week inquiry and resulting blueprint for restorative justice will involve a multidisciplinary approach. Fellows, speakers and staff will produce a blueprint - "An Appeal for Human Rights and Restorative Justice" for the city. Fellows will look at this concept from many different perspectives as the issues infuse both public life and individual attitudes and responsibilities: education, health, the law, residential patterns, police practices, urban planning, local and state government, religious institutions, the arts and restoration of historic sites and areas. Consequently, the program will draw upon informed and inspiring academics from many disciplines as well as those in journalism, urban affairs, religion, government, public health, the law and NGOs.

The goal of Humanity in Action and the National Center for Civil and Human Rights is to create a program for emerging leaders to learn, engage in intellectual discourse, propose solutions and develop the skill-sets needed to bring forth effective social, political and economic changes that improves the lives within and beyond the United States. In the past two years, the curriculum of the

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John Lewis program focused on the history and global impact of the Civil Rights Movement, immigration reform and Native American issues. Fellows participated in discussions with renowned scholars, activists and political leaders who have dedicated themselves to advancing civil and human rights in the United States and beyond. In 2016, Fellows also produced a collection of reflections about their experiences in the John Lewis program, delving into personal aspects of their own identities – such as national, ethnic, gender, racial, or religious – and ways in which participation in the program has shaped their personal outlooks and perspectives on democracy and diversity.

2016 Agenda

July 5

Move-In and Opening Reception

Humanity in Action and the National Center for Civil and Human Rights welcome the second cohort of the John Lewis Fellowship Program taking place in Atlanta, Georgia. Fellows will arrive at Georgia State University Commons to check into assigned suites. Fellows are allotted a three-hour block of time to settle into their living spaces. Fellows will participate in an evening reception where they are introduced to Humanity in Action Founder and Executive Director, Judith Goldstein, program staff and peers. During dinner, each Fellow and staff member will share a personal item that embodies a personal narrative about their life, one's home country, and their concern for human rights.

9:00AM-2:00PM Fellows Check into Georgia State University Commons

2:00PM-5:00PM Leisure Time

6:30PM-8:30PM Opening Reception at Mary Mac's Tea Room

July 6

Welcome and Orientation

The John Lewis Fellows will be welcomed by Humanity in Action and the National Center for Civil and Human Rights. Fellows will participate in an orientation that will introduce them to the city and the contours and the interactive nature of the program. Fellows and staff will discuss the program schedule, educational process, community building, and presentations. At the end of the program all Fellows will be asked to make oral and written presentations in which they will share new perspectives on the issues that will be explored throughout the program.

9:00AM-9:20AM Opening Greetings

- Derreck Kayongo (Chief Executive Officer, National Center for Civil and Human Rights)
- Deborah Richardson (Executive Vice President, National Center for Civil and Human Rights),
- Andre D. Dickens (Atlanta City Council Member, Post 3 at Large, Board of Trustees, National Center for Civil and Human Rights)
- Karcheik Sims-Alvarado PhD (Program Director, John Lewis Fellowship)

9:20AM-10:00AM American Exceptionalism

- Judith S. Goldstein PhD (Founder and Executive Director, Humanity in Action)

10:15AM-11:45AM Viewing the NCCHR "Civil Rights" Exhibition Part I

1:15PM-2:00PM Community Building Workshop Part I

- Ufuk Kâhya (Program Associate, John Lewis Fellowship)

2:00PM-2:30PM Sexual Harassment

- Michelle Issadore (Vice President, Operations and Public Information, the NCHREM Group, Inc.)

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2:45PM-4:00PM Viewing the NCCHR Exhibition "Human Rights" Exhibition Part II

4:00PM-5:00PM Community Building Workshop Part II

- Ufuk Kâhya (Program Associate, John Lewis Fellowship)

July 7

"Sankofa": Reaching Back to Move Forward

Presenters will offer a historical overview of African-Americans' quest for personal, political, and economic autonomy throughout the long Black Freedom Struggle in America. Speakers will focus on the enslavement of African Americans as a global human rights violation. The day will commence with a discussion of the Middle Passage in which Africans were brought to America as part of the global slave trade. The discussion will be followed by an examination of Modern Civil Rights Movement during the mid-twentieth century.

9:00AM-11:00AM The Coming

- Dr. Daniel Black (Full Professor of African American Studies, Clark Atlanta University, Novelist)

11:00AM-12:00PM The Quest for Freedom: From the American Revolution-Post Reconstruction

- Karcheik Sims-Alvarado, PhD (Program Director, John Lewis Fellowship)

2:00PM-3:00PM "What are Civil and Human Rights?" Discussion and Exercise

- La'Neice Littleton (Program Assistant, John Lewis Fellowship)

3:00PM-5:00PM "An Appeal for Human Rights"

- Dr. Roslyn Pope (Author of the manifesto, "An Appeal For Human Rights", 1960)

July 8

Slavery and Lynching in America

Fellows will have the opportunity to engage the system of chattel slavery and modern day human trafficking via a presentation on the life of Abolitionist Frederick Douglass, by Kenneth B. Morris, Jr. author of Picturing Frederick Douglass, and founder and president of the Frederick Douglass Family Initiatives. The succeeding discussion, with Dr. James Thomas, will cover racial terrorism during the Jim Crow era along with the psychology of racism in America both past and present.

9:00AM-10:00AM Discussion

- Ufuk Kâhya (Program Associate, John Lewis Fellowship)

10:00AM-12:00PM The Life of Frederick Douglass, Abolitionist

- Kenneth B. Morris, Jr. (Founder and President, Frederick Douglass Family Initiative)

2:00PM-3:30PM Lynching and the Psychology of Racism in America

- Dr. James Thomas (Assistant Professor of Sociology, University of Mississippi)

6:00PM-8:00PM Evening Program and Book Signing with Kenneth B. Morris, Jr.

July 9

Touring Sweet Auburn Avenue, The Black Mecca of the South

Fellows will have the opportunity to learn about the financial, religious, and civic organizations on Auburn Avenue that supported the long Civil Rights Movement in Atlanta from 1865-1965. Fellows will have an opportunity to visit the historic sites of Ebenezer Baptist Church, the Atlanta Life Insurance Company, the original locations of SCLC, the NAACP, SNCC, and other Civil Rights

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organizations.

9:30AM-12:00PM Sweet Auburn Avenue Tour

- Nasir Muhammad (CEO and Founder of Black Mecca of the South Tours)

July 10

Meet and Greet with Nelson Mandela Fellows

Fellows will have the opportunity to meet and greet with the Nelson Mandela Fellows from South Africa and participate in the Eid celebration hosted by the Andrew Young School of Public Policy at Georgia State University. (Food and refreshments will be provided. Swimwear is encouraged.)

11:00AM-2:00PM Eid Celebration with Nelson Mandela Fellows

July 11

Atlanta's "Race Men and Women" of the Twentieth Century

*In the morning, Fellows will visit the home of Alonzo Herndon, slave-born founder of the Atlanta Life Insurance Company. Through the life of Herndon, Fellows will also learn about W. E. B. Du Bois, George Towns and Norris Herndon, founders of the Niagara Movement (precursor to the National Association for the Advancement of Colored People). In their opposition toward the political ideology of Booker T. Washington, Atlanta's black intelligentsia organized in an effort to progressively push for inclusion within the public sphere, suffrage rights, equal education and the right to purchase land. After the tour, Fellows will engage in a conversation with Dr. Jacqueline Rouse about early twentieth-century "Race Women" and their active leadership roles during the long Civil Rights Movement. In the afternoon, Fellows will visit the sites where W. E. B. Du Bois resided and wrote his seminal work, *Souls of Black Folk*, founded *The Crisis* and *Phylon* and experienced the horror of the 1906 Atlanta Race Riot, followed by presentations about his life and legacy.*

9:00AM-10:00AM Herndon Home Tour

10:00AM-11:00AM Women of the Modern Civil Rights Movement

- Dr. Jacqueline Rouse (Associate Professor, History, Georgia State University)

1:00PM-2:15PM Organizational Structure of the Modern Civil Rights Movement

- Dr. Charmayne Patterson (Assistant Professor, History, Clark Atlanta University)

2:30PM-3:45PM The Legacy of W. E. B. Du Bois

- Dr. Stephanie Y. Evans (Professor, Chair, African American Studies, Africana Women's Studies, and History, Clark Atlanta University)

3:45PM-5:00PM The House that Du Bois Built

- Dr. Kurt Young (Professor, Chair, Political Science, Clark Atlanta University)

July 12

A Discussion on Race, Education, and Civil and Human Rights

In the morning, Fellows will engage with Dr. Beverly Tatum about the nature of race and education in America. Dr. Carol Anderson will continue the conversation with a discussion about defining civil and human rights. In the afternoon, Fellows will be allotted time to work on their end-of-program presentations. During the evening, Fellows will attend a stage production of Trey Anthony's "Da Kink in my Hair" at the Horizon Theatre Company.

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9:00AM-9:30AM Discussion

- Ufuk Kâhya (Program Associate, John Lewis Fellowship)

9:30AM-10:45AM Race and Education

- Dr. Beverly Tatum (President Emerita of Spelman College)

11:00AM-12:00PM Human Rights

- Dr. Carol Anderson (Samuel Candler Dobbs Professor, African American Studies at Emory University)

1:00PM-4:30PM Work on Presentations and Discussion

- Ufuk Kâhya (Program Associate, John Lewis Fellowship)
- La'Neice Littleton (Program Assistant, John Lewis Fellowship)

6:00PM-8:00PM Evening Program - Trey Anthony's "'Da Kink in My Hair"

July 13

Teaching with the Dr. Martin Luther King, Jr. Personal Papers

In the morning, Fellows will tour both Morehouse College and Clark Atlanta University's campuses. These tours will be followed by a presentation on religious leader and global human rights activist Rev. Dr. Howard Thurman. In the afternoon, Fellows will discuss the life and legacy of Rev. Dr. Martin Luther King, Jr. with Dr. Samuel T. Livingston. Led by Dr. Vicki Crawford, Director of the Dr. Martin Luther King, Jr. Collection at Morehouse College, Fellows will experience the rare opportunity to view the original writings and ephemera of Dr. Martin Luther King, Jr. via his personal papers housed at the Atlanta University Robert W. Woodruff Library Archive and Research Center.

9:00AM-10:30AM Morehouse College and Clark Atlanta University Tour

10:30AM-11:45AM The Life of Reverend Howard Thurman

- Dr. Kipton Jensen (Professor, Philosophy, Morehouse College), Mr. Shakeal Moore (Student, Morehouse College)

1:00PM-2:30PM Dr. Martin Luther King, Jr. The Birth of a New Nation

- Dr. Samuel T. Livingston (Chair, Professor, African American Studies, Morehouse College)

3:00PM-5:00PM Dr. Martin Luther King, Jr. Papers

- Dr. Vicki Crawford (Director of the Morehouse College Martin Luther King, Jr. Collection),
- Ms. Tiffany Atwater (Public Services Archivist at the Atlanta University Center Robert W. Woodruff Library's Archives Research Center)

5:00PM-6:00PM Discussion (Woodruff Library Greenspace)

- Ufuk Kâhya (Program Associate, John Lewis Fellowship)

July 14

Black Muslims and Black Power

In the morning, presentations will be given by Nasir Muhammad and La'Neice Littleton on the history of Black Nationalism, the Black Muslim Movement in Atlanta, and Malcolm X as both a civil and human rights activist. The presentations will focus on the complexities and historic consequences of the successes and weaknesses of coalition building in the struggle for civil and human rights. These conversations will provide an orientation for the evening program with Ilyasah Shabazz, daughter of Malcolm X and Dr. Betty Shabazz.

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9:00AM-9:45AM Video Seminar: Malcolm X and the Black Power Movement

10:00AM-11:00AM Black Nationalism and Black Muslim Movement in Atlanta

- Nasir Muhammad (CEO and Founder of Black Mecca of the South Tours)

11:00AM-12:00PM Malcolm X, Human Rights, and Coalition Building

- La'Neice Littleton (Program Assistant, John Lewis Fellowship)

1:00PM-3:30PM Discussion

- Ufuk Kâhya (Program Associate, John Lewis Fellowship)

5:00PM-8:00PM Evening Program with Ilyasah Shabazz

July 15

Using Your Creative Genius to Bring About Social Justice

Fellows will experience a full day of understanding civil and human rights through the visual and performing arts. Presenters will consist of artists who are using their genius to act as change agents and address social ills. The conversation will take place in the historic Clark Atlanta University Art Gallery which houses the collective works of some of the leading African-American visual artists of the twentieth century and continues to exhibit contemporary works of some of the nation's leading and emerging visual artists.

9:00AM-9:30AM Welcome

- Dr. Ronald A. Johnson (President, Clark Atlanta University)

9:30AM-10:30AM Conversation on the Life and Legacy of Malcolm X and Dr. Betty Shabazz

- Ilyasah Shabazz (Author, Daughter of Malcolm X and Dr. Betty Shabazz)

10:30AM-11:00AM CAU Art Collection

- Dr. Maurita Poole (Director, Art Gallery, Clark Atlanta University)

11:00AM-11:40AM Gallery Tour

11:40AM-12:00AM Student Response to Art Exercise

- Ufuk Kâhya (Program Associate, John Lewis Fellowship)

1:00PM-2:30PM Role of the Modern Day Artist-Activist: Visual Arts

- Alfred Conteh (Artist), Tabia Lisenbee-Parker (Photographer),
- Charmaine Minniefield (Artist)
- Joe Dreher (Artist)

2:45PM-4:00PM Role of the Modern Day Artist-Activist: Playwright and Opera

- Minka Wiltz (Playwright, Opera Singer)

4:00PM-5:00PM Spelman College Tour

- Greetings from Jane Smith, Ed.D. (Vice President, College Relations)

6:00PM-9:00PM Art and Jazz at the High Museum

July 16

The Life and Legacy of Dr. Martin Luther King, Jr.

10:00AM-2:00PM Visit to Martin Luther King, Jr. Center

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July 17

Sunday Worship Service

Fellows will attend Sunday Service at the historic Ebenezer Baptist Church.

11:00AM Sunday Worship Services

July 18

Leadership and Immigration

Throughout the day, Fellows will have the opportunity to hear from leading immigration advocates who act as political leaders, attorneys, or executives for some of the leading national and global civil and human rights organizations. Fellows will have an opportunity to learn of their leadership and collective efforts to improve the quality of life for members of the immigrant community in the United States.

9:00AM-9:30AM Discussion of Mid-Program Evaluation

- Ufuk Kâhya (Program Associate, John Lewis Fellowship)

9:30AM-10:45AM Immigration and the Struggle for Civil and Human Rights

- Derreck Kayongo (Chief Executive Officer, National Center for Civil and Human Rights)

11:00AM-12:00PM Project South, Immigration Law, and Human Rights Activism

- Adazadeh Shahshahani (Human Rights Attorney)

2:00PM-3:00PM The City of Clarkston, "Ellis Island of the South"

- Ted Terry (Mayor of Clarkston, Georgia)

3:10PM-3:30PM Complete Mid-Program Evaluation

- Ufuk Kâhya (Program Associate, John Lewis Fellowship)

3:30PM-5:00PM Construction of Race in America Discussion and Exercise

- "Cracking the Code" Video Clips

6:00PM-7:00PM Discussion

- Ufuk Kâhya (Program Associate, John Lewis Fellowship)

July 19

Congressman John Lewis and Asian American Issues

Fellows will spend the morning in conversation with Congressman John Lewis at his office in downtown Atlanta. Following US Representative Lewis, attorneys, Helen Ho and Bryan L. Sells will discuss Asian American issues and civil, social, and economic rights. In the afternoon, Fellows will have the opportunity have preliminary discussions about their Action Projects and end of the program presentations.

9:00AM -10:45AM One-on-One Conversation with Congressman John Lewis

11:00AM-12:00PM Asian issues and Voting Rights in America

- Helen Ho (Founding Executive Director, Asian Americans Advancing Justice), Bryan L. Sells (Civil Rights Attorney)

1:30PM-2:30PM Action Projects

- Veronica Agard (Program Associate, Humanity in Action)

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- 2:30PM-5:00PM "The Current State of Democracies in the US and Europe" Discussion
• Ufuk Kâhya (Program Associate, John Lewis Fellowship)

July 20

Immigration, Legislation, and Advocacy

Since 2002, the subject of immigration legislation has served as a subject of great national debate. In 2011, Georgia enacted a strict set of immigration laws covering a wide range of activities relating to daily life. Throughout the day, Fellows will hear from refugee advocates as well as Georgia legislators and grassroots activists as they discuss immigrants' rights and the laws that fail to protect non-citizens.

- 9:00AM-9:30AM Discussion
• Ufuk Kâhya (Program Associate, John Lewis Fellowship)

- 9:30AM-11:00AM Georgia Immigration Law and Latino Voting
• Representative Pedro Marin (Georgia Representative, District 96); Jerry Gonzales (Executive Director, GALEO)

- 11:15AM-12:30PM Grassroots Activism
• Adelina Nicholls (Co-Founder and President of the Coordinating Council of Latino Community Leaders of Atlanta)

- 2:00PM-3:00PM Film, "Stolen Education"

- 3:00PM-4:00PM Q&A
• Dr. Enrique Alemán, Jr., (Executive Producer and Co-Writer, "Stolen Education")

- 4:00PM-5:00PM Black-Brown Coalitions
• Joel Alvarado (Director of Community Outreach and Engagement, Georgia Piedmont Technical College)

July 21

Leadership and Representation: Native Americans, the Islamic Community, and Politics

In the morning, Fellows will have the opportunity to engage in conversation with members of the Native American community on culture, racial identity, political representation, education, and immigration. During the afternoon sessions Fellows will hear from representatives of the Islamic community in the areas of advocacy, religious leadership and photography. The session will close with a conversation with Former Atlanta Mayor, Shirley Franklin, on leadership and the creation of the National Center for Civil and Human Rights.

- 9:00AM-10:00AM Native American Issues, Immigration, and Political Representation
• Representative Ponka-We Victors (Kansas State Legislature)

- 10:30AM- 11:45AM Native American Culture and Racial Identity
• Ramona Big Eagle Moore (President and CEO, Dare To Soar Enterprises)

- 1:30PM-2:00PM Discussion
• Ufuk Kâhya (Program Associate, John Lewis Fellowship)

- 2:00PM-3:00PM Documenting the Atlanta Islamic Community through Photography

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- Rahmeek Rasul (Photographer), Imam Plemon T. El-Amin (Resident Imam, Atlanta Masjid of Al-Islam)

3:00PM-4:00PM Discussion on Leadership and the Building of a Center

- Shirley Franklin (Former Atlanta Mayor)

4:00PM-5:00PM Discussion Continued

- Ufuk Kâhya (Program Associate, John Lewis Fellowship)

July 22

Contextualizing the LGBTQ Struggle through Film

Through film Fellows will experience a day of examining the LGBTQ struggle for equal protection of the law in America. These films will examine the generational struggle of these individuals and will allow Fellows to understand the LGBTQ community's relationship to civil and human rights issues.

10:00AM-11:30AM Film: "Brother Outsider: Bayard Rustin"

11:30AM-12:00PM Discussion

- Ufuk Kâhya (Program Associate, John Lewis Fellowship)

1:00PM-2:00PM Mildred Loving Case, Marriage Equality, Lorde, Baldwin, Lynch Video Seminar

- Karcheik Sims-Alvarado (Program Director, John Lewis Fellowship), La'Neice Littleton (Program Assistant, John Lewis Fellowship)

2:00PM-4:00PM Film: "Bessie"

4:00PM-6:30PM Discussion

- Ufuk Kâhya (Program Associate, John Lewis Fellowship)

July 23

Outing to be organized by Fellows

July 24

Working on Presentations

July 25

Youth Activism and Black Lives Matter

Fellows will spend the morning discussing structural and institutional racism via the lens of Critical Race Theory and Racial Formation. In the afternoon, Fellows will have the opportunity to hear about the historical context of youth activism in relationship to contemporary social movements. These conversations will give Fellows the opportunity to critically analyze the Black Lives Matter Movement.

9:30AM-12:15PM Discussing Literature: Critical Race Theory, and Racial Formation

- Karcheik Sims-Alvarado (Program Director, John Lewis Fellowship), Ufuk Kâhya (Program Associate, John Lewis Fellowship), La'Neice Littleton (Program Assistant, John Lewis Fellowship)

1:45PM-2:15PM Fred Hampton and Youth Activism

- Craig McPherson (Adjunct Instructor, History, Clark Atlanta University)

2:30PM-3:45PM Teaching Black Lives Matter

- Dr. Samuel T. Livingston (Professor, Chair, African American Studies, Morehouse College)

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4:00PM-5:00PM Discussion

- Ufuk Kâhya (Program Associate, John Lewis Fellowship)

July 26

Justice and Journalism

In the morning, Fellows will hear from two leading civil rights attorneys about the legal challenges representing victims of police violence. Both attorneys will also discuss the successes and challenges related to the Fourteenth Amendment. During the afternoon session, Fellows will hear from award-winning journalist who covered the Ferguson demonstration in Missouri, the emergence of the Black Lives Matter Movement, and the mass shooting at Pulse Nightclub in Orlando, Florida.

9:00AM-10:45AM Work on Presentations

11:00AM-12:15PM Civil Suits and Fourteenth Amendment Rights

- Julie Oinonen-Williams (Partner, Williams Oinonen LLC); Mario Williams (Partner, Williams Oinonen LLC)

2:00PM-3:00PM Documenting Social Movements via the Press

- Ernie Suggs (Reporter, Atlanta Journal Constitution)

3:00PM-5:00PM Work on Presentations

July 27

Race and Place

Fellows will have the opportunity to consider race, class, and education as they relate to geography in the city of Atlanta. The Fellows will have an opportunity to discuss the ways in which race and economics intersect in urban cities, and how to address closing the economic gap throughout the US and beyond.

9:15AM-10:15AM "Gazing into the Crystal Ball of Atlanta: Race and Class in Urban Cities"

- Mike Carnathan (Manager of the Research & Analytics Division, the Atlanta Regional Commission, and Founder of Neighborhood Nexus)

10:30AM-12:00PM Creating Viable and Sustainable Communities using an Equity Agenda

- Hattie Dorsey (Principal, HB Dorsey & Associates LLC)

2:00PM-3:00PM Improving the Quality of Life: Education, Health, and Public Space

- John H. Eaves, Ph.D. (Chairman, Fulton County Board of Commissioners)

3:00PM-5:00PM Discussion

- Ufuk Kâhya (Program Associate, John Lewis Fellowship)

July 28

End of Program Presentations

Fellows will devote the entire day to delivering their presentations.

9:00AM-9:30AM Program Reflections

- Ufuk Kâhya (Program Associate, John Lewis Fellowship)

9:30AM-5:00PM Presentations

July 29

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Closing of the Program

In the morning, Fellows will hear closing remarks from the National Center for Civil and Human Rights and Humanity in Action. The program will close with a talk from contemporary artist Fahamu Pecou, whose work is currently on exhibit at the Center for Civil and Human Rights. The closing reception dinner will be held at No Más! Cantina.

9:00AM-10:00AM Closing Remarks

- Derreck Kayongo, (Chief Executive Officer, National Center for Civil and Human Rights), Judith S. Goldstein Ph.D. (Founder and Executive Director, Humanity in Action), Deborah Richardson (Executive Vice President, National Center for Civil and Human Rights), Karcheik Sims-Alvarado Ph.D. (Program Director, John Lewis Fellowship)

10:30AM-11:30AM Artist Fahamu Pecou

11:30AM-12:00PM End of Program Evaluations

- Ufuk Kâhya (Program Associate, John Lewis Fellowship)

2:00PM-4:00PM Closing Program

- Ufuk Kâhya (Program Associate, John Lewis Fellowship)

6:00PM-8:00PM Dinner - No Más! Cantina

Berlin

Program Description

Against the historical background of Germany's colonial history, the Second World War and the Holocaust, 22 carefully chosen participants from at least five different countries will examine contemporary questions around identity formation and societal pluralism in Germany.

Germany's past and present serve as case studies for the Humanity in Action Berlin Fellowship. On this basis, Fellows will examine patterns and mechanisms that underpin human rights related challenges today by learning from historic examples. Particular attention is given to the relationships between minority and the majority populations, the role of civil society, and phenomena of social injustice, including for example the concept of group-focused hostility. Fellows will visit historic sites of remembrance and speak with experts from the private, public and nonprofit sectors. The Berlin Fellowship's main platform of inquiry lies in the personal exchange with renowned policy-makers, activists, academics and artists, as well as among the Fellows.

The program will explore Germany's approaches to its own histories, Germany's remembrance culture and Germany's human rights situations today. More specifically, it addresses the neglected colonial past of the country and its impact on German society today; the Holocaust; forced labor during the Nazi era and forms of modern forms of labor exploitation; Nazi ideology and current right-wing extremism; as well as immigration and integration policy. A variety of issues related to minorities belonging in Germany, including their marginalization and contemporary mechanisms of discrimination – often with a view to their historical origins, will form part of the Berlin Fellowship. Among these issues are racism, Antisemitism, Islamophobia, Antiziganism, trans- and homophobia, classism, the devaluation of people with disabilities but also feminism and gender-related identity questions.

To be equipped with tools to translate their own ideas into action, Fellows will engage in practice-oriented skills workshops. To be inspired by ideas already turned into action, Fellows will meet with representatives of successful civil society initiatives in a variety of the above-mentioned realms. To

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ensure their own future impact, Fellows will start developing their ideas for projects in their own communities during this Fellowship program.

2016 Agenda

May 27

Evening Reception

To mark the beginning of this month together, the Fellowship program begins with an Evening Reception in Berlin-Prenzlauer Berg. Fellows, Senior Fellows and Members of the Board of Directors of Humanity in Action get together for an evening of getting to know each other over food and drinks.

- Evening Reception with Cornelia Schmalz-Jacobsen (Honorary Chair of Humanity in Action Germany), Board Members, Senior Fellows, Fellows

May 28

Welcome to Humanity in Action

The Fellows get to know each other and the team. The staff introduces the program and provides practical information about life in Berlin. At the end of this day, the Fellows reach consensus on their own rules for discussions and interactions in the coming weeks.

- Welcome to Humanity in Action and Sharing Expectations with Johannes Lukas Gartner (Program Coordinator) and Luisa Maria Schweizer (Program Director)
- Introduction to the Program and Practical Information
- Getting to Know Each Other
- Personal Experience: Bring an Object
- Agreeing on Ground Rules for Discussions and Debriefing Sessions
- Wrap Up

May 29

Without Papers

The Fellows embark on a guided tour that is organized by Grenzgänger Berlin e.V. The tour seeks to give insights into the day-to-day life circumstances of undocumented migrants living in Berlin. It explores their daily struggles in matters such as access to education, healthcare, and living space from various different angles.

- Guided Tour: Without Papers with Alexander Mattern (Guide, Grenzgänger Berlin e.V.)

May 30

Diversity Training

In a peer-based and cross-medial training the Fellows learn about various forms of inequalities, group-focused hostility, and discrimination. The training deepens the Fellows' understanding of different phenomena of everyday discrimination and assists them in developing strategies to constructively handle these. The training seeks to support the Fellows in reflecting on the current state of the discourse on 'diversity' in Germany and offers core reflections on efficient dialogue in educational settings.

- Diversity Training (I.) with Lorenz Narku Laing (Peer Diversity Trainer; Chairman, Schwarze Jugend in Deutschland e.V.; Member of the Board of Directors, Humanity in Action Germany; Humanity in Action Senior Fellow)

- Diversity Training (II.) with Lorenz Narku Laing

Only in case of good weather:

- Travel together to Tempelhofer Feld (former airfield)
- Networking Picnic with the Fellows of The DO School

May 31

Culture of Remembrance

Until 1945, more than 200,000 people from all over Europe were imprisoned at Sachsenhausen

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Concentration Camp, built by the SS in 1936. Tens of thousands died of hunger and diseases as a result of forced labor or systematic extermination. From 1945 to 1950, the Soviet Union used the site as a labor camp. Over a decade later, in 1961, the German Democratic Republic (i.e. East Germany, 1949-1990) founded the Sachsenhausen National Memorial. The Fellows today examine the histories connected to this place, particularly the Holocaust, and the persecution of minority groups and political opponents under National Socialism. The Fellows will connect these histories to the present and reflect on their impressions. There will also be the opportunity to share knowledge on and experiences with the remembrance culture in their own countries.

- Overview of Fellows' Expectations with Dr. Russell Alt-Haaker (PhD Graduate of Washington University in St. Louis)
- Guided Tour: Memorial and Museum Sachsenhausen with Dr. Russell Alt-Haaker
- Debriefing with Dr. Russell Alt-Haaker
- Travel back to Berlin

June 1

Origins and Mechanisms of Discrimination | Social Entrepreneurship for Inclusion

This day outlines two essential theoretical frameworks that may serve as reference points throughout the rest of the program: social-psychological origins and mechanisms of discrimination as well as the concept of group-focused hostility. These theories are not the only approaches to explaining discrimination, but they provide a useful perspective on the range of real-life phenomena that Fellows will discuss with experts, representatives of different minority groups and NGO activists over the course of the Fellowship.

In the afternoon, the Fellows learn about creative ways to ensure inclusion and accessibility. Last but not least, our Fellows from Poland present their views on the current situation of human and minority rights in their home country.

- Introduction to the Day
- Social-Psychological Mechanisms of Discrimination with Anna Stefaniak (PhD Candidate, University of Warsaw, Humanity in Action Senior Fellow)
- The Concept of Group-Focused Hostility with Simone Rafael (Editor-in-Chief, Netz-gegen-Nazis.de, Amadeu Antonio Foundation)
- Case Study: Social Heroes – For Inclusion and Accessibility with Silke Georgi (International Affairs and Fundraising, Sozialhelden e.V.)
- Spotlight Session Poland: New Government, New Human Rights?
- Revisiting Ground Rules for Discussions and Debriefing Sessions
- Fellows Discussion
- Wrap Up

June 2

Forced Labor – Past and Present

Today, the Fellows examine forced labor during the Nazi era before discussing examples of labor exploitation today. The former labor camp Berlin-Schöneweide, the last well-preserved labor camp in Germany, illustrates the historical organization of labor exploitation by the Nazis. A visit to the Foundation "Remembrance, Responsibility and Future" (EVZ) gives insights into the ways Germany has dealt with its history of forced labor. Lastly, contemporary forms of labor exploitation and human trafficking are addressed alongside a presentation of innovative campaign methods against these phenomena.

- Guided Tour: Documentation Center Forced Labor
- Travel together to Berlin-Mitte
- The Foundation Remembrance, Responsibility and Future – History and Present Projects with Martin Bock (Program Manager, Foundation Remembrance, Responsibility and Future) and Christa Meyer (Program Manager, Foundation Remembrance, Responsibility and Future)
- Travel together to Berlin-Prenzlauer Berg

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- Forced Labor in Germany Today with Paula Riedemann (Project Coordinator, Ban Ying Coordination and Counseling Center)
- Fellows Discussion Over Dinner
- Wrap Up

June 3

Post-War History and Questions of Identity | Introduction to the Action Project Phase

Today, the Fellows engage with history of post-war Germany at the remains of the Berlin Wall. This memorial site provides a historical lens into the border regime and the Cold War. In the afternoon, the Fellows' attention is drawn to the ACTION part in Humanity in Action. While all Fellows are required to implement an Action Project within one year after completion of the Fellowship program, the projects may differ significantly in their thematic scope, size, methodology, and number of people involved. The Fellows are provided with examples of Action Projects conducted in the past. The afternoon also gives space for sharing personal project experiences and for brainstorming initial ideas for their future projects. Returning to post-war history, this day culminates in an analysis of the trajectory of Germany's quest for identity and a look at the ramifications of certain historical developments on German national consciousness and identity.

- Guided Tour: Memorial Site Berlin Wall with Miriamne Fields (Tour Guide)
- Travel together to Berlin-Prenzlauer Berg
- Introduction to the Action Project Phase
- Working Groups: Share Personal Experience with Project Implementation
- Share Findings with the Group
- What are Humanity in Action's Expectations?
- Brainstorming: Action Project Ideas
- Germany and Its Quest for Identity with Gülay Gün (Project Manager, Hamburg Museum of Work; Humanity in Action Senior Fellow)
- Wrap Up

June 4

Translating Knowledge, Skills, and Passion into Action

This afternoon, our Fellows from Bosnia and Herzegovina present their views on collective memory processes and reconciliation in their home country. Afterwards, the Fellows get their first external input on how to maximize the impact of their future Action Project. The Fellows learn to effectively translate their ideas into action.

- Spotlight Session Bosnia and Herzegovina: Remembrance and Reconciliation
- Rock Your Idea - Bringing Ideas into Action with Martin Gaedt (CEO, Provotainment GmbH)

Optional

- Interventions - Refugees in Arts & Education - Evening of performances

June 5

Day Off

June 6

Contemporary Art of the Roma and Sinti | Antigypsyism | Germany's Colonial Past

Today starts with a trip to Kai Dikhas, a gallery exclusively dedicated to exhibiting art of contemporary Roma and Sinti artists from across the globe. In continuation, the Fellows learn about current forms of expression of antigypsyism in the German media, focusing largely on Sinti and Roma, two minority groups whose persecution under National Socialism has continuously been neglected in the public discourse and who remain among the most marginalized communities in Europe. In the afternoon, the Fellows dive into the colonial history of Germany, a topic that is also frequently neglected in the context of memorialization. First, the Fellows embark on a tour through the African Quarter in the district of Berlin-Wedding, where they may see the vestiges of Germany's

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colonial past. After the tour, the Fellows learn about the ramifications of the colonial past on the social dynamics of present-day German society.

- Gallery Tour: Kai Dikhas with Jobst Moritz Pankok (Founder and Artistic Director, Galerie Kai Dikhas)
- Antigypsyism in the German Media with Markus End (Lecturer, University of Hildesheim)
- Travel together to Berlin-Wedding
- Walking Tour: Germany and its Colonial Past with Joshua Kwesi Aikins (Political Scientist, Kassel University)
- Travel together to Berlin-Mitte
- Coloniality and Institutional Racism with Joshua Kwesi Aikins
- Fellows Discussion
- Wrap Up

June 7

Insights into the Educational System | Berlin's Memorial Landscape

The Founder of Humanity in Action, Judy Goldstein, joins the Fellows this morning for a conversation about the origins and aims of the organization. Afterwards, the Fellows learn about the challenges and advantages of history lessons in multi-diverse school classes. They meet representatives of Quinoa, a transformational secondary school start-up for disadvantaged youth in Berlin. In the afternoon, the Fellows are taken on a tour to reflect on three memorial sites in the center of Berlin: the Memorial to the Sinti and Roma Victims of National Socialism, the Memorial to Homosexuals Persecuted Under Nazism, and the Memorial to the Murdered Jews of Europe.

