



[Robina Foundation](#)

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Penny Hunt

ROBINA FOUNDATION
Board Meeting

February 26 – February 28, 2018

Location: New Haven, Connecticut

**Lodging: The Study
1157 Chapel Street
New Haven, CT 06511
Phone: 203-503-3900**

ROBINA FOUNDATION

TO: Robina Foundation Board of Directors

FROM: Penny Hunt

Date: February 20, 2018

RE: February 26-28, 2018 Meetings in New Haven

The agenda for this meeting includes an interesting mix of meetings with the three schools at Yale that Robina supports, dinner with President Salovey and others and important discussions about Robina's future. During our dinner on Monday night, we will have the opportunity to talk about the agenda and plans for our visit.

Several comments about material in the Board Book:

The pocket on the front cover of this book includes the remarkable resumes of the four Yale Law School students we will meet on Tuesday. Meeting with YLS students is always interesting and inspiring! Please note the calendars also in the pocket. We will review the dates of upcoming meetings and perhaps schedule additional meetings. Bring your calendars!

So that you have sufficient background for our meetings and discussions, the Board Book includes material submitted for the November Board Meeting. (Tabs 1, 2 and 8).

In advance of our meeting with David Blight and Michelle Zacks of the Gilder Lehrman Center, I hope to be able to send you a link to the Center's video that focuses on the role of the global supply chain in modern slavery so that you can view it before the meeting. During our meeting we will Skype with Genevieve Le Baron, whose research is featured in the film. Genevieve is co-chair of the Center's Working Group on Modern Slavery.

Our Tuesday night dinner with President Salovey and his wife will include Dean Bundy and Patty Pedersen and perhaps others.

As always, please feel free to contact me before the meeting if you have questions or concerns.

ROBINA FOUNDATION

Robina Foundation Board Meeting February 26 – February 28, 2018 New Haven, Connecticut

Monday, February 26

6:00 p.m. Dinner in the **Heirloom** Restaurant at The Study

Lodging: The Study at Yale
1157 Chapel Street
New Haven, CT 06511
Phone: 203-503-3900

Tuesday, February 27

7:30 a.m. Breakfast at The Study

8:30 a.m. Meet Deborah Berman in The Study Lobby

8:45 a.m. Yale School of Drama
222 York Street, Dean's Office

12:30 p.m. Yale Law School
Sterling Law Building
127 Wall Street

3:00 p.m. Gilder Lehrman Center
Hall of Graduate Studies
320 York Street, Room 116

6:00 p.m. Dinner with President Salovey
43 Hillhouse Avenue

Lodging: The Study at Yale

Wednesday, February 28

7:30 a.m. Breakfast in the Studio Boardroom at The Study

8:00 a.m. Board Meeting in the Studio Boardroom at The Study

11:45 a.m. Adjournment

Robina Foundation Board Meeting

Tuesday, February 27, 2018

8:45 a.m. to 4:30 p.m.

A G E N D A

TIME		TAB
8:45 a.m.	Yale School of Drama - Meeting with James Bundy, Dean; Deborah Berman, Director of Development and Alumni Affairs; Jennifer Kiger, Associate Artistic Director; Amy Boratko, Literary Manager ➤ Summary of Commissioned Plays ➤ Summary of Production Enhancement Fund ➤ Binger Center for New Theatre: External Review Report ➤ Binger Center for New Theatre: Program and Endowment Reports (from November BOD Meeting)	1
12:30 p.m.	Yale Law School - Lunch with Students and Faculty ➤ James Silk, Binger Clinical Faculty Chair in Human Rights; Hope Metcalf, Executive Director, Orville H. Schell, Jr. Center for International Human Rights; Tara Fitzpatrick, Director of Corporate and Foundation Relations;	2
1:30 p.m.	- Meeting continued with James Silk and Hope Metcalf ➤ Yale Law School Annual Report (from November BOD Meeting)	
2:00 p.m.	Meeting with Heather Gerken, Sol and Lillian Goldman Professor of Law and Dean	
3:00 p.m.	Gilder Lehrman Center - Meeting with David Blight, Class of 1954 Professor of History, Director of Gilder Lehrman Center for the Study of Slavery, Resistance and Abolition; and Michelle Zacks, Associate Director ➤ Gilder Lehrman Center Annual Report (Tab 10)	
4:30 p.m.	Adjournment	
6:00 p.m.	Cocktails and Dinner Dinner with Yale University President, Peter Salovey, Chris Argyris Professor of Psychology, and his wife Marta Moret	

Robina Foundation Board Meeting
Wednesday, February 28, 2018
8:00 a.m. to 11:45 a.m.
The Study at Yale

A G E N D A

TIME		TAB
✓ 7:30 a.m.	Breakfast at The Study in the Studio Boardroom	
✓ 8:00 a.m.	Welcome and Call to Order – Blatz	
✓ 8:05 a.m.	Minutes of November 16, 2017 – Short – Action	3
✓ 8:15 a.m.	Executive Director's Report – Hunt	4
✓ 8:30 a.m.	Treasurer's Report – Lewis • Assets and Grants • 2017 4th Quarter Financial Report from Mike Sullivan • CLA 2018 Engagement Letters - Action • Operational Changes Suggested in CLA 2016 Audit • 2018 Operating Budget – Hunt - Action	5 6
✓ 9:10 a.m.	Legacy Report Update • Revised Report • Foundation Center Dissemination Proposal - Action	7
✓ 9:50 a.m.	New Grants: Discussion • Preliminary Ideas for New Grants (from November BOD Meeting)	8
10:30 a.m.	Grantee Reports – Hunt • Discussion of Tuesday's Grantee Meetings ✓ Council on Foreign Relations ➤ <i>James H. Binger Chair in Global Governance</i>: Program and Endowment Report ➤ <i>Robina Franklin Williams Internship Fund</i>: Endowment Report • Yale University ➤ <i>Gilder Lehrman Center</i>: Annual Report	9 10
11:15 a.m.	Board Meeting Dates	
11:45 a.m.	Adjournment	

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YALE SCHOOL OF DRAMA

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YALE LAW SCHOOL
Annual Report (November 2017)

3

BOARD MINUTES
November 16, 2017

4

EXECUTIVE DIRECTOR'S REPORT

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TREASURER'S REPORT

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2018 OPERATING BUDGET

7

LEGACY REPORT UPDATE

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NEW GRANTS: DISCUSSION

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GRANTEE REPORTS
Council on Foreign Relations

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GRANTEE REPORT
Gilder Lehrman Center

Binger Center for New Theatre
Yale Rep Commission History FY2006-FY2017

Year	Artist	Play	Result/Status	Subsequent Productions	Notes
FY2006	David Adjmi	<i>Marie Antoinette</i>	World Premiere 2012-13 at Yale Rep	more than 5	
FY2006	Hilary Bell	<i>Perfect Stranger</i>	Completed; Released to author		
FY2006	Marcus Gardley	untitled	In process		
FY2006	Naomi Iizuka	untitled	In process		Co-Commission with Huntington
FY2006	Anne Washburn	<i>The Octavia</i>	In process		
FY2007	Elizabeth Meriwether	untitled	In process		
FY2007	Octavio Solis	<i>Jonny Que-Onda</i>	Completed; Released to author		
FY2008	Adam Bock and Todd Almond	<i>We Have Always Lived in the Castle</i>	World Premiere 2010-11 at Yale Rep		
FY2008	Amy Herzog	<i>Belleville</i>	World Premiere 2011-12 at Yale Rep	more than 5	
FY2008	Kathryn Walat	<i>Creation</i>	World Premiere 2012-13 at Theatre @ Boston Court (LA)		
FY2008	Marisa Wegrzyn	untitled	In process		
FY2009	Will Eno	<i>The Realistic Joneses</i>	World Premiere 2011-12 at Yale Rep	more than 5	
FY2009	Marcus Gardley, Lear deBessonet, Todd Almond	<i>On the Levee</i>	World Premiere 2009-10 at LCT3		
FY2009	Ann Marie Healy	<i>The Availables</i>	In process		
FY2009	Dan LeFranc	<i>In the Labyrinth</i>	Completed; Released to author		
FY2009	Scott Murphy and Jay Reiss	<i>Meanwhile on the Other Side of Mt. Vesuvius</i>	Completed; Released to author		
FY2009	Robert Woodruff and Bill Camp	<i>Notes from Underground</i>	World Premiere 2008-09 at Yale Rep	2	
FY2010	Kirsten Greenidge	<i>Little Row Boat</i>	In process		
FY2010	Julie Marie Myatt	<i>Opium Den</i>	Completed; Released to author		
FY2010	David Nugent	<i>Her Lightness</i>	Completed; Released to author		
FY2010	Lina Patel	<i>Love Play</i>	Completed; Released to author		
FY2010	Octavio Solis	<i>Slaughterboy</i>	Completed; Released to author		
FY2011	Matt Gould and Carson Kreitzer	<i>Lempicka</i>	World Premiere 2018 at Williamstown Theatre Festival		Co-commissioned with New Dramatists as part of Full Stage USA
FY2011	Danai Gurira <i>Guthrie Theater - 3/10-4/14</i> *	<i>Familiar</i>	World Premiere 2014-15 at Yale Rep	4	
FY2011	Noah Haidle	<i>Playscape</i>	Completed; Released to author		
FY2011	Amy Herzog	<i>Mary Jane</i>	World Premiere 2016-17 at Yale Rep	1	
FY2011	Branden Jacobs-Jenkins	<i>War</i>	World Premiere 2014-15 at Yale Rep	1	
FY2011	Aditi Brennan Kapil	<i>Imogen Says Nothing</i>	World Premiere 2016-17 at Yale Rep		
FY2011	Sarah Ruhl	<i>Dear Elizabeth</i>	World Premiere 2012-13 at Yale Rep	4	
FY2011	Lucy Thurber	<i>Perry Street</i>	Completed; Released to author		
FY2011	Alice Tuan	<i>Private Rivals</i>	Completed; Released to author		
FY2011	Paula Vogel and Rebecca Taichman	<i>Indecent</i>	World Premiere 2015-16 at Yale Rep	4	Co-commissioned with Oregon Shakespeare Festival
FY2012	Christina Anderson	<i>Knuckle Down</i>	In process		
FY2012	Sheila Callaghan	<i>Elevada</i>	World Premiere 2014-15 at Yale Rep		
FY2012	Lucinda Coxon	untitled	In process		
FY2012	Dorothy Fortenberry	<i>The Lotus Paradox</i>	Completed; Released to author		
FY2012	Rude Mechs	<i>Field Guide</i>	World Premiere 2017-18 at Yale Rep		
FY2012	Robert Woodruff and Bill Camp	<i>In a Year with 13 Moons</i>	World Premiere 2012-13 at Yale Rep		

prior to RE

Year	Artist	Play	Result/Status	Subsequent Productions	Notes
FY2013	David Adjmi	untitled	In process		
FY2013	Rolin Jones	<i>These Paper Bullets!</i>	World Premiere 2013-14 at Yale Rep		
FY2013	Meg Miroshnik	untitled	In process		
FY2013	Amelia Roper	<i>Two Serious Ladies</i>	In process		
FY2013	Sarah Ruhl	<i>Scenes from Court Life</i>	World Premiere 2016-17 at Yale Rep		
FY2013	Lucy Thurber	<i>Transfers</i>	World Premiere 2017-18 at MCC Theater (NYC)		
FY2014	Karen Hartman	<i>Good Faith</i>	World Premiere 2019-20 at Yale Rep		
FY2014	Rolin Jones	untitled	In process		
FY2014	Caroline McGraw	untitled	In process		
FY2014	Julie Marie Myatt	untitled	In process		
FY2014	christopher oscar peña	<i>How to Make an American Son</i>	Completed; Released to author		
FY2015	Sheila Callaghan	untitled	In process		
FY2015	Howard Korder	untitled	In process		
FY2015	Alice Tuan	<i>A Humbling in St. Paul</i>	Completed; Released to author		
FY2015	Woodruff, Camp, Ziporyn, Ziporyn	<i>Brother of Jackals</i>	World Premiere 2018-19 at Yale Rep		
FY2016	Jackie Sibblies Drury	untitled	In process		
FY2016	Jiehae Park	untitled	In process		
FY2016	Susan Soon He Stanton	untitled	In process		
FY2017	Tarell Alvin McCraney	untitled	In process		
FY2017	Mary Kathryn Nagle	untitled	In process		
FY2017	Claudia Rankine, Will Rawls, John Lucas	<i>What Remains</i>	World Premiere 2016-17 at the Fisher Center for the Performing Arts at Bard College		Co-commission with the Fisher Center (LAB), Crossing the Line Festival, and American Repertory Theater
FY2017	Tori Sampson	untitled	In process		
FY2017	Martín Zimmerman	untitled	In process		

Total Artists: 61	Total Commissions: 61
Women: 37	Pre-Robina (FY2006-FY2008): 11
Women of Color: 13	FY2009-FY2017: 50
White Women: 24	Produced: 23
Men: 24	World Premiere at YRT: 18
Men of Color: 7	World Premiere elsewhere: 5
White Men: 17	Completed, not yet produced: 14
	In process: 24
Note: For these demographics, the Rude Mechs are counted as Madge Darlington, Thomas Graves, Lana Lesley, Kirk Lynn, and Shawn Sides.	Note: Plays commissioned before FY2009 were commissioned with non-Robina funds, but became eligible for development and production support from the Binger Center starting in FY2009.