- Meet Humanity in Action's Founder – Dr. Judith Goldstein facilitated by Michael Williams (Program Intern)
- Teaching German History in a Multiethnic Classroom Prof. Dr. Viola B. Georgi, Professor, Hildesheim University
- Midterm Evaluation
- Case Study: Quinoa – A Transformational Secondary School with Pantelis Pavlakidis (Head of Fundraising and Evaluation, Quinoa) and Judith Scheer (Head of Backoffice Management, Humanity in Action Senior Fellow)
- Travel together to Memorial Area
- Guided Tour: Memorial to the Sinti and Roma Victims of National Socialism, Memorial to Homosexuals Persecuted Under Nazism, Memorial to the Murdered Jews of Europe with Anne Stalfort (Activist, TransInterQueer e.V.)

June 8

Right-Wing Extremism and the NSU | Online Hate Speech | Migration as the New Normal

Today starts with a visit to the German Bundestag, where the Fellows meet with a Member of Parliament to learn about her involvement in the working group 'Strategies against Right-Wing Extremism' and her position in the inquiry committee on the NSU (National Socialist Underground). After a Spotlight Session on the current situation of civil society in Ukraine, the Fellows meet with an expert on online hate speech. They learn about the nature of hate speech online and explore constructive counter-strategies. In the evening, the Fellows attend a public Humanity in Action lecture by a Polish intellectual and journalist, who shares his perspectives on the political and practical realities of what Europe today refers to as its 'refugee crisis.'

- Strategies Against Right-Wing Extremism and the Bundestag Inquiry Committee on the NSU with Susann Rùthrich (Member of Parliament, Social Democrats)
- Travel to Berlin-Prenzlauer Berg
- Spotlight Session Ukraine: The Current Situation of Civil Society
- Hands on Hate Speech with Johannes Baldauf (Project Coordinator no-nazi.net, Amadeu Antonio Foundation)

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- Migration as the New Normal with Konstanty Gebert (Journalist; Special Advisor on International Affairs, Humanity in Action)

June 9

Seeking Refuge and Asylum in Europe

Humanity in Action runs parallel Fellowship programs. This day brings the Fellows from the Berlin Fellowship and the Diplomacy and Diversity Fellowship together. The Fellows take a closer look at the challenges that current migration realities pose. They discuss various responses from within society - from volunteering to hate speech, from 'welcome culture' to discrimination.

- Introduction to the Day with Antje Scheidler (International Director of European Programs, Humanity in Action) and Luisa Maria Schweizer (Program Director, Humanity in Action Germany)
- Seeking Refuge and Asylum in Germany - Human Rights Violations Meet Counter Activities with Prof. Dr. Nivedita Prasad (Professor, Alice Salomon University of Applied Science)
- Realities of Newcomers and Refugees in Rural Areas - Between a Welcoming Culture and Racist Attacks with Konstanze Ameer (Project Director, Aktion Schutzschild, Amadeu Antonio Stiftung)
- Lunch at Restaurant Due Forni
- Panel Discussion: Europe's Refugee Crises: No Time for Easy Answers with Ramy Al-Asheq (Editor-in-Chief, ABWAB Newspaper), Maximilian Popp (Journalist, Der Spiegel), and Astrid Ziebarth (Migration Fellow, Europe Program, The German Marshall Fund of the United States) moderated by Linnea Riensberg (Member of the Board of Directors, Humanity in Action Germany; Humanity in Action Senior Fellow)
- Group Discussion and Debriefing
- Wrap Up

June 10

Developing Project Ideas

This morning, our Fellows from the United States share their insights on the ongoing race for President in the country. The rest of the day is dedicated to the development of project ideas. The Fellows define project goals, target groups, and methodologies. They start identifying the necessary resources for their projects. Through a combination of individual planning, collaborative brainstorming, feedback, and presentations in the plenary, the group works together to support each other in their project development. In the evening, the Fellows are invited to join a vernissage at Galerie Kai Dikhas.

- Spotlight Sessions United States: Perspectives on the Presidential Elections
 - Individual Work on Action Projects
 - Share Project Ideas with the Group
 - Working Groups: Feedback on Project Ideas
 - Ongoing Professional Opportunities within Humanity in Action: The Lantos-Humanity in Action Congressional Fellowship in the United States Congress and the Pat Cox-Humanity in Action Fellowship in the European Parliament Anne Aulinger (Humanity in Action Senior Fellow)
- Optional

- Vernissage at Kai Dikhas by the Artist David Weiß

June 11

How to Pitch a Project | Organizing Volunteer Teams

Today a professional presentation coach joins the Fellows. The coach will share her knowledge and tips about how to effectively pitch projects. The day closes with input on how to maximize the impact of the Fellow's future Action Project. The Fellows learn about how to create and manage functioning teams of volunteers.

- How to Pitch a Project? with Mona Shair-Wloch (Coach and Trainer, Key2Advance)
- Develop Your Project Pitch with Mona Shair-Wloch
- Test the Pitch with the Group & Feedback by the Group with Mona Shair-Wloch

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- Input on Project Management – How to Organize Volunteer Teams? with Henry Alt-Haaker (Program Officer, Robert Bosch Stiftung; Member of the Board of Directors, Humanity in Action Germany; Humanity in Action Senior Fellow)

June 12

Day Off

June 13

Jewish History and Jewish Life in Germany Today | How to Gain Action Project Support

This morning, the Fellows have the option of joining one of two guided tours through the Jewish Museum of Berlin, which was opened in 2001 and which continues to represent one of the largest of its kind worldwide. One of the tours focuses on the commonalities of the three monotheistic world religions Judaism, Christianity and Islam. The other tour examines the responses of German Jews to National Socialism. The day proceeds with a presentation on Jewish life in Germany today and how it has been shaped by immigration.

In the evening, the Fellows turn their attention to the development of their Action Projects, learning about fundraising strategies to engage financial supporters in their endeavors.

- Guided Tours: Judaism, Christianity and Islam: A Cultural Historical Comparison or The Jewish Response to National Socialism
- Individual Tour of the Jewish Museum
- Jewish Life in Germany Today: A Community's Changing Face Through Immigration with Boris Moshkovits (Digital Strategy and Communication Consultant)
- From No-Budget to Low-Budget: How to Engage Financial Supporters With Your Action Project with Anne Stalfort (Fundraiser, arbeiterkind.de)
- Fellows Discussion
- Wrap Up

June 14

Interreligious Dialogue | The Representation of Islam in the German Media

In order to understand how the past has shaped the status quo of the religious landscapes in Germany, this day starts with meeting a theologian, who provides the Fellows with an overview of historical and recent developments in this context. Later this morning, the Fellows examine the representation of Islam in the German media. After Lunch, the Fellows meet with a Reverend of The House of One, the world's first planned house of prayer for three religions and with two interreligious activists who speak about the coalitions and challenges they encounter in their work of fostering Jewish-Muslim encounters in Berlin.

- From Past to Presence: Religious Landscapes of Germany with Prof. Dr. Andreas Feldtkeller (Professor, Faculty of Theology, Humboldt University Berlin)
- The Representation of Islam in the German Media with Dr. Sabine Schiffer (Head, Institute for Media Responsibility)
- House of One: Three Religions Under One Roof with Eric Haußmann (Reverend, The House of One)
- Jewish-Muslim Encounters: Coalitions and Challenges with Ozan Kesinkılıç (Activist) and Armin Langer (Co-Founder and Coordinator, Salaam-Shalom Initiative)
- Fellows Discussion
- Wrap Up

June 15 to June 20

Individual and Group Work on Action Projects

Tasks for the Action Period include:

- **IMPORTANCE:** Get in touch with your designated target group and check if the project idea

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addresses real needs.

- **FEASIBILITY CHECK:** Determine the scope of your project, its timing, the financial resources needed and its time requirements, and potential partners.
- **FIND YOUR ALLIES:** Who could be potential collaborators during the implementation of the project?
- **INSPIRATION:** Find related projects and get inspired.
- **LITERATURE:** Review literature on your project topic.
- **TEAM UP:** Team up with other Fellows and discuss the ideas.
- **PROJECT PLAN:** Include the feedback and suggestions from other Fellows and modify the project plan accordingly.

June 15

Queer Realities in Germany | Action Project Day

This morning is dedicated to discussing contemporary queer life in Germany. The Fellows first meet with a Syrian journalist, blogger, and activist, who joins them for a discussion about the challenges that the German asylum system poses to queer refugees and vice versa. Following on from this, the Fellows meet with a representative of Germany's largest non-profit LGBTQI rights organization to examine recent developments in queer activism and policy in the country. After these two morning meetings, the Fellows work on their Action Projects.

- Queer Asylum in Germany: Perspectives on Challenging Realities and Changing Activism with Mahmoud Hassino (Journalist; Social Worker at Schwulenberatung Berlin)
- Status Quo and Perspectives on German LGB Advocacy and Policies with Markus Ulrich (Press Spokesperson, Lesbian and Gay Federation in Germany (LSVD))
- Individual and Group Work on Action Projects

June 16

Artivism | Action Project Day | Connecting Newcomers and Locals

This morning, the Fellows meet with the spokesperson of the Center for Political Beauty to learn about their politically motivated performance art and to discuss their aims and current campaigns. In the afternoon, the Fellows get to find out about the work of SINGA Deutschland, an organization which connects newcomers, often unexpectedly coming to Germany as refugees, and locals by creating opportunities for them to participate in and co-create projects and activities together. In between these sessions, the Fellows continue their Action Project work.

- Performance Art - Through the Eyes of the Center for Political Beauty
- Yasser Almaamoun (Spokesperson and Minister of Foreign Affairs, Center for Political Beauty)
- Individual and Group Work on Action Projects
- SINGA Deutschland - Connecting Newcomers and Locals Sima Gatea (Co-Founder, SINGA Deutschland)

June 17

Action Project Day | (Mis)Representations of Women

The morning period of today is again dedicated to working on the Action Projects. In the afternoon, the Fellows hear about the sexual assaults that took place in Cologne on New Years Eve of this year, focusing on those perspectives that go beyond the conventional headlines that have covered this issue. The Fellows then meet with the editor of a renowned feminist magazine to talk about how women are depicted in the German media.

- Individual and Group Work on Action Projects
- Perspectives on the Reactions to Cologne with Behshid Najafi (Executive Director, agisra e.V.)
- Depicting Women in the Media with Hengameh Yaghoobifarah (Editor, Missy Magazine)
- Feedback on Individual and Group Work on Action Projects
- Fellows Discussion
- Wrap Up

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June 18

Reimagine Belonging | Action Project Day

This morning, the Fellows meet for breakfast with a Humanity in Action Senior Fellow, who will present the educational documentary film project 'with WINGS and ROOTS.' After this meeting, the Fellows work on their Action Projects. In the evening, they are cordially invited to join an Iftar fast-breaking summer party organized by 'Über den Tellerrand kochen,' a powerful civil society initiative seeking to create 'new togetherness among refugees and locals.'

- Brownbag Breakfast: Reimagine Belonging – with WINGS and ROOTS with Isabel Schröer (Community Engagement Team Member, with WINGS and ROOTS; Humanity in Action Senior Fellow)

- Individual and Group Work on Action Projects

Optional

- Iftar summer party with refugees and locals, organized by Über den Tellerrand kochen

June 19

Day Off

June 20

Finalize Action Project Plan

Today starts with the last spotlight session in the Fellowship program. The Greek Fellows share their perspectives on the societal consequences of the economic crisis and the austerity measures in Greece. The Fellows then have the chance to refine their project pitches and to prepare their project presentations for the following day's farewell reception. Lastly, time is dedicated for the Fellows to reflect on the whole experience of the Fellowship and gather feedback beyond the written and oral evaluations of the program that have taken place throughout the Fellowship.

- Spotlight Session Greece: The Societal Consequences of Economic Policymaking
- Refine Pitches and Prepare Project Presentation
- Final Evaluation of the Program
- Wrap Up

June 21

Hand in Action Project Plans | Farewell Reception

By noon of today, the Fellows are required to submit their Action Project plans via an online form. In the afternoon, Fellows, Senior Fellows, host families and board members are invited to a Farewell Reception.

Farewell Remarks by Dr. Dirk Schmalenbach (Chairman of Humanity in Action Germany) and Luisa Maria Schweizer (Program Director, Humanity in Action Germany)

- Project Pitches by the Fellows

June 22

Departure for Greece

The Fellows travel together to Athens, Greece where the 2016 Humanity in Action International Conference takes place.

June 23 to June 26

Humanity in Action International Conference in Athens

The conference starts in the afternoon of June 23. Prior to the start of the conference, the Fellows may enjoy the morning off in Athens. For a detailed conference schedule, please check the conference program.

Sunday, June 26

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Departure for Germany

Copenhagen

Program Description

"Bridging: En route to an inclusive society"

History, Culture, Politics

The theme of the Humanity in Action Copenhagen Fellowship from 2017 to 2020 will explore how to bridge historical, cultural and political divides in pursuit of an 'inclusive society.'

2017 marks the 20th anniversary of the Humanity in Action Fellowship in Copenhagen. Since its founding, Humanity in Action Denmark has worked on a variety of themes focused on human rights, minority issues and democracy. In 1997, the focus of the program was the conscious responsibility and humanity that paved the way for so many Danes to help Danish Jews flee to Sweden in 1943.

Humanity in Action Denmark wants to return to and empower conscious responsibility and humanity by establishing a new theme for the Copenhagen Fellowship, "Bridging: En route to an inclusive society." This theme will set the stage for the next three Copenhagen Fellowships. Creating and maintaining an inclusive society is both a complex and demanding process, in which historical, cultural and political conditions play a pivotal role. The goal of this three-year endeavor is to study these conditions and explore methods to bridge societal divides in order to build an inclusive society.

The feeling of crisis and fear has increased social and political polarization that together with economic inequality has contributed to undermining citizens' faith and trust. Consequently, public confidence that politicians and public national and supranational institutions can solve national and international challenges is steadily declining. Moreover, cultural differences - real and/or imagined - are prominent between majority and the ethnic and religious minorities. The differences challenge the very notion of how inclusion can take place. Finally, history plays a sizable role when seeking to navigate contemporary society and securing our common future.

Recent developments in Denmark and internationally will be critically reflected in the Humanity in Action Copenhagen Fellowship. The Copenhagen Fellowship will therefore discuss the divides that occur in our otherwise interconnected societies. The pursuit of conscious responsibility and humanity twenty years ago has never been more pressing and is exactly why the Copenhagen Fellowship again will embark on this exploration.

2016 Agenda

May 27

Day of Arrival

Fellows arrive during the day at the HIA office: Farvergade 27B, 1463 København K. The fellows will receive their travel card for public transportation and travel directions to the house of the host family.

The evening is reserved for fellows to get to know their host families.

May 28

10 hours of Action

On the very first day of the fellowship, all fellows will be divided in groups of three. The groups will be asked to create an action project with the goal of raising awareness of various forms of discrimination that LGBT people in Denmark endure during Århus Pride on June 4th. The first group

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will raise awareness of the many hate crimes perpetuated towards people who identify as LGBTQ. The second group will come up with an action dealing with structural and everyday racism that LGBTQ people face. The third and final group will work directly with the transgender campaign that CPH Pride and Amnesty International Denmark launched earlier this year and create an action that empowers transgender people in Denmark. The three groups have to present their action projects in the evening and a small panel will choose a winner. The winning group will be asked to perform their action project during Århus Pride.

- Case 1: Hate crimes
- Case 2: Structural/Everyday discrimination
- Case 3: Transgender campaign with Amnesty International

Location: Borups Højskole, Classroom: Frokoststuen

Program Coordinator: Magnus Harrison

- Meet at McDonalds at Nørreport to go to Borups Højskole
- "Get up, stand up - the need for social impact", by Magnus Harrison, National Director Humanity in Action Denmark
- Presentation of Case and group formation
- Action outline in groups
- Lunch
- Action Project work in groups
- Action presentations to the judging panel

May 29

Welcome to the Fellowship

Every fellowship group has its own dynamics - some groups have functioned better when split up into smaller groups, others have used endless time to discuss all topics in plenum. However, certain features have dominated the best functioning groups over the years, namely having dared to be honest, trusting each other even in difficult and emotional discussions and respecting one another in spite of opposing opinions. Today the group will prepare for the coming fellowship and discuss how the cohort should function. Anders Jerichow, Chair of Humanity in Action Denmark, will welcome the fellows to the 2016 Copenhagen Fellowship. Magnus Harrison, National Director, will introduce this year's fellowship theme and program. Finally, the group will discuss their personal expectations, the group, and the program.

Location: Borups Højskole, Classroom: Frokoststuen

Program Coordinator: Magnus Harrison

- "Welcome to the Copenhagen Fellowship", a presentation by Anders Jerichow, Journalist and commentator at the Danish daily newspaper Politiken, Chairman of The Board of HIA Denmark
- "Introduction to the Fellowship", a presentation by Magnus Harrison, National Director Humanity in Action Denmark
- Ground rules workshop, facilitated by Magnus Harrison, National Director Humanity in Action Denmark

May 30

A Decade of Crises

In the last decade, Europe has faced several crises and challenges across the continent ranging from financial challenges to a debt crisis, the resurgence of war in the mainland of Europe namely Ukraine, several horrific terror attacks, a rise in nationalism and political polarization, the return of extreme right wing movements, the breakdown of the Schengen accord, and an unprecedented refugee crisis. Human rights and minorities are under severe pressure on all fronts and with the first glooming signs of climate change, it is hard to imagine brighter days. These challenge are the very

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core of Europe and the post-World War II consensus. This will be the focal point of day. Bjørn Bredal will welcome us to Borups Højskole following a workshop discussing narratives of crises. After lunch, Cecilie Felicia Stockholm Banke will place the current refugee crisis in a historical lens and finally Finn Østrup will discuss the financial crisis and its implications.

Location: Borups Højskole, Classroom: 09.45 - 12.15 Prismesalen / 13.15 - 17.00 Salen

Program Coordinator: Magnus Harrison

- Morning song
- "Welcome to Borups Højskole", by Bjørn Bredal, Superintendent of Borups Højskole
- "Learning from history - refugees then and now" Cecilie Felicia Stockholm Banke, Senior Researcher at Danish Institute for International Studies
- "The power of narratives" Workshop by Magnus Harrison, National Director Humanity in Action Denmark
- "A decade of financial distress", a presentation by Finn Østrup, Professor (MSO) Copenhagen Business School
- Group discussion and wrap up

May 31

Europe in Question

The definition of Europe has been discussed for millennia within the geographical, political and cultural discipline. The European Union does not guarantee a "unified Europe" and it is even harder to define "Europe" when the continent is constantly in flux. The crisis of the last decade has hit Europe severely, forcing Europe to change once again because of the reactions such as the reinstatement of national borders, that the EU worked so hard to dismantle back in time. What accounts for the reinforcement of borders? What does it mean for the EU and for Europe? Marlene Wind will begin the day by talking about the definition of Europe vs. The EU - How it has developed and why it is structured as it is. Martin Klatt will talk about the borders, which exist, even though most of the European countries have signed the Schengen agreement. Ismar Cirkinagic will talk about his latest exhibition; "Ocean Europe", which discusses European values. At the end of the day Anne Haubek will come and talk about the political compliances Europe currently faces.

Location: Borups Højskole, Classroom: 09.30 - 12.30 Prismesalen / 13.15 - 17.45 Salen

Program Coordinator: Ida Rønhoff Nielsen

- Morning song
- Introduction to today's program
- "Europe and the European Union", a presentation by Marlene Wind, PhD in European Politics and Center leader of Center of European politics at Copenhagen University
- "Borders in borderless Europe", a presentation by Martin Klatt, PhD in History and Associate Professor at Center for Border Region Studies, University of Southern Denmark
- "Ocean Europe", a presentation by Ismar Cirkinagic, Artist and political activist
- Group discussion and wrap up
- "The European divorce?", a presentation by Anne Haubek, Journalist, Hostess and editor of the radio programmes "Europe right now" and "Orientation" at DR.

June 1

Day of Action

Humanity in Action cares deeply for the conditions of human rights and minority relations. We ask all fellows to execute an action project after completing the fellowship. These action projects function as the backbone of the organization and is an outlet through which Humanity in Action gets its name as well as empowers young people to take responsibility of their community while becoming active citizens. To empower the action part of Humanity in Action, the fellows on this year's fellowship will be placed with an NGO in the greater Copenhagen area for the first time in this

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program. They will get a unique insight into methods, theories, and motivations of the NGOs and their target groups. The NGOs have been selected because they are innovative and ground breaking in their field and in Denmark. Grace KBH is one of the few shelters that works with international homeless people. Muhabet is a drop-in center in Nørrebro for immigrants with mental health challenges and has been widely acclaimed for its work. CPH Pride has become the leading LGBT organization in Denmark. Sabaah has been instrumental for the advancement, integration, as well as physical and mental well being for intersectional LGBT people in Denmark. Finally Asylum-Center Kongelunden has been on the forefront of the refugee crisis and hosts vulnerable groups such as children, single women and people with physical and mental disabilities. Fellows will perform tasks uniquely designed for each of the host organizations and the groups will present a report on the final day of the Fellowship.

Staff mentors:

- Ida: Grace
- Magnus: CPH Pride & Sabaah
- Priyanka: Asylum-center Kongelunden & Muhabet

Groups:

- Group 1: Grace: Baggesensgade 7-9, 2200 Copenhagen N
- Group 2: Muhabet: Bragesgade 8c, 2200 København N
- Group 3: CPH Pride: Knabrostræde 20 st, 1210 København K
- Group 4: Sabaah: Onkel Dannys Plads 1, 1711 København V
- Group 5: Asyl-center Kongelunden

June 2

Intercultural Relations in Europe

Mahatma Gandhi so prolifically stated, "A nation's greatness is measured by how it treats its weakest members." Today we will focus on the weakest members of society and the one group of people who face severe discrimination and marginalization in Denmark and across Europe: the Roma. We will begin the day by theorizing larger questions of majority/ minority relations. This will lay the foundation for a better understanding of how one can listen and speak up for the weakest members of society. We will then discuss the relationship between, minorities, nationalism, and political conflicts before turning our attention towards the Roma.

Location: Borups Højskole, Classroom: 09.30 - 16.15 Prismesalen / 16.30 - 18.00 Salen

Program Coordinator: Priyanka Srinivasa

- Morning song
- Introduction to today's program
- Intercultural workshop with Lea Lybecker, HIA Senior Fellow, dialogue facilitator and co-founder of the organization "Dialogik"
- Intercultural workshop with Lea Lybecker, dialogue facilitator and co-founder of the organisation "Dialogik"
- "Reflections on religious satire in Europe" presentation by Denis Meyerhoff Brink, Associate professor at Department of Acts and Culture, Copenhagen University
- Group discussions
- "Europe's inability to recognize Roma people", presented by Thomas Hammarberg, Swedish diplomat, former Council of Europe Commissioner for Human Rights and Board Member of Raoul Wallenberg Institute

June 3

Human Rights in Question

In the 1990s, international human rights were celebrated widely. This, however is not the case today.

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UN conventions and the universalism of international human rights are questioned by multiple people and politicians across Europe. This has spread fear within pro-human rights circles that countries will leave or demand changes to conventions etc. Others argue, however, that it is for the benefit of human rights that the conventions and values are questioned and debated. Another part of the debates about human rights often centers on moral questions concerning the rights of a collective group, the rights of individuals, the right to preserve one's culture, and the rights to practice one's religion. In more global and multi-ethnic/-cultural societies, these discussions will continue to be hot-button issues and thus, the ability to navigate these moral questions are ever so important. Eva Maria Lassen will discuss this in a workshop, Mark Gibney will then discuss how human rights are represented in popular media, and Steven Jensen discuss the origins of contemporary human rights system.

Location: Borups Højskole, Classroom: 09.30 - 17.30 Prismesalen

Program Coordinator: Magnus Harrison

- Morning song
- Introduction to today's program
- "Rights vs Rights Workshop", facilitated by Eva Maria Lassen, Vice Chair Humanity in Action Denmark, Senior Researcher at Danish Institute for Human Rights
- "Watching human rights" A presentation by Mark Gibney, Belk Distinguished Professor at UNC Asheville and Raoul Wallenberg Visiting Chair of Human Rights and Humanitarian Law at the Raoul Wallenberg Institute
- "The making of International Human Rights", a presentation by Steven Jensen, PhD in History and researcher at the Danish Institute for Human Rights
- Group discussions and wrap up

June 4

Day off

Århus Pride

June 5

Day off, Enjoy Wonderful Copenhagen!

Constitution Day & Father's Day

Because of Constitution Day, there will be a lot of events around the city, go and check them out in the sunny weather.

June 6

The Flight of Refugees

Last year, Europe trembled in fear of the great movements of refugees and migrants pouring over the borders of Europe through the Balkan route. The definitions of 'refugee' and 'migrant' have been debated in academic literature and public policy in order to expand the definition. Most often there are two designations connected with people who are forced to flee: 1. Physical danger from war, terrorism, lack of security, and violence. But 'refugees' or 'migrants' may also refer to people who have experienced loss of their home because of climate change, 'structural violence' issues such as lack of support from the state, lack of access to food, housing, and job opportunities for life subsistence. In the beginning of the day Thomas Gammeltoft Hansen will talk about the right to asylum according to human rights conventions. Klaus Rothstein will discuss how the refugee crisis is being handled in MENA countries. And finally Tarek Kelani will come and talk about his own experience during his flight to Denmark.

Location: Borups Højskole, Classroom: 08.30 - 12.30 Prismesalen / 13.30 - 15.00 Salen

Program Coordinator: Ida Rønhoff Nielsen

- Introduction to today's program

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- "Rights to Asylum - UNHCR, Dublin", a presentation by Thomas Gammeltoft Hansen, PhD in law and appointed Research Director at the Raoul Wallenberg Institute.
- Break
- "EU's way to address the refugee crisis in relation MENA countries", a presentation by Klaus Rothstein, critic, commentator and journalist at the Danish newspaper "Weekendavisen"
- Group discussion
- Lunch
- "A refugee's tale", a personal account by Tarek Kelani, former journalism student at Damascus University and refugee
- Wrap up and selection for exhibitions Thursday

June 7

Welcoming Refugees

Yesterday, we presented and discussed the external factors and conditions relating to refugees and the rights to asylum. Today we will discuss the issues that surround refugees once they have applied for asylum in Denmark. The first speaker will present how the integration of refugees in Denmark is progressing, what refugees are entitled to and what is expected of them. The second speaker will discuss how the refugee crisis and the fear of the 'Other' polarizes politics and civil society. After lunch we will discuss civil courage with Erik Hansen from Grandparents for Asylum. Finally the group will travel to Asylcenter Kongelund - an asylum center close to Copenhagen.

Location: Borups Højskole/ Asylum center, Classroom: 09.30 - 12.30 Prismesalen / 13.30 - 14.30 Salen

Program Coordinator: Priyanka Srinivasa

- Morning song
- Introduction to today's program
- "Integration of refugees in Denmark" a presentation by Zachary Whyte, DPhil from the Institute of Social and Cultural Anthropology, University of Oxford and part-time lecturer at Copenhagen University
- "Nørrebro - A history of immigration", a presentation by Garbi Smith, PhD in Islamic Studies and Professor of Cultural Encounters at the Institute for Culture and Identity at Roskilde University
- "On the run for life", a debate with Erik Hansen from Grandparents for Asylum
- Visit to Asyl-Center Kongelunden

June 8

Day of Action

All fellows will meet at the address of the organisation they will work with, and do their best to solve the tasks they will face. The organisations decide the program of the day for each of the groups.

Staff mentors:

- Ida: Grace
- Magnus: CPH Pride & Sabaah
- Priyanka: Asylum-center Kongelunden & Muhabet

Groups:

- Group 1: Grace: Baggesensgade 7-9, 2200 Copenhagen N
- Group 2: Muhabet: Bragesgade 8c, 2200 København N
- Group 3: CPH Pride: Knabrostræde 20 st, 1210 København K
- Group 4: Sabaah: Onkel Dannys Plads 1, 1711 København V
- Group 5: Asyl-center Kongelunden will have their "Day of Action" on Sunday the 5th and 8th

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June 9

Europe at War

In 2012 the Nobel Peace Prize was given to the European Union for its commitment to the advancement of peace and reconciliation, democracy and human rights in Europe for over six decades. Many critics at the time of the Balkan Wars, however, were critical of EU's lack of leadership. The impression of the EU as a peacemaker or instigator faltered with the inability to stop the outbreak of civil war in Ukraine, Russia's occupation of Crimea and the worsening of the Syrian civil war- which destabilized the entire region, gave ground to ISIL, and displaced millions of people. Many European countries since 9/11 have also become active in warfare and have been committed to the Wars in Afghanistan then Iraq, Libya, and now Syria. Europe might not have been at war in the region but it has been at war with distant countries and illusive enemies. The question is: how has this affected Europe?

Location: Borups Højskole and museums, Classroom: 13.30 - 17.00 Prismesalen

Program Coordinator: Ida Rønhoff Nielsen

- Group 1. "A Distant war", The Royal Arsenal Museum, Tøjhusgade 3, 1220 København K
- Group 2. "The Dream of Peace", Cisterne Søndermarken 2000 Frederiksberg
- Lunch while sharing exhibition reflections
- "An end in sight? From Al-Qaeda to ISIL and still no victory", a presentation by Jørn Boye Nielsen, MSc and Chair of the Council on International Conflict Resolution
- "Perpetrators disgust - reactions to killing", a presentation by Ditte Marie Munch-Juriscic, PhD in Philosophy and Minority Studies and HIA Senior Fellow
- Group discussion and wrap up
- Time off - dinner on your own
- Meet at Sort/Hvid Teatret, Standgade 38 1699 København V
- Exhibition: "Martyrmuseum", Sort/Hvid teateret Remember photo ID and student card

June 10

Terror as a New Normal

During the last decade, Europe has been hit by several terror attacks. Terror has become a "normal" security threat in everyday life but we still use public transportation and carry on with our everyday lives - so have the terrorists won? The fear that terror breeds affects the eagerness of European governments to push their anti-terror legislation to limit of fundamental rights. Has terror simply become the new normal in Europeans everyday life? Peter Vedel Kessing will start the day and discuss anti-terror legislation from a human rights perspective. Following lunch, terror expert Lars Erslev Andersen will discuss terror as a new normal. In the afternoon we will host an open event discussing reactions to crises with perspectives from Khaterah Parwani who has worked extensively with anti-radicalization. Calle Vangstrup reacted to the refugee crisis by sailing refugees from Denmark to Sweden. Thomas Ubbesen, as a correspondent, covered terror attacks across Europe, trailing refugees from Turkey through European and witnessed the reactions of the local populations. Judy Goldstein, HIA's Founder and Executive Director will give reflections on why reaction or action is so important to us and society.

Location: Borups Højskole/Søndermarken, Classroom: 09.45 - 14.45 Prismesalen - 15.30 - 17.00 Salen

Program Coordinator: Magnus Harrison

- Introduction to the day
- "Mission impossible: Fighting terror and adhering to international human rights", a presentation by Peter Vedel Kessing, Senior researcher at Danish Institute for Human Rights
- "Terror as a new normal?", a presentation by Lars Erslev Andersen, Senior Researcher Danish Institute for International Studies

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- 14.30-15.15: Group discussion
- "Reactions to crises", a public discussion with Khaterah Parwani, Calle Vangstrup (TBC), Thomas Ubbesen and Judith Goldstein

June 11-12

Weekend off, Enjoy wonderful Copenhagen!

June 13

Climate Change

Climate change is happening and has already had a severe impact on s lives, safety, and human dignity. The consequences of climate change will challenge previous and current concepts of nationhood and rights. Climate change is estimated to displace (conservatively) 250 million people on an unprecedented migration, making the current refugee crisis look like a storm in a teacup. The outlooks are bleak- so bleak that it may be beyond our human ability to understand the consequences and act with due diligence and thus proving a limit to western liberal democracy. Climate adaptation, however, has begun and there are multiple innovations and movements that make people act on climate change- serving mankind hope after all. Today HIA's Copenhagen Fellowship will deal with the consequences of climate change, understanding what is happening, how one can act on climate change, especially the challenges it brings to international human rights and dignity.

Location: Borups Højskole, Classroom: 09.30 - 12.30 Prismesalen / 13.30 - 14.45 Salen

Program Coordinator: Magnus Harrison

- Morning song
- Introduction to the day
- "Climate change", a presentation by Alexander Ege, Advocacy Coordinator at CARE Denmark and HIA Senior Fellow
- "Human Rights Based Approach and Climate Change", a presentation by Abigail Booth, Senior Project Manager Raoul Wallenberg Institute
- "Climate refugees and adaptation projects in Africa" a presentation by Rolf Hernø, Program Coordinator CARE Denmark
- "Driving Sustainable Change", a presentation by Sofie Ilsøe Sjöblom, project manager at Spark

June 14

Protectionism, Polarization and Racism

Having come out of the happy 90's with a conviction that globalization benefits all people, the populous now realizes that there are discrepancies between rural areas and urban cities because of changes in the global economy. People living in rural areas across Europe, however, have been left out of these global developments. One expression of this is that certain rural areas are rejecting the political establishment and voting in favor of anti-globalization and anti-Europeanization left and right wing parties. Since the happy 1990's Europe is facing a populous that is more protectionist oriented, polarized with no strong political center, increasing divisive policies, and in some cases- racist politics and rhetoric. Lasse Matin Koefoed will start the day by discussing globalization and nationalism. Following this Mira Skadegaard Thorsen will discuss what and how racism works in Europe. After lunch Magnus Harrison will lead a workshop on the group's own experience with racism. Finally, filmmakers Georgia and Sophia Scott will screen their documentary "In the Shadow of War" which deals with post-conflict society in Bosnia, led by a discussion of the movie and its message afterwards.

Location: Borups Højskole, Classroom: 09.45 - 12.30 Prismesalen / 13.30 - 15.15 Frokoststuen / 15.30 - 17.00 Biografen

Program Coordinator: Ida Rønhoff Nielsen

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- Morning Song at Borups Højskole
- Introduction to today's program
- "Globalization vs Nationalism", a presentation by Lasse Martin Koefoed, PhD in social science and lecturer at Roskilde University
- "Racism in Europe", a presentation by Mira Skadegaard Thorsen, PhD fellow at Aalborg University at the Department of Education, Learning, and Philosophy
- Workshop by Magnus Harrison, National Director Humanity in Action Denmark
- "In the Shadow of War" Screening of the acclaimed documentary following a Q&A with the directors Georgia and Sophia Scott

June 15

A New Normal in Europe?

Throughout this year's Fellowship, we have highlighted some of the greater challenges Europe has faced. We have furthermore discussed how politicians and civil society have tried to counter them by various means. All of this leaves the question, where are we headed? Terror, war, refugees, climate change, nationalism, polarization- should we just as well get used to it and accept that it is the new normal in future Europe?

Location: Borups Højskole, Classroom: 09.30 - 15.45 Biografen

Program Coordinator: Priyanka Srinivasa

- Introduction to today's program
- "A New Normal in Europe?", a presentation by Bo Lidegaard, Editor in Chief at the newspaper "Politiken"
- "Unity in Diversity", a presentation by Marie Sandberg, Phd in Ethnology and associate Professor at Copenhagen University
- "The Trans-Atlantic relationship", a presentation by Steffen Gram, Radio host at the program "Verden ifølge Gram"
- Group discussion and wrap up
- Travel to Anders Jerichow's home
- Dinner at Anders Jerichow's home with HIA DK board, host families, senior fellows and guests

June 16

Day of Action

All fellows will meet at the address of the organisation they will work with and do their best to solve the tasks they will face. The organisations decide the program of the day for each of the groups. Group 3&4 will meet at the Central Station at McDonalds to travel to Folkemødet. Remember to bring passport, warm wind-proof clothes and a sleeping bag.