Binger Center for New Theatre Production History
FY2009-FY2018

Yale Rep Commissions World Premiere at Yale Rep		
Notes from Underground**	2008-09	
We Have Always Lived in the Castle**	2010-11	
Belleville**	2011-12	
The Realistic Joneses**	2011-12	
Marie Antoinette**	2012-13	
Dear Elizabeth**	2012-13	
In a Year with 13 Moons	2012-13	
These Paper Bullets	2013-14	
War**	2014-15	
Familiar**	2014-15	
Elevada	2014-15	
Indecent**	2015-16	
Scenes from Court Life	2016-17	
Imogen Says Nothing	2016-17	
Mary Jane**	2016-17	
Field Guide	2017-18	
Total		16
Non-Yale Rep Commissions World Premiere at Yale Rep		
POP!**	2009-10	
Compulsion**	2009-10	
Bossa Nova	2010-11	
Good Goods**	2011-12	
The House that Will Not Stand**	2013-14	
peerless**	2015-16	
The Moors**	2015-16	
Total		7
New Plays Produced at Yale Rep (non-commission, non-World Premiere)		
The Fairytale Lives of Russian Girls**	2013-14	
Native Son**	2017-18	
Kiss**	2017-18	
Total		3
Yale Rep Commissions World Premiere Elsewhere & Funded by Binger Center		
On the Levee (LCT3)	2009-10	
Total		1
Yale Rep Commissioned Plays World Premiere Elsewhere		
On the Levee	LCT3 (New York City)	
Creation	Theatre @ Boston Court (Los Angeles)	
Transfers	MCC (New York City)	
Total		3

Binger Center For New Theatre
Production Enhancement Fund Expenditures FY2009-FY2018

Year	Play	Recipient Theatre	Amount
2010	Notes from Underground	La Jolla Playhouse	\$15,000
2010	Notes from Underground	Tour Coordinator	\$4,100
2010	On the Levee	LCT3 (NYC)	\$15,000
2011	Notes from Underground	Theatre for a New Audience	\$5,100
2011	POP!	City Theatre (Pittsburgh, PA)	\$15,000
2012	Marie Antoinette	American Repertory Theater (Cambridge, MA)	\$100,000
2013	Belleville	New York Theatre Workshop	\$15,000
2013	Marie Antoinette	Soho Rep. (NYC)	\$30,000
2013	POP!	Firehouse Theatre (Richmond, VA)	\$5,000
2014	The Realistic Joneses	Broadway	\$50,000
2014	Marie Antoinette	Woolly Mammoth Theatre (Washington, DC)	\$10,000
2015	These Paper Bullets!	Atlantic Theater Company (NYC)	\$60,000
2016	War	LCT3 (NYC)	\$5,000
2016	These Paper Bullets!	Geffen Playhouse (Los Angeles, CA)	\$6,225
2016	Transfers	NYSF Powerhouse Theater at Vassar	\$5,000
→ 2017	Indecent	Broadway	\$50,000
2017	Familiar	Woolly Mammoth Theatre (Washington, DC)	\$10,000
Total			\$400,425

** Denotes plays supported by the Binger Center that have had multiple productions in the American theatre.

World Premiere Productions supported by the Binger Center at Yale Rep since 2008-09	23
New Plays (not WP) supported by Binger Center at Yale Rep since 2008-09	3
WP productions elsewhere supported by the Binger Center since 2008-09	1
Yale Rep commissioned plays World Premiere at Yale Rep since 2008-09	16
Yale Rep commissioned plays world premiere elsewhere since 2008-09	3
Plays supported by the Binger Center that have multiple subsequent productions	19

> What was charge to committee?
No mention of PEF

Binger Center for New Theatre: External Review Report

1

Assessment Report on the Binger Center for New Theatre
Submitted February 14, 2018

We think you are brave.

We are honored to have been welcomed into your programs and process, and have been informed, moved and inspired by your students, faculty, staff and leadership. We are better artists for the experience.

BACKGROUND: The evaluation committee was provided with both original visioning materials and current operating documents for the Binger Center for New Theatre in preparation for our campus visit. We have spent two days with multiple cohorts of the Yale School of Drama (YSD) and the Yale Repertory Theatre (The Rep). We met first with Senior Leadership of The Rep (Artistic Director, Managing Director and Associate Artistic Director) for both a historical and current state overview of the Center. We toured YSD facilities and met with Production Management for an overview of venues and production calendars. We met with Development leadership and received a current snapshot of fiscal support for the Center. We met with students representing five of YSD's departments (Directing, Playwriting, Dramaturgy/Dramatic Criticism, Management, and Technical Design and Production). We met with YSD faculty, staff and Deans, with the Artistic Office of The Rep; and with artists currently in production and process with The Rep and the Center. Additionally, we were able to attend the meet and greet/design presentation for an upcoming Rep production, and attend a Center-developed production currently showing at The Rep. Earlier
valuation?

This report reflects our understanding of the Center's current activities and its impact on artists, students, faculty and Rep staff. The assessment of this committee is based on the foundational understanding that the work of the Binger Center is intended to serve The Rep, and that the work of The Rep is intended to serve YSD. PEF → and the broader
theatre world

The committee was comprised of three members, all of whom work as artists and artistic leaders in the new work development field:

Luis Alfaro, playwright and scholar at USC

Susan Booth, director and Artistic Director, The Alliance Theatre

Diane Rodriguez, director, writer, actor and Associate Artistic Director, Center Theatre Group

BASELINE PROJECT OVERVIEW: From the center's founding documents: *The mission of the Binger Center for New Theatre is to commission, develop and produce new work for the stage, cultivating the talents of playwrights and other theatre artists.*

As articulated by Jennifer Kiger and James Bundy, the chief architects of the program, the work of the Binger Center is to offer wholly individuated project development for theatre artists creating new work for the field. Each process has its own scope, timeline, resources and aesthetics of development and this process is driven by the generating artist. Intersecting and informing the selection of Center artists is YSD and the Rep's fiercely embraced commitment to the principles of equity, diversity and inclusion.

Kiger and Bundy articulated artist-centric metrics of success for the Center that included providing artists freedom from past (and possibly limiting) expectations of practice, insulation from risk, resources that cover all steps of the journey from idea to production, and wholly

Reference to PEF but no

comments about its use or apparently no contact
w/ theatre that received PEF funds.

2

* (personalized approaches to project development. Additionally, the Center is committed to funding commissions at a field-leading level, the largest in the nation, significant enough to support an artist's singular focus on theatrical work. External metrics for the Center's success include premiere productions of commissioned work (which may or may not include Rep productions), and the capacity to incentivize subsequent productions through the deployment of production enhancement funds, which has the added benefit of augmenting the Center's profile in the national field. Finally, we want to acknowledge the uniqueness of paying for playwrights and all artists' participation in each stage of development – a practice too rare in our field.

① Programmatically and philosophically, the Center has continued to evolve since its inception in response to iterative processes and a culture of learning. Some notable shifts would include a
② more intentional commitment to developing work by women and people of color, and the recent decision to discontinue the Yale Institute for Music Theatre in response to a perceived lack of alignment with the Center's goals in a challenging financial landscape.

2 We also acknowledge that YSD has experienced the phenomena of a series of leadership changes in the Playwriting program, whose chair could serve as a great champion and ally for the Center's value and programming.

The report that follows focuses on four points of inquiry and opportunity that emerged as common denominator topics across all cohorts and disciplines, points of inquiry that this committee feels the Binger Center is uniquely positioned to address. In all four areas, we heard a unified appetite across multiple populations, but a sometimes divergent appraisal of success in obtaining the stated priority. We share some generally attributed observations as well as a few resulting recommendations.

We close with two big picture recommendations – one programmatic, and one philosophical - for potential strategic shifts that could provide opportunities for growth that we feel reflect the core values of the Center, the Rep and YSD.

INTEGRATION OF PROCESS IN PEDAGOGY

Preface: We heard a deep desire for structured and strategic access to the pre-production developmental work of Binger Center projects - articulated by both students and faculty and across multiple practices. Knowing the origin story of a project and an artist's generating impulse is felt to be not only an invaluable context for understanding aesthetic, but near mandatory preparation for a professional new play development field that is constantly evolving in its definitions of process. Agility of thinking and practice has become a core virtue of the field's artists, artisans and managers. We believe an embrace of the integrated study of process would yield a more organic transition for projects from development to production, and a more versatile practitioner in all areas of theatre making. Observership is a time-honored practice in our field, that has equal value to active production.

What we heard:

"We see developing work that stretches us as an organization as a good thing, and the students are learning new models of production and touring." (leadership)

"Our dramaturgy students only do production dramaturgy because of the long arc development timing." (leadership)

"We're taught a general sense of being in service to production, but not so much in service to process. Development feels walled off to us." (student)

"We get inserted into the process after production options are exercised, so we don't really understand the curatorial process." (student)

"There's a lot of protection around developing plays; feels as if we should stand down until we get to production." (faculty)

"The Center exempts itself from the academy." (faculty)

"If the center is really investigating the development of multiple processes, as well as texts, that aligns with our commitment to EDI and should be shared with our students." (faculty)

"With the Institute being discontinued, there's a loss of opportunity for management and stage managers to learn to do their work in a developmental setting." (staff)

"Is it possible for the Center to document process, so that even if we're not resident, we would have materials to refer to when interacting with students who want to understand the process more fully?" (artist)

What we would recommend:

- Recognizing that the capacity to produce a development process is in growing demand in the professional theatre arena, and that a truly generative process is nimble in ALL areas of practice (budgeting, stage management, technical direction and design, as well as directing, writing and dramaturgy), we would recommend the development of a required Binger Center course. Drawing on the model of Robert Woodruff's course on adaptation, this artist lead course would include students of multiple practices following a single Binger Center project's developmental evolution over the course of a semester.
- A regularly offered, potentially short module, on curation and models of project development that could demystify the "why" of project and artist selection. We heard repeatedly that Jennifer is perceived as an underdeployed teaching asset.
- Increased opportunities for students of multiple disciplines to do work study hours in support of the Binger Center's efforts.
- Observership accorded curricular value, and actively promoted to students as a necessary practice in the development of their professional readiness and network.

INTERDISCIPLINARY CAPACITY

Preface: We would like to acknowledge the extraordinary versatility we perceived in the artistic office in the rep staff, specifically, their ability to transcend their traditional job definitions in support of the multiple requirements of a particular project or moment. We daily experience the need the field has for this capacity and hear from contemporary artists the absolute necessity of being able to wear multiple hats. Extrapolating out, we see this as an opportunity to embrace and respect this interdisciplinarity as a teachable virtue, and to use the work of the Center as a pedagogical laboratory for that multivalent approach.

What we heard:

"While there are lots of conversations about how we collaborate, and do it in production automatically, there really isn't a class to teach us how to do it *well*." (student)

"There's not a lot of cross departmental knowledge, so dramaturgy seldom understands the financial implications of extended development processes." (student)

"Cross training happens for actors, directors and playwrights far more frequently - but other practices also want to be in more rooms than their own." (faculty)

"#endthesilo is a real thing, no matter what we say." (staff)

What we would recommend:

- The availability of an artistic producing track for dramaturgy and management students was brought up repeatedly as a terrific example of nimble "cross training." We would recommend consideration of a broader cohort of students able to select that coursework (a gift to directors who will likely self produce in their early years).
- A course or module dedicated exclusively to the psychology of cross disciplinary/cross practice collaborations that is open to students in all practices.
- A greater percentage of students' work study hours would be intentionally allocated outside that student's core area of practice in order to foster not only a more 360 knowledge of production components, but also to create a common language with those who work in differing disciplines.

ARTIST SUPPORT AND ENGAGEMENT

Preface: We heard loud and clear the benefits of honoring the individual needs of each project and person in the path from inception to realization. Core to its identity is the Center's belief that serving the artist serves the work, and serving the work serves the field. While the Rep and YSD have a terrific and time-honored practice of production as student practicum, we see greater opportunities for both the artist to be more deeply engaged in classroom dialogue not only while in production, but also while in the development stage of their work and for students to be a more robustly utilized asset for the artist's developmental explorations. Understanding that preserving an artist's time and space to do their creative work is critical, YSD's commitment to EDI in both pedagogy and practice would suggest an opportunity for a more formalized integration of Binger artists into classroom contexts.

What we heard:

"We often don't know who's on campus at all [for Center work] or we learn too late to avail ourselves of them on behalf of our students." (faculty)

"Student playwrights get invited to Center work in progress, but seldom students in other disciplines, who would also benefit from that access." (faculty)

"We want to protect artists - they're here to do their work and we don't expect them to do anything else." (Staff)

Related to work at YSD.

commissioned artist?



"We love working with student designers, but would prefer to work with them over the longer arc of development, rather than just once we hit production." (Artist) *

"Students need to learn to think along with us as we conceive the work — and that's happening well before production, which is often our earliest interactions with them." (artist)

What we would recommend:

- In the absence of a concrete location, there is a need for a more robust communicating of the Center's mission and activity. Is there an all campus gathering each academic year/season that is singularly focused on the artists and projects currently in development at the Center, modeled on the production specific meet and greet presentation (multiple artists articulating their generating impulse and where they are in their process and how they like to work). (?)
- A Binger brand that heightens awareness and augments communication options - an Instagram presence, a monthly newsletter.
- The open Dean's Forum is much loved - a wondering if the Center's activity could be one of the focus points. *
- Could the Center's lead have a presence in the department head convening, so as to facilitate dialogues around artist presence and availability for classroom presence?
- YSD students could be more actively deployed in creating contextual materials and events in support of Binger developed productions that would serve to deepen the audience's experience of the work and to engage potential audiences in dialogue that might draw them to the show. Examples could include dynamic, hands on and interactive lobby experiences; off site, one off events that introduce the work to the community where they live; and curated experiences for both artists and audiences with the scholarly community of Yale to place the work in a larger dialogue. (?)

ALLOCATION OF TIME AND SPACE

Preface: We encountered an entire village of curious and questing minds in our time here - deep thinkers with great capacity to ask enormous "what if" questions. And yet amidst this culture of interrogation, we also experienced a self-imposed moratorium on imagined paradigm shifts characterized by these refrains: "but there's no time for that," or "but there's not space for that." Appreciating the very real zero sum game landscape that YSD students and faculty currently face in the arenas of schedule and venue, we are nonetheless compelled to return to the "what if" proposition and ask if there are some current operating assumptions that might be questioned in these arenas and lead to a greater good. }

What we heard:

"We are so balkanized, that we're unable to organically and opportunistically collaborate." (leadership)

"A lack of collisional frequency inhibits our capacity to understand one another's practice and language." (leadership)

"There are ways we are desperate to work with and observe new projects, but we're already scheduled beyond our capacity and so can't even consider doing so." (student)

"Space is a practical consideration, so we bring developmental processes here when students aren't around." (staff)

→ "In the absence of a dedicated space, the Center becomes an amorphous idea to us." (faculty)

"We often need to hold readings of Center work in New York simply because there's not a space available on campus." (Staff)

What we would recommend:

- Are there alternate spaces on campus outside of YSD venues that could be rented for similar cost as NYC based venues, thus making student observation more likely?
- provided there is a desire to more fully integrate students into the development process, could Center funds be used to "replace" a student on a support function for the Rep to allow them to use those hours in developmental observation and/or assistance?
- - When a Binger project determines a need for a process reading, could that event be offered to YSD faculty as the subject matter for an already scheduled class gathering? And in support of the stated desire to enhance interdisciplinarity, might that net be cast wider than just the playwrighting or dramaturgy classes?
- Could the faculty of all disciplines allot an equitably determined number of in class hours per semester that would be dedicated to Binger project process observation or facilitated artist dialogues?

OUR BIG FAT WISHES FOR YOU

THE BINGER COURSE:

We believe that YSD has a mandate to create a nationally singular opportunity for students and faculty to engage in the formalized study of process as pedagogy. In a field that is ever reinventing, the capacity to innovate around the development and generation of new theatrical work would be a key differentiator to position your graduates to lead the field.

The Binger Course would be an all discipline encompassing offering that would take students through a project's journey from the curated commission process through individuated development to the potential of eventual production. Understanding that any single project has a longer arc than the duration of a course, this offering would use case study moments from the full portfolio of Binger projects. Points of process learning could include:

- Students would encounter the aesthetic and relationship considerations that inform artist selection and the financial implications to both artist and organization of a commitment to long form development. This would yield robust dialogue around divergent voices, forms, and inquiry and how that multiplicity informs a cultural organization's mission and identity.
- By examining a series of divergent works and development processes and confronting how different artists rely on different collaborators and modes of making, students would actively experience the professional reality of requisite organizational agility. Students could be disabused of the notion that new work process lives exclusively in the realms of playwrighting,

dramaturgy and direction, but in fact relies heavily on design, technical production, and stage management at multiple points of evolution.