- Group 1: Grace: Baggesensgade 7-9, 2200 Copenhagen N
- Group 2: Muhabet: Bragesgade 8c, 2200 København N
- Group 3: CPH Pride: Folkemødet
- Group 4: Sabaah: Folkemødet
- Group 5: Center Kongelund: Kalvebodvej 250, 2791 Dragør

June 17

Day of Action

All fellows will meet at the address of the organisation they will work with, and do their best to solve the tasks they will face. The organisations decide the program of the day for each of the groups.
Action research group supervisor meeting

- Group 1: Grace: Baggesensgade 7-9, 2200 Copenhagen N
- Group 2: Muhabet: Bragesgade 8c, 2200 København N

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- Group 3: CPH Pride: Folkemødet
- Group 4: Sabaah: Folkemødet
- Group 5: Center Kongelund: Kalvebodvej 250, 2791 Dragør

June 18

Day of Action

Group 3&4 will return from Folkemødet.

June 19

Day of Action

June 20

Action research article writing and deadline

- Final meeting with action research group supervisor
- Send action research articles to Magus Harrison

June 21

Presentation of organizational work

During the day the groups will present their finished work in detail for the other groups and coordinators. Each group will be given 20 minutes to their independent presentation and 10 min for Q&A's. In the afternoon, collaborators, funds, the governing board, and representatives will be invited to hear a pitch (around 5 min for each group) of the finished work.

Location: Borups Højskole, Classroom: 10.00 - 18.00 Salen

Program Coordinator: Magnus Harrison

- Introduction to the day
- Grace CPH
- Muhabet
- CPH Pride
- Sabaah
- Lunch and written evaluation
- Asyl-center Kongelund
- Canal boat ride
- Changing the Normal, presentation, mingling and creating contacts
- Closing dinner

June 22

Day off!

June 23

Travel to Athens

June 23-26

Seventh Annual Humanity in Action International Conference in Athens

Sarajevo

Program Description

The Humanity in Action Fellowship in Sarajevo will delve deep into the topics of transitional justice, post-conflict identity politics, peacebuilding and socioeconomic transformation in marginalized local communities. The City of Sarajevo, and other important historical sites in its surrounding, will serve as a unique case study of the rich history of multi-confessional urban living in Europe.

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Academically well-rounded, the program will add diversity to the educational experiences and broaden the Humanity in Action program scope beyond Western Europe and the United States. It will provide Fellows with an intellectual framework that connects issues in Bosnia and Herzegovina to both past and current global issues. It will combine intense site visits, insightful lecture-style sessions with high level speakers and workshop-based learning units, which focus more on discussions and Fellow interactions. This combination of learning methods will allow Fellows to develop interpersonal relationships that solidify and strengthen the program itself.

By challenging Fellows' perspectives on human rights issues, the program will aim to interrogate their own assumptions and encourage them to question their scope and depth of knowledge of multiculturalism; economic inequality; interfaith dialogue; post-conflict social apathy, social unrests, divided communities and social exclusions; growing trends of Islamophobia, Antisemitism and anti-outsider sentiments in the Balkans; resistance movements before, during and after the Second World War in Bosnia and in Yugoslavia; minority experiences and representations; progressive grassroots movements; the role of media and culture in a post-conflict setting; and civic resistance to various forms of institutionalized human rights violations.

2016 Agenda

May 27

Arrival Day

Arrival of fellows from the United States, France, The Netherlands, Denmark, Germany and Bosnia and Herzegovina

Optional

- Welcome dinner and drinks at the residence of Sarah Freeman Woolpert

May 28

Team-building Day

Meet at the Second Gymnasium for hike and team-building exercises.

May 29th

Overview of Current Socio-Political and Democratic Challenges in Bosnia

- Meet at the EFSA
- Team Building
- Short History of Bosnia and Herzegovina (BiH) and some thoughts on education by Prof. Lamija Tanović, Ph.D. (Professor, SSST and Chair of Board of Directors, HIA BiH)
- Consociation in a Post-Conflict Society: A Recipe for Success? by Midhat Izmirlija, Ph.D. (Assistant Professor at the Faculty of Law, U. of Sarajevo)
- Wrap-up Session

May 30

Post-Dayton Conundrums

- How Dayton's Incentives and the West's Stability Fixation Impede BiH's Development into a Real Democracy via Skype by Kurt Bassuener (Senior Associate, Democratization at Policy Council)
- Deterring Corruption and Rebuilding Trust in the Rule of Law Among Youth in BiH by Ivana Korajlić (Program Manager for Public Relations, Transparency International)
- Democratic Representation in Multi-Ethnic States by Damir Kapidžić, Ph.D. (Assistant Professor at the Faculty of Political Science, U. of Sarajevo)
- The Yugoslav Powder Keg: Ethnopolitics Dominating Rational Minds by Prof. Asim Mujkić, Ph.D. (Professor at Faculty of Political Sciences, U. of Sarajevo)

May 31

The Interplay of Identity and Civil society

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- Social Identities in (Post-)Conflict Societies by Prof. Sabina Čehajić-Clancy, Ph.D. (Dean of Political Science, SSST)
- Establishing a Secular State in a Multiconfessional Society by Prof. Dino Abazović, Ph.D. (Professor of Sociology at Faculty of Political Science, U. of Sarajevo)
- Civil Society Initiatives in BiH by Darko Brkan (President, Association "Why Not?")

June 1

Yugo-Nostalgia

Travel to see Tito's Bunker and experience the town of Konjic

- Arrival at site of Tito's Bunker
- Organized Tour of the Bunker
- Return to Konjic city centre
- Lunch at Jezero Boracko
- Meeting at Bus Drop-off location
- Departure and Return to Sarajevo

June 2

Religion in a Multi-Confessional State

Visit various religious institutions and organized tour

- Inter-religious dialogue panel w/ representatives of different religious groups of Bosnia
- Group Discussion

June 3

Under Siege: Sarajevo in the Midst of War

Organized tour with General Jovan Divjak of Sarajevo War Tunnel, the Jewish Cemetery, and the Yellow Fortress

- Drive to Trebević Mountain
- Visit the urban ruins of Trebević Olympic Bobsleigh Course
- Return to Sarajevo

June 4

Art and Culture: A Refuge and Source of Strength in the War

- Meet at the Sevdah Art House
 - History and Role of Sevdah in connecting the peoples of BiH by Maja Baralić-Materne (Producer, BHRT)
 - Behind the Scenes at Sarajevo SARTR (War Theatre) by Nihad Kreševljaković (Member, SARTR)
- (n.b: location of lecture TBD)

June 5

Day off

June 6

A House Divided: Cities Under Tension and Segregation - Trip to Stolac and Mostar

- Depart and Drive to Stolac
- A visit and organized tour by Gorčin Dizdar, Ph.D.: Sites: Radimlja Medieval Necropolis (UNESCO World Heritage Site); city-centre of Stolac; and Mak's Art House.
- Talk on current political and social challenges on divided cities with Demir Mahmutćehajić (A member of the city council, Stolac)
- Educating for sustainable future for youth in BiH by Dženan Hakalović (History Teacher, UWC in Mostar)
- Guided tour of Mostar by HIA Fellow Marko Barišić, visit to the Old Bridge (UNESCO World Heritage Site);

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- Departure and Return to Sarajevo

June 7

A New Generation, A New Dialogue

- Two schools under one roof: personal insight from a youth student activist by Samir Beharić (Fellow, HIA and Student Activist)
- Fostering dialogue among youth in BiH by Ivana Kešić (Program Manager, CIVITAS BiH)
- Lunch
- Group Discussion

June 8

The Flight of Money, Brain, and Talent

- Structural economic issues in post-conflict BiH by Damir Šaljić (Advisor, British Embassy in Bosnia)
- Interaction of culture and human rights by Emina Ganić (Director, Sarajevo Film Academy)
- Brain Drain: An Endless Bosnian Pit by Amer Osmić (Teaching Assistant, U. of Sarajevo)
- Group Discussion
- Bosnian Diaspora and the importance of remittances and cultural exchange by Haris Halilovich, Ph.D. (RMIT University, Melbourne, Australia)

June 9

Contextualizing Historical Narratives of Bosnia and Herzegovina

- Civil courage in times of war by Svetlana Broz, M.D. (Gariwo)
- Rendering Justice from Afar: Local Perceptions of the Role of the ICTY in Prosecuting War Crimes by Almir Alić (Liaison, ICTY office in Sarajevo)
- Between denial and recognition: Attitudes towards "own crimes" in post-war Sarajevo and BiH by Nicolas Moll Ph.D. (Historian, Sarajevo)
- Wrap-up Session

June 10

In, Out and Around the System: Mobilizing Change

- Committed to Implement: An Analysis of the Sejdić and Finci v. BiH ECHR Judgement by Jakob Finci (President, Jewish Community of BiH)
- Walk to city administration of Sarajevo (HQ)
- Meeting with Prof. Ivo Komšić, Ph.D. (Mayor, Sarajevo) (in local language) at Mayor's Office—Rm. 320 on 3rd Floor
- Refusing to Surrender: Football as a Means of Resistance in Besieged Sarajevo by Predrag Pašić (Football Coach, Sarajevo)
- Wrap-up Session

June 11

Day off

June 12

Never Again: Remembering Srebrenica

- Drive and Departure to Srebrenica
- Arrival and Visit to Memorial Centre
- Lunch in Srebrenica
- Return to Sarajevo

June 13

Transitional Justice in BiH

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- Collective Memory of Mass Atrocities in BiH by Hikmet Karčić (Senior Associate, Institute for Islamic Tradition of Bosniaks)
- Drive to Prosecutor's Office (Queen Jelena street [see map at back of booklet])
- Visit to the Prosecutor's office: Special Department on War Crimes with Mirza Hukeljić, Ph. D. (Prosecutor, State Prosecutor's Office of BiH) and Boris Grubesić (PR, State Prosecutor's Office of BiH)
- Drive back to the EFSA
- IDPs and Returnees in BiH: Unresolved Questions and Socio-political dilemmas by Selma Porobić, Ph.D. (Director, Centre for Refugee and IDP Studies)

June 14

The Political Grid Lock: Human Rights Challenges in BiH

- Speech by His Excellency Valentin Inzko, Ph.D., High Representative of International Community in BiH
- Human Rights in BiH: Between Constitutional Principles and Reality by Goran Marković, Ph.D. (Associate Professor at the Faculty of Law, U. of East Sarajevo)
- Mosaic of Human Rights in BiH: Attainable, Segregated, Denied? by Jasminka Džumhur (Ombudsperson for Human Rights, BiH)
- Human Rights Protection at the State Level in BiH by Aiša Telalović (Ministry of Human Rights and Refugees BiH)
- Group Discussion

June 15

Lights, Camera, Action! The Politics of Media

- Al-Jazeera Balkans Study Visit with Melina Kamerić (PR and Communications Associate)
- Drive to Pofalici, N1 Headquarters
- N1 Television Study Visit with Suzana Stambol (Executive Producer)
- Afternoon free in Sarajevo

June 16

Positioning and Agency: Women in BiH

- Film Screening
- Panel discussion: Women in Politics with Prof. Jasna Duraković, Ph.D. (Member of Parliament, Federation of BiH) and Sabina Cudić (Member of Cantonal Assembly, Canton Sarajevo)
- Group Discussion

June 17

Cultural Resilience: Surviving Post-Dayton BiH

- Meet at the National Museum of BiH
- #IamtheMuseum Movement Talk with Marica Filipović (Deputy Director, National Museum of BiH)
- Visit the Historical Museum of BiH
- Travel back to EFSA
- From Dayton to Brussels, via Tuzla - Post-2014 Political and Economic Restructuring in BiH by Danijela Majstorović, Ph.D. (Associate Professor at the Faculty of Philology, U. of Banja Luka)

June 18

The Horrors of War: Consequences of Mass-Violence on Marginalized Groups

- Seeking Justice for Women War Victims by Armela Ramić (Legal Associate, Office of Dr. Nedim Ademović)
- Underage fighters of the War: Leaving the past behind? by Kemal Šalaka (Representative, Association of Underage Fighters) (in local language)
- Group Discussion

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June 19

Linking Mobilization to the Current Refugee Crisis

- Migration and Asylum: Legal Aspects and Current Challenges with the Migration crisis in the Western Balkans by Nedim Kulenović (Senior Legal Associate, Vasa Prava)
- Second Session with Nedim Kulenović
- Educating a New Generation on Human Rights by Dr. Judith Goldstein (Founder and Executive Director, Humanity in Action, Inc.)

June 20

LGBTQ Rights and Delegation Presentations

- Rights and Freedoms of the LGBT population in BiH by Damir Banović (Executive Director, Center for Political Studies)
- American Fellows' Presentation
- European Fellows' Presentation
- Final Wrap-up Session and Conclusion

June 21

Fellows write their papers and pack

June 22nd

Papers Due by Midnight

Departure to Belgrade Airport

June 23-26

Travel to Athens, Greece for the Seventh Annual Humanity in Action International Conference

Warsaw

Program Description

The Warsaw Fellowship, called "Ideas Incubator," deals with the question of how the Polish state and society have been dealing with human rights challenges in historical and contemporary perspectives. Special attention will be drawn to histories of discrimination and resistance - especially in the context of World War II, the Holocaust and National Socialism, relationships between majority and minorities, civil society, societal (in)justice, activism and solidarity. Those important and complex issues will be tackled through the Polish perspective so that they're not analyzed solely in an 'abstract' vacuum but in a given socio-political-economic and historical context. In other words, Poland's past-present-future will be treated as a case study in order to look for certain universal and particular patterns/mechanisms that influence how a showcased society is functioning at a given time and what the role of individuals is to make things work better. Special attention will be given to present cases of contemporary human rights violations from the perspective of various categories of discriminated or excluded members of the Polish society.

Since World War II, Poland has been a rather homogenous country. Polish society has lacked exposure to 'the other' and as a consequence, Polish society is polarized in debates on diversity. In many instances, free speech turns into hate speech. That is why the 2017 Warsaw Fellowship will focus on the issue of hate speech and discrimination - how it manifests, what kinds of threats it poses to a democratic society and how it could be counteracted. Throughout the program, participants will have a chance to come up with ideas/best practices on what kind of initiatives young activists can undertake to try to counteract discrimination in on-line and off-line realities, and - by that - make a difference.

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Fellows will take part in trainings on how to raise awareness on human and minority rights - with a special focus on community organizing, using social campaigns and various kinds of social action. The overall goal for Fellows will be to develop and implement social campaigns on social media. The task will first consist of outreach and research on the challenges and needs of selected groups facing discrimination within Polish society, to then develop innovative strategies for counteracting these human rights infringements.

2016 Agenda

May 28

Opening of the 2016 Fellowship: WELCOME! Let's Get to Know Each Other

This day is conceived as a smooth transition of all participants into the program: those fellows who arrived the day before will, first of all, have an opportunity to adapt to a new environment in Warsaw, to reenergize after the travel and to get to know each other informally. The aims of the day are to get to know each other and to familiarize with the nearest environment. In the morning the fellows will have a chance to get to know each other in a program setting by sharing personal experiences in human rights work. The last program element is a guided walking? tour through Warsaw in order to explore especially how history of Warsaw is interconnected with Polish history and what are the links between past and present.

- Introduction by Przemysław Iwanek & Jarmila Rybicka, HIA Poland
- Who is Who?
- Bring an Object - Who are we as Human Rights Activists?
- (In)Visible History and Vibrant Present in the Streets of Warsaw
- Guided tour through Warsaw, part 1 with Adrian Grycuk, guide
- Free time and informal networking

May 29

Let's Get to Know the Fellowship

The second program day is devoted to exploring the program in a more detailed way, to clarifying the expectations and to agreeing upon the 'rules of the game'. It consists of 3 sessions. In the first session will take a form of a short introduction to the program by the HIA staff and a discussion on expectations. In the second session the group will discuss and agree upon rules/obligations during the program in form of a contract. Additionally, the staff will provide some practical information about the stay in Warsaw (transportation, health, safety, etc.). The third program element is the second part of the guided walk tour through Warsaw, this time in the Praga district, which will give some ideas on how ethnic/religious diversity in Poland might have looked like in the past.

- Introduction by Przemysław Iwanek & Jarmila Rybicka, HIA Poland
- Let's Talk about the Fellowship
- Let's Talk about You in the Fellowship
- (In)Visible History and Vibrant Present in the Streets of Warsaw
- Guided tour through Warsaw, part 2 Adrian Grycuk, guide
- Free time and informal networking
- Welcome Dinner and Get-Together

May 30

Solidarity, Resistance and Democracy

The day starts with a debriefing session after a guided walking tour through Warsaw's streets. Then, content-wise the day is dedicated to exploring the phenomenon of the Solidarity social movement, its leaders, values and methods of resistance, and current legacy. Why this movement was so successful and influential not only for Poland but also for other parts of Europe? What are the universal lessons learned which are relevant nowadays and what are the actions that could be critiqued especially from today's perspective? Which good practices could be inspirational for other countries or which could be seen as troublesome (and why)? From this point of departure we will

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examine the current situation in Poland through the lenses of current constitutional crisis, as well as through the perspective of human rights challenges seen from the office of Polish Commissioner for Human Rights. During the day there will be also a session led by HIA Poland staff presenting HIA Poland's contribution to pre-empting prejudices and the promotion of human rights ideals/culture through its activities/initiatives.

- Introduction by Przemysław Iwanek & Jarmila Rybicka, HIA PolandMenora
- 'Warsaw-Book' – Sharing Impressions from the Guided Tour through Warsaw – Fellows'

Discussion

- S/solidarity & its Limits with Konstanty Gebert, journalist and activist
- Democracy in Danger? - the Constitutional Crisis with Katarzyna Śmieszek, Committee for the Defence of Democracy
- Fellows' Discussion
- Pre-empting Prejudice: Raising Awareness and Instigating Change by HIA Network & HIA Poland
- Summary & Closing
- Poland and Human Rights: the Big Picture with Adam Bodnar, PhD, Commissioner for Human Rights

May 31

From Hate to Extermination: Genocide Step by Step

Notwithstanding, in the context of the project the fellows will firstly have the chance to deepen the historical knowledge on the WWII as well as the Holocaust that was carried out by Nazi Germany on Polish territory. The historical realities of those times will be reanimated with the help of a documentary film on the Warsaw Ghetto. A film screening and site visit to Treblinka will lead to discussions on the relevance and legacy of the Holocaust as well as on linkages with other genocides and possible actions to prevent genocides. Secondly, the day is also thought out as an opportunity to commemorate the victims as well as an opportunity for personal reflection on this chapter of history and its relevance today.

- Introduction by Przemysław Iwanek & Jarmila Rybicka
- Seeing is Believing – "The Warsaw Ghetto 1940-1943", Jewish Historical Institute documentary movie
- Sharing Impressions, facilitated by Tomasz Cebulski, PhD, guide, historian and political scientist
- Travel to Museum of Armed Struggle and Martyrology in Treblinka by bus
- Never Again? The Legacy of the Holocaust guided by Tomasz Cebulski, PhD
- Fellows' Discussion, facilitated by Tomasz Cebulski, PhD
- Travel to Warsaw by bus

June 1

Significant 'Others': Poles & Jews

This day will be a journey through 1000 years of the history of Polish Jews – from the Middle Ages until today. Fellows will try to find answers to questions such as: how did Jews come to Poland? How did Poland become the center of the Jewish Diaspora and the home of the largest Jewish community in the world? How did it cease to be one, and how is Jewish life being revived? In contrast to Western Europe, after the WWII Poland turned from a very diverse country into a more homogenous one due to the war, the Holocaust and the communist policy to eradicate any form of social difference. As diversity was a challenge even before the WWII (the Second Polish Republic was a state struggling with consequences of diversity), communist propaganda managed to brain-wash many Poles that the newly 'introduced' homogeneity was not only good, but also one of the successes in this part of the world. After over 45 years of living in a communist/socialist freezer with very limited freedom of speech, Polish society is facing several challenges resulting from a more visible and growing diversity.

- Museum of the History of Polish Jews: Inside Out with Professor Barbara Kirshenblatt-Gimblett, Museum of the History of Polish Jews Polin

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- Sightseeing: the Core Exhibition, Museum of the History of Polish Jews Polin
- Past & Present Faces of Anti-Semitism in Poland with Anna Zielińska, Jewish Community in Warsaw and Daniel Słomka, HIA Senior Fellow
- Fellows' Discussion
- Individual sightseeing of the Core Exhibition

June 2

Roman Catholic Church, Transformation, Construction of the "Other" with Prejudices & Stereotypes

The day will help fellows to explore what is the role of the Roman-Catholic Church in the Polish history and today. In the past the Church often served as a sort of real and symbolic asylum/shelter for the dissidents. During Socialism people who disagreed with the uniform Communist Party-line organized the Solidarity movement, while the Church tried to galvanize the society together against the common enemy – the ruling regime. As much as it enabled to exercise some sort of freedom (personal, artistic and the like) and mobilizing resistance, it looked for ways of strengthening 'Polishness' and being together on particular terms. After 1989 the situation has deeply changed and the Roman Catholic Church needs to 'compete' on the free 'market' of diverse ideas. The second focus of this day concerns the system transformation after 1989 and the shaping of the so-called Third Polish Republic. This transformation was an impetus for the democratic system to be (re)installed as well as for the market economy to dominate on a macro level. At the same time, on a micro level of an average family it meant first of all a radical change: it was a new social order with new rules. As certain groups could not cope with new challenges, transformation also generated marginalization and exclusion, and caused socio-economic divides within the society.

- Introduction by Przemysław Iwanek & Jarmila Rybicka, HIA PolandMenora
- The Roman Catholic Church in Poland: Transformation, Power and Women with Zuzanna Radzik, Tygodnik Powszechny
- Poland's Socio-economic Transformation – a Success or a Failure? with Tomasz Janyst, Fundacja Kaleckiego
- Output Phase: Why, What, When and How? with HIA Poland Staff
- Prejudices & Stereotypes vs. Hate Speech: What Leads to What? with Mikołaj Winiewski, PhD, Center for Research of Prejudice, Warsaw University
- Fellows' Discussion
- Summary & Closing

June 3

Poland Now – Other 'Others'

With reference to the previous days, the fellows will continue exploring the nuances of the Polish democracy and civic society especially by focusing on challenges with the presence of migrants. After over 44 years of living in a communist/socialist 'freezer' with a very limited freedom of speech, Polish society is facing various difficulties that have been caused by a growing diversity. Opening borders after 1989 made Poles to question the prevalent notion of country's homogeneity due to several factors such as: the influx of migrants into the country; (re)discovering diversity within the country exemplified by Poland-based national and ethnic minorities; the possibility to freely travel and cross borders again. The fellows will explore what are the key challenges with integration and inclusion of newcomers as well as will learn some good practices developed by selected NGOs. At the end of the day, a much wider perspective will be discussed, which refers to regional and global implications of migration and other types of crises affecting Poland and other European countries.

- Introduction by Przemysław Iwanek & Jarmila Rybicka, HIA Poland
- Racism in Poland with Jacek Purski, Institute for Social Safety
- Migrants as Aliens? Challenges of Integration and Inclusion, Agnieszka Kosowicz, Polish Migration Forum
- Living on the Margin? Roma in Poland with Olimpia Świst, Nomada Association

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- The "World in Focus": Future Conflicts: Trade, Finance and Migration as 'Weapons' of the 21st Century with Edwin Bendyk, Polityka, Mark Leonard, European Council on Foreign Relations, Agnieszka Lichnerowicz, TOK FM Radio journalist and Prof. Witold Orłowski, chief economist of PwC Poland

June 4

Fellowship and Beyond

- Introduction by Przemysław Iwanek & Jarmila Rybicka, HIA PolandMenora
- Fellows' Discussion
- Action Project & Output Phase, part 1
- The Fellowship so Far: Sharing Impressions
- The "World in Focus" Continued
- "Islamistan": Islamic Radicalism and the Future of Multicultural Societies in Europe with Claude Guibal, French journalist, reporter and author of books and Agata Skowron-Nalborczyk, PhD, Co-chairman of the Joint Council of Catholics and Muslims, member of the editorial staff of "Sociology of Religion" magazine
- Toast for Freedom
- Networking with Senior Fellows

June 5

Day off

June 6

Other "Others" in the Polish Context: LGBTQ and Women

We will begin this day with a reflection about from what perspective do we see the world and where are we in a social structure. We believe that acknowledging how we ourselves are involved in existing power structure will enable us to become more sensitive, mindful and efficient activists. Second aim of the day is to explore the process of forging the new social order and its consequences on two case studies: LGBTQ and women. These will be presented by representatives of an NGO as well as informal social initiative groups, which will share their approaches towards and experiences with human rights violations (especially hate speech) and good practices in responding to them.

- Introduction by Przemysław Iwanek & Jarmila Rybicka, HIA PolandPM
- From what Perspective Do We See the World? with Dominika Cieślukowska, trainer
- Do We Have the Voice to Speak Up against Discrimination of Women? with Sylwia Wodzińska, Senior Fellow of Warsaw Program 2014 and Founder of #MamyGłos initiative
- LGBTQ Community - the Movement, the Rights, the Equality with Marta Turska, Piotr Godzisz, Lambda Association
- Fellows' Discussion
- Summary & Closing

June 7

Introduction to Community Organizing, Part 1

Participants will take part in the training on how to raise awareness on human and minority rights with a special focus on community organizing using social campaigns and various kinds of social action. We will be introduced to Saul Alinsky's community organizing model through the analysis of a successful civil rights campaign in France.

Second part of the training will be dedicated to the method of 'owning your story'.

- Introduction by Przemysław Iwanek & Jarmila Rybicka, HIA Poland
- Introduction by Tara Dickman
- Going from Horizontal to Vertical: an Introduction to Community - Tara Dickman
- Going Vertical: Workshop 1 - Tara Dickman

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- Owning Your Story - Tara Dickman
- The One on One - Tara Dickman
- Conclusions

June 8

Introduction to Community Organizing, Part 2

The overall goal of the day is to get to know how to develop and implement social or advocacy campaigns on social media. Participants will be asked to reach out and research problems and needs of selected groups facing discrimination within the society and to develop innovative strategies for counteracting these human rights infringements. We will gain basics of how to build good press relations, from framing a message to making it attractive to journalists.

- Feedback and Questions
- Going Vertical: Workshop 2, Tara Dickman
- Steps towards Good PR - Tara Dickman
- Media Training - Tara Dickman
- Conclusions

June 9

Warsaw – a City of Grassroots Activities & Social Change (with help of Social Media)

Systemic transformation had its enormous impact on perspectives of and prospects for the young generation. Although the collapse of communism brought freedom and market-driven economy, many young people, and not only them, are concerned about the Polish democracy in the making and liberal economic revolution, which took place straight after 1989 and reshaped social structures from the very bottom to the top. The recent emergence of the so-called 'city movements' proves that the current make-up of the political scene should not be taken for granted. When it comes to addressing social and economic issues at the local level, these new voices and actors have reinvigorated the public discourse. Additionally, the social change advocated in this context has increasingly been instigated by the means of social media, which are thriving and reshaping how we communicate.

- Introduction by Przemysław Iwanek & Jarmila Rybicka, HIA Poland
- Challenges for Modern Cities with Jan Śpiewak, MJN – The City is Ours, HIA Senior Fellow (New York Fellowship Program 2008), Kuba Grzegorzczak, Warsaw Tenant Association and Marta Żakowska, Res Publica
- Hate in Poland: How to Monitor it and Counteract it?
- Case Study: HejtStop with Miłosz Hodun, PhD, HejtStop initiative
- Social Change! Internet and Social Media! with Alexey Sidorenko, social activist
- Fellows' discussion

June 10

Research – Work with Community Organizations

Fellows will engage in some direct actions and community work in cooperation with one of the following NGOs: Foundation Ocalenie, Aim High Initiative, Forum for Dialogue and Foundation for Freedom. We will take part in activities close to the interests of communities involved. With hindsight of last two weeks fellows will be able to get more from their activities. We believe that this grass-roots experience and discussions with communities will allow fellows to come up with thoughtful strategies for addressing refugee crisis, xenophobia, discrimination, rise of the extreme via means of social campaigns. Campaigns run in cooperation with experts from the field and communities might have a considerable potential for igniting sparks of social change, and equip fellows with new attitudes.

- Introduction by Przemysław Iwanek & Jarmila Rybicka, HIA PolandMenora
- Group preparations
- Meeting and working with community organizations, part 1 featuring Ocalenie Foundation, Aim

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High, Forum for Dialogue, For Freedom Foundation

June 11

Training on Social and Advocacy Campaigns

The day is devoted to the skills' training with the aim to explore how to create and develop interesting campaigns and how to get other people to care about them (discuss, share, critique etc.). By the end of the day fellows should have a draft brief of a campaign they will run. At this stage fellows can contact our graphic designers for further guidance if needed.

- Social and Advocacy Campaigns in Action with Marek Dorobisz, Strategic Copywriter and Creative Director working for top Polish brands including: Onet.pl

Optional:

- Equality Parade

June 12

Day off

June 13

Work with Community Organizations, Part 2

During this day we will continue our cooperation with Ocalenie Foundation, Aim High, Forum for Dialogue and For Freedom Foundation. Fellows will contribute to NGO's daily work as volunteers with specific frames and goals of a given project. At the same time they will get to know the community and share their ideas for social campaigns with them. It is highly recommended to make use of this time to create some content which later might be used for social campaigns.

- Work with community organizations: Ocalenie Foundation, Aim High, Forum for Dialogue, For Freedom Foundation

June 14

Social and Advocacy Campaigns

Fellows will share with each other their results and the content they created so far.

- Introduction by Przemysław Iwanek & Jarmila Rybicka, HIA Poland
- Groups feedback part 1
- Groups feedback part 2

June 15

Social and Advocacy Campaigns

During this day fellows continue they work on their campaigns. HIA Staff will meet with each group on their request for feedback session.

June 16

Reflecting on Further Actions

By this day fellows will have started their campaigns and published first content on-line or off-line. Additionally we will have a chance to talk with Dr. Judith Goldstein about HIA activities, vision and its contribution to human rights education. Fellows will present their Action Project ideas.

- Introduction by Przemysław Iwanek & Jarmila Rybicka, HIA Poland
- Implementation
- Run a Campaign! Starting with the first content on-line/off-line
- Let's Talk about HIA and Activism Beyond with Dr. Judith Goldstein, Founder and Executive Director, Humanity in Action
- Action Projects: How to Link Output Phase with One's Activism? Part 2
- Fellows' Discussion
- Implementation

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June 17

Searching for Good Practices and Drafting Reports

During this day fellows continue they work on their campaigns. HIA Staff meet with each group on their request for feedback session.

- Introduction by Przemysław Iwanek & Jarmila Rybicka, HIA PolandPOLIN
- Implementation

June 18

Social and Advocacy Campaigns

During this day fellows continue they work on their campaigns. HIA Staff meet with each group on their request for feedback session.

- Introduction and Announcements
- Implementation
- Lunch Break
- Informal Networking with Diplomacy & Diversity Fellows

June 19

Day off

June 20

The fellows are requested to work on their final presentations in the Pecha Kucha format, which will introduce the public into their work and findings/results.

June 21

Presenting Campaign Results

This day is meant as a celebration of the whole fellowship as well as show-time. The fellows should do their best to share their findings and ideas with others in an interesting and engaging manner. It will be also a time for collective brain-storming/feedback on how to make the already existing ideas more effective and interesting.

- Welcome & Introduction with HIA Poland staff
- Hate Speech and Discrimination in Poland with keynote speaker Prof. Monika Płatek, TBC
- Presentations, Session 1
- Presentations, Session 2
- Groups 5 to 8
- Q&A
- Summary & Closing
- Farewell Dinner

June 22

Closing of the Warsaw-based 2016 Fellowship

The aim of the meeting is to share impressions after the whole experience, exchange some ideas for improvement of the program for the future as well as to fill in a feedback questionnaire. Finally, the details regarding the travel to International Conference will be discussed.

- Group Travel to the Conference by plane
- Sharing Impressions, Evaluation & Closing Remarks

June 23-26

Seventh Annual Humanity in Action International Conference in Athens



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November 15, 2017

Penny Hunt
4900 IDS Center
80 South 8th Street
Minneapolis, MN 55402

Dear Penny,

Thank you for the call yesterday and for your dedication in supporting LifeCourse. One of the items I mentioned to you was last week's site visit by the team from the Circle of Life Award committee.

The Circle of Life Awards honor innovative palliative and end-of-life care in hospices, hospitals, health care systems, long-term care facilities, and other direct care providers. The Circle of Life Awards seek to shine a light on programs and organizations that can serve as models or inspiration for other providers. The 2016 awards are supported, in part, by the California Health Care Foundation, based in Oakland, California and Cambia Health Foundation, based in Portland, Oregon. Major sponsors of the 2016 awards are the American Hospital Association, the Catholic Health Association, and the National Hospice and Palliative Care Organization & National Hospice Foundation. <http://www.aha.org/about/awards/col/awardees.shtml>

We spent 5-hours with the Site Visit team discussing LifeCourse. The critical parts of that discussion and the core content of LifeCourse were shared with the team in the enclosed binder. The feedback we heard at the end of the day was very positive. In their closing remarks, the site visit team members expressed that they were:

- Supportive of how LifeCourse addressed all the elements recommended in the IOM Dying in America report
- Delighted with the LifeCourse written responses to their 44 site issues
- Appreciative of the LifeCourse site visit binder and its comprehensiveness
- Impressed with the research/evaluation and asked that we continue to collect the outcomes that are vitally needed to advance the field

In closing, ^{Crane} Steve shared that the team will visit 5 organizations and plan to communicate the award decisions by May 6, 2017. Typically, two to three organizations receive the Circle of Life Award and others receive a Citation of Honor. The award presentations are made at the AHA Health Forum Leadership Summit in July 2017.

This is a shining example of the building national awareness that LifeCourse is receiving in part due to our persistence in applying and submitting to national opportunities for dissemination and in part due to our engagement with organizations like the Coalition to Transform Advance Care over the past several years and getting invited to speak at events like their Harvard Law School panel on "The 21st-Century Advanced Illness Care Team" Which we posted on our LifeCourse website <http://www.lifecoursemn.org/resources/> and can be seen at the Harvard website <http://petrieflom.law.harvard.edu/events/details/advanced-illness-care-team>

The National attention to LifeCourse is both exciting and enabling of a right future ahead for our work.

Warmly,

Paige Bingham
Director, LifeCourse

LifeCourse Robina Report Supplemental

November 15, 2017

We hope that the November LifeCourse Report was informative and responsive to the board discussion held in August. There were a few questions for which we wanted to provide more clarity.

1) Is Allina Health putting any money into LifeCourse?