- Recognizing that not all commissioned work results in production from the commissioning theatre, the course would embrace the teachable moment of examining these decisions and doing the forensic work of exploring the path to that outcome. By having this dialogue across disciplines, we can break down assumptions that categorize process outcomes as "success" or "failure," and develop the true understanding of essential artistic risk for both artist and organization.

CONCENTRIC CIRCLES: CENTRALIZING THE CENTER

It is our understanding that the ideal state of the Center, is that it lives in a central and catalyzing relationship to The Rep. It is our further understanding that The Rep lives in a central and catalyzing relationship to YSD. It is our observation that this is not a universally perceived method of operation.

YSD has a storied history of employing exceptional artists as faculty leads in all areas of practice. The Binger Center is committed to working with equally excellent generating artists. There is a profound opportunity for these populations to more synergistically collaborate to the deep benefit of the Center, The Rep and the YSD and all of those three entities' constituents.

In a more porous condition, Center leadership would actively engage with department chairs in YSD planning and strategy dialogues. YSD faculty would just as robustly engage with Center leadership and staff in their own planning and strategy conversations. The collisional frequency that is hampered by architecture could be facilitated by intentional engagement. ←

IN CLOSING

Know what an inspiring and deeply moving honor this time with you has been. To hear such a collective sense of aspiration, motivation, and sheer passionate belief in the transformative capacity of our art form touched all of us to our cores. We met no cynicism, and we were constantly awash in curious minds and adventuresome spirits. The ethos of good will and fierce work ethic pervades every area of activity we encountered, and the collective embrace of the necessity and possibility of the Binger Center was palpable. It is a heartening message to us and to our field that you have invested so deeply and so pervasively in the creation of new work, new voices and new ways for the theatre. We are inspired by and grateful for your leadership.

Luis, Susan, and Diane

> Focus on unrectg B Center to YSD + students. Same as last report.

> PER

Report on the Binger Center for New Theatre

Completed February 22, 2013

This past fall our five-person committee was invited to the Binger Center for New Theater to evaluate the impact of the Robina Foundation support on the programming of the new Binger Center at its five year mark. On December 6 and 7, 2012 we spent two days meeting with various stakeholders in the Binger Center, including its staff, and faculty and students of the Yale School of Drama. Since our two-day meeting we have also done follow-up interviews with artists who have worked at the Binger Center, and theater partners who have received support from the enhancement fund to support subsequent productions of plays commissioned through the Center. This report is both a summary of what we heard and an assessment of the programming based on our various perceptions and expertise in the field of the development and production of new theater.

Report Methodology:

In all of our meetings with various stakeholders we made it clear that their opinions and perceptions would be kept confidential and that we would not specifically identify individuals in the report. The exception to this is where the information in the report comes directly from Binger Center staff, James Bundy, Jennifer Kiger, and Amy Boratko who helped shape our understanding of the goals and objectives of the Center.

The committee's process included downloading all of our notes from meetings and interviews into a joint document. The committee chair took responsibility for organizing the notes into this report and then the report was sent to every committee member for feedback, editing, changes, etc.

The report structure includes:

1. A brief overview of the grant proposals to the Robina Foundation that provides a frame for our understanding of what was proposed to the Foundation.
2. A summary of what we heard from the key Binger Center staff elucidating the goals and objectives of the programming and definitions of success from their vantage point at this five-year mark.
3. A summary of what we heard from the Yale School of Drama Faculty about the work of the Binger Center.
4. A summary of what we heard from the students of the Yale School of Drama about their interaction with the work of the Binger Center.
5. A summary of the interviews we had with artists and partners who have benefitted from the resources of the Binger Center.
6. An overview from the committee.
7. Recommendations from the committee.

The Committee:

The Committee is made up of five people with a diversity of experience and expertise, some with no history with Yale Rep or the Drama School and some with direct working experience in both contexts in addition to two committee members who are alumni of the Drama School.

Polly Carl (Committee Chair)—Director/Editor, HowlRound: A Center for the Theater Commons, Emerson College

Emilya Cachapero—Director of Artistic Programs/ ITI-US, Theatre Communications Group

John Glore—Associate Artistic Director, South Coast Repertory

Leisl Tommy—Freelance Director

Doug Wright—Playwright

THE REPORT:**Overview of Original Proposals:**

As a committee we looked closely at some of the original language from the proposals using the frame of the mission of the Robina Foundation, and considered the evolution of that language from 2007 to 2012. Below we quote the key sections of the grants that guided our understanding of the proposed goals and objectives of the Binger Center for New Theatre.

Mission Statement for the Robina Foundation:

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.

Original Proposal from November 6, 2007:

Objectives include: "Mobilizing the talents, resources, and creative imaginations of young playwrights and stage professionals based on three propositions:

1. That with the strategic investment in the training and commissioning of plays, it will be possible to introduce innovation while ensuring the highest quality of production.
2. That it is imperative to attract and engage more diverse audiences that reflect the nation's changing demographics;
3. And that a key to enhancing the long-term vitality of live theatre lies in strengthening the regional stages through premieres and the showcasing of new talent. "

Two program components:

1. The establishment of a fund at the Center to commission new works for the stage—to raise the number of new plays for regional stages/ and encourage young playwrights.
2. The introduction of new writing-centered, collaborative, and integrated workshops, laboratories, and short courses to the Yale School of Drama curriculum. These will be focused on different genres, initially on musical theatre.

“Center will provide young playwrights with the time, resources, and support needed to create new plays....the Center will serve as a model for the training of professionals at other schools and provide a pipeline for new talent and new works.”

Revised Proposal April 13, 2012

“Yale now seeks to establish, in partnership with the Robina Foundation, the financial stability that will enable the Center to fire the American theatrical imagination for generations to come. . . to serve as a model for new theatrical productions around the country.

“The mission of the Center for New Theatre is to commission, develop, and produce new work for the stage, cultivating the talents of playwrights and other theatre artists.

“The Center will address the critical needs of the field by providing:

1. Meaningful compensation for writers.
2. Artist-centered processes.
3. Significant opportunities for production.
4. Multiple venues for interaction: classes, retreats, readings, workshops, residencies, and productions bring other theatre artists together at every stage of professional development.

“Expected Impact:

“We believe that this model—meaningful financial and artistic support of playwrights in combination with robust production opportunities and the fostering of community among artists—holds the highest promise for promoting the next great age of American playwriting.”

Summary from Meetings with the Staff of the Binger Center

Most of the following summary comes from conversations with James Bundy and Jennifer Kiger and additional contributions from Amy Boratko, Victoria Nolan, and Deborah Berman.

James Bundy began by framing the history of Yale Rep that led to the programmatic

priorities for the Robina Foundation proposal stated above. The frame for him included:

- A pressure to produce plays in a leadership role as Yale Rep productions reflect on how the Yale School of Drama is perceived.
- Acknowledging that their core competency over the past decade has been to identify and develop interesting writers.
- Addressing the big question he faced when he arrived at Yale—why would a playwright choose to do a play at Yale Rep when the royalty payouts were low, and given its proximity to NYC and the impact of the review as a New York review? This was part of the reason they focused on the need to commission writers in a substantial way and have put so many resources toward raising the commissioning amount.

Dean Bundy articulated what he thought success looked like if the Robina Foundation money was being leveraged toward the biggest impact:

- Giving the artist the widest possible audience they can find, multiple productions, and the ability to leverage other work because of the support they get from Yale.
- The extent to which the process contributes to the artistic growth of the artist, though less quantifiable, is just as important.
- Encouraging more adventurous work in the field at large.
- Inspiring others to create similar models.
- Using the enhancement fund, what Bundy described as the “most innovative tool they have,” as a form of risk capital to inspire others to do more new plays.

We spent most of the meetings with staff getting clear about how the programming works, how playwrights are chosen, and how development and production of the work comes about.

Day to day operations are much like those of a large regional theater when it comes to looking for and identifying new plays and strong voices they want to work with. Commissioned artists are chosen by Bundy and Kiger based on their long-term relationships with playwrights and their sense of who they consider the more innovative voices in the field. The literary office of the Binger Center assists in the process accepting unsolicited scripts and scripts from agents wading through a large pile of plays with the help of the YSD dramaturgy students.

The development path for the commissioned plays is driven by the needs of the artist and the project. One thing we heard consistently from all of the Binger Center staff: the artists making the work must drive its development. For this reason, and because of limited rehearsal space at Yale, most of the development work happens in New York City and not in New Haven. As most of the artists are in New York and

the collaborators are there as well, it is more convenient to the artists to work in New York. As a result, during the development of the work, YSD students are much less likely to be involved or able to access the process of the play's evolution in its earlier stages.

Yale Rep does not have a role in selecting playwrights for the YSD playwriting program so there isn't any direct relationship between the Binger Center commissioning program and the playwrights of the YSD.

We asked a question about how risk and innovation around the work was assessed, as the Binger Center staff and the Robina Foundation used both terms in defining the purpose of the support. And we heard risk defined this way by both Jennifer Kiger and Amy Boratko:

- Risk is assessed in relationship to the artist, not the audience. They work with artists to define the question of risk,
- In terms of how artistic risk-taking impacts audience engagement, there is less effort put here given that ticket sales do not drive their budget or their artistic decision making. They have begun to implement some post-show talk backs, but focus is not on preparing audience around risk.

We recognized as we got to the end of our two-day visit that we were still not clear on the relationship between what we perceived as three entities involved in the Robina Foundation proposal: Yale Rep, the Binger Center, and Yale School of Drama.

Dean Bundy clarified it for us this way:

- The Binger Center is a program and not a place. The word "Center" was primarily used as an academic word, to suggest a place to which funds would go—to create the idea of a community with potential donors, a place to create a rallying cry for money with the goal of ultimately creating an endowment.
- The primary resources of the fund are used to commission, develop, and produce new work.
- Bundy acknowledged that it might be inferred that these resources would be used to develop a curriculum around new play production but that isn't the case here. Faculty have methodology for teaching new play production but that is not run through the Binger Center and it is not the role of the Rep to shape how faculty will work.
- The branding challenge is how to best put Yale Rep out there as a professional theater.
- Robina Foundation is funding work that was already happening at Yale Rep and the funds make sure it will happen more deeply and in perpetuity. So the Binger Center isn't a new program but really a way of endowing existing practice.

At this point we asked Dean Bundy and Jennifer Kiger a series of questions:

What would be the most forward thinking way to integrate students and professionals and should Binger Center have a role in that? Is there a new exemplary practice for Binger Center within the YSD?

- Bundy reiterated here the autonomy of the faculty.
- Emphasized their interest in keeping the focus on the work and that feels strange for example to advertise the program, sees it as a template, not a model.

How they would define their audience?

- Bundy talked about the process of getting plays from writers they liked and getting those plays out and produced in other theaters.
- Their audience is probably the 50 largest theaters in the US

How they would define success on a national level?

- Success would be encouraging other communities to find their Robina Foundation to endow their practice—called their mission a “subversive elitist practice.”

We asked about communication between Binger Center and the faculty, and possible collaboration with commissioned artists and the faculty. Could there be a course on devised work for example when the recently commissioned Rude Mechanicals ensemble was in town?

- Not much has been done to integrate artists when they are in the middle of the development process, but when they are in a Yale Rep production then there is a lot of focus on integration.
- Bundy thought the communication overall was good.

Bundy then turned the tables and asked us to consider: What outcomes are we (Yale Rep) not using that we should be to measure success?

Summary of the Meeting with YSD Faculty

This meeting started with a very strange vibe, almost oppositional before anything was actually said. When we reiterated the confidential nature of the meeting then things seemed to be a little more free flowing. Part of the initial resistance was the general feeling from the faculty that the Robina support was not a conversation they felt a part of. For example, it was mentioned that the faculty learned about the gift at the same time the general public did.

The start of the conversation focused on the extra work that Binger Center was causing from the production side of things, particularly as they were getting into

more of the world of new musicals. The school didn't have the machine in place for that and a lot of extras were landing on existing staff as a result.

There was a general level of consensus that the caliber of new work has improved with the infusion of the Robina money and that the Rep was now attracting more exciting artists and that this is great for students. The faculty is most aware of how the Robina money impacts the productions at Yale Rep and they saw it as a boon for the design students in particular to get to work on such high quality plays with high quality artists. Everyone felt this had less impact for playwrights at YSD.

The best example of integration between the Binger Center and YSD was the summer musical which also includes YIMT.

The biggest concern from the faculty was the lack of communication (as perceived by the faculty) between the two entities, and missed opportunities for student engagement as a result. They didn't feel like there was a formal mechanism for communication between YSD and the Binger Center and as a result they had little sense of what artists had been commissioned and when they would be on campus, or when the development of the work was taking place.

They also expressed concern about how better integration could happen. One faculty member stated that they responded to this grant like they respond to everything else: there's a lot going on here. This led to an explanation of how things are scheduled within the YSD and concern that there is no room in the schedule for anything new; that to fit visiting artists from the Binger Center into the schedule for example would mean not doing something else. They have proven methodologies that they want every student who comes through Yale to experience, so integrating and creating new opportunities is a challenge.

That said, a couple of the faculty were more eager to take advantage of artist residencies. They expressed a desire for a space for visiting artists to work and to be accessible to students, and to find ways to connect the playwrights at YSD to the work of the Binger Center.

In asking the faculty about what they perceived to be the mission of the Binger Center, they didn't feel it had much to do with YSD but rather that the development of new work for the industry in general was the primary goal.

In a follow-up conversation after our meetings at Yale, we asked about the relationship between the Yale Institute for Music Theatre (YIMT) and the Binger Center, we learned that this is the first year YIMT will be integrated into the Binger Center and it's the only Binger Center program with a separate artistic director. It is scheduled in early June as a way to avoid conflicts with other programs. There has been a very strong interaction with the drama school, particularly stage managers and designers, but like with YSD much less interaction with the playwrighting students.

* Overall in our conversations with the faculty both in-person and via email, we heard a particular concern for finding ways to integrate the YSD playwriting students into the activities of the Binger Center, and a desire generally for more transparency and increased communication between the Binger Center and the faculty.

Summary of the Meeting with YSD Students

Most of the students didn't know about the Binger Center until they received the email about the 18 million dollar grant. Notably, Binger Center as a name didn't really resonate with the group, but dollar amount did. Students did say the size and nature of the grant conferred additional prestigious status upon the school, and they felt a trickle-down benefit from that, but that this is connected to public perception of the school, not practices within it.

Students reported that most of their interaction with the Binger Center is informal—they have one or two-hour conversation with the artists who come through town and these conversations are very inspirational.

Many of the students talked with great enthusiasm about Boot Camp. This seems to be the only event in which students and commissioned Binger playwrights mingle, exchange ideas, and cross-pollinate. It's also interesting to note that it occurs four or five days before the semester begins, so as not to interfere with the rigorous calendar mentioned by the faculty.

Playwrights expressed the greatest frustration in being able to connect to Yale Rep productions, as this is how the students come into contact with the programming of the Binger Center. Playwrights desire more access and training around the business side of playwriting and the real world challenges of getting work produced, and feel like they could gain a lot from more interaction with the professional arm of Yale. The group did speak highly of Jennifer Kiger and her willingness to meet and talk about the profession and engage the individual work of the playwrights.

Like the faculty, the students realize that more in-depth interaction with the Binger Center would have to be integrated into the curriculum; otherwise their schedules don't permit more involvement. But they would love to see "pop-up" master classes by visiting artists, more focus and learning opportunities around devised work, and access to the play development process and the pre-production process as part of their training.

Summary from Interviews with Collaborating Artists and Theaters

As a Committee we talked with a number of commissioned artists and theaters that benefitted from enhancement funds. In all cases we promised confidentiality so we will not mention specific names but summarize the responses from those interviews.

From Commissioned Artists

We heard from all the commissioned artists we talked to that the commission was a significant "shot in the arm" to the artists' careers and to their ability to engage and focus on the specific project. There was great praise for the Yale Rep staff and their commitment to the work, especially when the play went into full production, in other words when it wasn't a commission that was ultimately passed on. We heard responses like "when you fall in love, you never take it for granted," conveying the sentiment that Yale Rep is a true artistic home for some of the artists involved.

We did hear from more than one artist that they didn't receive as much support for their development process as they had hoped. They felt that the staff seemed to be "overwhelmed" or "stretched too thin," and that communication was not as transparent and free flowing as they had hoped. That said, even those artists acknowledged the importance of the commission in their careers. And not surprisingly, these artists were very nervous about talking openly for fear of being perceived as "ungrateful" and risking the loss of future opportunities with Yale Rep.

From Theaters That Received Enhancement Funding

All of the theaters we talked to had a similar story. They had chosen to work with the artists and produce the plays based on their own relationships. They did not credit Yale Rep with bringing these artists to their attention. And everyone we talked to said they had decided to produce the work before they were aware of the enhancement funding (important to note here that we didn't talk to everyone who received enhancement funding). But that said, those we talked to report that the enhancement funding—that went to improving design or extending the rehearsal process—had an undeniably positive impact on the final production. There was praise for the expertise of Vicki Nolan and gratitude for the invaluable insights about budget and other production challenges Yale Rep was able to provide due to their familiarity with the work. *

Overview and Assessment from the Committee

It's important to note here that though some of the committee members have worked at Yale Rep, none of us came into the process with much information about the Binger Center or any preconceived notions about the programming. For all of us this evaluation has been a learning process that has involved listening and then thoughtful reflection.

All of us were very impressed by the staff of the Binger Center and the stalwart commitment to artists and to the artistic process.

From our vantage point the Binger Center seems well on its way to achieving the first of its stated goals; it has commissioned excellent writers who have produced compelling work; it has helped those works get produced in admirable fashion; playwright compensation has increased; and finally, for the most part, the artists involved speak very highly of their experience working with the Rep. The synergy between James Bundy, Jennifer Kiger, and Amy Boratko makes for an acutely

intelligent and passionate artistic team—deeply responsive to the needs of the artists whose work they undertake to support.

In this respect the Binger Center is clearly an example of a “best practice” in the field of new play development. And we recognize that this has been the objective of the Binger Center. As we attempted to understand the goals, we went back as a group and focused on what Dean Bundy expressed as the primary purpose of the Binger Center—to endow the new play development activity that was already happening at Yale Rep for the sake of a higher level of new-play production on the Rep’s stage. From our vantage point that goal is being achieved at the highest level.

That said there was consensus among the committee that the other stated goal of the Binger Center -- “student enrichment” -- at present seems more elusive. There seems to be a dominant notion that if exciting things are happening at the Binger Center, the students will benefit by association.

And it’s true, to the extent that students were benefiting from new-play production at the Rep before the Binger Center came along, presumably they will continue to do so. Arguably they will have an enriched experience through exposure to better productions of new work that has had the benefit of artist-centered development.

But all of us wondered if this was enough? It’s crucial to note that student playwrights feel most divorced from both the Binger Center and the Rep, and there was an uncomfortable irony there for the committee members as the Binger Center is so focused on creating positive experiences for playwrights as a core part of the mission. We worried that some (not all) of the faculty see the activities of the Binger Center as a potential intrusion into their current curricula, rather than an opportunity to further inform and enrich it.

One of the stated goals of the Binger Center is to have an impact on the production of new work across the nation and this raised two questions for us:

1. How might the Binger Center model improve integration between professional theater and training programs?
2. And how can the enhancement funds of the Binger Center be more effectively used to leverage national impact?

We all saw, as Dean Bundy articulated, the enhancement fund as the most innovative piece of the Robina Foundation funding, and were excited to think about how it could be used in a more innovative fashion.

We particularly admire the Binger Center’s desire to make playwriting a tenable profession and wondered how this model might spread: could the Binger Center have a larger impact on the field in this respect and what would that take?

Two things we noted in this regard: The Playwriting Chair at the Yale School of Drama is the only chair without any formal affiliation or title at the Rep; and other than commissioned artists, there are no playwrights actually advising or participating in Binger Center operations or decision making. Is this prudent in what is essentially a heavily funded playwriting initiative?

Recommendations:

The following recommendations are offered based on our overview and assessment.

1. For all of us we felt the impact of an investment this size should be felt more clearly in the lives of the students of the YSD, especially on the playwriting programming. This investment calls out for an exploration of ways to improve the intersection between the professional theater and the pedagogical infrastructure that supports it.
2. Given that supporting playwriting and playwrights is such a focus of the Binger Center we suggest creating an advisory position to the Binger Center to be held by a professional playwright. This voice seems to be missing in the current staffing configuration and could help foster a deeper relationship between the YSD playwrights and the Binger Center.
3. The investment of the Robina support was primarily to deepen and preserve activities that were already happening at Yale Rep. The support is to ensure excellence. To the degree that Robina and the Rep seek to make this funding innovative—to support new practices and behaviors—we recommend reconsidering how the enhancement support is made public, and whether it might be used in ways to encourage productions of new plays from Yale Rep commissions that could not happen without such support.
4. Because the size of this investment in the American theater is so substantial, we encourage you to find ways to report your activities and your learning around these activities to the field more regularly. Are you creating a model for other regional theaters? Are you ensuring a more vibrant future for the field? This is such an important project and one that can benefit others through sharing outcomes.

It was an honor for all of us to participate on this committee. We admire your commitment to fostering new voices and new projects with the kind of financial support that can sustain careers.

JAMES BUNDY, ARTISTIC DIRECTOR
VICTORIA NOLAN, MANAGING DIRECTOR



DARING ARTISTS. BOLD CHOICES. ADVENTUROUS AUDIENCES.

October 23, 2017

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

Dear Penny,

It is my pleasure to provide you and the Trustees of the Robina Foundation with this annual report for the FY2017 activities of the Binger Center for New Theatre.

Provide the goals and objectives established in your grant proposal.

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

Goals

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

Objectives

- To support a significant number of Yale Rep-commissioned plays and musicals and provide commissioned artists with readings and workshops, as well as residencies at the School of Drama.
- To produce work of the highest possible artistic standards at Yale Rep and to encourage the advancement of plays commissioned, developed, and produced through the Binger Center for New Theatre.
- To promote partnerships through the Production Enhancement Fund, a mechanism that helps to underwrite multiple productions of Yale-commissioned plays and musicals at theatres across the country.

- To introduce writing-centered, collaborative, and integrated workshops, laboratories, and short courses to the Yale School of Drama (YSD) curriculum, focusing specifically on musical theatre (including libretto, lyric, and music composition for the stage).

Provide a summary of your activities during the reporting period and how they relate to achievement of the ultimate goal/purpose of the program.

The 2016-17 season featured the world premieres of three Yale Rep-commissioned plays: Sarah Ruhl's *Scenes from Court Life, or the whipping boy and his prince*; Aditi Brennan Kapil's *Imogen Says Nothing*; and Amy Herzog's *Mary Jane*, which is currently having its New York premiere at New York Theatre Workshop. Paula Vogel and Rebecca Taichman's *Indecent*, which premiered in Yale Rep's 2015-16 season, had a critically acclaimed Broadway run from April 4 to August 6, 2017; the production received Tony Awards for Best Direction of a Play (Rebecca Taichman) and Best Lighting Design of a Play (Christopher Akerlind), as well as a nomination for Best Play (Paula Vogel).

Commissions

- In FY2017, we offered commissions for four new plays to Tarell Alvin McCraney, who will serve as Yale Rep's Playwright-in-Residence; Mary Kathryn Nagle; Tori Sampson; and Martin Zimmerman. With the Fisher Center for the Performing Arts at Bard College, we commissioned *What Remains*, an innovative performance piece by Claudia Rankine, Will Rawls, and John Lucas.
- One commission is scheduled for its world premiere production in Yale Rep's 2017-18 season: the Rude Mechs' *Field Guide*.
- We are currently developing Karen Hartman's *Good Faith*; Ann Marie Healy's *The Available*; Amelia Roper's adaptation of the Jane Bowles novel *Two Serious Ladies*; christopher oscar peña's *How to Make an American Son*; Alice Tuan's *A Humbling in St. Paul*; and Robert Woodruff, Bill Camp, and Evan Ziporyn's opera *Brother of Jackals*, based on the Book of Job.

Workshops, Readings, and Residencies

The Binger Center continues to provide ample development opportunities for our commissioned artists and their collaborators. In FY2017, we produced 6 workshops and 8 residencies. As in FY2016, we produced several large-scale, complex workshops, and we continued to increase the number of activities in New Haven. The Rude Mechs were in residence at Yale for ten days to workshop their commission, *Field Guide*. Developing the piece in our spaces gave them opportunities to collaborate with our production staff in anticipation of their upcoming production this winter. Caroline McGraw and Meg Miroshnik, who both participated in an August 2015 Writers Residency in New Haven, had overlapping residencies to continue work on early drafts of their plays. They also participated in a round-table discussion for current YSD playwriting students about the transition from the MFA program to the professional world.

- Workshop of *Good Faith* by Karen Hartman (New York, July 2016)
- Writers Residency: Alice Tuan (New Haven, July 2016)
- Workshop of *Two Serious Ladies* by Amelia Roper (New York, July 2016)
- Artist Residency: Aditi Brennan Kapil and Laurie Woolery (New Haven, September 2016)
- Workshop of *Mary Jane* by Amy Herzog (New York, October 2016)
- Writers Residency: Alice Tuan (New Haven, November 2016)

- Writers Residency: Caroline McGraw (New Haven, March 2017)
- Writers Residency: Meg Miroshnik (New Haven, March 2017)
- Writers Residency: Ann Marie Healy (New Haven, April 2017)
- Workshop of *Field Guide* by the Rude Mechs (New Haven, May-June 2017)
- Writers Residency: Karen Hartman (New Haven, June 2017)
- Yale Institute for Music Theatre Workshop: *Cowboy Bob* by Molly Beach Murphy, Jeanna Phillips, and Annie Tippe (New Haven, June 2016)
- Yale Institute for Music Theatre Workshop: *GUMBO* by Brett Macias and Christina Quintana (New Haven, June 2016)
- Yale Institute for Music Theatre Residency: Julia Meinwald and Gordon Leary (New Haven, June 2016)

New Play Production

The Binger Center supported three productions in Yale Rep's 2016-17 season: *Scenes from Court Life, or the whipping boy and his prince* by Sarah Ruhl; *Imogen Says Nothing* by Aditi Brennan Kapil; and *Mary Jane* by Amy Herzog. All three plays received Edgerton Foundation New Play Awards.

- *Scenes from Court Life* by Sarah Ruhl, directed by Mark Wing-Davey, ran in New Haven from September 30 to October 22, 2016, at the start of our 50th anniversary season. The play, which juxtaposed the British Stuart and the American Bush families, was called "a welcome oasis for those parched from the lack of humanity during the election season...an incisive examination [and] a veritable treat" (*New Haven Register*). The production received nominations from the Connecticut Critics Circle for Outstanding Production of a Play, Costume Design (Marina Draghici), and Sound Design (Shane Rettig).
- *Imogen Says Nothing* by Aditi Brennan Kapil was performed from January 20 to February 11, 2017. The production, directed by Laurie Woolery, was praised for being a "fierce, feminist fable" that is a "profound meditation on women in society, gender roles in general, persecution, creativity, posterity, and the nature of theatre itself" (*Hartford Courant*). Ashlie Atkinson received an Outstanding Actress nomination from Connecticut Critics Circle for her portrayal of the eponymous Imogen, an "extraordinary and unexpected protagonist" (*New Haven Independent*).
- Amy Herzog's *Mary Jane* ran in New Haven from April 28 to May 20, 2017, and was directed by Anne Kauffman. Terry Teachout, in a review for the *Wall Street Journal*, declared that this play solidifies Ms. Herzog's place as "the most significant American playwright of her generation." The production was nominated for the Connecticut Critics Circle Awards for Outstanding Production of a Play, Outstanding Actress (Emily Donahoe), and Featured Actress (Miriam Silverman). *Mary Jane*, in a production at New York Theatre Workshop in association with Yale Rep, began its New York run on September 6; Jesse Green of the *New York Times* called it one of "five shows to see if you're in New York in September." *Mary Jane* was also a finalist for the 2017 Susan Smith Blackburn Award.

Production Enhancement Fund

The Production Enhancement Fund supported the Broadway production of Paula Vogel and Rebecca Taichman's *Indecent* at the Cort Theatre. The production was among "Best of the Year" lists in the *New York Times*, *Time Out New York*, *Newsday*, *Deadline*, and *The Advocate*, and on the websites theatremania and app.com. Notably, the production was slated to close June 25, shortly after the

Tony Awards, but a passionate response from audiences caused the producers to reverse the decision and keep the play open for an additional six weeks, during which each week turned a profit. *Indecent* was filmed and will air in PBS's *Great Performance* series on November 16, 2017.

Describe any unanticipated results or lessons learned and any changes you have made or propose to make to the project or the timing of the project. Provide information on any other issues or matters you would like to highlight to the Robina Board.

In FY2017, Jennifer Kiger, Yale Rep's Associate Artistic Director and Director of New Play Programs, served as interim chair of Yale School of Drama's playwriting program. During this year, her role at Yale Rep and at the School allowed for further integration of Binger Center artists into classrooms. For each world premiere production, a playwriting student served as an assistant to the playwright, and Ms. Ruhl and Ms. Herzog, who are on faculty, encouraged their students to regularly attend rehearsal and observe their processes. We expect this collaboration to continue under the incoming chair, commissioned artist and Yale Rep Playwright-in-Residence Tarell Alvin McCraney. Chantal Rodriguez, who served as Assistant Dean last school year and is now Associate Dean at the Yale School of Drama, worked with Yale Rep's artistic staff to connect Binger Center artists to Affinity Groups at the school. During her residency in November, Alice Tuan attended an event led by the Asian and Asian American Theatre Coalition, a student-led Affinity Group at YSD; her relationship with students she met there continued through her next residency.