Yes. To provide context, you might recall that in August, we reported to the Robina Foundation:

Allina Health has committed \$1.5 million in 2016 to implement LifeCourse in the clinics. In 2017 Allina plans to double its commitment in pursuit of the goal: *enabling access to LifeCourse to every qualified patient in the Twin Cities*. While Allina expects to assume responsibility for the program in its own facilities, it will be seeking the support of Robina Foundation and others to seed expansion beyond its walls in the period through 2020.

Following the additional direction provided by the Robina Board after the August meeting, LifeCourse's November 2016 report focuses on proposed Robina funded work and does not detail the Allina Health activities involved in operationalizing LifeCourse. Based on the question asked, we have pulled together information about how Allina Health is implementing LifeCourse in 2016 and 2017.

Allina Health began staffing for **LifeCourse implementation** earlier this year. The Allina Health LifeCourse Implementation is distinct from the Robina LifeCourse budget. Our Robina LifeCourse team is part of the Division of Applied Research and includes six LifeCourse Research Care Guides. The Research Care Guides provide care to the research patient population and are not attached to an Allina Health clinic. In 2016, the eight LifeCourse Implementation Care Guides (listed in the spreadsheet below) were hired by the clinics implementing LifeCourse and these Care Guides report into the clinic management.

Allina Health budgeted \$1.5 million in 2016 for LifeCourse Implementation, but the projected expenses for the year are \$950,466. As part of the implementation plan, LifeCourse Care Guides were hired in hospital-based specialty clinics and in primary care clinics. The hospital-based clinics at Abbott Northwestern Hospital that implemented LifeCourse include the Givens Family Brain Tumor Center, Minneapolis Heart Institute (MHI), and Abbott Northwestern General Medicine Associates (ANGMA). The Allina Health primary care clinics that implemented LifeCourse are in Coon Rapids and Richfield. In total, eight LifeCourse Care guides were hired in 2016.

An important highlight in 2016, was the grant received from the Givens Family to fund a LifeCourse Care Guide in the Brain Tumor Center. For 2017, the Givens Family is continuing this support. In seeking the best means to continue supporting LifeCourse Care Guides in the Allina Health systems, we tapped into the Abbott Northwestern Hospital Foundation that also agreed to support the four Care Guides located at MHI and AGNMA next year.

For 2017, Allina Health has planned for LifeCourse implementation costs of \$1.6 million with \$300,000 in other revenue from the grant support mentioned above. The number of Care Guides working on LifeCourse will increase from eight to 19. The five grant-funded hospital based Care Guides will remain attached to their clinics. The three LifeCourse Care Guides integrated into the Allina Health primary

care clinics (Coon Rapids and Richfield) will become part of the centralized Allina Health Care Management structure. At the same time Care Management will hire one additional Care Guide and will train their existing team of ten Care Guides in the LifeCourse approach. Care Management is focused on caring for the accountable care and risk-based populations served by Allina Health. Currently, the LifeCourse case-finding dashboard identifies that there are over 2,500 patients in the ACO population that may be eligible and benefit from LifeCourse. These Care Guides can make a difference and deliver a marketable benefit that results in better patient outcomes with a proven cost savings and positive return on investment. In sum, Allina Health's \$1.37 million investment will fund 14 Care Guides to implement the LifeCourse program in Allina in 2017.

Allina Health has made one additional related investment to late life care in Minnesota and LifeCourse. As part of building Community and Stakeholder Engagement, Penny Wheeler made a \$250,000 investment in The Convenings <http://theconvenings.org/> which builds on a leading MPR and TPT broadcaster, Cathy Wurzer, who wrote a compelling book with Bruce Kramer titled We Know How this Ends. Three organizations are core to this work, Allina Health, HealthPartners and Honoring Choices Minnesota, a state wide effort to engage Minnesota families in end of life care decision. This program was identified as a priority as Dr. Wheeler believes that collaboration in late life care is critical to achieving the needed conversations and desired spread of LifeCourse.

In summary, the projection for 2017 is that Allina Health will invest over \$1.37 million. For this same period we are requesting \$1,360,348 in additional funding from the Robina Family Foundation.

Allina Health Implementation	2016	2017
Care Guides (CG)	8 [†]	19 ^{††}
Grant Funded Revenue		
Givens Family Foundation (1 CG)	\$60,000	\$60,000
Abbott Northwestern Hospital Foundation (4 CG)		\$240,000
LifeCourse & Late Life Expenses		
Salaries (Care Guides & Other Operational Staff)	\$542,573	\$1,068,813
Benefits	\$150,692	\$296,061
Supplies	\$7,201	\$13,682
Purchased Services - The Convenings	\$250,000	\$250,000
Total Operating Expenses	\$950,466	\$1,628,557

[†] 2016 Care Guides deployed in ANGMA, MHI, Givens, Coon Rapids, Richfield

^{††} 2017 Care Guides deployed in ANGMA, MHI, Givens, Care Management

* Staffing, Projections and Proposed Budget excludes Robina LifeCourse Staffing which is part of the Division of Applied Research such as LifeCourse Research Care Guides

2) What is the potential impact of the November elections on LifeCourse?

In November 2017 Robina Report, we proposed activities to disseminate nationally and advance policy change, and designed our proposed activities to be robust to rapidly changing political environments. However, the election of Donald Trump as President and continued control of Congress by Republicans deserves careful consideration, with adjustment to proposed activities as warranted. This preliminary assessment is based on President-Elect Trump's campaign positions on healthcare, and related statements made during the campaign. President-Elect Trump has clearly vowed to repeal the Affordable Care Act (ACA), however, a detailed plan for what he wants to accomplish with regard to healthcare is not available.

While there is some uncertainty about the direction of health policy driven by a Trump White House, House Republicans led by Speaker Paul Ryan did issue a very detailed proposal of their plans back in June. They agree with Mr. Trump on repeal, but their replacement plan includes many similar features already put in place by the ACA. On Medicare, there is no indication a Republican Congress would abandon the shift to provider reimbursement based on quality of care begun under the ACA, and which is the principal basis for our LifeCourse public policy strategy. To the contrary, the Medicare Access and CHIP Reauthorization Act of 2015 (MACRA) that created Medicare's new Quality Payment Program for physicians was drafted by Republicans and enacted into law in 2015 with widespread bipartisan support.

As such, we intend to move ahead with our proposed strategy, which includes creating new billing codes unique to LifeCourse, advocating for the inclusion of lay healthcare workers modeled after the LifeCourse Care Guide as part of advanced illness care teams, and seeking endorsement and widespread use of LifeCourse quality measures. We will closely monitor the situation in Washington in the coming months for any health policy appointments, announcements, new regulations or legislation that may warrant a change in our strategy.

In light of the new dynamic in Washington, we will increase our outreach to State Medicaid agencies around the country to introduce them to LifeCourse. House Republicans have signaled an interest in turning Medicaid into a block grant program and ceding virtually full authority to individual states on overall budget, benefit design, and eligibility for their Medicaid plans. Though such reform to Medicaid may be difficult to accomplish in the next Congress, a Republican-controlled CMS will likely give states more regulatory flexibility to experiment with new benefit design or care delivery models. As a part of our national dissemination plan in our November 2017 report, we proposed rural and health equity implementations of LifeCourse nationally. Operationalizing these activities as statewide deployments aligns well with any future changes related to Medicaid block grants and the increased control of states to deliver Medicaid.

In sum, we will continue to monitor the political environment and shifts in national healthcare policy, responding to emerging opportunities for action. LifeCourse, and our proposed policy change activities, are based solidly on a whole person patient-centered approach and value-based reimbursement strategies, both of which have garnered widespread, bipartisan support. We will move forward with these strategies, and adapt as necessary to ensure that all those with advanced illness have access to LifeCourse-like services in the years to come.



LifeCourse
Listen. Honor. Guide.

November 1, 2016

Dear Robina Foundation Board,

When we met in August we had the opportunity to share how LifeCourse stands out in addressing the national challenge of providing late life care for the aging Baby Boomers. In this report, we go further in forecasting how LifeCourse will impact future national policy through transformative change.

We have set forth a four part action plan for LifeCourse geared to influence national policy based on the significant research results. The LifeCourse approach is simple, replicable, and scalable. This report lays the plan that will lead to needed change.

We hope you enjoy reading the attached narrative. Please let us know what questions you might have!

Best wishes,

A handwritten signature in cursive script, appearing to read 'Paige Bingham'.

Paige Bingham, MBA
Director, LifeCourse

A handwritten signature in cursive script, appearing to read 'Heather Britt'.

Heather Britt, MPH, PhD
Director, Division of Applied Research

A small handwritten asterisk or star symbol.

LIFECOURSE:

An Innovative Approach to Late Life Care

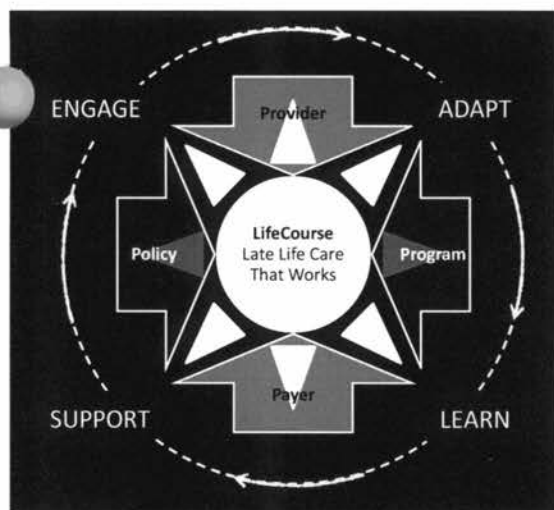
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OVERVIEW

I skate to where the puck is going to be, not where it has been.

– Wayne Gretzky

Hockey's Great One could have been talking about LifeCourse; **we're already where the puck is going to be** in American late life care. Providers and health plans across the country are racing to develop innovative clinical programs and workable, value-based reimbursement systems to address the unimaginable challenge of scale in late life care posed by aging Baby Boomers.



While LifeCourse has heady company in its upstream quest to support individuals in the last months or years of life, we differ in one important respect: the role of the trained lay healthcare professional, or Care Guide, at the center of our program. Care Guides are the primary source of strong early evidence of both financial sustainability and clinical merit. The Care Guides' \$50,000 salary and 'whole person' approach are rooted in tenets of palliative care coordination – as opposed to acute care delivery. Others have chosen a more traditional, interdisciplinary approach featuring a bevy of licensed professionals: a physician and/or a specialty nurse and/or a social worker and/or a chaplain. Those professionals are appropriate in a hospice or post-acute setting, but pose a significant cost over the continuum of serious illness and are the largest impediment to mass adoption of programs of this nature upstream of hospice.

More than any other factor in our 2012-2016 study, this key staffing decision drove decreased utilization (and lower cost of care) resulting in **a transformational average savings of \$11,508 per patient per year** versus a comparison group receiving usual care that did not include a Care Guide. Both groups had access to and utilized palliative care, transitional care, home care, ED, ICU, and hospice as needed/desired but only the LifeCourse group had a LifeCourse-trained Care Guide. As the LifeCourse data show, our patients are very satisfied with their experience. We believe multiple stakeholders, including large health systems, health plans, and community clinics, will be too. The LifeCourse approach is **simple, replicable, and scalable**.

Results Update

Below are the cost savings that were presented orally during our August update discussion.

Adjusted costs for LIFECOURSE patients versus matched control patients

Control Patients	LIFECOURSE Patients	Per Member Per Month Savings
\$43,658	\$31,643	\$959

These data compare total costs of care during enrollment in LifeCourse with total costs for patients receiving usual care. Controlling for the other factors that might influence cost, LifeCourse patients saved Allina Health \$12,015 per patient over 376 days -- \$11,508 annually, or \$959 per member per month (PMPM). Deducting the direct and indirect costs of a LifeCourse Care Guide (approximately \$120 PMPM), we calculate **an 8:1 return on investment (ROI) in LifeCourse**. Sutter Health's published Advanced Illness Model (AIM) program yielded PMPM savings of \$760, but when program costs of \$900 PMPM were factored in, Sutter incurred a net loss on patients enrolled in their program.¹ Given the LifeCourse ROI, coupled with the outstanding quality of life and care experience patients reported, we clearly scored a Triple Aim goal! (We resist the impulse to call it a "hat trick.")

In the area of advance care planning (ACP), we find that **LifeCourse patients are statistically and substantially more likely to complete an ACP** than usual care patients. While both groups start at approximately 40-45% ACP completion, once enrolled in LifeCourse, 38% more LifeCourse patients completed an ACP compared with only 10% more among usual care patients (see table in Appendix C). A total completion rate of 77% among LifeCourse patients is comparable to results gained through implementation of Sutter Care AIM. While completion of an ACP is only one part of a comprehensive support program for individuals with advanced illness later in life and their families, we believe it's a critical measure.

¹ Landis, Jared; Ogundimu, Tobí. Expanding the Scope of End of Life Care: Understanding Concurrent Hospice Models, The Advisory Board, March 2014

National Positioning

The LifeCourse team recently spent time in Washington, DC, at the Coalition to Transform Advanced Care (C-TAC) meeting and followed that visit with time at the Center to Advance Palliative Care (CAPC) in New York. These conversations with stakeholders from around the country reinforced for us three key messages about LifeCourse:

- **We are indeed innovative.** As noted in the University of California San Francisco (UCSF) environmental scan sponsored by the Robina Foundation, LifeCourse embodies both the characteristics of laudable late life programs, coupled with a lay healthcare worker as the key connector for patients and families, health systems, and other social service agencies. National models like AIM from Sutter Health and the Compassionate Care Model from Aetna both rely upon an extensive and expensive interdisciplinary team – a team which typically already exists in the patient's care experience. These models focus on a narrow portion of eligible patients and have high PMPM costs which restrict their economic target and use to the last few months of life. LifeCourse still stands out as an **affordable, scalable model that can be deployed across a population upstream from existing end of life care.**
- **Many organizations are ready to implement innovative models.** In conversations with Sutter Health, Aspire Health, Kaiser Permanente, and Optum, we found enthusiastic support for the LifeCourse model and requests to initiate further conversations around implementation. Patient advocacy groups and faith-based organizations publicly announced a need for models with trained lay healthcare workers that are accessible and supportive of all communities. CAPC requested that LifeCourse be a spotlight for their upcoming conversations around innovative community-based models of care. Diane Meier, MD, CAPC's executive director, noted that CAPC is seeing more and more lay healthcare worker models, none of which are **as thoughtfully developed or advanced as LifeCourse.** Both CAPC and LifeCourse would like to see our training added to CAPC's broader community-based model curriculum.
- **Policy contexts and communities are ready for lay healthcare worker enabled supportive care for individuals with advanced illness late in life.** At C-TAC there was emerging support for expansion of the current Centers for Medicare and Medicaid Services (CMS) code for advance care planning to include provision of the service by a wider range of care team members, including lay healthcare workers. Provider and payer organizations expressed significant public support for the expansion of reimbursable services by CMS – a pathway forward that would benefit LifeCourse substantially. Further, organizations such as those with a Medicare Advantage plan or those serving individuals and families likely to live longer than a year were **all interested in supporting a LifeCourse model using their innovative value paradigms.**

While the national landscape is primed to adopt LifeCourse-like models, important barriers to national expansion exist. The most significant is ensuring that future healthcare payment systems are structured to reimburse LifeCourse activities. Additionally, it is imperative that healthcare consumers, payers, providers, and national advocates fully realize the extent to which LifeCourse meets their need for high quality care with significant cost savings. This report presents our plan for how to meet these challenges and advance LifeCourse to its next stage of development, with the goal that all Americans with advanced illness have the opportunity to receive LifeCourse-like services.

The Action Plan

We've made so much progress to date, and it's essential that we continue, given the changing demographics in this country. This report describes our success to date and an action plan to disseminate LifeCourse nationally, backed by supportive policy to spur replication of our results and achieve transformative change:

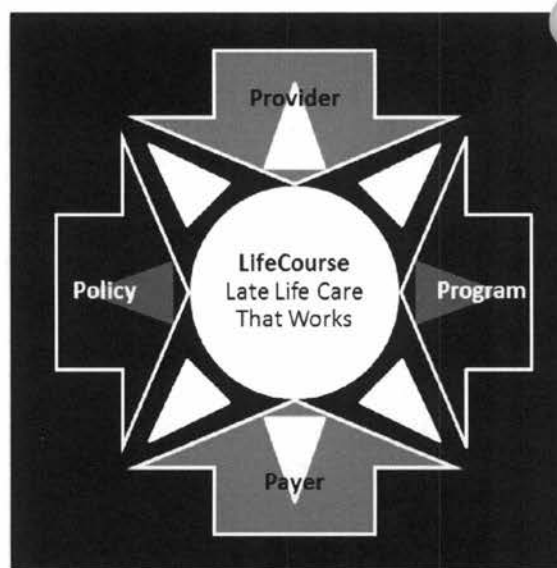


Four actions.

In reaching transformative change, we will 1) **engage** communities seeking a better way in late life care; 2) collaborate with the community to **adapt** LifeCourse and implement a working model; 3) **learn** about LifeCourse by evaluating and reporting experience and outcomes, in order to 4) gain **support** en route to self-sustaining status aligned with the shared values of our society.

Four parts.

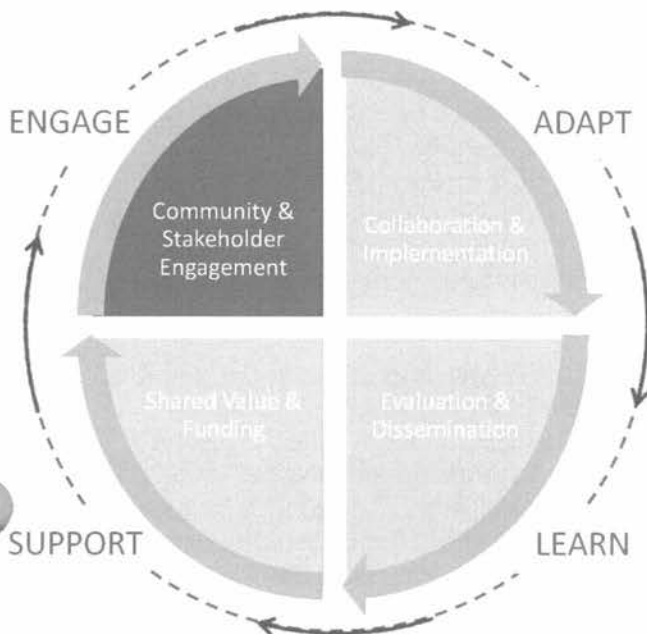
Four components are essential to creating transformational change. LifeCourse and other advanced/serious illness **programs** interact in an ecosystem of **payers** and **providers** in service of **policy** aimed at optimizing both the quality and economics of late life. In short, LifeCourse provides late life care that works.



ENGAGE

Community & Stakeholder Engagement

LifeCourse will tap into local-national bonds within communities that have shared beliefs and needs. LifeCourse will expand on current relationships held with community organizations, media channels, national advocacy groups, and healthcare professional associations, with the goal of creating demand for LifeCourse nationally.



Our process will be two-pronged. First, we'll develop and implement **a national engagement strategy yielding meaningful partnerships** with key coalitions, practice-based and disease-specific groups, consumer groups, and major players in urban health equity and rural health. Public partnerships with key national coalitions and organizations will enable us to a) jointly advocate for environments and policies supportive of LifeCourse, b) identify key potential implementation partners active in the same coalitions, and c) contribute to the ongoing national dialogue about late life supportive care.

Second, and complementing this national engagement strategy, we will develop a Resource Toolkit for local community engagement in those areas where we launch LifeCourse. We will begin with orientation delivered to clinical staff before we ever start work. Our team will meet with frontline

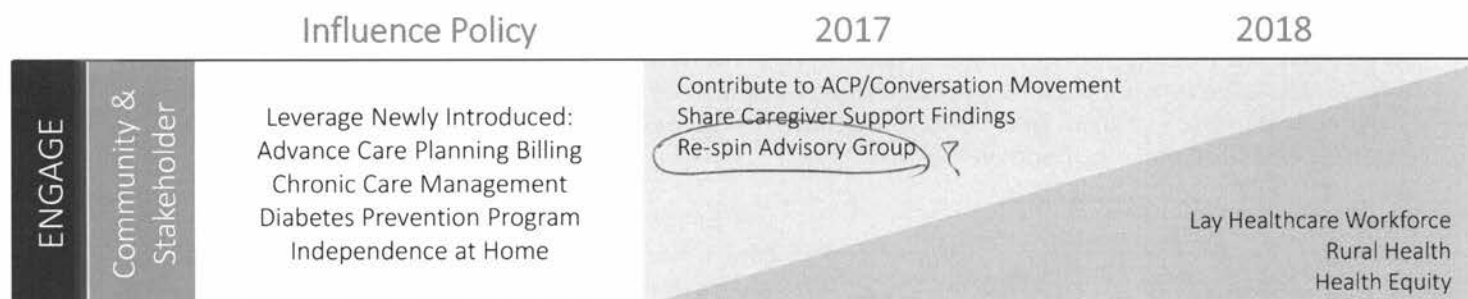
clinical workers to introduce our approach, emphasizing its link to more familiar concepts of palliative and end-of-life care. We believe early connection with frontline professionals enable **rapid uptake of LifeCourse in new markets.**

The LifeCourse Resource Toolkit will provide "air cover" to support outreach from local implementation sites to organizations such as veterans' groups and auxiliaries, advocacy groups, churches, synagogues, hospital affiliation groups, neighborhood councils and locally prominent media. Our work with Twin Cities PBS, online publications, newspapers, diverse radio, and the NorthPoint—Heritage Park collaboration provides templates for engaging with media and organizations serving diverse segments of the population. In essence, we will partner with local implementing communities to do what we did in the Twin Cities, which was to **spark a social movement** relying on the collective action of engaged constituents—both patients and their friends and families.

Aligning clinics?

Where?

The Engage Strategy



Both the national and local engagement strategies aim to **build demand for LifeCourse**, to highlight the obvious and urgent need for such models, and to enable smoother policy advocacy and local implementation pathways. Our engagement strategies will build toward our ultimate policy goal of strong demand for late life innovations like LifeCourse and clear reimbursement pathways for LifeCourse-like services.

Drawing on local and national ties to communities and organizations with shared beliefs and needs, LifeCourse will expand our current relationships with national advocacy groups, healthcare professional associations, community organizations, and media channels. In 2017, LifeCourse will concentrate on a) forging partnerships that contribute to expanding support for advance care planning and **the national "conversation" movement**; b) engaging with organizations that support caregivers of individuals with serious illness later in life; and c) refocusing our national advisory committee to concentrate on national implementation and policy advocacy partnerships.

At the same time, we'll expand on our LifeCourse Resource Toolkit for implementing sites and communities. This kit lays out needed steps and key targets to build a local movement backing late life supportive care. Methods for finding and successfully engaging key stakeholders are suggested including social services, faith-based organizations, local media, provider and payer networks, and consumer advocacy groups. The implementing sites are urged to convene, tap into and partner with these entities to create demand for LifeCourse and the supportive care approach.

In 2018, LifeCourse will enhance its engagement efforts to focus on lay healthcare workforce advocacy, rural health organizational collaborations, and urban health equity organizational initiatives. This expanded set of engagement partners will further position LifeCourse to achieve a variety of goals, including: a) **influence policy and payment for equity and rural health areas**; b) set expectations for late life care training and staffing models built on the lay healthcare workforce; and c) attract funders for advancing innovative late life support that is community-appropriate and scalable.

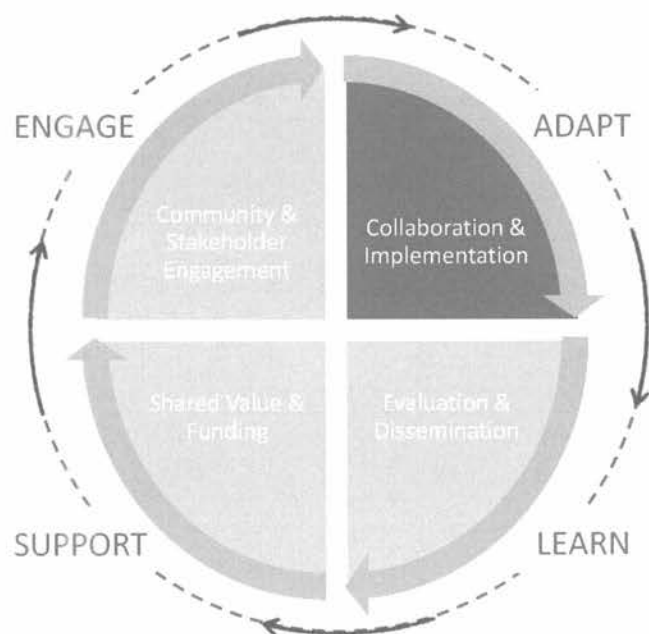
Specific national partners already identified for our work in 2017-2018, along with key targets for collaboration, joint advocacy, and influence arrangements, are described in the figure below. Establishing and implementing an effective engagement framework and plan will yield **a readiness and demand for LifeCourse in national advocacy conversations** and in local implementation.



ADAPT

Collaboration & Implementation

LifeCourse implementation depends on collaboration and adaptation as spread relies on tailored, person-centered care addressing gaps and disparities, especially in communities of color and rural communities.



There is such a need for meaning in life, connecting to care, and creating a lasting legacy, particularly in the face of advanced illness. As Bob Lawrenz said during his conversation with a LifeCourse Care Guide, **"I came to grips with my mortality about a year ago..."** How does LifeCourse support late life care that helps people create their own meaning and derive satisfaction from their efforts?

Caring for our aging population is one of society's grand challenges today. Many organizations are grappling with the issue. We think we're the closest to an effective, realistic approach to resolving the multifaceted problem of late life planning and care. LifeCourse addresses the systemic problems many people later in life and organizations supporting these individuals experience, in particular: (1) quality of life; (2) excess costs and waste of medical resources; and (3) shortage of healthcare professionals, especially in palliative and geriatric care.

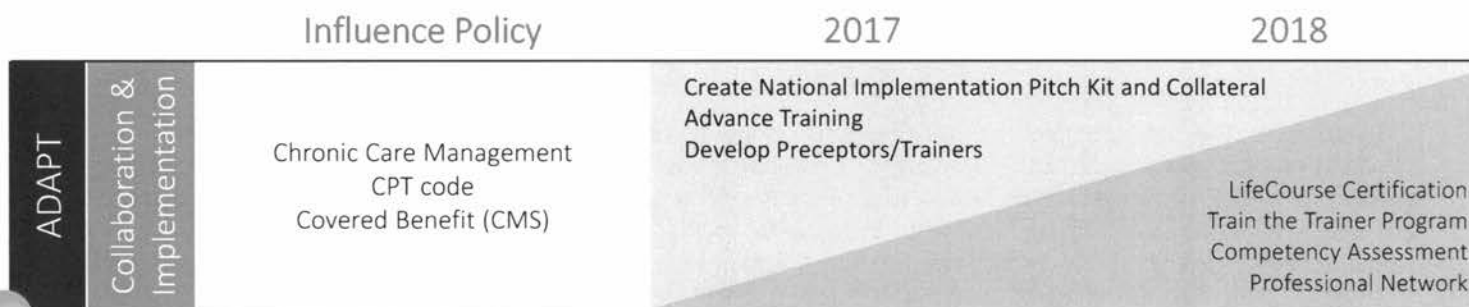
Recently, the SCAN Foundation report on Person-Centered Care described LifeCourse as a cost-effective approach to caring for people later in life. In 2015, **LifeCourse was cited as a national model for advanced illness care** by C-TAC. Additionally, in the Robina-commissioned environmental scan, among 20 programs studied by UCSF, LifeCourse was unique in training lay healthcare workers in whole person (both medical and nonmedical) care. In summary, LifeCourse significantly influences the financial feasibility of providing longitudinal supportive care that improves quality of life and aligns with patient and family preferences and stated needs all the way to the end.

Our goal through 2017-2018 is to fan out over the U.S. and implement LifeCourse in diverse settings, where risk-based payment structures support coordinated care or where grants/philanthropy seed operations until payment systems catch up. We believe that potential collaborators and implementers will be drawn to an applicant that has already completed the labor-intensive research phase of development – successfully – and is primed to implement. "Diverse" settings means just that – in multiple dimensions, each with its own custom adaptations. We're seeking two implementers in each of four priority areas. The first two priority areas focus on reaching underserved populations targeting health equity (in urban communities) and rural health. The last two priority areas are more standard healthcare channels of providers and payers.

Adapting to diverse settings is the linchpin of our efforts to influence policy and disseminate LifeCourse nationally. First, it increases LifeCourse's profile and provides greater evidence of our relevance nationally to providers, payers, and others interested in adapting the LifeCourse model. Second, it generates evidence for national policy-making bodies that LifeCourse is feasible, which advances our policy goal of reimbursement for LifeCourse-like services. This is described in more detail in the evaluation and policy sections, below. In this proposal, we are seeking funds to support developing national dissemination opportunities, not for the operational funds necessary to implement the individual adaptations themselves. In particular, we propose developing materials to reach ideal collaborators and implementers, and adapting our current training program to the task of national dissemination in a variety of settings, with diverse populations of people with advancing serious illness.



The Adapt Strategy



The LifeCourse approach is simple, replicable and scalable. Using trained lay healthcare professionals called Care Guides, LifeCourse helps individuals in later stages of life and their families articulate what matters most to them and then to navigate healthcare, financial and community resources that address their needs and preferences. LifeCourse supports individuals of all ages with advancing frailty or serious illness (such as later stages of cancer, dementia or heart failure). On a 1:1 basis, potential enrollees are identified via provider referral or through our implementing sites electronic eligibility reports based on diagnoses and related symptoms or treatments in the electronic health record (EHR).



LifeCourse Care Guides are matched with individuals and their families navigating the complexities of living with serious illness. While other coordinated care programs are often phone-based and last 30 to 90 days post-hospitalization, LifeCourse Care Guides meet with patients monthly for a span of months and years if necessary, delivering a whole person approach to addressing an individual's prioritized needs. Care Guides assist individuals in accessing needed care and resources, articulating personal goals, and ensuring continuity of care through future transitions such as hospice or home care, in order to support individuals living well with serious illness. Care Guides coordinate with care teams, regularly updating team members through conversations, notes and eMessages as needs change.

LifeCourse Care Guides receive training in the domains of palliative care, advance care planning, goal-setting, motivational interviewing, communication, professional boundaries, and personal safety. They are trained on a structured visit framework based on the National Consensus Project Clinical Practice Guidelines for Quality Palliative Care and the National Quality Forum Preferred Practices for Palliative and Hospice Care. The visit framework incorporates question sets and assessment tools such as the Palliative Performance Scale.



Monthly in-home visits from a trained lay healthcare worker called a Care Guide.



Assistance with articulating preferences, goals, and what matters, including completion of advance care planning.



Whole person care via a structured visit framework to facilitate discussion of a patient's medical and non-medical concerns.



A family and community oriented approach to help patients meet their needs and prepare for what is coming next.

We consider the core, active ingredient of LifeCourse to be the Care Guide, whose employment facilitates both participant outcomes and the substantial return on investment that LifeCourse delivers. Our goal in adaptations is to maintain the integrity of the LifeCourse program to the greatest extent possible, while also remaining flexible to the diverse logistic considerations, reimbursement systems, and benefit packages nationally. For example, telephonic intervention for second and subsequent visits may be advisable in rural areas where transportation is expensive and time consuming. Likewise, adaptation into provider or payer systems may result in a reduced number of visits to accommodate existing staffing structures.

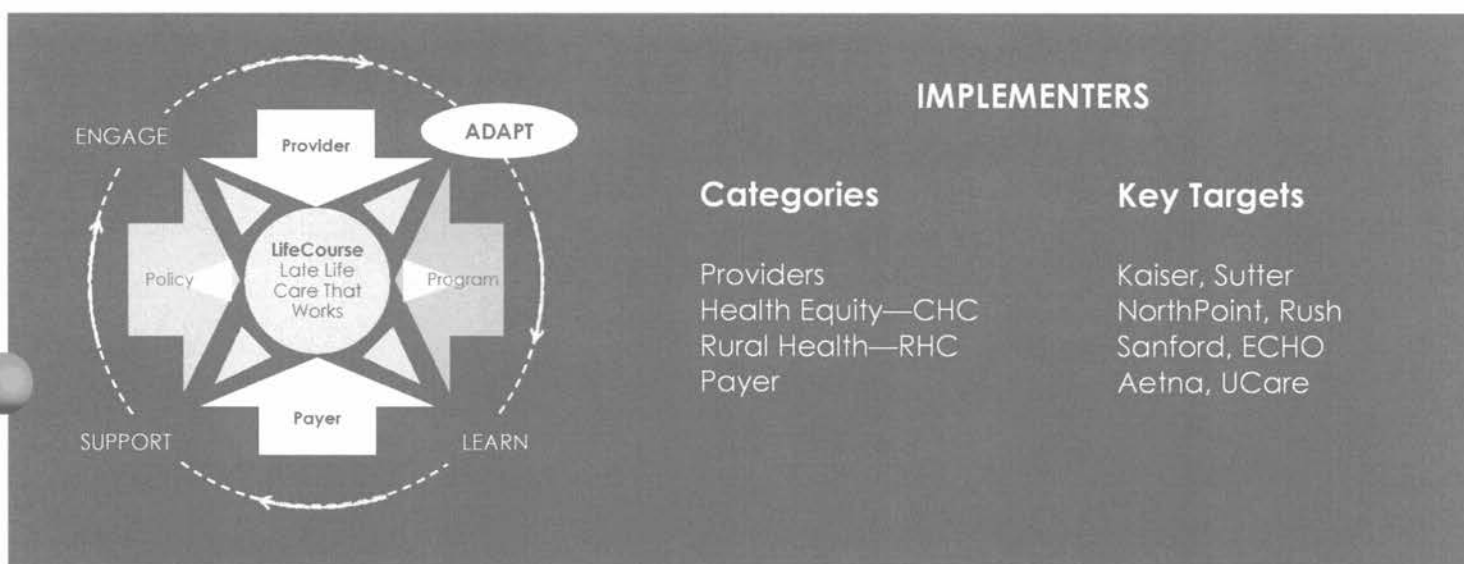
During the first half of 2017, our plans include working with outside collaborators to translate our two-week in-person LifeCourse training program into an efficient electronic platform that better supports interactive, train-the-trainer learning. Our connections with other advanced care planning programs, Health Catalyst stakeholders, and healthcare improvement institutes will be beneficial in disseminating the LifeCourse knowledge that Care Guides, providers, caregivers and family have found so valuable. We believe that this adaption to LifeCourse training will make the intervention more easily scalable across diverse communities nationally.

In 2017-2018, reaching ideal collaborators and implementers of LifeCourse will require active networking and marketing. We will build on the applied research results and the networking opportunities from key meetings as a springboard to spread LifeCourse nationally. In particular, for policy and health reform, we are a key contributor to C-TAC in Washington, DC, and part of their demonstrated models of change in their recent publication, *A Roadmap for Success*. We are well positioned with C-TAC as it seeks pilot opportunities with the Center of Medicare and Medicaid Innovation (CMMI) on advanced illness models, with National Quality Forum (NQF) on advanced illness measures, and with the John A. Hartford Foundation and The SCAN Foundation on community-based advanced illness care.