We have commissioned the innovative performance piece *What Remains* by poet Claudia Rankine, choreographer Will Rawls, and filmmaker John Lucas. This piece began at the Fisher Center for the Performing Arts at Bard College, where it had its first showing in Annadale-on-Hudson, NY, at the Fisher Center in April 2017. Through movement, language, and video, *What Remains* explores the types of surveillance that have shaped—and still shape—the black experience in America. By joining with the Fisher Center, American Repertory Theater, and the Crossing the Line Festival, Yale Rep is contributing to the continued life and development of this timely and remarkable work, which we plan to produce in our No Boundaries presenting series.

Due to ongoing budget cuts mandated by the university, we made the difficult decision to end the Yale Institute for Music Theatre. Over its nine seasons, the Institute developed over 20 projects and helped advance the careers of dozens of musical theatre artists. However, the program was conceived in collaboration with the Yale School of Music and later brought into the Binger Center for New Theatre. Its aims, while important to the young artists it served, did not fully align with the Binger Center's goal of long-term artist-centric processes leading to production.

Additionally, please let us know if there is anything Robina could do differently to enable you to work well with the support given by Robina. Also share with us your thoughts about ideas/needs/trends related to your field of work that Robina might want to consider as we move forward.

As discussed in previous reports, we have identified the need to reassess our commissioning pipeline to ensure that we always maintain a diverse roster of voices: this will allow us to advance artists who are underrepresented in the field and work towards greater inclusion. All of the commissioned playwrights for FY2017 identify as artists of color, and *What Remains* is led by two prominent black artists, Claudia Rankine and Will Rawls. We hope to continue and further conversations about

equity, diversity, and inclusion in the theatre and work with our colleagues in the industry to address and reduce barriers to participation.

In February, we will host the second five-year review of the Binger Center. Susan Booth, the Artistic Director of the Alliance Theatre, has agreed to chair the committee. We anticipate that this committee of colleagues will give us insightful and productive responses to our programming and goals.

Attach an income and expense statement for this grant period along with your original budget for the period and a narrative explanation for any line item differences between the original budget and actual expenses. (Income for the project should include a list of additional funders and the amounts they provided.)

Our income and expense statement for FY2017 is attached. The (unaudited) value of the Binger Center permanent endowment as of June 30, 2017, was \$19,015,867. The value of converted Treasury bills is \$1,879,860. Income from the permanent endowment in FY2017 was \$833,309; income from the Treasury bills endowment was \$85,542. The School used \$527,798 in principal from the Treasury bills.

We remain enormously grateful to the Foundation for its extraordinary investment in the Binger Center for New Theatre.

Sincerely,


James Bundy

ARTIST BIOS

Tarell Alvin McCraney is the Chair, and Professor in the Practice, of Playwriting at Yale School of Drama and is the Yale Repertory Theatre Playwright-in-Residence. He is also a member of Teo Castellanos/D-Projects Theater Company in Miami, a member of the Steppenwolf Theatre Ensemble. McCraney co-wrote the 2016 film *Moonlight*, based on his own work *In Moonlight Black Boys Look Blue*, for which he received an Academy Award for Best Adapted Screenplay. His numerous awards include the Whiting Award, Steinberg Playwright Award, Doris Duke Artist Award, Windham-Campbell Prize, London Evening Standard Award for Most Promising Playwright, New York Times Outstanding Playwright Award, the Paula Vogel Award, and a 2013 MacArthur Fellowship. He is a graduate of Yale School of Drama.

Mary Kathryn Nagle was born in Oklahoma City, Oklahoma, and is a citizen of the Cherokee Nation of Oklahoma. She graduated *summa cum laude* from Tulane University Law School, where she was the recipient of the Judge John Minor Wisdom Award. Her play *Manabhatta* was recently featured in The Public Theater's inaugural Public Studio workshop production series and will have its world premiere at Oregon Shakespeare Festival in its 2018 season. Other recent productions include Amerinda Inc.'s presentation of *Miss Lead* at 59E59 Theaters in 2014. Nagle is an alumna of the 2013 Emerging Writers Group at The Public Theater and of The Civilians' 2014 Research & Development Group, where she developed her play, *Fairly Traceable*. She is the executive director of the Yale Indigenous Performing Arts Program, designed to develop Native voices in the American theater and ensure that Native plays reach the American stage. Nagle is also a partner at Pipestem Law, P.C., where she works to protect tribal sovereignty and the inherent right of Indian Nations to protect their women and children from domestic violence and sexual assault. She is the author of *Sliver of a Full Moon*, a play that has traveled to theatres and law schools across the country to educate the public on the need for restoration of tribal criminal jurisdiction over non-Indians in the 2013 re-authorization of the Violence Against Women Act. She has been commissioned by Arena Stage; Portland Center Stage; and The Rose Theater in Omaha, Nebraska.

Tori Sampson recently received her MFA in playwriting from Yale School of Drama, where her credits included *If Pretty Hurts Ugly Must be a Muthafucka*, *THIS LAND WAS MADE*, and *Some Bodies Travel*. Her plays have been developed at Great Plains Theatre Conference and Berkeley Repertory Theatre's Ground Floor residency program. Sampson received an Honorable Mention from the American Playwriting Foundation's 2016 Relentless Award and is the Kennedy Center's 2017 Paula Vogel Playwright and second-place Lorraine Hansberry Playwriting Award recipient. Sampson is a 2017 finalist for the Alliance Theatre's Kendeda Prize. Her other plays include *Cadillac Crew*, *Black Girl Nerd*, and *Cottoned Like Candy*. Her short play, *She's our President*, will be produced by Baltimore Center Stage as part of the *My America: She* commission. Sampson is currently working on a commission from Berkeley Repertory Theatre. A native of Boston, Massachusetts, she holds a B.S. in sociology from Ball State University in Muncie, IN.

Martin Zimmerman is a multi-ethnic, bilingual playwright and screenwriter whose plays include *Seven Spots on the Sun*, *On the Exhale*, *White Tie Ball*, *The Making of a Modern Folk Hero*, *The Solid Sand Below*, and *Let Me Count the Ways*. His plays have been produced or developed at The Kennedy Center, Goodman Theatre, Cincinnati Playhouse in the Park, Oregon Shakespeare Festival, La Jolla Playhouse, Alley Theatre, Roundabout Underground, LCT3, New York Theatre Workshop, Victory Gardens Theater, The Eugene O'Neill Theater Center's National Playwrights Conference, Philadelphia Theatre Company, Marin Theatre Company, The Playwrights' Center, Alliance Theatre,

A.C.T. (Seattle), PlayPenn, Icicle Creek New Play Festival, American Theater Company, The Theatre @ Boston Court, Chicago Dramatists, Primary Stages, Teatro Vista, Ojai Playwrights Conference, Playwrights Foundation, Cara Mía Theatre Co, Seven Devils Playwrights Conference, The City of Chicago's Department of Cultural Affairs, Theatre Row, Illinois Shakespeare Festival, Borderlands Theater, Source Festival, The Gift Theatre, Collaboraction Theatre, Red Tape Theatre, The University of Texas at Austin, and Duke University with upcoming projects at Roundabout Underground, Rattlestick Playwrights Theater, La Jolla Playhouse, and Milwaukee Repertory Theater. A recipient of the Terrence McNally New Play Award, Steinberg/ATCA New Play Award Citation, Humanitas Prize New Voices Award, Sky Cooper New American Play Prize, McKnight Advancement Grant, Jerome Fellowship, Carl Djerassi Playwriting Fellowship, and the National New Play Network's Smith Prize, Zimmerman was a Staff Writer on Netflix's *Narcos*, is a Story Editor on the upcoming Netflix Series *Ozark*, has been the Alliance for Latinx Theater Artists (ALTA) Artist of the Month, was a member of the 2011-2012 Playwrights' Unit at Goodman Theatre, is a Playwright in Residence at Teatro Vista and a Resident Playwright at Chicago Dramatists, and has been a finalist for the Kendeda Competition and Heideman Award. MFA in Playwriting: The University of Texas at Austin. BA in Theater Studies, BS in Economics: Duke University.

***What Remains* (Claudia Rankine, Will Rawls, and John Lucas)**

Claudia Rankine is the author of five collections of poetry, including *Citizen: An American Lyric* and *Don't Let Me Be Lonely*; and two plays, including *Provenance of Beauty: A South Bronx Travelogue*; numerous video collaborations; and she is the editor of several anthologies, including *The Racial Imaginary: Writers on Race*. For her book *Citizen*, Rankine won both the PEN Open Book Award and the PEN Literary Award, an NAACP Image Award, and the National Book Critics Circle Award for Poetry (*Citizen* was the first book ever to be named a finalist in both the poetry and criticism categories); and *Citizen* was also a finalist for the National Book Award. *Citizen* also holds the distinction of being the only poetry book to be a *New York Times* bestseller in the nonfiction category. Among her numerous awards and honors, Rankine is the recipient of the Poets & Writers' Jackson Poetry Prize and fellowships from the Lannan Foundation and the National Endowment for the Arts. She lives in California and is the Aerol Arnold Chair in the University of Southern California department of English.

Will Rawls is a choreographer, performer and writer. Rawls creates solo and group works that engage and attenuate relationships between language and dance. To this end, he is committed to expressing the nature of multiple selves within socially inscribed constructs. He is a recipient of the 2017 John Simon Guggenheim Foundation Fellowship, a 2017 Robert Rauschenberg Foundation Residency, the Casinos Austria 2016 Prix Jardin d'Europe, and a 2015 Foundation for Contemporary Arts Grant. As an interpreter and performer, Rawls has worked with Marina Abramovic, Jérôme Bel, Alain Buffard, Maria Hassabi, Xavier Le Roy, Tino Sehgal and Shen Wei Dance Arts. As an educator, he has been a 2015-2016 Mellon Creative Campus Fellow at Wesleyan University and an Arthur J. Levitt Artist-in-Residence at Williams College. His writing has been published by Artforum, Triple Canopy, les presses du réel, The Museum of Modern Art, and The Hammer Museum, and he was co-editor of *Lost and Found: Dance, New York, HIV/AIDS*, and *Then and Now*, published by Danspace Project. He holds a Bachelor's Degree in Art History from Williams College. willrawls.com

John Lucas was born and raised in Ohio. A documentary photographer and filmmaker working in the humanist tradition, he has directed and produced several cutting-edge multimedia projects, including a collaborative series of video essays, with poet Claudia Rankine, entitled *Situations*. In 2014 he completed his first feature-length documentary film, *The Cooler Bandits*, which was awarded Best Documentary at the 2014 Harlem International Film Festival. His work has been exhibited in museums and galleries both nationally and internationally, including the Brooklyn Museum of Art; Cleveland Museum of Art; REDCAT, Los Angeles; OK Harris Works of Art, New York City; the Smithsonian Institution, Washington D.C.; Pulitzer Arts Foundation, St. Louis; La Panaderia Gallery, Mexico City; Aeroplastics Contemporary, Brussels; and Fieldgate Gallery, London. Lucas lives and works in Southern California.

Binger Center for New Theatre
FY17 Financial Report

	FY2017 Binger Center Budget	FY2017 Other Sources Budget	FY2017 Center for New Theatre Total	FY2017 Binger Center Actuals	FY2017 Other Sources Actuals	FY2017 Center for New Theatre Total
Income						
Binger Center Endowments	1,429,864		1,429,864	1,396,649		1,396,649
Robina Production Enhancement Funds	50,000		50,000	50,000		50,000
Other (Foundation, Individual, and University support) ⁽¹⁾		577,046	577,046		538,342	538,342
Grand Total Income	1,479,864	577,046	2,056,910	1,446,649	538,342	1,984,991
Expenses						
Literary Manager, Assoc Artistic Director, Artistic Associate: Salary and Benefits	338,468		338,468	349,329		349,329
Commissions ⁽²⁾	68,750		68,750	80,000		80,000
Workshops, Residencies and Retreats	120,000		120,000	93,921		93,921
Production Expenses	670,923	299,567	970,489	648,597	378,065	1,026,662
Enhancement Support ⁽³⁾	50,000		50,000	50,000		50,000
Yale Institute for Music Theatre	105,413	19,671	125,083	98,492	5,666	104,158
YSD Playwriting Lecturers		163,842	163,842		60,643	60,643
YSD Key Staff Time ⁽⁴⁾	126,310	93,967	220,277	126,310	93,967	220,277
Program Review			-			-
Grand Total Expenses	1,479,864	577,046	2,056,910	1,446,649	538,342	1,984,991

(1) Additional income for the project came from K Unterberg (\$50K), Beinecke Playwriting Residency endowment (\$50.1K), Center for New Theater endowment (\$30.5K), National Endowment for the Arts grant (\$17.8K)

(2) Commission fees are fluid, depending on when drafts are completed, and extend over fiscal years

(3) Production Enhancement Fund supported *Indecent* on Broadway

(4) Key Staff Time reflects charging the following % of salary & fringe: 10% of Managing Director, 50% of Production Manager, 60% of Stage Carpenter, 60% of Props Master, and 88% of Artistic Coordinator to reflect actual effort.

Yale School of Drama/Yale Repertory Theatre
Binger Center for New Theatre
Annual Report - July 1, 2016-June 30, 2017

**The Binger Center for New Theatre Funds Report
as of June 30, 2017**

Overall Endowment Performance for Fiscal Year 2017

Yale's endowment earned an 11.3% investment return (net of fees) for the year ending June 30, 2017. The endowment value increased from \$25.4 billion on June 30, 2016, to \$27.2 billion on June 30, 2017.

Spending from the endowment, which is the largest source of revenue for the university and supports faculty salaries, student scholarships, and other expenses, for Yale's 2018 fiscal year is projected to be \$1.3 billion, representing approximately 34% of the University's net revenues. Endowment distributions to the operating budget have increased at an annualized rate of 9.2% over the past 20 years. Those distributions support, among other priorities, Yale's commitment to meeting the full financial need of every student enrolled in Yale College.

The university's longer-term results remain in the top tier of institutional investors. Yale's endowment returned 12.1% per annum over the 20 years ending June 30, 2017, exceeding broad market results for domestic stocks, which returned 7.5% annually, and for domestic bonds, which returned 5.2% annually. Relative to the estimated 7.3% average return of college and university endowments, over the past 20 years Yale's investment performance added \$24.3 billion of value in the form of increased spending and enhanced endowment value. During the 20-year period, the endowment grew from \$5.8 billion to \$27.2 billion.