CAPC, led by Diane Meier, MD, is a practice-based organization in which LifeCourse is positioned to disseminate our transformative approach to national provider and payer members. As noted in the press release appendix to this report, our October presentations at the CAPC National Seminar, which included research and implementation findings, resulted in multiple leads. On the national scene, as noted in the engagement strategy section, LifeCourse is recognized as an evidence-based approach that fits into the community-based models sought by practices, providers and payers.

We're optimistic that potential systems with unique exposure to rural areas, such as Sanford Health in North and South Dakota, will be drawn to LifeCourse, especially since the costly and ubiquitous research phase of development is complete and we are primed to implement. State and county health departments who hold both federal block grant funds and accountability for rural health status are another potential seed funder, as are rural health initiatives supported through Margaret A. Cargill Foundation and the SCAN Foundation.

Additionally, interest in health equity initiatives from the Kresge Foundation and many health plan foundations, such as Blue Cross Blue Shield, are prime targets for outreach into community health clinics. The NorthPoint Health and Wellness Center implementation that began in 2016 will provide valuable learning and refinement of LifeCourse to share.



With health equity as a priority of LifeCourse from the beginning, we have integrated cross-cultural elements into our LifeCourse training, curriculum, and lived experience of individuals participating in LifeCourse. With the implementation of LifeCourse at the Hennepin county-operated NorthPoint Health and Wellness Center (NorthPoint) in North Minneapolis, we now have an implementing clinic eager to learn and help us adapt LifeCourse to a community with the highest level of health disparities in Minnesota. The Center for Prevention at Blue Cross and Blue Shield of Minnesota² noted the following health disparities for the NorthPoint community:

- 26.2 percent of residents speak a language other than English.
- 91 percent have incomes below 275 percent of federal poverty level.
- Almost 82 percent of the residents are from a community of color.

² <http://www.centerforpreventionmn.com/what-we-do/our-current-initiatives/communities-eliminating-tobacco-inequities/northpoint-health-and-wellness>

NORTHPOINT

North Minneapolis has a culturally diverse population with many valued community assets providing resources and support to the community. Time spent getting to know the community, attending and hosting community events, having many conversations, and joining community groups has led to collaboration with NorthPoint and others.

In April 2015, LifeCourse hosted a community conversation about late life care needs and resources in North Minneapolis. The event was co-hosted by KMOJ radio station and AMPERS, a public radio network of which KMOJ is a part. The show was later broadcast on KMOJ along with commentary from LifeCourse team members and notable community members.

We learned through our North Minneapolis engagement on late life care challenges that we must offer direct resources to connect with and serve community members. We couldn't start the conversation and leave without offering some support.

We began to explore various ways we could offer LifeCourse to the community. We spoke to church groups and community-based organizations but in order to document and share what matters most to patients and families, we had to identify an organization that would provide a LifeCourse Care Guide in North Minneapolis with access to an electronic health record and supporting care team.

NorthPoint serves 25,000 individuals through the multi-specialty medical, dental, mental health center and human service agency with several locations in North Minneapolis. Between 2006-2015, demand for services at NorthPoint increase by 67% increase. NorthPoint recently opened a clinic located in Heritage Park Senior Services Center that is dedicated to caring for older adults. Under the leadership of NorthPoint's Medical Director, Dr. Paul Erickson, the NorthPoint-Heritage Park location is well-positioned to offer LifeCourse.

Heritage Park is a unique \$20M development over 145 acres with 900-housing-units. As part of the Housing and Urban Development (HUD) plan the Minneapolis Public Housing Authority developed the Heritage Park Senior Service Center as a hub for area senior residents. Partners located in Heritage Park include Allina Health's Courage Kenny Rehabilitation Institute; the YMCA; NorthPoint; Grace Hospice; Augustana Open Circle Adult Day Services; Augustana Feeney Manor, an assisted living and memory care facility for low-income seniors; and the Northside Funders Group.

Relationships with community leaders involved in supporting older adults have been built throughout our assessment of the community's needs and assets, and our involvement with neighborhood and community groups (Hawthorne Neighborhood Council, Dr. Solomon Carter Fuller Act on Alzheimer's, YMCA—Heritage Park, and African American Leadership Forum). There is increasing awareness of late life issues and desire to strengthen community resources. This is precisely the type of collaboration we believe will yield increased demand for LifeCourse in this and other communities.

Through the relationships built between the NorthPoint LifeCourse Care Guides and patients in this community, we will continue to gain insight into the unique assets and needs of the community around late life care. NorthPoint has dedicated staff to oversee evaluation of the program's effectiveness by assessing their Care Guides' successes and barriers to supporting patients as well as the value of LifeCourse to NorthPoint's care teams. Also, program materials and processes are being adapted collaboratively to ensure that the program supports the clinic's and community's needs.

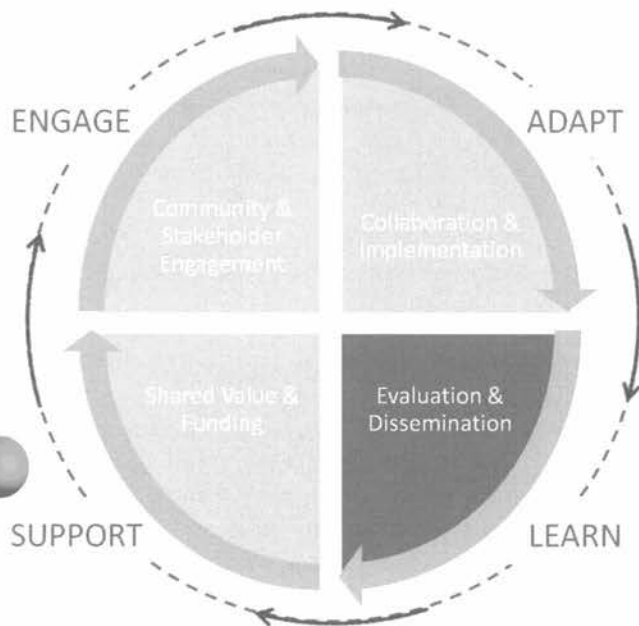
NorthPoint, with the support of LifeCourse staff, will pursue funding opportunities such as Minnesota Governor Mark Dayton's 2018 eliminating health disparities initiative³ and Allina Health's Neighborhood Connection grant program. NorthPoint is well-positioned as a community health clinic and a healthcare home to seek and be supported by state and philanthropic grants. We look forward to supporting these efforts.

³ <http://www.health.state.mn.us/ommh/grants/ehdi/index.html>

LEARN

Evaluation & Dissemination

Knowledge gained throughout research and early implementations forms the foundation for launching LifeCourse. While LifeCourse is adaptable to different settings and cultures, its core relies on evidence and on Care Guide delivery predicated on a detailed, two-week training program in whole person care. Also inherent is our continuing reliance on measurement and evaluation of our procedures and outcomes. We know one size doesn't fit all and that a good program is never set in stone.



The good news for the Robina Foundation and next-stage funders is that our costly research phase is over, with tremendously positive outcomes. As reported to the Robina Foundation in August, we are engaged in a robust publication and presentation effort to disseminate our important findings (see LifeCourse CV in appendix).

Research may be complete, but evaluation is an ongoing process. Together with continued, targeted evaluation, LifeCourse research can be leveraged to achieve the transformational change of advancing public payer reimbursement for LifeCourse, with the goal of making LifeCourse-like services available to all those with advanced illness.

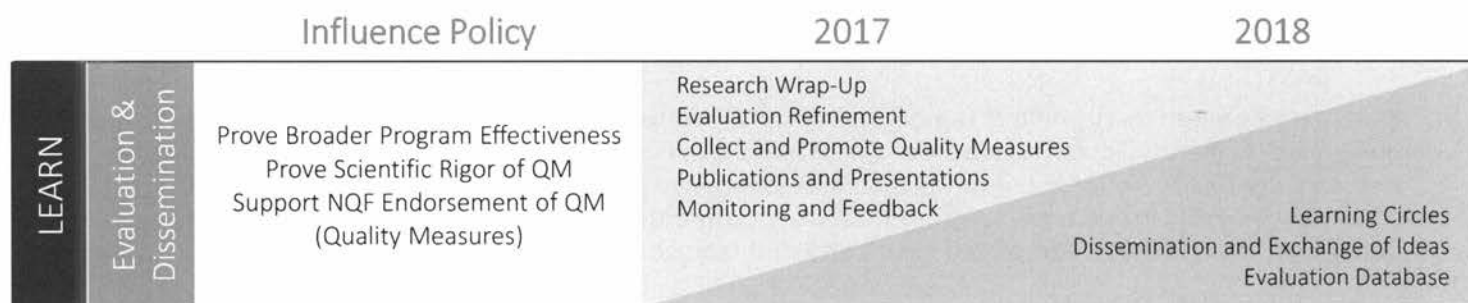
Existing research and ongoing evaluation of LifeCourse adaptations will develop a robust body of evidence demonstrating LifeCourse's effectiveness and viability across diverse settings. In many ways, our research results and ongoing evaluation are the most important



elements of our public policy advocacy. Policy-makers will only enact change to public health programs when they see new health services that actually work, can hear from the patients and families who have benefited, and review the evidence and data that back up those results. None of the policy changes needed to make LifeCourse a sustainable and permanent part of our healthcare system would be possible without the positive results the program has demonstrated to date.

The on-going evaluation of LifeCourse will also be integral to influence the **creation of new quality measures** for late life care that track patient satisfaction and cost savings. With the rapid transformation of healthcare to value- and risk-based reimbursement, health services will eventually need a related quality measure to justify their use. Additionally, current Medicare Advantage payers receive bonuses based on how well their plans score on health plan Star Ratings, which are based on quality measures. Taken together, establishing the link between LifeCourse and key quality measures and having those quality measures accepted by CMS will be critical to maximizing payment and reimbursement opportunities in current and future healthcare environments.

The Learn Strategy



Our initial goal is to guide select LifeCourse measures related to patient experience and cost of care through the endorsement process sponsored by the National Quality Forum (NQF), a key first step in eventually having such measures adopted by public payers for the quality-based payment models. Consideration by NQF requires thorough vetting of LifeCourse and its quality measures, built on scientific rigor and strong relationships with key players to identify opportunities to advance the LifeCourse agenda, as was discussed in the section on engagement, above. Two primary activities will set the course for this work: *research dissemination* and *evaluation dissemination*.

Research Dissemination. For 2017, in addition to completing any paper revisions still necessary for manuscripts in the publication process, we propose to develop two key articles to document concisely the scientific evidence supporting our approach, based on existing LifeCourse research. We will aim for these articles to be published in prestigious journals (e.g., *Annals of Internal Medicine*). The first article will provide the case for LifeCourse in its totality, describing the intervention and its outcome measures, including return on investment. The second will focus on utilization, which has the potential to impact the approval of quality measures. These publications will be designed to maximize the credibility of LifeCourse to key stakeholders, with the goal of supporting our engagement strategy and securing invitations to **participate in key decision-making groups addressing quality measures**, such as Quality Improvement Organizations (QIOs), and national reimbursement policy.

Evaluation Dissemination. Additionally, establishing the scientific rigor of the LifeCourse approach entails demonstrating its effectiveness across a broad array of settings and patient groups. (Our approach to adapting LifeCourse is described in the Adapt section, above.) Understandably, policy-making bodies such as CMS expect strong evidence of efficacy in a variety of settings.

Based on the Centers for Disease Control and Prevention's Program Evaluation Standards⁴, the RE-AIM framework for translating research into practice,⁵ and the Value-Added Research Dissemination Framework,⁶ we propose, in 2017, to streamline and refocus the existing rigorous LifeCourse evaluation on national spread and dissemination. The evaluation will be designed to answer six key questions:

- What are strengths and areas for improvement regarding the communication channels and materials that support adapting LifeCourse to new settings?
- How has LifeCourse been implemented in each new setting? With what level of consistency, costs, and adaptations?
- What impact has LifeCourse had on outcomes for participants and key friends and family? On return on investment?

Current focus?

⁴ <http://www.jcsee.org/program-evaluation-standards>; <http://www.cdc.gov/eval/standards/index.htm>

⁵ RE-AIM (Reach, Efficacy, Adoption, Implementation, Maintenance) <http://re-aim.org/about/>

⁶ <http://www.acf.hhs.gov/sites/default/files/opre/valueadded.pdf>

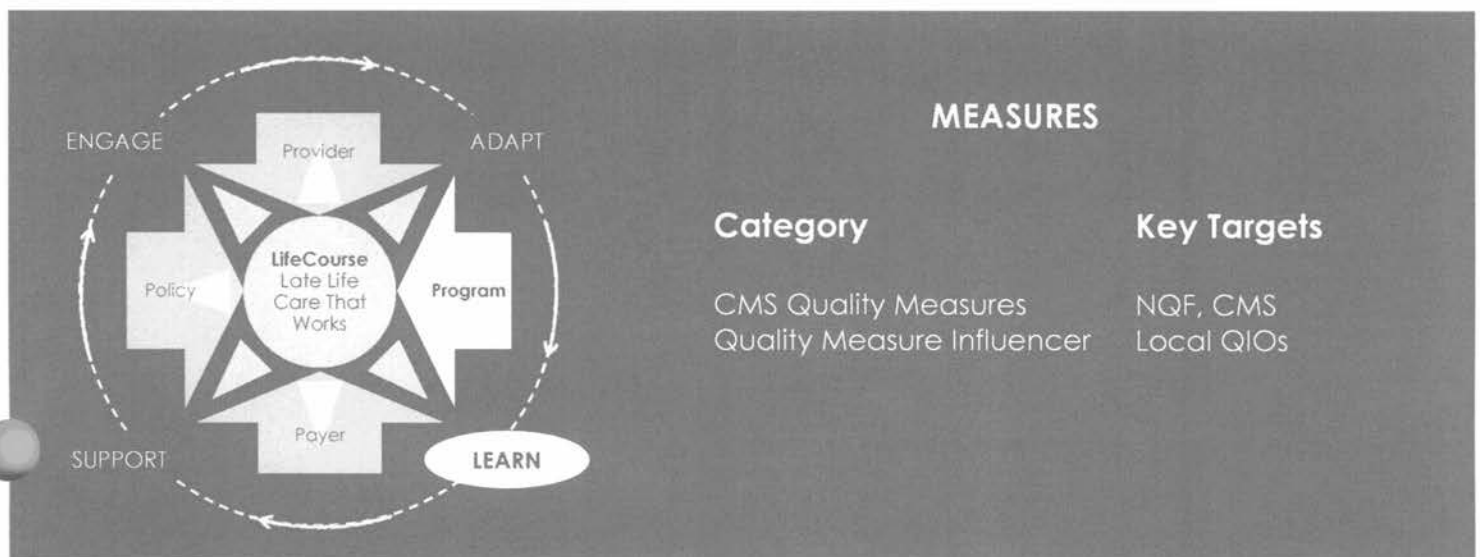
- What implications do the target implementations have for future adaptations in key settings?

In 2017-2018, we will provide materials and training regarding LifeCourse evaluation measures and processes to new LifeCourse sites (targeting rural areas and the arena of health equity), as well as existing LifeCourse sites (NorthPoint, Allina Health Clinics, Care Management, John Nasseff Neuroscience Institute, Minneapolis Heart Institute). We will obtain evaluation data collected by sites according to our protocols and conduct an independent analysis of the data to answer the six questions outlined above.

Our current experiences with LifeCourse deployments suggest that the most effective strategy to ensure site participation in evaluation is to *invite* sites to participate. Especially in marginalized communities, *requiring* evaluation may deter adoption due to historically negative experiences with researchers and evaluators. For example, LifeCourse has successfully secured a voluntary agreement with NorthPoint whose evaluators plan to use our existing evaluation model and materials and share data for learning and dissemination purposes. Dr. Paul Erickson and Vivian Anugwom have already submitted one joint abstract for a palliative care meeting next spring.

Lessons learned from multiple diverse LifeCourse adaptations nationally will be used 1) to support adoption of LifeCourse quality measures by CMS, 2) to refine recruitment and intervention planning for future national deployments, and 3) to support engagement efforts with key stakeholders. In 2018, our goal will be to translate findings from our research and evaluation for decision-makers and influencers. This may involve fostering learning circles and other forums, or the targeted sharing of our evaluation database with strategic partnerships to advance policy interests.

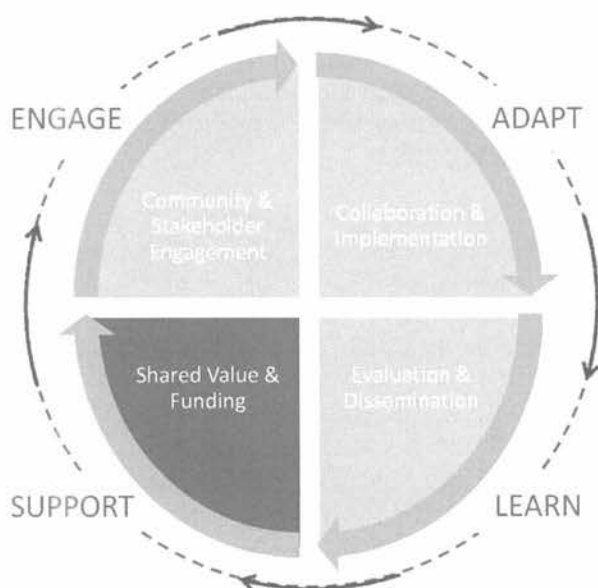
In sum, we **propose conducting a robust evaluation** of national LifeCourse deployments in diverse settings with a focus on dissemination, and **leveraging existing research and new evaluation findings** to advance engagement and policy change. Through these channels we seek to achieve the long-term goal of establishing quality measures by CMS, which requires an adaptive approach, as well as a significant time investment. While the process of establishing quality measures is both complex and sensitive, we believe that research and evaluation provide a solid foundation for LifeCourse to mature and secure opportunities to create the policy changes necessary to make LifeCourse-like services available for all. Robust evaluation also serves the larger goal of convincing CMS that LifeCourse should be a foundational element of late life care coordination.



SUPPORT

Shared Value & Funding

Philanthropy can serve as a catalyst of innovation to address societal difficulties. The aging population bubble is one of those, as is the dauntingly complex shift to value-based payment for healthcare. The two meet in late life care support, which can last months or even years. That is the unique – and enormous – challenge LifeCourse was created to address, on behalf of both public and private payers, as well as patients and their families.



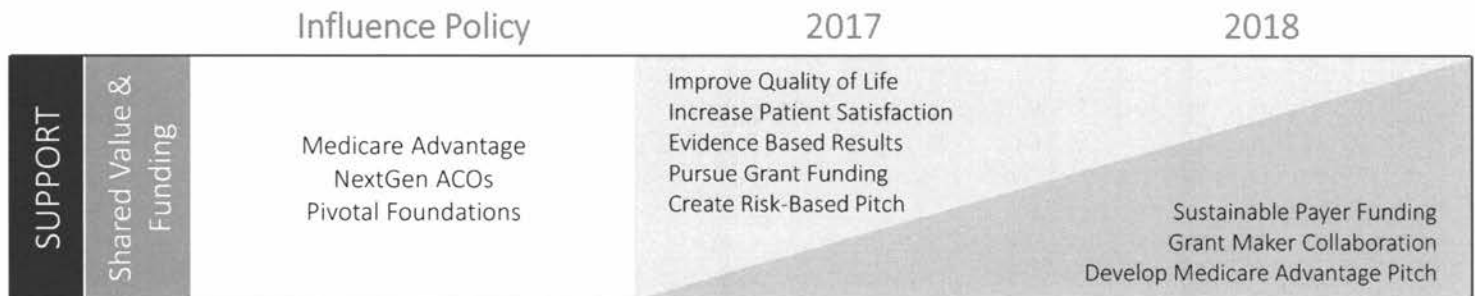
Our long-range vision is to secure sustainable support for LifeCourse. This will be achieved by **establishing shared value in the community** and impacting public and private payer funding streams. Ultimately, we will prove our value operationally and become self-sustaining in the range of settings described in this report. This vision is made possible by the important healthcare context in which LifeCourse operates.

First, public and private payers alike are moving toward reimbursement of programs that focus on coordinated care with payment based on quality and care experience – not just the number of tests, procedures and hospital days. This is timely for LifeCourse, as we have proven the program's effectiveness in coordinating and improving measures of quality care for patients in late life. Our strategy for promoting LifeCourse to payers and thus securing funding is described below.

Second, influential healthcare leaders and philanthropic organizations are championing the idea that quality **healthcare is about what should be done, rather than simply about what can be done**. LifeCourse is well positioned within this theory and can be the catalyst for creating shared value for late life care. In the section below we outline our strategy for collaborating with philanthropic organizations to establish shared value.

Bolstering community-wide shared value and establishing sustainable funding streams will lead to transformational change in late life care.

The Support Strategy



In past reports to the Board, we have discussed the alternative payment models being adopted by public payers like Medicare and Medicaid. Currently, alternative payment models like NextGen ACOs can accommodate care coordination models like LifeCourse. NextGen ACOs shift significant financial risk onto the health providers participating in the model, making LifeCourse's cost savings potentially attractive. There are currently 18 NextGen ACOs operating in 14 states, and Medicare has indicated that others will be added in 2017-2018, including one offered by Allina Health. ?

Another public payment model that could accommodate LifeCourse right now is Medicare Advantage. These are essentially managed care plans where most financial risk has been shifted from Medicare to private health plans. The case for incorporating LifeCourse into Medicare Advantage plans is even more compelling than NextGen ACOs because these plans are at risk for almost all underlying medical costs. Private payers such as UnitedHealthcare, Humana and Aetna offer Medicare Advantage plans in nearly every state and could significantly benefit from deploying late life care coordination in their plan designs.

In addition to the other outreach activities described in this report, in 2017 we will reach out to select NextGen ACOs and Medicare Advantage plans to **share Allina's experience with LifeCourse**. We will develop a package of materials (Pitch Kit) used to promote LifeCourse with these organizations. The Pitch Kit will include (1) a description of the program, (2) a summary of the research findings, and (3) an analysis of the improved patient experience and cost savings that can be achieved by implementing LifeCourse.

Alongside targeting existing public and private payer models, in 2017-2018 we will be targeting several key philanthropic organizations to bridge between proven results and sustainable funding – building on the shared value of LifeCourse. We have identified key targets across the five strategic categories listed below. Securing philanthropic partners in the policy and social change arenas will be critical in **moving forward our mission of meaningful transformation in late life care**. In addition, targeting health equity, rural health and community partners will allow us to spread this transformation nationwide and reach underserved populations. Specific foundations, such as the John A. Hartford Foundation, Kresge Foundation, and The SCAN foundation have potential for creating shared value around policy and social change in end-of-life and patient-centered care. Other foundations such as the Margaret A. Cargill (MAC) Foundation and The Harry and Jeanette Weinberg Foundation have interests in aging and older adults within the health equity, rural health and community arenas that align well with LifeCourse.

Our method for creating shared value by securing funds to extend our work will be strategically targeted. The first step will be to identify and define potential for shared interests between key organizations and LifeCourse. Second, we will actively work to develop relationships with these organizations and discuss how LifeCourse fits within their existing priority areas. Because many of the identified organizations do not accept unsolicited requests for funding, we look for warm leads from the Robina, Allina Health, and Abbott Northwestern Hospital/Foundation Boards, and the LifeCourse National Advisory Committee to set up introductions with targeted funding and influencing organizations. Lastly, we will pursue funding by developing tailored proposals that highlight our shared interests. These proposals will align LifeCourse with what matters most to the funders. **We will build off our successes implementing LifeCourse** in settings such as John Nasseff Neuroscience Institute, where the LifeCourse Care Guide position is funded through the Abbott Northwestern Hospital Foundation and the Givens Family Foundation. Collaborating with these philanthropic organizations to establish shared value will provide the bridge to future reimbursement by both public and private payers.



FOUR PART HARMONY

Influence Policy

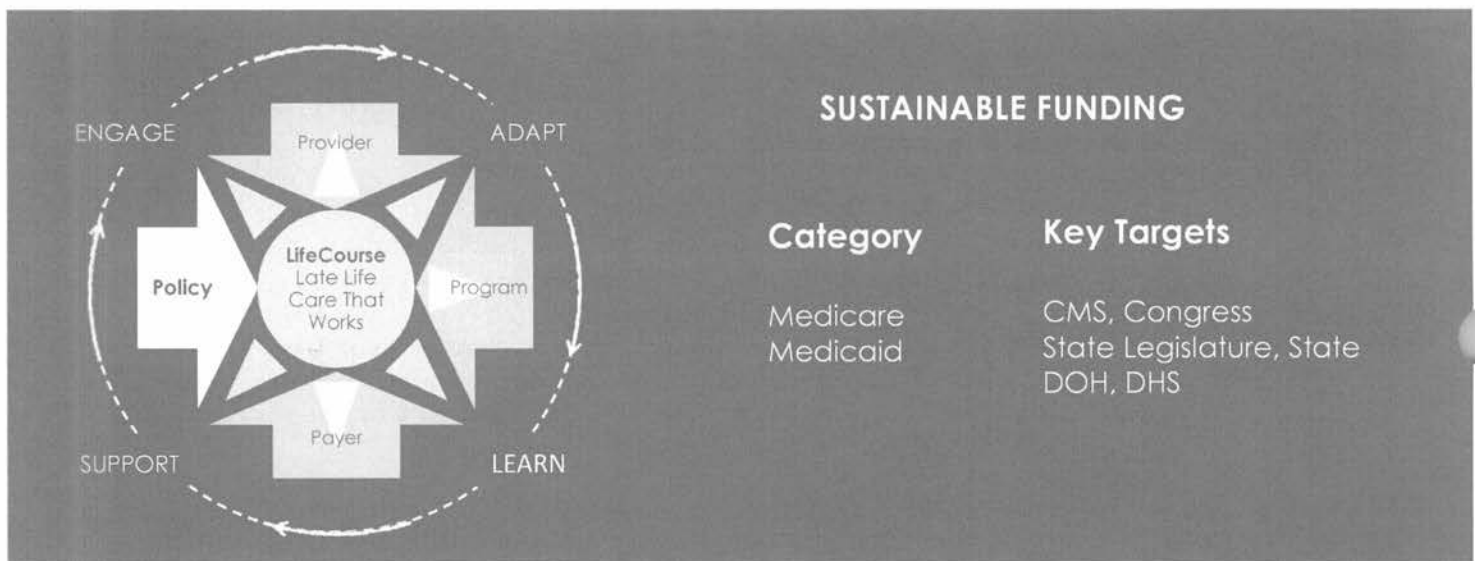
As this current report details, we are moving forward along several fronts to broaden the adoption of the LifeCourse model and make it an essential feature of our nation's healthcare system. The efforts already discussed such as the new collaboration with NorthPoint, the pending publication and dissemination of our early results and data, and conducting outreach to Medicare Advantage plans and NextGen ACOs, will help showcase LifeCourse's value, and persuade policy makers and key influencers that additional policy changes are necessary to foster the spread of LifeCourse.

As the country comes together after a divisive election, we believe opportunities will exist in Washington and in multiple states to adopt the policy changes needed to make LifeCourse permanent and sustainable. As we have detailed in past reports, the LifeCourse approach is optimally aligned with the quality and population-based payment reforms currently underway in the healthcare system. These reforms are redesigning the healthcare delivery environment to promote evidence-based care, coordinate care across providers and settings, and meaningfully engage patients and their families in care decisions. LifeCourse is built for such an environment, and despite the acrimony of the recent election, we believe these reforms will continue to move forward.

Our 2017-2018 policy strategy seeks three fundamental policy changes to current public payer reimbursement for health services. First, **billing codes must be created to capture LifeCourse's value-added late life care coordination services** not currently reimbursed by fee for service Medicare or Medicaid. As of this writing, we expect Medicare to approve new monthly capitated fees to providers who are coordinating care for patients with cognitive impairment. This will follow earlier decisions that Medicare would pay similar capitated fees for transitional care management (in 2013) and chronic care management (2015). During 2017-2018, Allina will work with key stakeholders such as the American Medical Association to develop such codes.

We have also discussed in this and past reports the importance of quality measures in the new payment models that based payment on the underlying quality of care. In this new paradigm, all **health services will eventually need to have a related quality measure** to justify their use. Given this, LifeCourse staff met with the National Quality Forum (NQF) in September to introduce them to LifeCourse and discuss the program's quality and performance metrics. NQF endorsement of quality measures is a key milestone in the adoption of such measures by Medicare and Medicaid, and LifeCourse will move aggressively over the next 24 months to gain such endorsement. Completion of the concluding research publications, coupled with ongoing efficacy evaluation of LifeCourse deployment, will also ready the environment for CMS encouragement of the LifeCourse model.

Finally, perhaps the most challenging task will be to obtain recognition for reimbursement purposes of lay health professionals such as the Care Guide. Medicare and Medicaid are beginning to recognize such contributions. Medicare's recently proposed Diabetes Prevention Program uses lay healthcare workers, called lifestyle coaches, to help educate patients and lower the severity of diabetes. Minnesota's Medicaid program will reimburse services of a community health worker. In light of LifeCourse's impressive early results, the looming worker shortage in the palliative care space, and the **rigorous education and training LifeCourse Care Guides undergo**, we believe Allina has a compelling argument that lay healthcare workers should be an essential member of late life interdisciplinary care teams.



BUDGET NARRATIVE

2017-2018 Proposed Budget

We've made so much progress to date and it's essential to work toward better care for America's aging population. That's why as we focus our actions on influencing policy in 2017-2018 we are asking for \$2,907,392 from the Robina Foundation.

Currently, we project a \$557,678 fund balance at the end of December 31, 2016. With the Robina Foundation's approval, these funds will carryforward as part of the 2017 budget as described below.

	Projected Year End 12/31/16	Proposed Budget		2017-2018 Total Request
		2017	2018	
Robina Grant	\$2,500,000	\$1,360,348	\$1,547,044	\$2,907,392
Fund Balance (carryforward)	788,246	557,678	-0-	
Robina Foundation	3,288,246	1,918,026	1,547,044	
Salaries	1,598,525	1,130,540	904,432	
Benefits	442,599	327,857	262,285	
Supplies	49,407	32,938	24,704	
Purchased Services	488,755	325,837	293,253	
Website, Education, Travel, Meetings	143,322	95,548	57,329	
Other	7,959	5,306	5,041	
Expenses	2,730,568	1,918,026	1,547,044	
Fund Balance (year end)	557,678	\$1,118,026	-0-	

We budgeted \$800K

\$560,348 in new money

As LifeCourse enters 2017, we will adjust staffing to align with the four actions outlined in this report – engage, adapt, learn, support – with the goal of influencing national policy. The largest expense in 2017-2018 is for salaries and benefits (76% of total expenses) to support the national LifeCourse team.

The second highest expense is for purchased services (18% of total expenses). In 2017, our research dissemination team and consultants are in high gear to produce nationally recognized publications. Throughout 2017-2018, we will continue to actively seek national speaking engagements for all actions of the LifeCourse work. We will also leverage our collaborating authors, national advisors, and implementing partners to spread the word of LifeCourse through all media channels.

During the first half of 2017, our plans include working with outside collaborators to translate our two-week in-person LifeCourse training program into an efficient electronic platform that better supports interactive, train-the-trainer learning. Our connections with other advanced care planning programs, Health Catalyst stakeholders, and healthcare improvement institutes will be beneficial in disseminating the LifeCourse knowledge that Care Guides, providers, caregivers and family have found so valuable. These expenses are included in the 'supplies' and 'website, education, travel, meetings' categories (6% of total expenses).

Moving into 2018, our goal is to develop a groundswell through community and stakeholder engagement across LifeCourse implementers to grow our body of knowledge and overall LifeCourse support. Ultimately we will reach a point where our collected measures, shared value, and stakeholder action influence our national policy to better support the later stages of serious illness.

CONCLUSION

LifeCourse is late life care that works. Just as Gretzky noted that he skated to where the puck would be, LifeCourse is already across the ice, prepared for patients and families, payers and providers, and communities and contexts that are ready for and demanding a population-based supportive care approach. With its lay healthcare worker-enabled whole person approach to care, LifeCourse remains an innovative, scalable approach to taking care of the growing numbers of individuals with serious illness later in life. Not your typical cross-sectional, episodic, or single-visit approach, LifeCourse offers individuals longitudinal support, a deep trusting relationship, a connection to healthcare and social systems, and an honoring of family. The approach is simple enough to be adopted widely and yields improvement in quality of life, experience, and appropriate utilization, all while reducing cost and yielding an exceptional return on investment.

We're almost there. We've accomplished a great deal since 2012 – developed and tested the LifeCourse model, transitioned to sharing results and internal implementation, and created a training and national implementation plan and platform. We need your help to get to the next step – to launch that training and national implementation plan, to enable policy and context change so that payers and communities can create environments where LifeCourse will thrive, and to secure complementary funding to continue to advance the work.

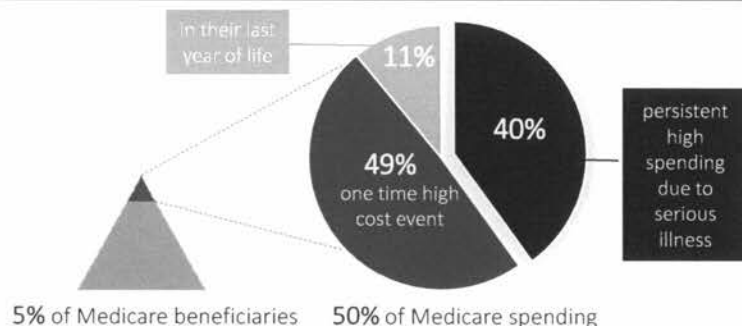
We're on the cusp of contributing to national change.

In 2017-2018, the LifeCourse team will **engage** key stakeholders seeking a better way in late life, collaborate with communities to **adapt** and implement LifeCourse, and **learn** about program efficacy and adaptations in order to gain **support** for LifeCourse by ensuring self-sustaining funding. Ultimately, we aim for policy change and a sense of shared value across all stakeholders. We strive for an environment in which LifeCourse and other serious illness **programs** interact in an ecosystem of **payers** and **providers** in service to **policy** aimed at optimizing both the quality and economics of late life.



We believe that the Robina Foundation can enable us to cross the threshold from internally-facing program with local results to externally facing movement with national impact. We seek these additional funds to move from research to national implementation, from large test to major change. Just as the Centers for Medicare and Medicaid Innovation grants have yielded programs with significant national impact, we invite the Robina Foundation to ensure the same for LifeCourse.

WHY LIFECOURSE?



The end of life period often spans years, not just weeks or months...



...yet traditional health care models artificially distinguish curative and supportive care.

Sources: 1,2

PATIENTS

Electronic eligibility report
using EHR data



Patient-Provider
conversations



TARGET POPULATION:
Patients living with serious
illness in the later stages of life



INTERVENTION



Monthly in-home visits
from a trained lay
healthcare worker called a
care guide.



Assistance with
articulating preferences,
goals, and what matters,
including completion of
advance care planning.