Audited values as of October 2017:

The Binger Center for New Theatre Endowment Fund I

Original Investment	\$15,000,000.00
Principal	\$15,000,000.00
Market Value	\$20,158,019.92
Expendable Income (2017-2018)	\$ 893,718.08

The Binger Center for New Theatre Endowment Fund II

Original Investment	\$2,194,203.00*
Principal	\$1,340,583.67
Market Value	\$1,457,044.59
Expendable Income (2017-2018)	\$ 64,598.96**

**Wasting endowment. Replaces the Binger Center for New Theatre Current Use Fund*

***Income distribution in addition to withdrawals from the principal*

Yale Law School

THE ROBINA FOUNDATION HUMAN RIGHTS FELLOWSHIP
INITIATIVE



Annual Report

October 2017

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BACKGROUND

The Robina Foundation has supported the Robina Human Rights Fellowship Initiative at Yale Law School since 2008-09. Between 2008 and 2016, the Foundation made annual \$1 million gifts to support the Initiative that totaled \$9 million. In that time, the Foundation has supported a total of 84 scholarships for 76 individual YLS students interested in careers in human rights; 378 summer human rights fellowships for 322 individual students; and 32 year-long post-graduate fellowships for recent graduates working for human rights organizations.

In the fall of 2016, the Foundation made two endowment gifts to the Law School: \$10 million to endow the Initiative and \$3 million to endow the Binger Clinical Faculty Chair in Human Rights at Yale Law School. In July 2017, James Silk, long-time director of the Robina Human Rights Initiative, became the inaugural holder of the Binger Chair. This report describes the fellowships and activities supported during 2016-17, which were funded by the \$1 million expendable grant awarded in May 2016.

Since its inception, the Robina Human Rights Fellowship Initiative has funded scholarships and fellowships that a) support students and post-graduates interested in human rights through academic and internship opportunities, field missions, and financial aid, and b) bring leading scholars in human rights to the Law School to conduct research, teach courses, host discussions, participate in conferences, and publish scholarship. Over the years, the Initiative has met with remarkable success and expanded its scope. During the past year, the Initiative also provided support to graduates working in human rights who are enrolled in COAP (the Law School's student loan repayment program).

The components of the Robina Human Rights Fellowship Initiative in 2016-17 were:

- Human Rights JD Scholarships
- Kirby Simon Summer Human Rights Fellowships
- Post-Graduate Human Rights Fellowships
- Visiting Human Rights Fellowships
- COAP Recipients Supported by the Robina Foundation
- Human Rights Clinical Education Innovation and Travel
- Outreach to the Wider Yale Community
- Robina Human Rights Fellowship Coordinator and Program Administration

PROGRESS TOWARD GOALS

This report will first detail the Law School's implementation of each of the Initiative's components in 2016-17. The longer-term outcomes are addressed on page 13.

A. Robina Human Rights JD Scholarships

Robina Human Rights JD Scholarships are awarded to Yale Law School students on the basis of financial need and demonstrated interest in human rights. This year, the Law School awarded scholarships to six outstanding students who have shown a clear commitment to human rights through participation in extracurricular activities, clinical work, and/or employment at a human rights-focused organization or law firm. For biographies of this past year's JD Scholars, please see addendum A.

- Alexandra Francis '18
- Allison Frankel '17
- Adrienne Lee '17
- Iulia Padeanu '17
- Hillary Vedvig '17
- Andrew Walchuk '17

B. Kirby Simon Summer Human Rights Fellowships, funded by the Robina Foundation

The Kirby Simon Summer Human Rights Fellowships provide stipends to Yale students who spend their summers working in human rights. During the summer of 2016, 29 YLS students, eleven Yale College students, one Yale medical student and one Yale graduate student received these fellowships. During the summer of 2017, 24 YLS students, twelve Yale College students, and one Yale graduate student received fellowships. Their internship placements were as follows:

Summer 2016:

- Laika Abdulali '17 J.D. - The Advice on Individual Rights in Europe (AIRE) Centre, U.K.
- Courtne Drigo '18 J.D. - World Bank, Office of Suspension and Debarment, U.S.
- Kyle Fees '18 J.D. - Center for Human Rights and Global Justice, NYU, U.S.
- Ama Francis '18 J.D. - Islands First, U.S.
- Michael Gale '18 J.D. - Asociacion por los derechos civiles, Argentina
- Anna Gonzalez '18 J.D. - Media Legal Defence Initiative, U.K.
- Arielle Humphreys '17 J.D. - ACLU, Human Rights Division, U.S.
- Sameer Jaywant '18 J.D. - Human Rights Watch, Jordan; Indian Court, India
- Scout Katovich '17 J.D. - European Court of Human Rights, France
- Shane Kunselman '18 J.D. - JUSTICE, U.K.
- Steven Lance '18 J.D. - The Door, U.S.; Proyecto Lingüística Quetzalteco de Español, Guatemala

- Hyun-Soo Lim '18 J.D. - Doughty Street Chambers, U.K.
- Alina Lindblom '17 J.D. - United Nations High Commissioner for Refugees (UNHCR), Colombia
- David Miller '18 J.D. - U.S. Department of Justice, Human Rights Crimes Section, U.S.
- Katherine Munyan '17 J.D. - European Roma Rights Centre, Hungary
- Carolyn O'Conner '18 J.D. - Inter-American Commission on Human Rights, U.S.
- Helen Price '18 J.D. - Bronx Defenders, U.S.
- Paul Rink '18 J.D. - Proyecto Lingüística Quetzalteco de Español, Guatemala
- Victoria Roeck '18 J.D. - AIRE Centre and Doughty Street Chambers, U. K.
- Alexandra Schluntz '18 J.D. - Death Penalty Project, U.K.
- Alex Sverdlik '18 J.D. - European Court of Human Rights, France; World Bank, U.S.
- Kevin Tobia '17 J.D. - Daily Freedom Network, U.K.
- Andrew Udelsman '17 J.D. - Earth Justice, Colombia; UNHCR, U.S.
- Andrew Walchuk '17 J.D. - Human Rights First, U.S.
- Chang (Julia) Wang '18 J.D. - European Court of Human Rights, France
- Evan Welber '18 J.D. - UN Registry of Damages, Austria
- Jonathan Wong '18 J.D. - World Bank, U.S.
- Alyssa Yamamoto '18 J.D. - UN Office of the High Commissioner for Human Rights (UNHCHR), Switzerland; Human Rights Watch, U.S.
- Tara Zivkovic '17 J.D. - Paul Hoffman, U.C. Irvine School of Law, U.S.

- Rachel Baker, YC - Drug Policy Alliance, U.S.
- Carmen Baskauf, YC - International Organization for Migration, Egypt
- Charlotte Finegold, YC - Legal Resources Center, South Africa
- Rob LaRose, YC - Initiative for Social and Economic Rights, Uganda
- Ishrat Mannan, YC - Human Rights Watch; Talent beyond Boundaries, U.S.
- Maria Melchor, YC - Karnes Family Detention Center, U.S.
- Kar Jin Ong, YC - Independent podcast producer, Malaysia
- Kyle Ranieri, YC - Rockefeller Foundation, U.S.
- Emily Rice, YC - UNHCR, Switzerland
- Christoph Sponsel, GSAS - UNHCHR, Colombia
- Nicholas Stewart, YC - EssMart Global, India
- Thais Vinholo, YSMed - Oswaldo Cruz Foundation, Brazil
- Alexis William, YC - Department of Education, Office of Civil Rights, U.S.

Summer 2017:

- Laika Abdulali '17 J.D. - Doughty Street Chambers, U.K.
- Laith Agel '19 J.D. - Special Tribunal for Lebanon, Netherlands
- Luis Calderon '19 J.D. - European Court of Human Rights, France
- Varun Char '19 J.D. - Asylum Access Ecuador, Ecuador
- Jonathan Cohen '19 J.D. - Adalah, Israel
- Catherine Crooke '19 J.D. - UNHCR, Caribbean Protection Unit, U.S.
- Kyle Fees '18 J.D. - ACLU Human Rights Division, U.S.

- Ama Francis '18 J.D. - Gov't of Dominica, Environmental Coordinating Unit, Dominica
 - Shikha Garg '19 J.D. - Legal Resources Center, South Africa
 - Eri Kalu '19 J.D. - Human Rights Watch, Health Division, U.S.
 - Steve Lance '18 J.D. - Proyecto Lingüística Quetzalteco de Español, Guatemala
 - Ellis Liang J.D./M.B.A. - The Court of First Instance of the High Court of Hong Kong, Hong Kong
 - Carolyn Lipp '19 J.D. - Proyecto Lingüística Quetzalteco de Español, Guatemala
 - Chris Looney '19 J.D. - European Court of Human Rights, France
 - Melissa Marichal '18 J.D. - Proyecto Lingüística Quetzalteco de Español, Guatemala
 - Catherine McCarthy '19 J.D. - DOJ, Office of Human Rights and Special Prosecutions, U.S.
 - Annika Mizel '18 J.D. - Willow International, Uganda
 - Mariana Olaizola '19 J.D. - Council of Europe, Office of the Commissioner, France; Advocates Abroad for Human Rights, Greece
 - Paulina Perlin '19 J.D. - UN Office of the High Commissioner for Human Rights, Colombia
 - Amber Qureshi '19 J.D. - Justice Project Pakistan, Pakistan
 - Srinath Reddy Kethireddy '19 J.D. - Doughty Street, U.K.; Supreme Court of India
 - Beatrice Walton '18 J.D. - Human Rights Court for Council of Europe, France
 - Zoe Weinberg J.D./M.B.A. - Oxfam, Iraq
 - Evan Welber '18 J.D. - International Criminal Court, Netherlands
-
- Rayan Alsemeiry, YC - Peace & Dialogue Leadership Initiative, Israel/Palestine
 - Maddy Batt, YC - Solitary Watch & The North Carolina Commission of Inquiry on Torture, U.S.
 - Jade Chowning, YC - Yale Prison Education Initiative, U.S.
 - Edwin Edem, YC - Integrated Refugee and Immigrants Services (IRIS), U.S.
 - Aaliyah Ibrahim, YC - Peace and Conflict Studies, Uganda and Rwanda
 - Catherine Liu, YC - IsraAID, Germany & France
 - Wellington Mackey, YC - Integrated Refugee and Immigrants Services (IRIS), U.S.
 - Maria Melchor, YC - Global Detention Project, Switzerland
 - Helen Price, YC - Foreign and Commonwealth Office, U.K.
 - Kyle Ranieri, YC - Human Rights Watch, LGBT Program, U.S.
 - Yun (Nancy) Tang, GSAS - Human Rights Watch, U.S.
 - Lekha Tlhotlhlalema, YC - Khulumani Support Group, South Africa
 - Matthew Wrocklage, YC - Initiative for Social and Economic Rights, Uganda

C. Robina Post-Graduate Human Rights Fellowships

Robina Post-Graduate Human Rights Fellowships provide recent graduates of Yale Law School the opportunity to work full-time in human rights for one year or more. These fellowships serve an important function as many Yale Law School graduates desire to work in human rights, but financial considerations and the lack of paid entry-level positions lead them to embark on careers in private or corporate law. In 2016-17, four graduates received Robina Post-Graduate Human Rights Fellowships. For descriptions of their work, please see addendum B.

- **Tosin Agbabiaka '16 J.D./M.B.A.** - USAID/Power Africa, Washington, D.C.
- **Sergio Giuliano '16 LL.M** - European Court of Human Rights, Strasbourg, France
- **Lani Inverarity '15 LL.M.** – Accountability Counsel, San Francisco, CA
- **Andrea Scoseria Katz '16 J.D./Ph.D.,** European Court of Human Rights

D. Robina Visiting Human Rights Fellowships

The Robina Foundation supported three Visiting Human Rights Fellows during the 2016-17 academic year. The Fellows conducted research on human rights issues and contributed to students' knowledge of and engagement with these issues by delivering lectures, teaching courses, and participating in one-on-one discussions. For information on each of the Fellows and their work, please see addendum C.

- **Paul Linden-Retek '12 J.D.**
- **Nick Robinson '06 J.D.**
- **Jennifer (JJ) Rosenbaum**

E. COAP Recipients Supported by the Robina Foundation

Yale Law School allocated a portion of Robina Fellowship funding in 2016-17 to support graduates who are working in human rights and enrolled in the Career Options Assistance Program (COAP). COAP provides assistance with student loan repayment, in order to enable graduates to follow a variety of career paths, particularly opportunities in public interest law, without suffering undue financial burden.

In fall 2016, the Robina Foundation supported thirteen Yale Law School graduate COAP recipients working in human rights; in spring 2017, seven graduates received support.

Fall 2016

- **Josh Andresen '15 J.D.** – Post-doctoral student, Yale Law School
- **Alisha Bjerregaard '08 J.D.** – Robert M. Cover - Allard K. Lowenstein Fellow in International Human Rights, Yale Law School

- **Megan Corrarino '13 J.D.** – Robert L. Bernstein International Human Rights Fellow, Human Rights First
- **Kyle Delbyck '14 J.D.** – Robert L. Bernstein International Human Rights Fellow, Balkan Investigative Reporting Network
- **Carrick Flynn '11 J.D.** – Research Project Manager, Future of Humanity Institute, Oxford University
- **Yuvraj Joshi '15 LL.M.** – Peter and Patricia Gruber Fellow in Global Justice, Human Rights Watch
- **Sharanya Kanikkannan '11 J.D.** – Robert L. Bernstein International Human Rights Fellow, Human Rights Watch
- **Stephanie Kim '14 J.D.** – Staff Attorney, International Refugee Assistance Project
- **Eunice Lee '06 J.D.** – Senior Staff Attorney, Center for Gender and Refugee Studies, University of California, Hastings College of the Law
- **Jessica So '14 J.D.** – Consultant, International Senior Lawyers Project
- **Jennifer Taylor '10 J.D.** – Staff Attorney, Equal Justice Initiative
- **Ryan Thoreson '14 J.D.** – Robert L. Bernstein International Human Rights Fellow, Human Rights Watch
- **Leah Zamore '14 J.D.** – Robina Human Rights Fellow, UNHCR; now Senior Policy Analyst, Center on International Cooperation, New York University

Spring 2017

- **Alisha Bjerregaard '08 J.D.** – Robert M. Cover - Allard K. Lowenstein Fellow in International Human Rights, Yale Law School
- **Kyle Delbyck '14 J.D.** – Robert L. Bernstein International Human Rights Fellow, Balkan Investigative Reporting Network
- **Carrick Flynn '11 J.D.** – Research Project Manager, Future of Humanity Institute, Oxford University
- **Stephanie Kim '14 J.D.** – Staff Attorney, International Refugee Assistance Project
- **Jessica So '14 J.D.** – Consultant, International Senior Lawyers Project
- **Jennifer Taylor '10 J.D.** – Staff Attorney, Equal Justice Initiative
- **Ryan Thoreson '14 J.D.** – Robert L. Bernstein International Human Rights Fellow, Human Rights Watch