Whole person care via a
structured visit framework
to facilitate discussion of a
patient's medical and non-
medical concerns.



A family and community
oriented approach to help
patients meet their needs
and prepare for what is
coming next.

OUTCOMES



better quality of life
higher patient care experience
more patients with advance care plans



fewer ED visits



fewer inpatient days



fewer ICU stays

MEDIAN
HOSPICE
LENGTH
OF STAY

with LifeCourse: 28 days

with usual care: 17 days

\$959 PMPM savings

8:1 return on investment

Core Strategies	Activities				Potential Stakeholders	
		Influence Policy	2017	2018	Category	Key Targets
	Community & Stakeholder Engagement	Leverage Newly Introduced: Advance Care Planning Billing Chronic Care Management Diabetes Prevention Program Independence at Home	Contribute to ACP/Conversation Movement Share Caregiver Support Findings Re-spin Advisory Group	Lay Healthcare Workforce Rural Health Health Equity	Coalitions Industry Groups Practice-based Groups Disease-specific Groups Consumer Groups Community/Faith-based Health Equity (Urban) Rural Health Media	C-TAC AHIP, AHA CAPC, SICP, RC ACS, AHA, AA AARP Local OMH ORHP PBS, Local News
	Collaboration & Implementation	Chronic Care Management CPT code Covered Benefit (CMS)	Create National Implementation Pitch Kit and Collateral Advance Training Develop Preceptors/Trainers	LifeCourse Certification Train the Trainer Program Competency Assessment Professional Network	Providers Health Equity—CHC Rural Health—RHC Payer	Kaiser, Sutter NorthPoint, Rush Sanford, ECHO Aetna, Ucare
	Evaluation & Dissemination	Prove Broader Program Effectiveness Prove Scientific Rigor of QM Support NQF Endorsement of QM (Quality Measures)	Research Wrap-Up Evaluation Refinement Collect and Promote Quality Measures Publications and Presentations Monitoring and Feedback	Learning Circles Dissemination and Exchange of Ideas Evaluation Database	CMS Quality Measures Quality Measure Influencer	NQF, CMS Local QIOs
	Shared Value & Funding	Medicare Advantage NextGen ACOs Pivotal Foundations	Improve Quality of Life Increase Patient Satisfaction Evidence Based Results Pursue Grant Funding Create Risk-Based Pitch	Sustainable Payer Funding Grant Maker Collaboration Develop Medicare Advantage Pitch	Social Change Policy Health Equity Rural Health Community/Hospital	Robina Hartford, SCAN, Moore Kresge, Weinberg Helmsley, MAC, Macy UW, BCBS Foundation

Acronyms			
AA	Alzheimer's Association	GSA	Gerontological Society of America
AAA	Area Agency on Aging	HFSA	Heart Failure Society of America
AB	Advisory Board	HHS	US Department of Health & Human Services
AAHPM	American Association of Hospice & Palliative Medicine	HRSA	Health Resources & Services Administration
AARP	American Association of Retired Persons	IHI	Institute for Healthcare Improvement
AASB	African-American Southern Baptist	KFF	Kaiser Family Foundation
ACS	American Cancer Society	LA	Leading Age
ACP	Advance Care Planning	MAC	Margaret A Cargill Foundation
ACT/DFA	ACT on Alzheimer's--Dementia Friendly America	MNCM	MN Community Measures
AGS	American Geriatrics Society	MGMA	Medical Group Management Association
AH	Academy Health	NACCHO	National Association of County & City Health Officials
AHA	American Hospital Association	NCC	National Council of Churches
AHA	American Heart Association	NCOA	National Council on Aging
AHIP	America's Health Insurance Plans	NCQA	National Committee for Quality Assurance (HEDIS)
AHRQ	Agency for Health Care Research & Quality	NHC	National Health Council
AOA	Administration on Aging	NQF	National Quality Forum
ASTHO	Association of State & Territorial Health Officials	NRHA	National Rural Health Association
BCBS	Blue Cross/Blue Shield	OMH	Office of Minority Health
CAN	Caregiver Action Network	ORHP	Office of Rural Health Policy
CAPC	Center to Advance Palliative Care	PCORI	Patient Centered Outcomes Research Institute
CCM	Chronic Care Management	QIO	Quality Improvement Organizations (CMS-funded)
CDC	Center for Disease Control	RC	Respecting Choices
CF	Community Foundations	RHC	Rural Health Clinics
CHC	Community Health Centers	RUPRI	Rural Policy Research Institute
CMS	Centers for Medicare & Medicaid	SCIP	Serious Illness Care Program
CMMI	Center for Medicare & Medicaid Innovation	SHADAC	State Health Access Data Assistance Center
CPT	Current Procedural Terminology	SNF	Skilled Nursing Facilities
C-TAC	Coalition to Transform Advance Care	UofM	University of Minnesota
DOH	Department of Health	UW	United Way
FQHC	Federally Qualified Health Centers	YMCA	Young Men's Christian Association

Total Cost of Care

Preliminary Assessment of the LifeCourse Intervention Using Claims Data for Total Cost of Care

Total expenditure information (e.g., professional, facility, and Rx) incurred by patients for all services covered by Allina's at-risk insurer (ACO, TCOC) contracts was obtained from claims files shared by CMS, BCBS, UCare, and HealthPartners. Payer control patients were selected using propensity scores that took into account patient demographic characteristics and pre-period (12 month) expenditures (Table 1). The overall balance of the matching was within acceptable criteria (Figure 1). The mean bias attributable to potential confounders after matching was 5.1%.

Table 1. Patient Characteristics Before and After Propensity Score Matching

	Unmatched Payer Control (N = 21,993)	Matched Payer Control (N = 406)	LifeCourse (N = 125)
Age	56 ± 21	77 ± 13	78 ± 10
Prescriptions	3 ± 5	10 ± 8	11 ± 10
Follow-up period	718 ± 430	386 ± 289	376 ± 249
Male	47%	45%	44%
Caucasian	93%	96%	95%
Married	58%	40%	38%
Died during follow-up	11%	41%	42%
Principal diagnosis			
Cancer	25%	24%	14%
Cardiovascular	27%	36%	51%
Dementia	4%	11%	22%
Other	44%	29%	13%
Pre Enrollment Cost			
Total	11,066 ± 42,582	28,035 ± 127,867	25,533 ± 27,365
Inpatient	3,464 ± 20,129	16,278 ± 119,724	11,377 ± 17,673
Emergency	189 ± 1,009	26 ± 235	30 ± 240
Imaging	508 ± 5,566	45 ± 375	153 ± 1,388
IP – 1 month prior	614 ± 8,572	562 ± 5,755	1,914 ± 5,912

Preliminary Impact

To assess the potential impact, we examined expenditures in the follow-up period by applying multivariable gamma regression models with a log link to look at the average effect of the LifeCourse intervention on total cost of care compared to usual care (Table 2).

Gamma regression models are the preferred model for cost data because they can correct for heteroscedasticity (which is a common property when modeling cost as an outcome).

(Note: LTCF=Long Term Care Facility)

Table 2: Adjusted costs for LifeCourse participants versus propensity score matched controls.

Sub-Group	Matched Payer Control	LifeCourse	Net Change	Mean Follow-up Days	Savings PMPM	P-Value
+LTCF (N = 531)	\$43,658	\$31,643	\$12,015	376	\$959	0.109
-LTCF (N = 427)	\$50,194	\$33,546	\$16,648	401	\$1,245	0.131

* Generalized linear models (GLMs) using propensity score matched data for selected cost outcomes. GLMs were specified as having a gamma distribution and log link. All models adjusted for demographic characteristics, pre-period utilization, and days of follow-up. Sub-group analysis was conducted by removing patient in a long-term care facility from the regression model prior to matching.

The average length of follow-up for LifeCourse patients included in the GLM regression analysis (Table 2) was 376 days. Over that period, LifeCourse was associated with average adjusted savings in total costs of \$12,015 per patient ($p=.109$). This amounts to savings of approximately \$959 per patient per month followed compared with usual care or \$11,508 per patient per year.

Limitations: The number of intervention patients who met the analytical criteria was relatively small, so the findings may not be representative of the experience for all participants. As a result, the findings should be interpreted with caution and cannot be reliably extrapolated to the entire population.

Advance Directives Stratified by Study Group

Patients with completed advance directives in the electronic health record occurred 77% (LifeCourse) versus 56% (comparison) of the time in the two groups.

Following enrollment in the study, advance directives increased by 38% for LifeCourse patients compared to 10% for usual care patients.

Table 3: Advanced directive status stratified by study group.

Advance Directive Status	LifeCourse (N = 450)		Usual Care (N = 452)		P-Value
	N	%	N	%	
None	103	23%	200	44%	< 0.001
Before Enrollment	176	39%	206	46%	
After Enrollment	171	38%	46	10%	

Sample Characteristics

We have completed enrollment in the LifeCourse research study with 902 patients enrolled. Looking across patients receiving LifeCourse and comparison patients, we find that ethnicity, gender, marital status, and educational attainment are similar for both groups. LifeCourse intervention patients were enrolled from the community setting and from long-term care facility, yielding differences in the proportions of patients with dementia. The intervention group is also older on average than the comparison patients, suggesting that improvements in utilization and quality of life are especially significant.

Table A1. Patient Characteristics

	Intervention (n = 450)	Usual Care (n = 452)	P-Value
Age (mean $\pm$ sd)	78.1 $\pm$ 12.0	74.3 $\pm$ 12.5	<0.001
Comorbidity (mean $\pm$ sd)	4.5 $\pm$ 2.2	4.6 $\pm$ 1.9	0.280
Female	51%	51%	0.843
Caucasian	95%	95%	0.988
Married or living with partner	45%	49%	0.181
Highest Level of Education			0.398
HS or less	30%	35%	
Some college to bachelor's	46%	43%	
Grad/professional school	20%	18%	
Unknown	5%	4%	
Baseline Location			<0.001
Home	71%	90%	
Assisted living	12%	1%	
Nursing home	14%	8%	
Unknown	3%	2%	
Primary Diagnosis			<0.001
Heart failure	57%	69%	
Dementia	27%	14%	
Cancer	16%	17%	

Quality of Life & Care Experience

When examining quality of life more deeply at the 9 month period, we find that the difference between the starting **total quality of life** value (baseline) for LifeCourse patients and the quality of life at 9 months of enrollment is statistically significantly better than this difference for comparison patients. In other words, total quality of life is better over time for LifeCourse patients as compared to usual care patients. When we examine quality of life components or domains, we find that at 9 months, the palliative domain for LifeCourse patients is significantly better than for usual care patients. Further, all quality of life domains reveal improved performance for LifeCourse patients as compared to usual care patients.

Table A2. QOL baseline adjusted 9 month change score models (total and domains)

	Intv.	Comp.	Beta	95% CI	P-Value	Adj. R2 (%)
Total	188	168	4.27	0.32, 8.22	0.034	7.6
Physical	188	166	0.73	-0.22, 1.69	0.132	14.8
Emotional	186	166	0.49	-0.32, 1.29	0.233	16.1
Social	184	165	0.40	-0.47, 1.26	0.365	15.4
Functional	188	168	0.49	-0.53, 1.50	0.344	9.8
Palliative	188	168	2.35	0.61, 4.08	0.008	10.3

When examining care experience at the 9 month period, we find that the difference between the starting **total care experience** value (baseline) for LifeCourse patients and the care experience at 9 months of enrollment is statistically significantly better than this difference for comparison patients. In other words, total care experience is better over time for LifeCourse patients as compared to usual care patients. When we examine care experience components or domains, we find that at 9 months, the **care team** and **goals** domains for LifeCourse patients are statistically significantly better than for usual care patients. The communication domain also reveals improved performance for LifeCourse patients as compared to usual care patients.

Table A3. Care Experience baseline adjusted 9 month change score models (total and domains)

	Intv.	Comp.	Beta	95% CI	P-Value	Adj. R2 (%)
Total	125	123	1.55	-0.23, 3.33	0.087	21.7
Care Team	163	163	1.18	0.08, 2.28	0.035	24.8
Communication	153	143	0.26	-0.20, 0.72	0.262	29.8
Goals	147	159	0.38	0.03, 0.74	0.033	30.4

In the figures below, the 'dots' to the right of the vertical line demonstrate LifeCourse patients have a higher quality of life and care experience than comparison patients at all time points. The farther each horizontal line is from the vertical line, the more significant this difference. Later months show less significance, however, these time periods lack power to detect statistically significant differences – in other words, while there are differences, there are not sufficient responses to demonstrate significance.

Figure 1. Patient Quality of Life - 95% Confidence Interval Coefficient Plot

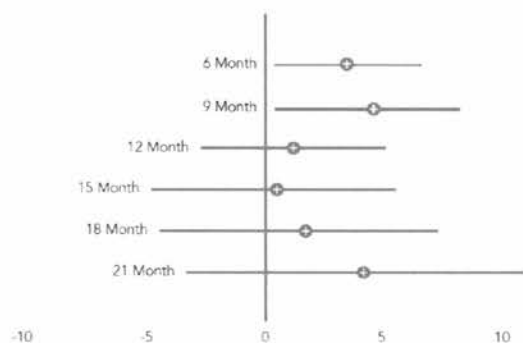
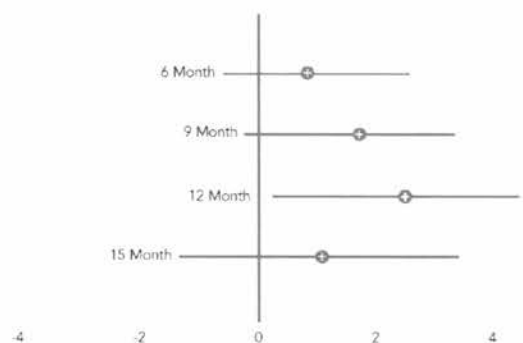


Figure 2. Patient Care Experience - 95% Confidence Interval Coefficient Plot



Utilization

When we examine utilization data for LifeCourse patients, we find that the number of emergency department (ED) visits, the number of inpatient days, and the likelihood of intensive care unit (ICU) stays are statistically significantly lower for LifeCourse patients than usual care patients. For ED visits, LifeCourse patients have a 16% lower likelihood of having ED visits than usual care patients. For inpatient days, LifeCourse patients have 37% fewer inpatient days than comparison patients. And finally, for ICU stays, LifeCourse patients have 57% fewer stays than usual care patients.

Table A4. Utilization regression models comparing LifeCourse to usual care

Outcome	Incidence Rate Ratio for Treatment	95% Confidence Interval	P-Value
ED Visits	0.84	0.71, 0.99	0.036
Inpatient Days	0.73	0.61, 0.88	0.001
ICU Stays	0.43	0.24, 0.75	0.003

Zero-inflated negative binomial regression models testing whether participation in LifeCourse resulted in decreased utilization on three outcomes, ED visits, inpatient days, and ICU stays. Models were adjusted for prior utilization patterns, death during follow-up, primary diagnosis, level of education, baseline location, and variable follow-up time.

In examining hospice utilization, we find that LifeCourse patients are more likely than usual care patients to enroll in hospice and this trend holds for all conditions – heart failure, cancer, and dementia. More importantly, we find that the median length of stay (i.e., number of days enrolled in hospice) is statistically significantly higher for LifeCourse patients than for usual care patients. In fact, LifeCourse patients have 11 more days, on average, in hospice than usual care patients. Given that hospice care provides supportive, best-in-class care for patients at the very end of life, this is precisely the outcome we are seeking with the LifeCourse intervention.

Table A5. Hospice utilization prior to death.

	U.S. (N=2.6M)	Allina Health (N=55,276)	LifeCourse (N=173)	Usual Care (N=81)	P-Value
Overall, %	42.8	17.3	48.6	43.2	0.426
Heart Failure		24.9	44.4	38.9	0.514
Cancer		32.8	58.8	56.5	0.863
Dementia		26.3	49.0	25.0	0.613
LOS, median days	18.7	18.0	27.5	17.0	0.041

All data are percent unless otherwise indicated. NHPCO estimates are for the 2013 calendar year. Allina EHR estimates are for patients with any hospice admission and a date of death in 2013 or later.

Satisfaction

The vast majority of LifeCourse patients and key friend & family would recommend LifeCourse to others.

Figure 1. Patient Response: Would you recommend LifeCourse?

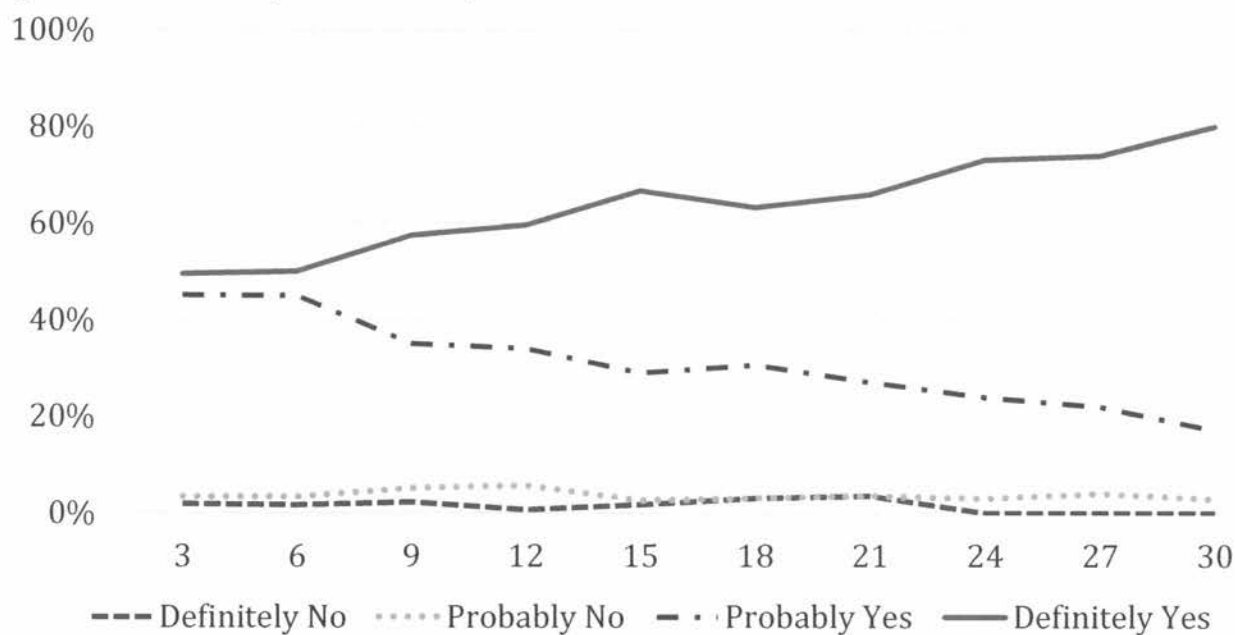
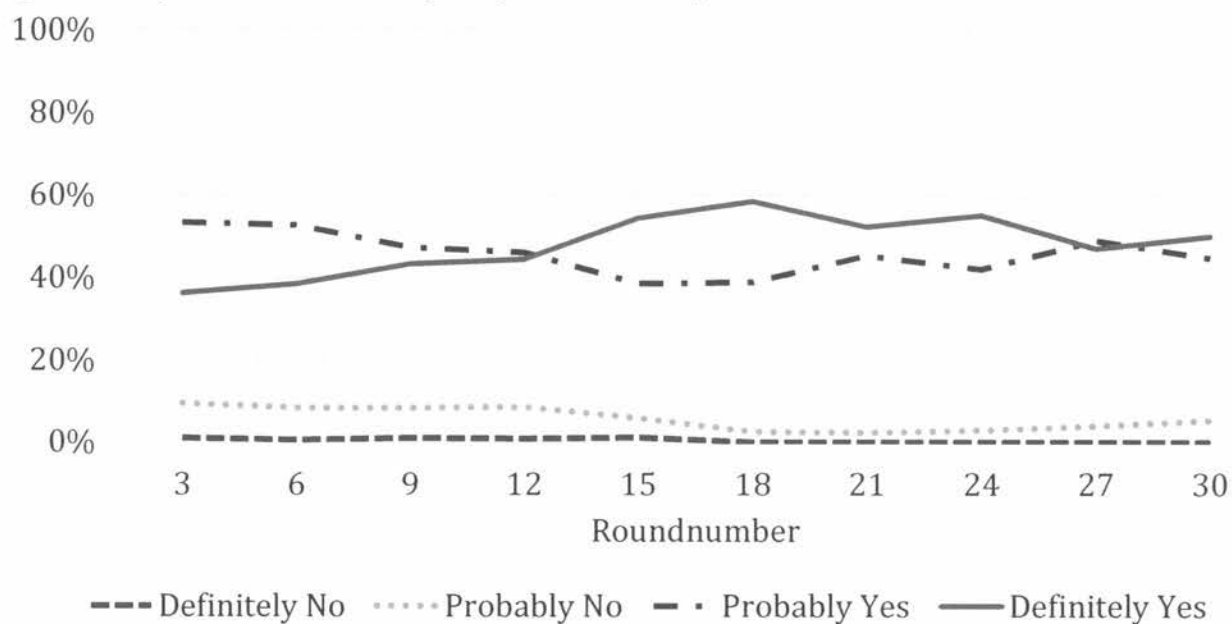


Figure 2. Key Friends and Family Response: Would you recommend LifeCourse?



News Release



Allina Health researchers present LifeCourse findings at Center to Advance Palliative Care National Seminar.

The last years of a serious illness can be expensive and stressful, not only for the person with the illness, but also family and friends. This situation can only escalate. In the next 15 years, U.S. communities will care for the same number of people over 65 as they have over the past 90 years combined.

"The need for innovative, upstream palliative care models that can be deployed wide scale and sustainably is critical," says Heather Britt, MPH, PhD, director of the Division of Applied Research at Allina Health. Through a grant from the Robina Foundation, Allina Health is studying such a model and implementing LifeCourse in clinics and health systems.

Researchers will present four posters that reflect findings from LifeCourse at the Center to Advance Palliative Care National Seminar October 27-29 in Orlando, Fla.

Sandra E. Schellinger, MSN NP-C, will present "Speaking from the Heart: Heart Failure Goals Beyond Advance Care Planning (ACP)." Schellinger found that people's goals change over time and increasingly take on non-medical components. Patient self-defined goals are broader than treatment goals typically addressed with advance care planning. This requires ongoing discussions that include the non-medical aspects of disease specific and life-sustaining treatments.

Paige Bingham, MBA will present "LifeCourse—Design to Implementation in a Health System" to show how Allina Health was inspired by positive research results to expand LifeCourse for the most seriously ill across the health system. Bingham will summarize the successes and challenges of integrating research into practice.

Heather Britt, MPH, PhD will present "Health Care Utilization Outcomes for LifeCourse Patients" that suggest when a whole person approach to care is used, and patients' preferences are known, there is a beneficial impact on health care utilization in late life. The research team tested whether participation in LifeCourse resulted in decreased utilization of emergency department (ED) visits, inpatient days, and intensive care unit (ICU) stays.

Britt will also be presenting "Improving Quality of Life for Late Life Patients: LifeCourse Findings," where she uses multiple analyses to show that LifeCourse intervention improves quality of life. She says participants actively seek out ways to maintain quality of life and exhibit resilience in the face of decline.

LifeCourse has enrolled over 900 participants who are or were in the last years of serious illnesses. Half of them received or are receiving "the usual" care. The other half were cared for by a lay health care worker, delivering a whole person approach to care that focused on what matters most to the individual and their family.



LifeCourse™
Listen. Honor. Guide.

Overview

The LifeCourse team has published one article in a top research journal, published one conference abstract, and has 12 additional papers under review. Research findings have been presented at more than 40 conferences and annual research meetings across the country hosted by organizations such as AcademyHealth, Gerontological Society of America, and American Academy of Hospice and Palliative Medicine. Our team also presents work throughout Minnesota at conferences hosted by the University of Minnesota and Minnesota Network of Hospice and Palliative Care. Additionally, our research findings have appeared in five webinars, and received press coverage in three media outlets. LifeCourse has also been featured in online MinnPost articles and a series of documentaries that have aired multiple times on Twin Cities Public Television.

Book Sections

Novelli B, Koutsoumpas T. In: Workman B, ed. *A Roadmap for Success: Transforming Advanced Illness Care in America*. Coalition to Transform Advanced Care (C-TAC); 2015:87-88.

Tabbush V, Coulourides Kogan A, Mosqueda L, Kominski GF. *Person-Centered Care: The Business Case*. The SCAN Foundation; June 2016:27.

Manuscripts

Published in Peer-Reviewed Journal

Schellinger S, Cain CL, Shibrowski K, Elumba D, Rosenberg E. Building New Teams for Late Life Care: Lessons From LifeCourse. *American Journal of Hospice & Palliative Care*. 2016;33(6):561-567.

Shippee T, Shippee ND, Mobley P, Fernstrom K, Britt H, Eckman P. LifeCourse: Lay Healthcare Workers Impact Quality of Life for Heart Failure Patients [abstract]. *Journal of Cardiac Failure*. 2016;22(8):S96.

Under Peer Review

Anderson EW, Frazer MS, Schellinger S, Roberts J, Radcliff K, Elumba D, Britt H. Building Supportive Care for Serious Illness Using a Systemic Human-centered Approach. *Family Medicine*.

Anderson EW, Frazer MS, Schellinger S. Combining Best Practices and Patient, Caregiver, and Healthcare Provider Perspectives for Late Life Supportive Care: LifeCourse. *BMC Health Affairs*.

Anderson EW, Schellinger S, Frazer MS. Expanding the Palliative Care Domains to Meet the Needs of a Community-Based Supportive Care Model. *Journal of Palliative Medicine*.

Cain CL, Frazer MS. Lay Health Care Workers and Interprofessional Collaboration. *Academic Medicine*.

Cain CL, Frazer MS, Kilaberia R. Identity Work as Invisible Work Within Attempts to Transform Healthcare. *Human Relations*.

Cain CL, Schellinger S, Frazer MS, Roberts J, Sutter L, Kilaberia R, Kaasovic J, Bassett K, White K, Anderson EW. Improving Late Life Care: Key Ingredients Delivered by Lay Health Care Workers. *Journal of Palliative Medicine*.

- Cain CL, Taborda-Whitt C, Frazer MS, Schellinger S, White K, Kaasovic J, Nelson B, Chant A. A Mixed Methods Study of Emotional Exhaustion: Energizing and Depleting Work within an Innovative Health Care Team. *Journal of Interprofessional Care*.
- Fernstrom K, Shippee ND, Jones A, Britt H. Development and Validation of a New Patient Experience Tool in Patients with Serious Illness. *BMC Palliative Care*.
- Schellinger S, Anderson EW, Frazer MS, Cain C. Patient Self Defined Goals: Essentials of Person-centered Care for Serious Illness. *American Journal of Hospice and Palliative Medicine*.
- Shippee ND, Shippee T, Mobley P, Fernstrom K, Britt H. Effect of a Whole Person Model of Care on Patient Experience with Complex Chronic Illness in Late Life. *American Journal of Hospice and Palliative Medicine*.
- Shippee T, Shippee ND, Fernstrom K, Mobley P, Frazer MS, Jou J, Britt H. Quality of Life for Late Life Patients: Mixed Methods Evaluation of a Whole Person Approach for Patients with Advanced Chronic Illness. *Journal of Applied Gerontology*.
- Taborda-Whitt C, Cain CL, Frazer MS. Navigating the Boundaries of Innovative Health Care. *Contexts*.

Presentations

2016

- Anderson EW. Improving Care for Persons Late in Life. Learning lab presented at Institute for Healthcare Improvement: 17th Annual Summit on Improving Patient Care in the Office Practice and the Community; March 20-22, 2016; Orlando, Florida.
- Anderson EW, Greenberg P. LifeCourse - Brief Explanation of Preliminary Findings and the LC Intervention. Presentation at Minnesota Gerontological Society 40th Annual Conference: AS WE AGE: Trends, Transitions, Triumphs.; April 22, 2016; Brooklyn Center, Minnesota.
- Anderson EW, Schellinger S. Upstream Adventures - Initial Results from a Clinical Trial of Early Palliative Care, Delivered in the Community by Trained Lay Persons. Paper presented at American Academy of Hospice and Palliative Medicine Annual Assembly; March 9-12, 2016; Chicago, Illinois.
- Anderson EW, Schellinger S, Frazer MS. Understanding the Lives of Caregivers: Opening the Door to Important Conversations. Symposium presented at Gerontological Society of America 69th Annual Scientific Meeting: "New Lens on Aging"; November 16-20, 2016; New Orleans, Louisiana.
- Anderson EW, Schellinger S, Frazer MS. Understanding the Lives of Caregivers: Opening the Door to Important Conversations. Roundtable discussion presented at Collaborative Family Healthcare Association 18th Annual Conference: Celebrating the Many Faces and Places of Integration; October 13-15, 2016; Charlotte, North Carolina.
- Bingham P, Anugwom V, Curran S, Hunt A, Johnson K, Nelson S, Sutter L. LifeCourse—Design to Implementation in a Health System. Poster presented at Center to Advance Palliative Care National Seminar (CAPC); October 27-29, 2016; Orlando, Florida.
- Borson S, Mobley P. Measuring Caregiver Activation for Managing Advanced Illness at Home: Insights From LifeCourse. Presentation at Gerontological Society of America 69th Annual Scientific Meeting: "New Lens on Aging"; November 16-20, 2016; New Orleans, Louisiana.
- Cain CL, Frazer MS. Repeated Group Interviews: Supporting and Empowering Staff during Transformation. Poster presented at AcademyHealth Annual Research Meeting; June 27, 2016; Boston, Massachusetts.

- Fernstrom K, Britt H. Health Care Utilization Outcomes for LifeCourse Patients. Poster presented at Center to Advance Palliative Care National Seminar (CAPC); October 27-29, 2016; Orlando, Florida.
- Fernstrom K, Mobley P, Britt H. LifeCourse: An Innovative Approach to Late Life Care in the Community. Symposium presented at Minnesota Health Services Research Conference; March 1, 2016; St. Paul, Minnesota.
- Fernstrom K, Shippee ND, Shippee T, Cain CL, Jones A, Britt H. Development and Validation of a New Patient-centered Experience Tool in Patients with Serious Illness. Poster presented at AcademyHealth Annual Research Meeting; June 27, 2016; Boston, Massachusetts.
- Frazer MS, Mobley P. Quality of Life among Patients with Serious Illness in Late Life: A Mixed-methods Analysis. Poster presented at Gerontological Society of America 69th Annual Scientific Meeting: "New Lens on Aging"; November 16-20, 2016; New Orleans, Louisiana.
- Schellinger S. The 21st-Century Advanced Illness Care Team: How Team-based Care is Moving Medicine Beyond the Clinic into the Home and Community. Panel discussion at Project on Advanced Care and Health Policy, a collaboration between the Petrie-Flom Center at Harvard Law School and the Coalition to Transform Advanced Care (C-TAC); November 2, 2016; Cambridge, Massachusetts.
- Schellinger S. Innovations in a Community Based Approach to Serious Illness Care Delivery [webinar]. Stratis Health; May, 2016.
- Schellinger S, Anderson EW, Frazer MS. Dynamic Nature of Patient Self-defined Goals over the Serious Illness Experience. Symposium presented at Gerontological Society of America 69th Annual Scientific Meeting: "New Lens on Aging"; November 16-20, 2016; New Orleans, Louisiana.
- Schellinger S, Anderson EW, Frazer MS, Curran S, Fernstrom K. Speaking From the Heart: Heart Failure Goals Beyond ACP. Poster presented at Center to Advance Palliative Care National Seminar (CAPC); October 27-29, 2016; Orlando, Florida.
- Schellinger S, Blomberg J. Late Life Care: Maintaining a Sense of Well-being, Meaning and Purpose. Presentation at University of Minnesota Nursing: Caring for a Person with Memory Loss Conference; June 4, 2016; Twin Cities, Minnesota.
- Schellinger S, Curran S. An Innovative Approach to Operationalizing the Domains of Palliative Care. Presentation at Minnesota Network of Hospice & Palliative Care Annual Conference: Care, Connection & Renewal; April 10-12, 2016; Bloomington, Minnesota.
- Shippee T, Fernstrom K, Frazer MS, Mobley P, Shippee ND, Britt H. Evaluating Quality of Life: Whole Person Intervention for Late Life Patients with Chronic Illnesses. Poster presented at AcademyHealth Annual Research Meeting; June 25, 2016; Boston, Massachusetts.
- Shippee T, Shippee ND, Fernstrom K, Mobley P, Frazer MS, Britt H. Improving QOL for Late Life Patients: LifeCourse Findings. Poster presented at Center to Advance Palliative Care National Seminar (CAPC); October 27-29, 2016; Orlando, Florida.
- Taborda C, Cain C, Frazer MS. Forging Professional Identities: Lay Health Care Workers and Expertise. Paper presented at Eastern Sociological Society's Care Work Mini-Conference; March 19, 2016; Boston, Massachusetts.

2015

- Anderson EW. Upstream Adventures: Early Results of a Late Life Supportive Care Trial. Presentation at Minnesota Network of Hospice and Palliative Care Annual Conference: Joining Knowledge, Passions, and People; April 20-21, 2015; Bloomington, Minnesota.
- Anderson EW, Schellinger S, Shippee T, Frazer MS, Britt H. Using a Patient and Family Centered Approach in a Late Life Supportive Care Intervention-Pilot Phase Findings. Symposium

presented at Minnesota Health Services Research Conference; March 3, 2015; St. Paul, Minnesota.

Anderson EW, Schellinger S, Shippee T, Shippee ND, Britt H. Reinventing Late Life Care: Evidence for a Longitudinal, Whole Person Approach for Patients with Chronic Illnesses and Their Caregivers. Symposium presented at Gerontological Society of America 68th Annual Scientific Meeting; November 18-22, 2015; Orlando, Florida.

Anugwom V. Strengthening Cultural Sensitivity of a Late Life Supportive Care Approach. Presentation at Connecting to Transform Communities Conference: Stakeholders in Health and Wellness; November 16-17, 2015; Minneapolis, Minnesota.

Cain CL, Frazer MS, Schellinger S, White KM. Team Members' Wellbeing in the Development of a Supportive Care Program for Adults with Chronic Illness. Poster presented at AcademyHealth Annual Research Meeting; June 14-16, 2015; Minneapolis, Minnesota.

Fernstrom K, Prenevost R, Tong T, Britt H. Innovative Late Life Care Model Decreased Resource Utilization and Total Cost of Care. Poster presented at Gerontological Society of America 68th Annual Scientific Meeting; November 18-22, 2015; Orlando, Florida.

Fernstrom K, Prenevost R, Tong T, Britt H. Effect of an Innovative Late Life Care Approach on Resource Utilization. Poster presented at Center to Advance Palliative Care National Seminar (CAPC); November 12-14, 2015; San Antonio, Texas.

Fernstrom K, Prenevost R, Tong T, Britt H. Innovative Late Life Care Model Decreased Resource Utilization and Total Cost of Care. Poster presented at AcademyHealth Annual Research Meeting; June 14-16, 2015; Minneapolis, Minnesota.

Frazer MS, Chant AO. The Experiences of Interdisciplinary Team Members in a Newly Formed Late Life Supportive Care Approach. Poster presented at Collaborative Family Healthcare Association 17th Annual Conference; October 15-17, 2015; Portland, Oregon.

Frazer MS, Mendenhall T, Berge J. Engaging Families in Healthcare Research [webinar]. Collaborative Family Healthcare Association; 2015.

Schellinger S. LifeCourse: An Innovative Approach to Late Life Care in the Community [webinar]. International Palliative Care Network; 2015.

Schellinger S. What Matters at the End-of-Life? Honor, Respect and Support Goals and Preferences for Serious Illness. Presentation at Minnesota Network for Hospice and Palliative Care Annual Conference: Joining Knowledge, Passions, and People; April 20-21, 2015; Bloomington, Minnesota.

Schellinger S, Anderson EW. Delivery on What Matters Most in Late Life. Presentation at Institute for Clinical Systems Improvement 18th Annual Colloquium on Health Care Transformation; May 4-6, 2015; St. Paul, Minnesota.

Schellinger S, Anderson EW, Frazer MS, Cain CL. What Matters at End of Life: Early Results Related to Goals for Complex Chronic Illness Care. Poster presented at Gerontological Society of America 68th Annual Scientific Meeting; November 18-22, 2015; Orlando, Florida.

Schellinger S, Anderson EW, Frazer MS, Cain CL. What Matters at End of Life: Early Results Related to Goals for Complex Chronic Illness Care. Poster presented at AcademyHealth Annual Research Meeting; June 14-16, 2015; Minneapolis, Minnesota.

Shippee ND, Shippee T, Fernstrom K, Cain CL, Jones A, Britt H. Patient Experience with Care: Early Results from the LifeCourse Intervention. Poster presented at Gerontological Society of America 68th Annual Scientific Meeting; November 18-22, 2015; Orlando, Florida.

- Shippee ND, Shippee T, Fernstrom K, Cain CL, Jones A, Britt H. Patient and Caregiver Experience with Care: Early Results from the LifeCourse Intervention. Poster presented at Center to Advance Palliative Care (CAP-C) November 12-14, 2015; San Antonio, Texas.
- Shippee ND, Shippee T, Fernstrom K, Cain CL, Jones A, Britt H. Patient and Caregiver Experience with Care: Early Results from the LifeCourse Intervention. Poster presented at AcademyHealth Annual Research Meeting; June 14-16, 2015; Minneapolis, Minnesota.
- Shippee T, Frazer MS, Shippee ND, Britt H, Fernstrom K. Patient and Caregiver Quality of Life. Paper presented at Gerontological Society of America 68th Annual Scientific Meeting; November 18-22, 2015; Orlando, Florida.
- Shippee T, Frazer MS, Shippee ND, Britt H, Fernstrom K. Patient and Caregiver Quality of Life: Early Results from the LifeCourse Intervention. Poster presented at Center to Advance Palliative Care National Seminar (CAPC); November 12-14, 2015; San Antonio, Texas.
- Shippee T, Frazer MS, Shippee ND, Britt H, Fernstrom K. Patient and Caregiver Quality of Life: Early Results from the LifeCourse Intervention. Poster presented at AcademyHealth Annual Research Meeting; June 14-16, 2015; Minneapolis, Minnesota.

2014

- Anderson EW, Schellinger S. Moving the Elephant in the Room Upstream: A New Spin to the Traditional Palliative Care Team. Presentation at Minnesota Network for Hospice and Palliative Care Annual Conference: Improving Education-Improving Lives!; April 6-9, 2014; Bloomington, Minnesota.
- Anderson EW, Schellinger S, Frazer MS. New Model for Late Life Care: Intervention, Quality of Life, and Experience [webinar]. International Palliative Care Network; 2014.
- Anderson EW, Schellinger S, Frazer MS, Britt H. What Matters Most for Patients Living with Progress Chronic Illness? Understanding Goals for Individuals with Chronic Illness. Poster presented at Center to Advance Palliative Care National Seminar (CAPC); Pathways to Quality Palliative Care; November 13-15, 2014; Orlando, Florida.
- Britt H, Fernstrom K, Hanson K, Jones A, Shippee T, Shippee ND. Quality of Life and Care Experiences among Patients with Chronic Illness and their Caregivers: Early Results. Poster presented at Center to Advance Palliative Care National Seminar (CAPC); Pathways to Quality Palliative Care; November 13-15, 2014; Orlando, Florida.
- Cain CL, Frazer MS, Kilaberia R. Identity Work Within Attempts to Transform Health Care. Roundtable discussion presented at American Sociological Association 109th Annual Meeting; August 16-19, 2014; San Francisco, California.
- Frazer MS, Trudeau-Hern S, Cain CL, Kilaberia R. "Here's What I Do:" Role Definition within an Interdisciplinary, Late Life, Supportive Healthcare Team. Roundtable discussion presented at Collaborative Family Healthcare Association 16th Annual Conference; October 16-18, 2014; Washington, D.C.
- Friedman J. Decision Support Through Focused Observations from the Electronic Health Record: Using HEADS-UP Technique to Support Non-Clinical Professionals. Poster presented at Gerontological Society of America 67th Annual Scientific Meeting; November 5-9, 2014; Washington, D. C.
- Schellinger S. "What Matters Most" for Individuals and Families Living with Serious Illness [webinar]. Coalition to Transform Advanced Care (CTAC); August, 2014.
- Schellinger S, Cain CL, Frazer MS, Britt H. Team Wellbeing in the Development of a Supportive Care Program for Adults with Chronic Illness. Poster presented at Center to Advance Palliative Care National Seminar (CAPC); Pathways to Quality Palliative Care; November 13-15, 2014; Orlando, Florida.

Trudeau-Hern S, Chant A, Frazer MS. Barriers, Successes, and Role Development: A Content Analysis of a Family Therapist as a Member of Team-based End-of-life Healthcare Delivery Model. Poster presented at Collaborative Family Healthcare Association 16th Annual Conference; October 16-18, 2014; Washington, D.C.

2013

Anderson EW, Herman K, Spinelli W, Chant A, Rosenberg E, Shibrowski K, Roberts J, White K. Seeing the Whole Person: Systematic Implementation of the Domains of PC for all Care Team Members (PRED). Poster presented at Center to Advance Palliative Care National Seminar (CAPC); November 7, 2013; Dallas, Texas.

Anderson EW, Schellinger S. Moving Palliative Care Upstream: An Emerging Model; Presentation at Minnesota Network of Hospice and Palliative Care Annual Conference; April 14-16, 2013; Bloomington, Minnesota.

Britt H, Anderson EW, Schellinger S, Frazer MS. LifeCourse: Development and Implementation of a Late Life Supportive Care Intervention. Symposium presented at Minnesota Health Services Research Conference; March 5, 2013; St. Paul, Minnesota.

Fernstrom K, Krueger J, Hanson K, Anderson EW, Britt H. Creating a Flexible, On-demand, Report for Identifying Subjects for a Care Delivery Redesign Project Tasked with Improving End-of-life Care. Poster presented at American Medical Informatics Association Annual Symposium; November 16-20, 2013; Washington, D.C.

Nelson B. Pharmacist Role. Presentation at Minnesota Society of Hospital Pharmacists Annual Conference; 2013; Minnesota.

Schellinger S, Anderson EW, Britt H, Radel K. Team Based Supportive Care Approach Late in Life. Poster presented at Center to Advance Palliative Care National Seminar (CAPC); November 7, 2013; Dallas, Texas.

Windén T, Krueger J, Krypel K. Utilizing the Electronic Health Record for Research: Workflow Documentation and Developing EHR Tools for Subject Identification, Tracking, and Data Collection. Presentation at American Medical Informatics Association Annual Symposium; November 16-20, 2013; Washington, D.C.

News

Pres Releases

Allina Health researchers present LifeCourse findings at national palliative care conference [press release]. American Association for the Advancement of Science, October 20, 2016.

Allina Health presents LifeCourse developments at national conference [press release]. American Association for the Advancement of Science, June 15, 2016.

Howatt G. Allina Offers Life Lessons for the Dying. *Star Tribune*. June 16, 2016.

MinnPost Series

Schmickle S. Late-in-life care: Fragmentation and complexity for the chronically ill. March 18, 2014.

Schmickle S. Minnesota's 'health care homes' aim to fill gaps in support for late-in-life patients. March 19, 2014.

Harvey K. How do shuttling snowbirds handle their health care? March 31, 2014.

Albright S. Late-in-life care: Your experience, insights, and advice. April 16, 2014.

Perry S. Late-in-life health needs: Are we ready: A Q&A with Dr. Steve Miles. June 12, 2014.

- Perry S. Late-in-life care: Dr. Steve Miles on coping with illness, and transitioning from home. June 13, 2014.
- Perry S. Few doctors discuss end-of-life planning with heart-failure patients, Mayo study finds. June 18, 2014.
- Fitzgerald J. Late-in-life: To live at home, rural seniors need food, socialization, support. June 23, 2014.
- Schmickle S. Late-in-life health care: Initiatives aim to cut costs while increasing quality. August 4, 2014.
- Beal D. Transportation for the aging poses mounting challenge in Twin Cities. August 4, 2014.
- Cronin M. Minnesota responds to rural doctor shortage with teams, training, telemedicine. August 11, 2014.
- Perry S. Late-in-life care: The stressful, complicated world of surrogate decision-makers. August 20, 2014.
- Cronin M. The big late-in-life move: Assisted living is becoming a rite of passage. August 22, 2014.
- Schmickle S. Late-in-life: As U.S. 'spends more and gets less,' the Dutch offer myriad health and social supports. October 30, 2014.
- Schmickle S. Late-in-life: Innovations focus on care coordination and tailored support. November 17, 2014.
- Goetzman A. Late-in-Life: Unpaid caregiving ranges from shoveling the walk to working 24/7. December 22, 2014.
- Perry, S. Family Caregivers often asked to perform medical tasks with little or no training. December 23, 2014.

TV/ Radio Broadcast**Twin Cities Public Television - Late Life Series**

- Living With Chronic Illness. tpt aired 26 times between June 2014 and Jan 2016.
- Beyond the Doctor. tpt aired 26 times between Sept 2014 and Jan 2016.
- Meaning & Legacy. tpt aired 27 times between Oct 2014 and Jan 2016.
- Language of Health. tpt aired 27 times between Nov 2014 and Jan 2016.
- Redefining Care. tpt aired 35 times between March 2015 and Feb 2016.
- Cancer In Between. tpt aired 32 times between April 2015 and Jan 2016.
- Facing Dementia. tpt aired 22 times between June 2015 and April 2016.
- Exploring Possibilities. tpt will air 18 times between June 2015 and Sept 2016.
- Heart & Soul. tpt aired 14 times between Sept 2015 and Jan 2016.
- Making a Difference. tpt aired 22 times between Nov 2015 and August 2016.
- A Conversation with Atul Gawande. tpt aired 14 times between Jan 2016 and August 2016.

KMOJ Radio

- Bell F, Burger K, Wheeler P. Community Conversation: What Matters Most. KMOJ. May 17, 2015.
- Bell F, Azzahir A, Anugwom V, Curran S. Community Conversation: What Matters Most. KMOJ. August 16, 2015.
- Milford B, Erickson P, Anugwom V. Senior Perspectives. KMOJ. July 23, 2016

UNIVERSITY OF MINNESOTA

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October 20, 2016

Robina Foundation Board of Directors
c/o Penny Hunt, Executive Director
4900 IDS Center
80 South 8th Street
Minneapolis, MN 55402

Ladies and Gentlemen:

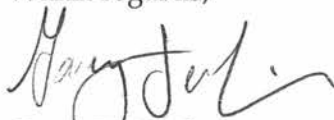
Thank you, thank you, thank you! While we are still developing our public announcement plan, I just wanted to write to express my sincerest appreciation for the transformative gift to endow the James H. Binger Center for New Americans (the "CNA") at the University of Minnesota Law School. This is truly one for the record books!

There is no question in my mind that the CNA has had (and will continue to have) a powerful impact on U.S. immigration law and policy while also being terribly important to the future of the Law School. As experiential learning and clinics increasingly become vital aspects of legal education, defining programs at law schools, and highly valued by both employers and prospective students, the CNA greatly expands the reach of our offerings, standing of our programs, and the overall prestige of Minnesota Law. In a short time, the Center's accomplishments have been truly remarkable and place our clinic programs in rarified air. (The reality is that most law clinics don't have a regular docket of cases reaching federal circuit courts or, let alone, the Supreme Court of the United States.)

The CNA is an essential part of our identity as a law school and the richness of our educational program. And now it's work and legacy are secure.

Again, many thanks for the Foundation's support and involvement in launching—and now securing the future of—the Binger Center for New Americans. I am thrilled to know that it will transform the lives of law students, clients, and the nation, in perpetuity.

Warm regards,



Garry W. Jenkins
Dean and William S. Pattee Professor of Law

UNIVERSITY OF MINNESOTA

Twin Cities Campus

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November 1, 2016

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

Dear Penny,

I am enclosing annual reports for our Scholarship Match Program and our Robina Criminal Law and Criminal Justice Institute. If you have any questions, please let me know.

As always, we are deeply grateful for the Foundation's support.

All best regards,



Garry W. Jenkins
Dean and William S. Pattee Professor of Law

Enclosures



University of Minnesota Law School

Report to the Robina Foundation on
The Robina Institute of Criminal Law and Criminal Justice
October 24, 2016

Annual Report: Original Grant Year 5; Enhancement Grant Year 3 (2015-16)

Program Area 1: Sentencing Law and Policy (SLP)

Goals and Objectives.

SLP seeks to influence and promote large-scale, systemic improvements in sentencing law and policy in two ways: by providing assistance directly to individual jurisdictions and law reform organizations; and by producing, encouraging, collecting, and disseminating policy-relevant research about the operations and effects of sentencing systems in the United States and elsewhere, and the effects of these systems on public safety, sentencing proportionality, racial and ethnic disparities, and imprisonment rates. SLP received an enhancement grant to fund four multi-state law-reform projects: the Probation Revocation Project, the Sentencing Guidelines Repository Project, the Parole Release and Revocation Project, and the Criminal History Project. The common goal for each of these projects is to promote the reduction of unnecessary incarceration and the more efficient and effective use of corrections resources without compromising public safety. A summary of SLP activities follows.

Activities.

1. *Strategic Planning and Fundraising.* Now that the four enhancement grant projects are on track to achieve their anticipated goals, the Institute Directors have been engaging in strategic planning about the future of the Institute. The Robina Institute has become a nationally known entity, and has received feedback that the work of the Institute should continue on into the future. But in order to do that, the Institute must become fully self-funding. It is unlikely that the Institute will be able to secure enough funding to continue at its current staffing level, and this in turn will impact the work that the Institute is able to do. At a minimum, the Institute would like to continue its work in sentencing guidelines and parole, and continue to provide general expertise and assistance to the local (MN) criminal justice system. To support these efforts, the Institute has engaged a consultant to help identify external grant funding opportunities and to develop an individual donor program. The Institute will also participate in Give to the Max day in November.

2. *Model Penal Code.* The Model Penal Code (MPC): Sentencing project is in its final stages. Subjects of the final draft include new limits on the use of incarceration; victims' rights in sentencing and corrections processes; procedures for sentencing



hearings and sentence appeals; sentence modification; alternative “restorative justice” procedures for the disposition of some cases; and accelerated release of prisoners, jail inmates, probationers, or parolees in circumstances of correctional overcrowding. When the MPC project wins final approval, it will be a major outreach opportunity for the Institute. Already the Pew Charitable Trusts’ Public Safety Performance Project has expressed interest in working with the Institute to bring the MPC to the attention of responsible state officials, and to use it to promote legislative change in receptive states. **Result:** *The fifth and last volume of the project was approved by the American Law Institute (ALI) Council in October 2016, and will be presented to the full ALI membership for final approval in May 2017.*

3. *Annual Conference.* The Institute held its annual conference, *Paying For The Past: The Consequences of Criminal Convictions*, on October 7, 2016. The conference grew out of Institute’s Criminal History Project, and was conceived, organized, and hosted by the Project team and Institute staff. The conference had three main goals. First, we sought to educate the public and criminal justice professionals about the nature and importance of sentencing enhancements based on the offender’s prior record by presenting key findings of the Robina project and suggesting possible reforms for discussion. Second, we directed the audience’s attention to other important and problematic consequences of criminal records, beyond their effect on sentence severity. Third, we wanted to identify and explore common themes underlying these problematic consequences of criminal records, in particular, their typical overbreadth, disparate impacts on disadvantaged non-white offenders, and mutually-reinforcing adverse effects. The morning session presented Criminal History Project findings, followed by a panel discussion and audience questions. The panelists were chosen to reflect a diversity of viewpoints and expertise, including a prosecutor and defender, a member of the Massachusetts Sentencing Commission, the Executive Director of the North Carolina Sentencing and Policy Advisory Commission, and the Minnesota Commissioner of Human Rights. The two afternoon sessions explored broader consequences of offender records. The first session addressed the problem of widespread felon disenfranchisement; it was led by University of Minnesota Sociology professor Christopher Uggen, one of the most nationally-prominent experts on this topic, and included audience participation by means of wireless clickers capable of instantly tabulating answers to questions raised by the presenter. The second session consisted of an interview and audience questions for James Jacobs, a world-renowned law professor and criminologist from New York University whose 2015 book, *The Eternal Criminal Record*, comprehensively explores the creation, dissemination, use, and misuse of arrest and conviction records within and outside of the criminal justice system. This was the first Robina annual conference for which we charged an admission fee. We did this in order to gauge the effect it would have on attendance, and to assess the feasibility of making future meetings partly or fully self-financed. Despite the fee, there were 190 registrants. Post-event participant reviews revealed high



levels of audience satisfaction, particularly with the Robina staff presentation. Participants also expressed a desire for more such events. **Result:** *The Robina Institute was able communicate research results from the Criminal History Project to a wide audience and successfully staged its first annual conference with an admission fee.*

4. *American Exceptionalism in Crime and Punishment.* **Result:** *Institute Co-Director Kevin Reitz has completed writing and editorial work for a book of this title, to be published by Oxford University Press in mid-2017. The book grew out of the Institute's Annual Conference in 2013, which has sparked an expansion of interest in the field of comparative criminal justice policy, and has focused renewed attention on possibilities that the U.S. has much to learn from other, less punitive nations.*

5. *Service to MN Criminal Justice System.* Throughout its efforts, the Robina Institute makes it a high priority to be of service to the local criminal justice system. One effort, described in the Criminal Law Theory section below, is the Institute's work in the area of mental health and criminal justice. **Result:** *In the past year, the Executive Director has served on Senator Latz's Prison Population Control Task Force and the legislatively-mandated Earned Compliance in Probation Committee. Ebony Ruhland has presented to the Hennepin County Bench on findings from our Probation Project.*

6. *SLP Enhancement Grant Projects.* The following activities comprise our work in the four SLP Enhancement Grant Projects.

a. **Probation Revocation Project.**

The goals of the Probation Revocation Project are to: (1) profile the diversity of probation revocation practices nationally; and (2) work directly with several jurisdictions interested in reforming their existing revocation practices. We approach probation revocation as an important but neglected element of American incarceration policy, and as a key lever of change.

The Project is currently active in seven jurisdictions, ranging from small/rural to large/urban. These are Bell and Wharton Counties, Texas; Ramsey County, Hennepin County, and Marshall District, Minnesota; New York City; and the Commonwealth of Massachusetts (a statewide probation system).

The work in most sites has been in two phases: The "Alpha" phase develops an in-depth profile of existing revocation and related practices. The "Beta" phase is devoted to revocation-related experimentation and reform. **Result:** *As of October 2016, six sites have completed the Alpha phase and have moved into the Beta phase. A seventh site – New York City – elected to proceed immediately to a Beta project due to the quality of its preexisting information systems.*

Three Alpha reports have been published by the Institute, with the remaining three in process. These include a statistical analysis of each site's revocation practices, including



elements of their systems that contribute to revocation rates such as lengths of probation terms and “intensity” of conditions. One unique feature of the Project’s work has been the gathering of interview data from a wide variety of stakeholders, including probationers and prisoners who have been revoked from probation; this concentration on offenders’ perspectives is rarely undertaken in the criminal justice world. The Alpha process has yielded rich information, and has been critical in identifying subjects for Beta projects. The Institute is in the process of publishing a “comparative” summary of findings from all six individual Alpha reports, to highlight similarities and differences across the country, in urban versus rural settings, and to bring the benefits of our work to a wider national audience.

In the most advanced Beta project (begun in Bell County, Texas), project staff have expanded our work into four Texas counties and across a variety of stakeholders to study the state’s current heavy emphasis on the imposition and collection of probation supervision fees. These fees account for 50 to 90% of probation departments’ operating budgets across the state. Heavy reliance on fees has unintended consequences, including lengthened probation terms, the withholding of early termination for “paying customers,” greater exposure to the risk of revocation, loss of attention to reintegrative programming, displacement of funds that could be used for victim restitution, and direct impediment of probationers’ efforts to get back on their feet. We are pursuing local and statewide reforms, and team members have been invited to participate in a U.S. Department of Justice initiative on these issues.

In Massachusetts, our Beta work has been focused on the subject of over-burdensome conditions of supervision, which create high numbers of violations and revocations downstream. With the endorsement of the state probation department and the leadership of every level of the Massachusetts court system, we have launched a pilot project in a select number of jurisdictions to provide streamlined guidelines for the imposition of conditions. In Wharton County, Texas, we are assisting the probation office in the design of guidelines for incentives and sanctions, exploring ways to encourage productive behaviors in addition to the proportionate punishment of violations. In New York City, we have begun work on a Beta project to introduce elements of restorative justice into the city’s violations and revocations procedures. This is something line probation officers are already experimenting with at the ground level, but the department is interesting in widening their practices and integrating them into the system as a whole. In Hennepin County, we will serve as a resource to the County’s Initiative for Equal Justice, which includes a Subcommittee on Probation Revocations. A Beta Project with Ramsey County is still in the design stage.

The project team has engaged in considerable networking and outreach. Our publication rate has accelerated as our site work has matured—as has our presence at national conferences of practitioners. One publication, on comparative rates of



probation supervision in the U.S. and Europe, received attention in the national media and in international reform groups. Ronald Corbett, Project Director and Coordinator, was the recipient of the University of Cincinnati Award at the 2016 Annual Meeting of the American Probation and Parole Association. We have established a relationship with the Pew Charitable Trusts, and have been asked to consult on the next stages of their state-centered criminal justice initiatives.

b. Sentencing Guidelines Repository Project.

The first-stage goal of this project was to create and steadily expand an on-line database of existing materials on sentencing guidelines systems, along with original, expert-drafted materials designed to help users of the website understand and make maximum use of the collection. Because the site has grown into much more than a repository of documents, it is now called the Sentencing Guidelines Resource Center (www.sentencing.umn.edu). Longer-term goals of this project are to facilitate the exchange of information, expertise, and experience on sentencing policy, guidelines, and commissions; promote multijurisdictional comparative research and policy analysis; and promote the adoption and retention of best practices in sentencing guidelines systems.

The Sentencing Guidelines Resource Center meets both the short-term and long-term goals of the Repository Project. The repository page of the website, which currently contains materials from 23 sentencing guidelines jurisdictions, is the embodiment of the database initially envisioned when funding was sought for this project. In addition, the website currently includes in-depth information about 14 sentencing guidelines jurisdictions and several articles about sentencing guidelines and sentencing commissions. ***Result:** With the development of the rich set of information contained within the Sentencing Guidelines Resource Center, the Robina Institute has become known for its expertise in sentencing guidelines, and has been called upon repeatedly to consult with jurisdictions in this area.*

In Massachusetts, the governor reinvigorated the Massachusetts Sentencing Commission, and this Commission has spent the last year reviewing its guidelines and developing a full-scale proposal for revision. The proposal is currently out for public comment. The Massachusetts sentencing guidelines, which were first drafted in 1998, have never been formally adopted within the state. With this current proposal, the Commission hopes to gain formal adoption of the guidelines by the Legislature. Professor Frase and Ms. Mitchell consulted with a small working group of the Commission on multiple occasions, and have responded to repeated requests for additional research and information from the Commission Chair during this period.

The U.S. Sentencing Commission has been discussing whether it can overcome the U.S. Supreme Court decision in *Booker*, which rendered the guidelines advisory. As we



reported last year, Professor Frase was asked to present to the U.S. Commission about how guidelines work in the states. And in the year that followed, the Commission has contacted the Robina Institute several times with targeted questions about how the states handle various issues, such as whether they count arrests in their criminal history scores. In August, the U.S. Sentencing Commission held its annual training conference in Minneapolis, and Ms. Mitchell was asked to speak at the opening reception.

As another example, because of the Robina Institute's expertise in sentencing guidelines, and its ties to the National Association of Sentencing Commissions, Ms. Mitchell was asked to present about sentencing commissions and sentencing guidelines to the Commission on the Administration of Justice in Nevada. Professor Frase and Ms. Mitchell then both participated in follow up meetings, and learned that the Commission has been actively considering whether to recommend to the Nevada Legislature that it create a sentencing commission and task that commission with developing sentencing guidelines. If this interest holds, it would be the first state to consider moving to a sentencing guidelines system since the early 2000's when Alabama and Washington, D.C. enacted their sentencing guidelines.

These real-world impacts demonstrate both how unique it is for the Robina Institute to have such expertise in sentencing guidelines and how needed that expertise is. Over the next year, we will continue to add to and update content in the Sentencing Guidelines Resource Center and continue to provide consulting services as needed to jurisdictions across the country.

c. Parole Release and Revocation Project.

The goals of the Parole Release and Revocation Project are to inform and improve prison release and parole revocation practices nationwide by: (1) gathering and publicizing information about the current diversity of practice nationwide, including best and worst practices, with an aim toward maximizing policy impact; and (2) directing law reform work with selected jurisdictions.

Result: In 2016, Project staff published a major report with results of the 2015 National Survey of Paroling Authorities, a two-year effort that achieved a 90 percent response rate. The Institute has been publishing an ongoing series of "infographics" to highlight the survey's major findings, which will continue over the next two years. A separate report, highlighting the views of parole board chairs on the most important problems facing their field (a separate section of the National Survey) is in the publication process.

The Project's second major national initiative, to assemble detailed legal and policy information from all 50 states about their processes of prison release and parole revocation, has been steadily enlarged in scope and ambition. **Result:** "Profiles in Parole Release and Revocation" have now been published for three states (Colorado, Pennsylvania, and Texas), with six more in press, and an additional 20 profiles in draft form. As they have



evolved, the Legal Profiles now resemble the state reports prepared for the Sentencing Guidelines Resource Center. Each Profile is approximately 25 pages long, and is comprehensively reviewed by experts in each state before publication. Policy-relevant information of this kind has never been available to parole agencies to compare and evaluate their practices. As with the Guidelines Resource Center, the Institute is working on ways to preserve and update this parole-based resource beyond expiration of our current funding.

New direct law reform projects have begun in the past year with state parole boards in Pennsylvania and Iowa. (In Pennsylvania, we are working under agreement with both the parole board and the state sentencing commission.) In addition, Institute staff has started a project to evaluate the new Federal Reentry Court in the District of Minnesota. Our work with the Colorado State Board of Parole was ended after we delivered a confidential report on the decision making practices and approaches of individual board members. Following turnover in the Chair of the Colorado Board, the Board elected not to pursue an additional statistical analysis of decisions under their parole guidelines. Instead, we accepted similar research undertakings to examine decisional instruments in Pennsylvania and Iowa, with the goal of helping those states design new instruments.

The Parole Advisory Council met twice in 2016. Members have been instrumental in providing guidance on the project's main areas of activity, including best uses of National Survey and the Legal Profiles, and the most promising areas of focus for our direct law-reform work. Project team members presented at annual meetings of the American Society of Criminology and the Association of Paroling Authorities International, which remains a close partner in dissemination of our work. Project Director Edward Rhine, in coauthorship with Stanford Law Professor Joan Petersilia and Institute Co-Director Kevin Reitz, published two comprehensive articles on the reform of American prison-release systems, and are now writing a book on that subject for Oxford University Press. They are using the National Survey and Legal Profiles as essential source materials.

d. Criminal History Project.

The goals of this project are to: 1) Comprehensively document the ways in which American guidelines systems enhance sentences on the basis of the offender's prior record, the stated justifications for these enhancements, and the costs and benefits; 2) identify and work with guidelines commissions interested in studying and improving their use of criminal history enhancements; 3) carry out or commission new research on criminal history rules and impacts; 4) encourage criminologists and other researchers to study the operation and effects of such enhancements; 5) increase public and professional awareness of a sentencing problem which accounts for significant prison resources and racial disproportionality in prison.

The first goal above was substantially achieved with the publication of the *Criminal History Enhancements Sourcebook* in August 2015. This 120-page monograph – the first-ever detailed survey of criminal history sentence-enhancement provisions under state and federal guidelines systems -- was widely disseminated and, with minor revisions and corrections, is now in its second printing.¹ The Sourcebook analyzes the critical dimensions of criminal history scores utilized in sentencing guidelines schemes, examines the policy issues that commissions face when determining how to account for an offender's prior conviction record, and touches on the disparate racial impact of these policy choices as well as their impact on prison population.

We continue to receive frequent and very positive comments from sentencing commissioners and staff, attesting to the quality and usefulness of the Sourcebook and indicating that it is already helping us to achieve our goal of working with sentencing commissions to study and improve their use of criminal history enhancements. We have consulted with commission members in Nevada about criminal history and other topics. At the recently-reconstituted Michigan Sentencing Commission, the *Sourcebook* has been heavily relied upon as a basis for criminal history reform discussions. **Result:** *We have had numerous conversations with sentencing commissioners and staff in Massachusetts and Pennsylvania, and have been pleased to see our work reflected in a number of criminal history reform proposals in these states.*

We continue to carry out new research on criminal history enhancements. As previously reported, Professors Frase and Roberts (now joined, for several chapters, by research fellow Rhys Hester) are writing a book about criminal history enhancements to be published by Oxford University Press in late 2017. Last November the authors convened a meeting of sentencing law and policy specialists to critique the manuscript; we received many useful suggestions for revisions, which are expected to be completed by the end of this year. To further develop and disseminate our research on this topic, the four Sourcebook authors have requested and been encouraged to submit an article for publication next year in *Crime and Justice: A Review of Research*, edited by Michael Tonry. A recent Thomson-Reuters review showed that this is the most widely-cited criminal justice journal in the world, and the second-most-widely-cited law-related journal. A submission will be made to *Crime and Justice* in early 2017. We also continue work on our project to assess the extent to which the Minnesota guidelines criminal history score accurately predicts an offender's risk or future offending. This novel and very challenging project has encountered a number of technical problems related to the complex data bases maintained by the relevant Minnesota criminal justice agencies; accordingly, we have sought assistance in working with these agencies from the Minnesota Sentencing Guidelines Commission, which has done similar work on a

¹ Available online: <http://www.robinainstitute.org/publications/criminal-history-enhancements-sourcebook/>.



smaller scale in the past. Lastly, we continue our research on public opinion as it relates to criminal history enhancements. ***Result:** Two national public opinion surveys have been conducted; the results have been or will be presented at the 2016 annual meetings of the National Association of Sentencing Commissions (NASC) and the American Society of Criminology, and will be published in a journal article that will be submitted to a peer-reviewed journal in November 2016.* Notable findings from this research are that the public strongly supports limits on the consideration of convictions entered many years in the past, and also strongly supports the policy of not considering an adult offender's prior juvenile court adjudications. Additional peer-review publications will be submitted in 2017.

Our actions to encourage criminologists and other researchers to study criminal history issues have included the following. At the 2015 annual meeting of the American Society of Criminology (ASC) we presented a paper discussing the disconnect between what is known about criminal careers and how criminal history is used at sentencing – as offenders become older their risk of further crime steadily declines, but their criminal history scores and recommended sentence severity continue to increase. At the 2016 ASC annual meeting we will convene a roundtable discussion of this problem which will feature comments by some of the world's most respected criminal careers scholars. Researchers around the country also seem to be increasingly aware of our expertise and goal of encouraging research on criminal history enhancements – several scholars have sent us their working papers on this topic and sought our comments and suggestions. Finally, we continue to add to our collection of recent sentencing data from guidelines states, which is one of the most comprehensive sentencing databases in existence. The Robina annual meeting this fall and our other work described above forced us to delay our plan to solicit research papers using this data and convene a U.S. comparative sentencing conference, but we hope to do so in the future.

Program Area 2: Criminal Justice Policy

Goals and Objectives

The work in this Program Area aims to contribute to a major rethinking and restructuring of the American criminal justice system.

Activities

The following activities and projects comprise our work in this Program Area. Work on some projects slowed in 2015-2016 as a result of health problems experienced by Michael Tonry in the latter half of 2015. Lost time has however been recouped and all projects are operating according to their original schedules.

1. *Reinventing American Sentencing.* The institute continued its scholarly efforts to assist American policy makers in their efforts to move beyond mass incarceration to develop and rebuild criminal justice institutions, policies, and practices in order to



make them fairer, more just, and more effective in the future and to assist them to address the legacies of the problems of the recent past. Most recently, Professor Tonry undertook a book project analyzing the transformation of U.S. sentencing systems from early reforms in the mid-1970's to the transition towards harsher sentences in the mid-1980s through subsequent developments through 2015. The book examines the empirical evidence of consequences of changes in sentencing policy for court operations, crime rates, sentences, and imprisonment rates over the past four decades. It concludes with a set of much more fully developed, justified, and explained law reform proposals. **Result:** *Sentencing Fragments: Penal Reform in America, 1975-2025* was published by Oxford University Press in December 2015.

2. *Reinventing American Criminal Justice Systems.* Changes in sentencing laws, policies, and practices were at the heart of America's march to mass incarceration, but redressing it will require changes throughout the criminal justice system. In May 2015, we convened a conference to in which thirty-two senior scholars and practitioners, including heads of federal agencies and leading law reform organizations, discussed commissioned papers on policing, community corrections, gun violence, substance abuse treatment, mental illness, parole release, illegal drugs, and sentencing. The draft papers were also critically assessed and reviewed by leading subject matter experts. All were substantially revised. **Result:** *Reinventing American Criminal Justice*, edited by Michael Tonry and Daniel S. Nagin, will be published in January 2017 by the University of Chicago Press. The articles will be available on-line in advance of publication. Nagin is America's leading authority on the crime preventive effects of punishment and wrote the relevant chapter of the National Academy of Science's (NAS) 2014 mass incarceration report. He was also the chairman of a 2013 NAS panel report on the deterrent effects of capital punishment.