F. Human Rights Clinical Education Innovation and Travel

Clinical experience is an essential part of students' development of the knowledge and skills necessary to be effective advocates. Projects with an investigative component provide students with the intensive field experience that is critical to their practical human rights education. Students also practice written and oral advocacy skills. Nearly every project involves a significant piece of persuasive writing – human rights reports, submissions to domestic or international tribunals, and policy papers – and students regularly present their findings in testimony or meetings with officials, advocates, and media. Clinical projects provide our partner organizations with valuable work that they would not be able to undertake without the collaboration of the Yale clinics. Over the course of the 2016-2017 school year, the Lowenstein Clinic worked with 28 students on thirteen projects. Highlights include:

- The Clinic published a paper, *Governance of Agricultural Concessions in Liberia: Analysis and Discussion of Possible Reforms*. The Clinic team documented a lack of consultation and compensation under Liberia's complex agricultural concessions regime, concluding that this void violates international human rights law. The paper identifies a range of regulatory reforms to implement at each stage of the concession process, from the negotiation of concession contracts and community agreements to their enforcement and renegotiation. The Clinic team prepared the paper to submit to Liberia's Governance Commission, which, in discussions, encouraged the Clinic to provide independent recommendations on how Liberia could strengthen its regulatory framework. The Commission, founded in 2003 as part of the Accra Peace Accords, is an independent government entity that tackles structural reforms to sustain Liberia's young democracy. The Clinic team traveled to Liberia to conduct research through interviews with twelve government agencies, as well as legislators, concessionaires, non-governmental organizations, and affected communities. The team returned to Liberia to present the paper to officials and members of civil society. Students also appeared on two call-in radio programs to answer questions about the issue, which is of great concern to many rural Liberians.
- In the wake of Pakistan's resumption of the death penalty in 2015, the Clinic co-authored a report examining how Pakistan's execution practices entail many human rights violations. The Clinic's partner organization, Justice Project Pakistan (JPP), is the leading organization challenging the death penalty in that country. Pakistan has one of the largest populations on death row – more than 8,000 individuals – and the report details the many abuses, including the use of evidence obtained by torture, the execution of juveniles and individuals with mental illness, and the prevalence of "death row" syndrome, whereby individuals choose death over the torturous conditions of confinement. In September 2016, students traveled to Geneva with JPP to present the report's findings in tandem with Pakistan's Universal Periodic Review before the U.N. Human Rights Committee. JPP has also used the report extensively in its advocacy with the European Union and European nations to educate them about how Pakistan's resumption of the death penalty presents a serious rebuke to human rights norms.
- A Clinic team supported a lawsuit brought by attorneys at the Death Penalty Project (DPP) before the Judicial Committee of the Privy Council to challenge Trinidad and Tobago's imposition of life sentences on prisoners who had previously been sentenced to death. Over

the last few decades, human rights organizations have used strategic litigation to make great strides in reducing the imposition of the death penalty worldwide. Unfortunately, sometimes this success results in new human rights violations. Such is the case in Trinidad and Tobago, where prisoners who were formerly sentenced to death are now sentenced to life without parole. The Clinic team researched comparative and international law, contributed to party briefing, and then traveled to London for the argument in March 2017.

- At the request of Women's Link Worldwide, a Clinic team prepared an *amicus* brief for the Inter-American Court of Human Rights on the right to informed consent under international human rights law. *I.V. v. Bolivia* concerns a woman who was sterilized without her consent in a public hospital in La Paz, Bolivia, in 2001. The Inter-American Commission on Human Rights submitted the case to the Inter-American Court when the Bolivian government failed to implement the remedies it suggested for what it found was the violation of I.V.'s rights to physical and psychological integrity, freedom from violence and discrimination, access to information, and a private and family life. The *amicus* brief, submitted in 2016, outlined the right to informed consent within the context of the rights to health and personal integrity. It also detailed how, under international human rights law, a reproductive rights violation can amount to torture and cruel, inhuman or degrading treatment. In November 2016, the Inter-American Court issued its decision, finding that Bolivia had violated I.V.'s rights to personal integrity, personal freedom, dignity, non-discrimination, and a private and family life, as well as the rights to access information, raise a family, and be free from cruel, inhuman and degrading treatment. The Court awarded I.V. individual reparations and ordered the government of Bolivia to, among other general measures, provide training programs for healthcare and social security professionals on informed consent, reproductive health, gender-based violence, discrimination and stereotyping.

- The Clinic released a report, *Forced into Breaking the Law: The Criminalization of Homelessness in Connecticut*, which examines the threat of criminal sanctions that people living in homelessness face for fulfilling their basic needs. Laws in cities throughout Connecticut prohibit a person without a bed from sleeping on a park bench, ban someone without a place to be during the day from standing in a public plaza, and restrict the ability of a person without access to food to ask for money to buy something to eat. The report, which drew on public records and dozens of interviews with homeless people as well as state and local officials and service providers, analyzes various forms of criminalization and the legal implications under U.S. and international law. In the spring 2017 term, the Clinic used the report as a means to educate the public as well as decision-makers about the general issue of the criminalization of homelessness. The student team also presented the report's findings at *Housing Not Handcuffs*, a national meeting convened by the National Law Center on Homelessness and Poverty. New Haven's commission on homelessness is now considering various measures to decrease homelessness and to recognize the right of people living in homelessness to pursue life-sustaining acts in public. The work is ongoing, but there appears to be building momentum among local activists as well as an openness on the part of city and other officials to explore alternatives to criminalization.

- The Clinic led a campaign in 2016-17 to educate the public in Connecticut about the many harms of solitary confinement. The Clinic has been working to decrease reliance on solitary confinement within the state since 2010; as a result of that work, the population in long-term

isolation at the state 'supermax' facility has decreased approximately 80%. Still, the reforms to date are administrative and, thus, fragile. In the spring term of 2017, the Clinic worked with a coalition of local community, religious and university organizations to organize a series of events on solitary confinement. The coalition's project, Inside the Box, brought a true-to-life, replica solitary cell to several public locations in New Haven and Hartford. The campaign attracted hundreds of visitors and received widespread media coverage. Clinic team members also worked with survivors of solitary confinement, as well as family members of survivors, to speak publicly about their experiences and to prepare testimony before the Commission on Civil Rights. In June 2017, the Connecticut legislature passed a bill to end solitary confinement of juveniles and to mandate reporting on the state's use of solitary.

- In addition, the Robina Foundation's support enabled the Clinic to produce a chapter of an upcoming book on solitary confinement that will be published by Voices of Witness, a human rights imprint by Dave Eggers, the award-winning novelist. The chapter tells the story of Aaron Strong, a long-time client who entered solitary confinement at Northern Correctional Institution, Connecticut's 'supermax' prison, in 2000, when he was just seventeen. The Clinic conducted numerous interviews with Mr. Strong over the course of several months and adapted Mr. Strong's interviews for the book chapter. The Foundation's support paid for transcription of the many hours of interviews with Mr. Strong. The book, to be published in 2018, will also be the basis for public education materials, including for high school curricula.

G. Outreach to the Wider Yale Community

The Schell Center continues to strengthen its connections across the University and with Yale College by sponsoring speakers, conferences, social events, and volunteer opportunities. A core part of the Center's efforts to reach the larger Yale community is the Multidisciplinary Academic Program in Human Rights at Yale College, which is now in its fourth year. Robina funding has provided support for the following outreach activities:

- **Multidisciplinary Academic Program in Human Rights:** This Yale College program offers undergraduates the opportunity to learn the analytical and practical skills necessary for human rights study and human rights-related careers. The Multidisciplinary Academic Program in Human Rights recognizes the complex and interdisciplinary nature of human rights and supports a diverse community of students, Human Rights Scholars, from across Yale College. The Program, while administered by the Schell Center, benefits from a Faculty Advisory Committee consisting of faculty from various departments, including anthropology, area studies, economics, English, history, law, literature, philosophy, sociology, and political science. Each spring, the Program accepts approximately fifteen sophomores, who must complete the requirements of a Yale College major in addition to the Program's six courses. Now in its fourth year, the Program includes students from a wide array of majors, including environmental studies, history, literature, and political science. The Schell Center founded the Program, provides it with administrative, financial, and programmatic support, and offers students additional academic, summer, and post-graduate advising and opportunities to attend human rights-related talks, workshops, symposia and other events. Weekly dinners often feature guests, such as Robina Visiting Scholars Jennifer Rosenbaum and Nicholas Robinson. In addition, the Schell Center offers modest stipends to the Human Rights Scholars and other undergraduate students to pursue human rights-related internships during the summer.

- **Hope Village Human Rights Project.** Since September 2015, a group of Yale undergraduates has been designing a high-school curriculum on human rights and conflict resolution for the Dr. Hawa Abdi Hope Village, a camp for displaced Somalis in Lower Shebelle, Somalia. After Deqo Mohamed, Executive Director of the Dr. Hawa Abdi Foundation, visited Yale in November 2015 with the support of the Robina Foundation, the Yale team was able to draft lesson plans for the first year of the curriculum and outline a four-year program. In the fall of 2016, the team met frequently with Dr. Mohamed while she was in residence as a Yale Greenberg World Fellow, to design the second year of the curriculum and work with teachers on-the-ground in Hope Village to implement the program. In April 2017, Dr. Mohamed returned to Yale with her mother, Dr. Hawa Abdi, to deliver Timothy Dwight College's Chubb Fellowship Lecture. While at Yale on that visit, Dr. Mohamed met again with the Yale curriculum team to review their progress and discuss the team's plans to get the curriculum reviewed by educators and human rights advocates in the U.S. and abroad and to create professional development materials for Hope Village's teachers.
- **Israel-Palestine Conflict Resolution Simulation.** In April 2017, the Schell Center co-sponsored a talk on the Israeli-Palestinian conflict, featuring Ghaith al-Omari, a longtime advisor to the Palestinian negotiating team and a contributor to the 2003 Geneva Initiative, and David Makovsky, the top negotiator on John Kerry's 2014 team and the Executive Editor of The Jerusalem Post. The talk took place after a weekend of mock negotiations with seven Palestinian and seven Israeli Yale students.
- **New Haven Resource Access Mapping Project.** As a capstone project for the undergraduate Program in Human Rights, a Yale College senior designed a participatory, multi-lingual map of the Greater New Haven Area, showing resources for refugees, asylum seekers, and formerly incarcerated people. The Schell Center provided resources for the student to organize working sessions in which other students from across the university could do data entry and other necessary tasks to support the project. Before she graduated, the student who designed the map passed the project on to younger students.

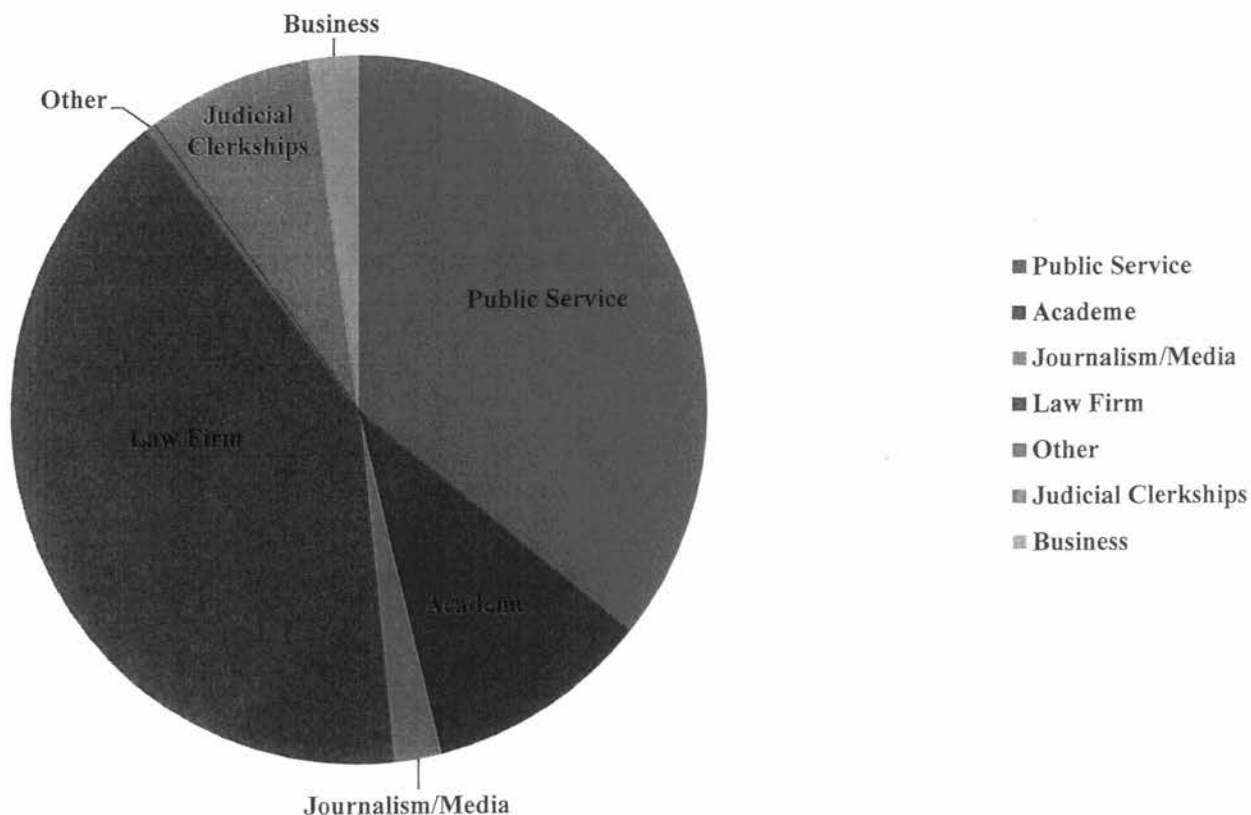
H. Human Rights Fellowship Initiative Coordinator and Program Administration

The Robina Fellowship Initiative's longtime Coordinator, Katy Lawder, is responsible for implementing the Initiative's day-to-day activities, tracking participants and outcomes, and tracking the Initiative's long-term impact. One of the Coordinator's main projects has been developing and maintaining a comprehensive database of Yale Law students and alumni involved in human rights, including all current and former Robina fellows. The Coordinator position is part-time, as some of the work falls to the Schell Center Executive Director, Hope Metcalf. Hope co-teaches the Lowenstein International Human Rights Clinic and works with students and faculty to coordinate human rights events at the Law School, including the annual Bernstein Human Rights Symposium, as well as the weekly Human Rights Workshop. She also administers the undergraduate Multidisciplinary Academic Program in Human Rights.

ALUMNI OUTCOMES

In total, 283 recipients of Robina funding have now graduated from Yale Law School. Twenty-three of these graduates are pursuing doctoral degrees and two are unemployed. Of the 258 alumni who are employed, we have up-to-date employment data on 256 of them. Fifty (20%) are working in international human rights in some significant capacity, either in non-governmental organizations, government, or academia.