3. *Sentencing Policies and Practices in Western Countries.* Mass incarceration is the signature challenge facing American criminal justice and is in large part the product of severe sentencing laws (three-strikes, mandatory minimum, life without parole, truth-in-sentencing) enacted in the period 1980-1996. Undoing mass incarceration will require both repealing or substantially amending all such laws and devising methods for releasing many hundreds of people from prisons where they are now serving lengthy terms. All other Western countries experienced crime rate increases between the late 1960s and early 1990s equal to or greater than those in the United States but none enacted severe new sentencing laws or experienced massive increases in imprisonment. The US imprisonment rate increased five-fold after 1973. American policy makers could learn much from their peers in other countries in relation to sentencing laws and policies. The aim of this project is to provide that information by producing an in-depth and up-to-date collection of original essays on the current state of and recent developments in sentencing policies and practices in a wide range of countries. An October 2014 conference was held on the characteristics of and changes in sentencing



and sanctioning policies in eight different countries (Canada, England and Wales, Germany, France, Italy, Belgium, Poland, South Africa, Australia) and one region (Scandinavia). The conference brought together prominent American and foreign scholars in criminal law, criminal justice, and criminology to discuss commissioned papers over three days. All of the papers subsequently underwent peer review by leading experts from the respective countries (one was dropped in light of justified criticisms), and all were substantially revised. A comprehensive paper on American sentencing laws was added after the conference. **Result:** *Sentencing Policies and Practices in Western Countries – Comparative and Cross-national Perspectives*, edited by Michael Tonry, was published in September, 2016 by the University of Chicago Press. Copies of articles were made available on line “in advance of publication” in mid-2016.

Program Area 3: Criminal Law Theory

Goals and Objectives

The goal this Program Area is to work towards a better understanding of the proper aims, role and limits of the criminal law – an understanding that will help to guide the work of scholars, practitioners, and policy makers seeking to reform our criminal law. One route to this goal lies through the realm of normative theory. Another route begins from specific, concrete problems that face our existing systems of criminal law: by thinking more thoroughly about such problems, and about their roots, we can hope to work towards a better understanding of the values, principles and aims that can point the way towards their solution.

1. *Mental Health in Criminal Justice.* **Result:** *The Criminal Law Theory’s most significant undertaking this past year was the launching of a series addressing mental health in the context of criminal justice.* Criminal justice professionals estimate that 25-40% of offenders engaged in low-level crime suffer from some form of mental illness. Treating these individuals in the traditional justice model – where arrest can lead to jail, conviction, and incarceration – has been expensive, ineffective, and in some cases, inhumane. The Robina Institute has sought to engage practitioners in a discussion of the issues and to help uncover potential solutions and new ways of doing business. The Institute engaged former Chief Public Defender John Stuart to lead our efforts in this area. The series began with a public conference entitled *Criminal Justice and Mental Illness: Creating Alternatives in Minnesota*. With nearly 250 attendees, this conference provided an excellent forum for describing the problem and sharing best practices and solutions between and among practitioners from the courts, law enforcement, correctional services, social work, and mental health services. U.S. Senator Al Franken participated by delivering a special video message to conferees.

In March of 2016, the Minnesota Legislative Auditor released a report entitled *Mental Health Services in County Jails*. One of the issues highlighted in the report was the “competency gap” wherein an individual is found incompetent to stand trial, but does



not meet the standard for civil commitment. The Robina Institute convened a Competency Round Table in June to talk about this issue. Participants included defense attorneys, prosecutors, judges, mental health providers, civil commitment examiners, and others. The Robina Institute produced a report detailing the discussion and recommendations and is currently working to disseminate that report to practitioners and lawmakers. In the coming year, the Institute will produce a follow up report on potential law changes that could be made to address this gap. The Institute is also planning programs about the ethical considerations of representing persons with mental illness and what traditional courts can learn from the experiences of problem solving Mental Health Courts.

2. *International Criminal Law. Result:* In April 2016, the Robina Institute partnered with the Nathanson Centre on Transnational Human Rights, Crime and Security at Osgoode School of Law to put on the International Criminal Law Conference. This conference brought together a group of dynamic and original early and mid-career criminal law theorists to address the theoretical underpinnings of what should be criminalized in the context of international law.

3. *Sexual Exploitation. Result:* In June of 2016 the Robina Institute on Criminal Law and Criminal Justice sponsored a day-long conference at Villanova University Charles Widger School of Law, in collaboration with the Institute on Criminal Sexual Exploitation (CSE), titled "Commercial Sexual Exploitation: Shifting Perspectives and Policing Practices." The conference addressed the prevalent issue of commercial sexual exploitation today and how shifting law enforcement strategies and policies have provided an avenue for reform. With a diverse group of panelists ranging from law enforcement officers and prosecutors, to academics, program directors, and survivors alike, audiences have an opportunity to learn about the domestic and international response to the commercial sex trade.

* * *

An income and expense statement for the past year is attached. As always, we are very grateful to Jim Binger and the Foundation for making the Institute possible.

ROBINA INSTITUTE ON CRIMINAL LAW AND CRIMINAL JUSTICE
Income and Expense Statement for 7/1/2015 - 6/30/2016

	Budget FY2016	Expenditures FY2016	
Research Streams			
Criminal Law Theory	85,000	94,184	
Sentencing Law and Policy	85,000	151,990	(1)
Criminal Justice Policy	85,000	7,644	
Visitors	62,500	83,863	(1)
Conference/Target of Opportunity	60,000	15,248	(2)
Faculty Development	876,205	937,812	(3)
Co-Directors		47,594	
Junior Level Faculty		411,260	
Consulting Faculty		326,125	
Criminal Law Clinical Faculty		152,833	
General Operations	385,746	659,830	
Executive Director 50%		68,856	
Post-Doctoral Research Fellows		222,388	
Research Director		79,251	
Research Attorney		28,423	
Research Assistants		26,920	
IT/Web Development		62,854	
Administrative Assistant		58,442	
Events and Communications		68,472	
Travel & Other Operating		44,224	
Subtotal Robina Original	1,639,451	1,950,571	
Enhancement Projects			
Criminal History Project	206,265	111,978	
Probation Revocation Project	235,100	134,603	
Sentencing Guidelines Repository Project	228,544	29,216	
Parole Release and Revocation Project	200,088	115,170	
Executive Director 50%		68,855	
Subtotal Enhancement Projects	869,997	459,822	(4)
Total All Projects	2,509,448	2,410,393	

- (1) Overage addressed by utilizing carry-over balances.
- (2) The Robina Institute 2016 Annual Conference, "Paying for the Past: The Consequences of Criminal Convictions", was postponed from May to October 7, 2016 to allow time to complete research gauging public opinion about criminal history enhancements.
- (3) Uses carry-over from FY2014-15 when one faculty member was called away for most of the year.
- (4) Project expenses appear lower than budget because all staff salaries are shown above in the general operations section. All Robina staff work across multiple projects and activities.

**The Binger Center for New Theatre Funds Report
as of June 30, 2016**

Overall Endowment Performance for Fiscal Year 2016

Yale's endowment earned a 3.4% investment return for the year ending June 30, 2016. The endowment value declined from \$25.6 billion on June 30, 2015, to \$25.4 billion on June 30, 2016, net of spending that supports faculty salaries, student scholarships, and other expenses.

Spending from the endowment, which is the largest source of revenue for the University, for Yale's 2017 fiscal year is projected to be \$1.2 billion, representing approximately 34% of the University's net revenues. Endowment distributions to the operating budget have nearly doubled in the last decade, with an annualized increase in endowment spending of 5.9%.

The University's longer-term results remain in the top tier of institutional investors. Yale's endowment returned 8.1% per annum over the 10 years ending June 30, 2016, surpassing broad market results for domestic stocks, which returned 7.5% annually, and for domestic bonds, which returned 5.1% annually. Relative to the estimated 5.1% average return of college and university endowments, over the past decade Yale's investment performance added \$7.1 billion of value in the form of increased spending and enhanced endowment value. During the 10-year period, the endowment grew from \$18 billion to \$25.4 billion.

The Binger Center for New Theatre Endowment Fund I

Original Investment	\$15,000,000.00
Principal	\$15,000,000.00
Market Value	\$19,015,866.70
Expendable Income (2016-2017)	\$ 865,308.67

Total
950,850

The Binger Center for New Theatre Endowment Fund II

Original Investment	\$2,194,203.00*
Principal	\$1,868,382.05
Market Value	\$1,879,860.42
Expendable Income (2016-2017)	\$ 85,542.22

**Wasting endowment. Replaces The Binger Center for New Theatre Current Use Fund*

Calendar for year 2017 (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 5:● 12:○ 19:● 27:●	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 3:● 10:○ 18:● 26:●	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 5:● 12:○ 20:● 27:●
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October 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 5:○ 12:● 19:● 27:●	November 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 4:○ 10:● 18:● 26:●	December 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 3:○ 10:● 18:● 26:●

Holidays and Observances:

Jan 1 New Year's Day	May 14 Mother's Day	Nov 11 Veterans Day
Jan 2 'New Year's Day' observed	May 29 Memorial Day	Nov 23 Thanksgiving Day
Jan 16 Martin Luther King Day	Jun 18 Father's Day	Dec 24 Christmas Eve
Feb 14 Valentine's Day	Jul 4 Independence Day	Dec 25 Christmas Day
Feb 20 Washington's Birthday	Sep 4 Labor Day	Dec 31 New Year's Eve
Apr 13 Thomas Jefferson's Birthday	Oct 9 Columbus Day (Most regions)	
Apr 16 Easter Sunday	Oct 31 Halloween	

Robina Foundation 2017 Board Meeting Dates

DATE (2017)	PLACE/TIME
February 27 – March 1, 2017 (Mon, Tues, Wed) New York City (Lodging at The Lotos Club, Meetings at CFR)	New York City Monday, February 27 - 6:00 p.m. Dinner Tuesday, February 28 – 8:00 a.m. to 5:00 p.m. Tuesday, February 28 – 6:00 p.m. Dinner Wednesday, March 1 – 8:00 a.m. to 12 noon
May 16, 2017 (Tuesday) Conference Call	10:00 a.m. to 12 noon (CDT)
August 28-30, 2017 (Mon, Tues, Wed) Annual Meeting Minneapolis, Minnesota	Minneapolis, MN Monday, August 28 – 6:00 p.m. Dinner Tuesday, August 29 – 8:00 a.m. to 5:00 p.m. Tuesday, August 29 – 6:00 p.m. Dinner Wednesday, August 30 – 8:00 a.m. to 12 noon
November 16, 2017 (Thursday) Conference Call	10:00 a.m. to 12 noon (CST)

Calendar for year 2018 (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:○ 8:● 16:● 24:● 31:○	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 7:● 15:● 23:●	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 1:○ 9:● 17:● 24:● 31:○
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Holidays and Observances:

Jan 1 New Year's Day	May 13 Mother's Day	Oct 31 Halloween
Jan 15 Martin Luther King Day	May 28 Memorial Day	Nov 11 Veterans Day
Feb 14 Valentine's Day	Jun 17 Father's Day	Nov 22 Thanksgiving Day
Feb 19 Presidents' Day	Jul 4 Independence Day	Dec 24 Christmas Eve
Apr 1 Easter Sunday	Sep 3 Labor Day	Dec 25 Christmas Day
Apr 13 Thomas Jefferson's Birthday	Oct 8 Columbus Day (Most regions)	Dec 31 New Year's Eve

Calendar generated on www.timeanddate.com/calendar

Robina Foundation 2018 Board Meeting Dates

DATE (2018)	PLACE/TIME
February 26-28, 2018 (Mon, Tues, Wed) Location to be Determined	Location to be Determined Monday, February 26 - 6:00 p.m. Dinner Tuesday, February 27 - 8:00 a.m. to 5:00 p.m. Tuesday, February 27 - 6:00 p.m. Dinner Wednesday, February 28 - 8:00 a.m. to 12 noon
May 15, 2018 (Tuesday) Conference Call	10:00 a.m. to 12 noon (CDT)
August 27-29, 2018 (Mon, Tues, Wed) Annual Meeting Minneapolis, Minnesota	Minneapolis, MN Monday, August 27 - 6:00 p.m. Dinner Tuesday, August 28 - 8:00 a.m. to 5:00 p.m. Tuesday, August 28 - 6:00 p.m. Dinner Wednesday, August 29 - 8:00 a.m. to 12 noon
November 15, 2018 (Thursday) Conference Call	10:00 a.m. to 12 noon (CST)

Nancy Gilberg

From: Bingham, Paige E <Paige.Bingham@allina.com>
Sent: Thursday, December 29, 2016 4:45 PM
To: Nancy Gilberg
Cc: Britt, Heather R; 'Penny Hunt'; Wheeler, Penny
Subject: Robina Reports due for 2017
Attachments: All IAGG 2017 Abstract Submitted.docx

Nancy,

Yes, no snow this Christmas, but I sure do like the above zero weather. The arctic chill a week before the holidays was a reminder that warmer is better.

Thank you for the Annual Report information and dates. We will be sure to submit the LifeCourse Annual Report on February 7 along with the detailed results discussed below. Penny Wheeler had also asked Penny Hunt about having an opportunity to share our experience and gratitude with the Robina Board when they meet. Might that happen in February or would it be later in the year?

We also received word over the holidays that LifeCourse was accepted for a symposium and 4 presentations at the major geriatrics conference happening in San Francisco in July. IAGG—International Association of Geriatrics & Gerontology occurs every 4 years and is hosted by 73 member organizations. I provided a quick recap below of the topics, dates and times for the LifeCourse presentations. As I mentioned earlier this year, Steve Schroeder agreed to be the discussant for the LifeCourse IAGG symposium and we are delighted that all the LifeCourse submissions were accepted for presentations.

Hope you have a wonderful New Year's celebration this weekend! Paige

Here's the final line-up for IAGG <https://www.iagg2017.org/>

SYMPOSIUM ACCEPTED - And FOUR (4) PRESENTATIONS

Symposium ACCEPTED in Symposium

Design/Intervention

Research

Implementation/Evaluation

Utilization ACCEPTED

Quality of Life ACCEPTED

Patient Experience ACCEPTED

Goals ACCEPTED

Abstract ID: 2581105

Abstract Title: Life Course Beyond Research: Learning Through Implementation and Evaluation

Session Title: Design, Results, and Implementation of a Whole Person Intervention for Late Life Care

Session Type: Symposium

Date: July 23, 2017

Time: 9:00 AM - 10:30 AM

Received by: Paige Bingham

Abstract ID: 2581229

Abstract Title: Effect of a Person-Centered Intervention on Patient Experience With Care in Serious Chronic Illness

Session Title: Palliative Care for Older Adults

Session Type: Paper

Date: July 24, 2017

Time: 2:00 PM - 3:30 PM

Received by: Nate Shippe

Abstract ID: 2581272

Abstract Title: Speaking From the Heart: The Changing Goals of Heart Failure Patients in the Last Years of Life

Session Title: Care Preferences at End of Life

Session Type: Paper

Date: July 24, 2017

Time: 4:00 PM - 5:30 PM

Received by: Sandy Schellinger

Abstract ID: 2581184

Abstract Title: Improving Quality of Life for Late Life Patients: Key Findings From LifeCourse Intervention

Session Title: Quality of Life and Well-Being: International Perspectives

Session Type: Paper

Date: July 25, 2017

Time: 8:00 AM - 9:30 AM

Received by: Tetyana Shippee

Abstract ID: 2581158

Abstract Title: Health Care Utilization Outcomes for Patients Enrolled in a Late Life Care Intervention

Session Title: Unique Perspectives in Understanding End of Life Care Experiences

Session Type: Paper

Date: July 25, 2017

Time: 2:00 PM - 3:30 PM

Received by: Karl Fernstrom

From: Nancy Gilberg [mailto:ngilberg@robinafoundation.org]

Sent: Thursday, December 29, 2016 1:19 PM

To: Bingham, Paige E <Paige.Bingham@allina.com>

Cc: Britt, Heather R <Heather.Britt@allina.com>; 'Penny Hunt' <pennhunt@gmail.com>

Subject: Reports due for 2017

Hi Paige,

Hoping you've been having some time off to enjoy the Holidays! I had hoped we would have had snow instead of the rain!!

As before your reports are due for our February Board Meeting this year and should include the following re LifeCourse: Annual Report, Analysis of The Final Report on the Research Study, and the Projected/Planned Use of the \$1,000,000 you'll receive in 2017. They are due in our office on Tuesday, February 7th (electronic and eight hard copies).

Thank you and wishing you a very good 2017!

Nancy

Symposium Overview (250 words)

In the next decade and a half, communities in the US will care for the same number of individuals over the age of 65 as they have over the past combined nine decades. Seven in ten of these individuals will live with a progressive serious illness that will last not weeks but months to years. While traditional palliative care services provided through inpatient settings and community-based models have demonstrated positive impacts on symptom management and experiences of care, there exists a woefully small number of palliative trained providers to enable sufficient support for the growing population. The need for innovative, upstream palliative care models that can be deployed wide scale and sustainably is critical. A large healthcare delivery system in the upper Midwest has developed an innovative model—LifeCourse—to support patients facing advanced serious illness and their key friends and families. The model is being evaluated in partnership with 900 intervention and usual care patients and their key friends and family (total n=1,800). In an effort to close the widening gap between the production of positive research results from new interventions and ultimate systematic implementation of those interventions, the community-based care system testing this approach has moved to rapid deployment of the model across its primary and specialty care service areas. This symposium will offer an overview of the development of the LifeCourse model, the components of the model, the results to date from the research trial, and lessons from the rapid deployment of LifeCourse across the healthcare system.

Symposium Design Abstract

Title: Creating a Whole Person Intervention for Patients with Serious Illness and their Caregivers

Authors: Eric Anderson, Monica Frazer, Sandy Schellinger, Jess Roberts, Kim Radel, Deb Elumba, Kathy Shibrowski, Katie White

This presentation describes the LifeCourse intervention and the human-centered research approach used to create it. Meetings were conducted with 183 patients, caregivers, and care professionals who experienced and/or worked with serious illness to systematically gather perspectives on optimal care delivery for persons diagnosed with serious illness. Participant feedback was shaped into care components that attend to how illness is lived, the care relationship is experienced, and care is delivered. Care components guided creation of protocols for a trained lay healthcare worker who meets with patients and caregivers in their home, early in their illness experience, to holistically understand the patient's experience and goals for living well, working to enhance supportive relationships in the one's family, community, and health care teams. Drawing upon the experiences of those who have lived and worked with serious illness may yield an approach that more fully supports patients and caregivers so they can live well.

Symposium Research Abstract

Title: Utilization, Quality of Life, and Care Experience of Patients in LifeCourse (150 words)

Authors: Heather Britt, Cindy Cain, Karl Fernstrom, Alissa Jones, Patrick Mobley, Nate Shippee, Tetyana Shippee, Jessica Taghon

Based upon current data from 450 intervention and 430 comparison patients, we find a 16% reduction in ED visits ($p=0.047$) and a 23% reduction in number of inpatient days ($p=0.006$) for intervention compared to usual care patients. Of deceased patients, 49% of those in the intervention group enrolled in hospice compared to 42% of usual care patients; median length of stay in hospice for intervention patients was 23 days, compared to 15.5 for usual care patients ($p=0.05$). Examination of quality of life (QOL) of patients enrolled in LifeCourse (using the FACIT-Pal) reveals consistently more positive QOL for intervention patients than comparison patients, especially in the emotional, functional and palliative domains and among patients with lower starting QOL values. An experience survey designed specifically for the longitudinal nature of LifeCourse reveals consistently more positive experience, both overall and across most experience domains, for intervention compared to usual care patients.

Symposium Implementation Abstract

Title: LifeCourse beyond Research: Learning through Implementation and Evaluation

Authors: Paige Bingham, Vivian Anugwom, Scott Curran, Amanda Hunt, Melissa Hutchison, Kendall Johnson, Sochenda Nelson, Laura Sutter

Strong research results and supportive funding propelled leadership of a healthcare system to implement LifeCourse across multiple clinics and collaborating community sites. LifeCourse relies upon lay healthcare workers, called care guides. The implementing primary and specialty care clinics hired care guides to provide whole person care for clinic patients living with serious illness.

During implementation, clinic leaders were solicited to be part of a team which met over several weeks to help prepare the clinics, hire the care guides, and champion LifeCourse. The program materials were adapted from the research intervention to support the specific patient population and clinic processes.

In addition to following a detailed implementation strategy, an evaluation plan was created to measure the effectiveness and provide feedback on the process and outcomes. The presentation will describe the implementation and evaluation framework for systematic deployment and will summarize the successes and challenges of integrating research into practice.

Quality of Life Abstract

Word count: Title: 13/100 Abstract: 249/250

Title: Improving Quality of Life for Late Life Patients: Key Findings from LifeCourse Intervention

Objective 1: (Required) "After attending this session participants will be able to..." : Describe LifeCourse intervention for late life patients living with chronic illness.

Objective 2: (Required) "After attending this session participants will be able to..." : Outline the effect of LifeCourse on patient quality of life.

Abstract Body:

Quality of life (QOL) for patients with chronic conditions at the end of life is a concern among policymakers and consumers, and has implications for improved care delivery outcomes. QOL indicators enable understanding of healthcare delivery beyond system oriented outcomes, shedding light on the effect of holistic, supportive care for those living with complex chronic illness in late life. In this mixed methods evaluation, we examine the effectiveness of a new patient-centered approach to late life care—LifeCourse intervention. A key component is ongoing, across-setting assistance by layperson care guides, supported by a clinical team. We investigate whether participation in LifeCourse improves QOL for patients, compared to usual care controls. QOL is assessed through quarterly administration of the Functional Assessment of Chronic Illness Therapy-Palliative Care survey (n=190 intervention patients and 157 controls). Data is presented as change in QOL indicators between baseline and 6 months. Mixed-methods analysis includes longitudinal examination of scores and qualitative data analysis. Multivariate analyses reveal that LifeCourse intervention had a significant positive effect on QOL for intervention patients when compared to controls. Additional analyses show that most changes happen for social quality of life domains. Interview data reveal that participants actively seek out ways to maintain QOL and exhibit resilience in the face of decline. Overall, our findings show that LifeCourse has a positive impact on QOL when compared to usual care patients. These trends indicate whole-person supportive care like LifeCourse is a promising approach for patients affected by complex chronic illness in late life.

Properties

Session Topic: (1) Quality of Life and Subjective Well Being; (2) Palliative Care

Session Track: Health Sciences/Geriatric Medicine

Authors: Tetyana Shippee, MS, PhD, Nathan Shippee, MS, PhD, Karl Fernstrom, MPH, Patrick Mobley, MPH, Monica Frazer, MA, PhD, and Heather Britt, MPH, PhD

Patient Experience Abstract

Title (100/100)

Title: Effect of a person-centered intervention on patient experience with care in serious chronic illness

Objectives:

1. To describe the approach and methods used to evaluate LifeCourse, a novel intervention for patients with serious chronic illness in late life.
2. To outline key findings from the six-month evaluation of LifeCourse's effects on patient experience.

Abstract (239/250)

Patients with serious chronic illness face multiple challenges in managing conditions to reduce ongoing risk, while increasingly moving toward issues and decisions surrounding end of life. Meanwhile, broad overmedicalization leaves patients at risk for overly invasive treatment and self-management routines and a depersonalized experience of care. However, most studies of patient experience and tools designed to measure it are not well suited to addressing patients with serious illness in late life. This study evaluates a new patient-centered approach to care for patients with serious chronic illness. LifeCourse is focused on understanding the whole person and ongoing, cross-setting assistance by layperson care guides, supported by a clinical team. We test whether participation in LifeCourse improves patient experience compared to usual care (n=110 intervention and 93 comparison patients). The outcome variable is 6-month change the LifeCourse experience tool, a multi-item self-report experience tool designed specifically to emphasize key domains of the intervention, including listening, access and time, trust, frustration, and patient goals. In multivariate analyses, LifeCourse had a significant positive effect on change in patient experience versus usual care. Domain-specific analyses indicated that the primary driver of this effect was time/access for patients. Overall, our findings show that LifeCourse has a positive impact on QOL when compared to usual care patients. These trends indicate that whole-person, supportive care approaches like LifeCourse may offer modest benefits in improving experience with care as patients require more services for chronic illness in later life.

Properties

Session Topic: (1) Palliative Care (2) Care values and preferences

Session Track: Health Sciences/Geriatric Medicine

Authors:

Nathan Shippee, PhD; Tetyana Shippee, PhD; Patrick Mobley, MPH; Karl Fernstrom, MPH;
Heather Britt, PhD

Utilization Abstract

Title: Health Care Utilization Outcomes for Patients Enrolled in a Late Life Care Intervention

Objectives: (1) After attending this session, participants will be able to describe LifeCourse a new late-life care intervention deployed in a large health system. (2) After attending this session, participants will be able to summarize the effects of LifeCourse on utilization outcomes.

Abstract Body:

Health systems in the U.S. are faced with increased utilization for patients in their last years of life. Care for patients with serious illness is complex and requires a greater number of clinicians and care settings. This can contribute to duplicative and unwanted medical procedures. As a large portion of the population approaches retirement, health systems must redouble efforts to better serve patients as they near the end of life. LifeCourse is a patient-centered intervention which leverages a layperson care guide to build upon an expanded set of palliative care domains. Care guides meet with patients, their family members and clinicians to help patients articulate goals, take part in decision making, and connect with resources. LifeCourse is a non-randomized prospective study of 450 intervention and 448 usual care patients followed between October 2012 and June 2016. Patients and controls were selected based on diagnosis, disease progression, and comorbidity mix. Using zero-inflated negative binomial regression models we tested whether participation in LifeCourse resulted in decreased utilization on three outcomes, ED visits, inpatient days, and ICU stays. On average, patients in the intervention group experienced 25% fewer inpatient days (IRR = 0.75; 95% CI: 0.62-0.91) and 57% fewer ICU stays (IRR = 0.43; 95% CI: 0.24-0.77). We did not detect a difference in the number of ED visits (IRR = 0.85; 95% CI: 0.72-1.01). Our findings suggest that when a whole-person approach to care is used and patients' preferences are known there is a beneficial impact on health care utilization in late-life.

Properties

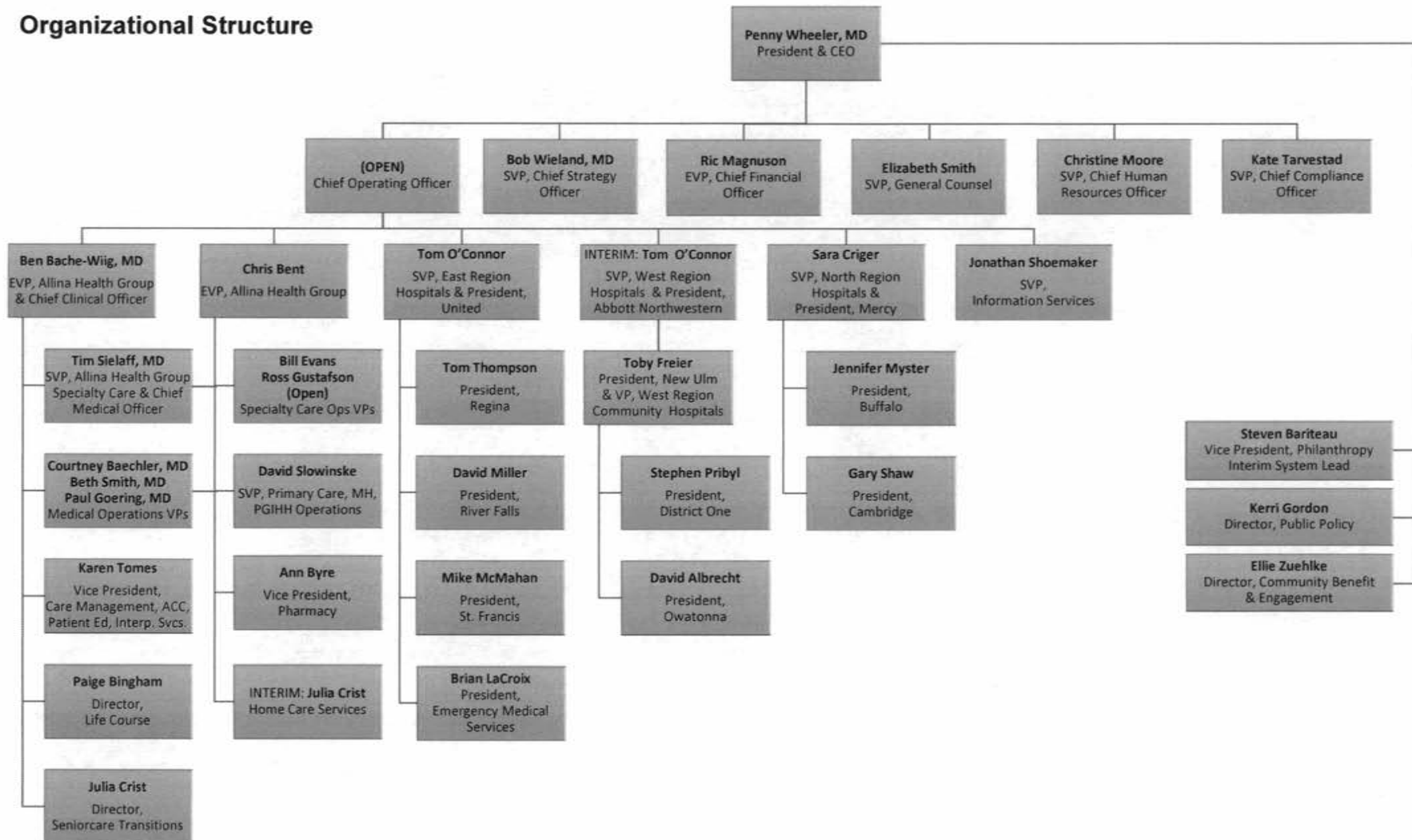
Session Topic: (1) Economics; (2) Palliative Care

Session Track: Health Sciences/Geriatric Medicine

Authors: Karl Fernstrom, MPH; Heather Britt, MPH, PhD.



Organizational Structure



Nancy Gilberg

file grants

From: Penny Hunt <pennhunt@gmail.com>
Sent: Tuesday, October 11, 2016 11:55 AM
To: Susan Berresford; Kathleen Blatz; Karoff Peter; Steve Lewis; Marianne Short
Cc: Nancy Gilberg; Christensen, Renee P
Subject: Re: \$25,000 Grant Requests from Steve and Gordy

Greetings,

My thanks to all of you for indicating your support of the grants proposed by Steve and Gordy. Nancy and I are working to provide the funding as requested.

Regards,
Penny

On Oct 7, 2016, at 4:14 PM, Penny Hunt <pennhunt@gmail.com> wrote:

Dear Board Members,

At the August board meeting, the Board passed a motion permitting Steve and Gordy to make \$25,000 grants to organizations of their choice that are "aligned with the spirit and vision of Jim Binger as expressed in the Mission Statement of the Robina foundation." The Board asked Steve and Gordy to submit written grant proposals for review and approval by the Board. I have attached information on the grants Steve and Gordy propose and ask that you let me know if you approve Robina support for the two organizations.

Thanks for your help. Have a nice weekend.

Warm regards,

Penny

<Proposed \$25K grant to Tandem Partners in Early Learning for Steve Schroeder 2016.docx>
<Proposed \$25K grant to UofM Orthopaedic International Education Fund for Gordy Aamoth 2016.docx>

Award Grants Approval of \$25K each to proposals by Steve Schroeder and Gordy Aamoth
Tandem, Partners in Early Learning and U of M Department of
Orthopaedic Surgery International Education Fund

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Thanks for your help. Have a nice weekend.

Warm regards,

Penny

October 7, 2016

Good evening.

I am interested in everyone's thoughts. After a first-read, I support both Steve's and Gordy's suggested recipients. Gordy's recipient mirrors in a way the work done by Yale's human rights scholars--only with a medical bent. Steve's recipient is a bit more removed from what Robina has funded but seems consonant with our interest in social justice and community outreach. I think both suggestions are within the guidelines suggested by counsel and our prior gift to the Center for Victims of Torture that Ed Spencer directed.

Best to all,
Kathleen

Penny - Both Steve's and Gordy's gift are fine and I vote their approval -
Best from SB, Peter

I support the proposals from Steve and Gordy. Steve

On Oct 7, 2016, at 9:41 PM, Short, Marianne <marianne.short@uhg.com> wrote:
I agree and support both.

I can accept these grants. They are more or less consistent with Mr B's ideals. Susan

Award Grants Approval of \$25K each to proposals by Steve Schroeder and Gordy Aamoth
Tandem, Partners in Early Learning and U of M Department of
Orthopaedic Surgery International Education Fund

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Warm regards,

Penny

October 7, 2016

Good evening.

I am interested in everyone's thoughts. After a first-read, I support both Steve's and Gordy's suggested recipients. Gordy's recipient mirrors in a way the work done by Yale's human rights scholars--only with a medical bent. Steve's recipient is a bit more removed from what Robina has funded but seems consonant with our interest in social justice and community outreach. I think both suggestions are within the guidelines suggested by counsel and our prior gift to the Center for Victims of Torture that Ed Spencer directed.

Best to all,
Kathleen

Penny - Both Steve's and Gordy's gift are fine and I vote their approval -
Best from SB, Peter

I support the proposals from Steve and Gordy. Steve

On Oct 7, 2016, at 9:41 PM, Short, Marianne <marianne.short@uhg.com> wrote:
I agree and support both.

I can accept these grants. They are more or less consistent with Mr B's ideals. Susan

Mental

Email to KB and PH from Steve Schroeder re the \$25K grant

Dear Kathleen and Penny,

Attached is a grant proposal to Robina for \$25,000 to help an early childhood education program in Richmond, California, one of the most embattled cities in Northern California. I would be glad to answer any questions about the proposal, and am grateful to the board for its consideration.

Sincerely,

Steven A. Schroeder, MD

Proposed Robina Grant to Tandem, Partners in Early Learning

Background: I grew up in El Cerrito, California, a small town north of Berkeley. Nearby Richmond was always a city with a lot of problems. It had a multi-racial poverty population, many of whom migrated to the area from the south during World War II in order to work in the Kaiser shipyards. Richmond has suffered—now and then—from a high crime rate. When Sally and I decided to form a family foundation in 2007, we involved our two sons and their wives and selected as a giving theme, the enrichment of vulnerable families through exposure to early childhood reading enhancement. Through a donor advised fund established at the Marin Community Foundation, we supported such programs in three separate communities: Portland OR, where son David resides; East Palo Alto, near where son Alan lives; and Richmond. We initially supported a small Richmond program, and then gave a larger grant to the San Francisco chapter of Raising a Reader, a national organization devoted to outreach programs to vulnerable families to encourage parental reading to their preschool children. That grant induced the San Francisco Raising a Reader program to expand into Richmond. Along the way the chapter split from national organization to form its own entity: Tandem, Partners in Early Learning.

Grant purpose: Tandem is now establishing early reading programs in the Richmond public school system, working carefully with the teachers, training champions, and cultivating parental leaders. A grant of \$25,000 would provide flexible core funding to help sustain and expand this program, which has the capacity to transform the lives of poor inner city children of diverse racial backgrounds. We have visited the program and are impressed with the passion and dedication of its participants. Its leader is Molly Mertz, Executive Director. Contact information:

Tandem, Partners in Early Learning, 1275 Fairfax Ave, Suite 201, San Francisco, CA 94214

Telephone: 415-683-5460

Website www.tandembayarea.org

Molly Wertz email: molly@tandembayarea.org

I hope that you can support this request. These are good people, and the underlying social justice theme is consistent with many of the Robina grants.