- Ninety-eight (34%) are currently working in public service, which includes international and domestic non-governmental organizations (73, 29%), and government positions, excluding clerkships (25, 10%);
- Ninety-three (36%) are at law firms;
- Twenty-six (10%) hold academic positions (twelve of which involve human rights);
- Seventeen (7%) are in judicial clerkships;
- Twelve (5%) are working in business;
- Eight (3%) are working in journalism/media; and
- One (0.3%) is a high school teacher.



UNANTICIPATED RESULTS AND POTENTIAL CHANGES

There have been no unanticipated results. Now that the Robina Human Rights Initiative is endowed, and we have received a matching endowment from the Goldman family that will provide COAP funding for eligible alumni working in human rights, civil rights, and social justice fields, we likely will reduce or eliminate COAP funding from the purposes for which we use the income from the Robina endowment.

CONCLUSION

The Robina Human Rights Fellowship Initiative supports human rights advocates at all stages of their careers – from first-year law students to seasoned human rights leaders. The outcomes of the Foundation's support have been impressive, with more than one in three graduates who received some form of Robina support now working in public service. Equally telling are the reports and letters we receive from current and former Robina-funded students and scholars. Each year, we hear how Robina's support has enabled students to discover the career paths they wish to follow, or has allowed our graduates to perform critical research and advocacy that they would not otherwise have been able to complete. Your gift is truly helping Yale Law School foster the next generation of human rights activists and scholars, and for this we offer you our deepest thanks.

FINANCIAL REPORT

EXPENDITURES JULY 1, 2016-JUNE 30, 2017

Income:

\$ 1,000,000 New Award
\$ 117,642 Balance Forward from FY 16

Total: \$ 1,117,642

	Original Budget	Actuals as of 6/30/17
Expenses:		
Kirby Simon Summer Human Rights Fellows	\$ 200,000	\$ 168,478
Robina Post-Graduate Human Rights Fellows	\$ 199,000	\$ 173,058
Robina Human Rights JD Scholars	\$ 100,000	\$ 103,029
Robina Visiting Human Rights Fellows	\$ 175,000	\$ 199,314
Art and Human Rights Initiative	\$ 25,000	\$ 920
Clinical Education and Field Missions	\$ 40,000	\$ 39,581
Outreach, including Yale College human rights program	\$ 20,000	\$ 7,492
Administrative Support	\$ 91,000	\$ 72,464
Robina COAP Scholars	<u>\$ 150,000</u>	<u>\$ 150,000</u>
Total:	\$ 1,000,000	\$ 914,335
Balance carried forward to FY18		\$ 203,306

ADDENDA

- A. Robina Human Rights JD Scholars
- B. Robina Post-Graduate Human Rights Fellows
- C. Robina Visiting Human Rights Fellows
- D. JD Scholars Thank You Letters

A. Robina Human Rights J.D. Scholars

Alexandra Francis '18 is one of the Lowenstein Clinic's student directors this year. She focuses on human rights, international humanitarian law, and national security. Prior to law school, Francis worked as a Junior Fellow in the Nuclear Policy Program at the Carnegie Endowment for International Peace. She also held a Fulbright Scholarship in Amman, Jordan where she researched the national impact of the Syrian refugee crisis and worked with UNHCR. Immediately before law school, Francis worked in Turkey with ARK Group DMCC, a conflict transformation consultancy, on projects relating to the Syrian conflict stabilization. At Yale, Francis is also involved with the Center for Global Legal Challenges, the National Security Group, and the International Refugee Assistant Project. She received her B.A. in Political Science from Davidson College and is a Truman Scholar.

Allison Frankel '17 received her J.D. degree in May. She is currently a law clerk for Judge Andrew Carter in the U.S. District Court, Southern District of New York. During her time at the Law School, she participated in the Lowenstein Clinic, researching the criminalization of homelessness in Connecticut and the use of extreme forms of solitary confinement. She also worked with the Criminal Justice Clinic representing defendants in New Haven's courts and with the International Refugee Assistance Project. During her law school summers, Alexandra clerked at the Southern Center for Human Rights and the Bronx Defenders. Before attending law school, she worked as a paralegal at the ACLU's Criminal Law Reform project and as a legal assistant in their Human Rights Project. She graduated from the University of Wisconsin, Madison, in 2011, with a major in Political Science.

Adrienne Lee '17 received her J.D. degree in May. She is currently clerking for the Hon. Richard G. Seeborg at the U.S. District Court, Northern District of California. During law school, Adrienne participated in the Lowenstein Clinic, researching domestic immigration detention policies through the lens of international human rights law, and also in the Challenging Mass Incarceration Clinic in New Haven. She also served as the Comments editor for the *Yale Law Journal*; and was on the executive boards of the Asian Pacific Law Students Association and the American Constitution Society. She worked as a teaching assistant for the first year Procedure course and as research assistant for a faculty member preparing a book on the development of federal criminal law enforcement priorities. During her law school summers, she interned at Paul, Weiss and in the U.S. Attorney's Office for the

Southern District of New York's Terrorism and International Narcotics unit. She graduated from Harvard College in 2012 with a major in History.

Iulia Padeanu '17 received her J.D. degree in May. She is currently a Robina Human Rights Post-Graduate Fellow at the European Court of Human Rights, where she is working both as a law clerk to one of the 47 judges and with the Court's Research Division. The position offers a unique opportunity for recent graduates to observe and contribute to the work of the ECHR, the leading voice on international human rights and one of the most important institutions in the application and development of international law. During the clerkship, Iulia will research and draft opinions, write comparative legal reports on pressing human rights issues, and observe hearings in both the Chamber of the Court and the Grand Chamber.

Prior to law school, Iulia served as a Researcher and Facilitator at Co-operation Ireland in Belfast, Northern Ireland, where she wrote extensively on ethnic conflict issues and facilitated an EU funded peace-building program aimed at integrating British Services families into the Northern Irish community. At YLS, Iulia focused on international law, human rights, and foreign policy. She served as a Student Director for the Yale Law School Center for Global Legal Challenges, an Executive Editor of the *Yale Journal of International Law* and the *Yale Law & Policy Review*, and as the Scholarship Chair of the Yale Society of International Law. During her law school summers, Iulia worked as a Litigation Summer Associate at Shook Hardy & Bacon, Chicago and at Kirkland & Ellis, Chicago. She received her B.A. in International Studies and History from Boston College and her M.A. in Comparative Ethnic Conflict from Queen's University, Belfast.

Hillary Vedvig '17 received her J.D. degree in May. During law school, Hillary participated in the Lowenstein Clinic, as one of the lead researchers and co-authors of a 2016 report on the criminalization of homelessness in Connecticut. She also was a student director of the Law School's Palliative Care Medical-Legal Partnership. During her law school summers, she interned at the European Human Rights Advocacy Center in London and at the Ombudsperson Institute of Kosovo, as well as serving as a summer associate at O'Melveny & Meyers, D.C. and Foley & Lardner, Milwaukee. Before law school, Hillary was campaign manager for a state assembly candidate in Wisconsin and worked in a law office in Bozeman, MT. She is a 2011 graduate of the University of South Carolina, where she was elected to Phi Beta Kappa.

Andrew Walchuk '17 received his J.D. from YLS and a Master of Arts in Religion from Yale Divinity School in May. During law school, Andrew served as a student director of the Lowenstein Clinic, where he wrote a report on the use of extreme isolation in U.S. federal prisons, and also participated in the San Francisco Affirmative Litigation Project. He worked with the Asylum Seekers Advocacy Project, drafting requests for re-interviews with immigration judges for women and children fleeing violence in Central America. From 2013-15, he was the president and legal director of YLS's chapter of the Iraqi (now International) Refugee Assistance Project. During his law school summers, Andrew interned at Human Rights First, where he produced a report identifying gaps in protection for refugees in the 2015 EU-Turkey migration agreement, and at the State Department's Office of Legal Advisor. He graduated from the University of Arkansas in 2011 with majors in Political Science, International Relations, and Spanish.

B. Robina Post-Graduate Human Rights Fellows

Tosin Agbabiaka '16 J.D./M.B.A spent his fellowship year at USAID/Power Africa, which works to expand access to electricity in Africa by providing financing, legal and regulatory support, and technical advice to burgeoning clean-power projects on the continent. Tosin obtained a joint degree from the Law School and the School of Management (SOM) in 2016, focusing his coursework on international law, energy investments and finance, and public sector economics. He conducted research aimed at revising the Nigerian government's oil revenue redistribution system, power sector reform plan, and climate change adaptation strategy. Additionally, Tosin was a student director for the Immigration Legal Services Clinic, Vice President of the Yale Black Law Students Association, content director for the Africa Business Practicum at Yale SOM, and co-coordinator of the Yale Africa Law and Policy Association's Doing Business in Africa series. In his summers, he worked for the Awethu Project, a South African double bottom line investment fund, and Texas Civil Rights Project, a civil rights law firm focused on impact litigation and advocacy in Texas. Prior to attending Yale, Tosin analyzed social and economic policy related to migration in the EU and Greece as a Fulbright-Schuman research fellow. He received his B.A. in English from Duke University.

Sergio Giuliano '16 L.L.M. spent his fellowship year working as a clerk for András Sajó at the European Court of Human Rights in Strasbourg, France, and for the Research Division of the Court. Sergio's fellowship builds on his experience on constitutional law and human rights. He has been a research assistant for Prof. Bruce Ackerman on comparative constitutionalism; a research assistant for Prof. Judith Resnik on global constitutionalism; and was a member of the Yale Law School Constitutional Advisory Group, directed by Prof. Richard Albert, where he co-authored a Report on the Draft Law on Amendments to the Constitution of the Republic of Albania.

Sergio graduated with a law degree from the Universidad de San Andrés (Argentina). His thesis focused on commercial freedom of expression from a comparative perspective. He worked as legal advisor to two subsequent minority leaders at the Argentine Congress and has taught Constitutional Rights and Liberties, and Interpretation of the Law and Caselaw Analysis at San Andrés. He is also the lead editor of a forthcoming Handbook on Human Rights. He authored a chapter for the Handbook on the right to protest and co-authored two chapters on civil rights and women's and LGBT rights.

Lani Inverarity '15 LL.M. – Accountability Counsel, San Francisco, CA spent the second year of her post-graduate fellowship working with communities to seek remedy for harm caused by internationally-financed development projects. For such communities, weaknesses in the local legal system, a lack of resources or jurisdictional limitations often mean that litigation and/or other traditional legal mechanisms are not a viable option. Accordingly, Accountability Counsel specializes in assisting communities to utilize non-judicial grievance mechanisms associated with international development finance institutions (IFIs) to demand accountability and remedy. These mechanisms – often called international accountability mechanisms (IAMs) – exist inside or outside IFIs to receive community complaints about the actual or anticipated environmental and social harms caused by projects funded by those IFIs. IAMs usually have two functions: dispute resolution, where the IAM will support communities, the project company and other relevant stakeholders to try to reach mutually acceptable solutions to the issues raised by the communities; or compliance review, where the

IAM will conduct an investigation to determine whether the IFI complied with its environmental and social obligations. In the second year of her fellowship, Lani worked to help three communities based in Colombia, Mongolia and Haiti to use IAMs.

Lani's fellowship builds on her prior academic and professional experience in human rights law. Prior to her time at Yale, Lani spent two years as a Judges' Clerk in the High Court of New Zealand, followed by two and a half years as Assistant Crown Counsel on the Constitutional and Human Rights Team at Crown Law Office, providing legal advice and representation services to the New Zealand government. She holds an LL.B. (Hons) and a B.A. in Political Science and International Relations from Victoria University of Wellington.

Andrea Scoseria Katz '16 J.D./Ph.D. clerked at the European Court of Human Rights in Strasbourg for Judge Andras Sajó. In 2016, she received a J.D. from the Yale Law School and a Ph.D. from the Yale Political Science Department. Her Ph.D. dissertation, "The President in His Labyrinth," explores comparative traditions of presidentialism in the Americas. Andrea served as a managing editor for the Global Constitutionalism Seminar for four years and has spent summers conducting research in Brazil and working, with a Kirby Simon Summer Human Rights Fellowship, as a trainee at the European Court of Human Rights in Strasbourg, France. She graduated from Yale College in 2007 with a B.A. in Comparative Literature and East Asian Studies. Before starting her graduate studies at Yale, Andrea spent a year as a visiting student researcher at the Graduate School for Law and Politics at the University of Tokyo. She hopes to pursue a career as a scholar of comparative constitutional law.

C. Robina Initiative Visiting Human Rights Fellows

Paul Linden-Retek '12 J.D. is a Robina Foundation Visiting Human Rights Fellow at Yale Law School and a Ph.D. Candidate in the Department of Political Science. In addition to helping to administer the Multidisciplinary Academic Program in Human Rights at Yale College, Paul conducts research on the political philosophy of European integration, cosmopolitan constitutionalism, and law and the humanities. He has worked previously as a legal adviser in the Human Rights Section, Office of the Government of the Czech Republic; the Legal Unit, International Civilian Office/EU Special Representative, Kosovo; and the EU Department, Ministry of the Environment of the Czech Republic. He holds a J.D. from Yale Law School and an A.B. from Harvard University.

Nick Robinson '06 J.D. was a Lecturer in Law and Robina Fellow at Yale Law School during the 2016-17 academic year. After graduating from YLS in 2006, he spent seven years in South Asia. In 2006-07 he clerked for Chief Justice Sabharwal of the Indian Supreme Court. In 2007-2008 Nick was a Bernstein Fellow at Human Rights Law Network (HRLN) in New Delhi where he worked on rights litigation involving water and health. In 2009-2010 he was a Ruebhausen South Asia Teaching and Research Fellow, during which time he was visiting faculty at the law department at Lahore University of Management Sciences and the National Law School in Bangalore. In 2010-11 he was an Assistant Professor at Jindal Global Law School and from 2012 to 2013 a senior fellow at the Centre for Policy Research in New

Delhi where he worked on reforms in the Indian legal system and the implementation of social welfare programs in India. In 2013, Nick returned to the U.S. and was a Research Fellow at the Program on the Legal Profession at Harvard Law School until 2016. He researches and writes in the areas of the legal profession, human rights, administrative law, and courts, with a particular emphasis on South Asia.

Jennifer Rosenbaum (JJ) was a Robina Foundation Visiting Human Rights Fellow for the 2016-2017 academic year. She focuses on a human rights approach to raising standards for low-wage workers on global supply chains--both global production networks and global labor subcontracting chains. Her research and consultations with worker organizations focus on legal, policy, and organizing approaches to raising workplace standards, overcoming forced labor, and promoting new forms of bargaining. She was previously the founding Legal and Policy Director for the National Guestworker Alliance and the New Orleans Workers' Center for Racial Justice. She was the legal strategist behind national campaigns including the Signal workers, who exposed labor trafficking from India to the Gulf Coast after Hurricane Katrina, and the Justice @ Hershey's campaign, where hundreds of foreign students won new regulations for the cultural exchange visa program. She has litigated cases before trial and appellate courts, led national policy campaigns, and testified before the U.S. Congress on labor issues confronting migrant workers. In 2014, she was appointed by then-Secretary of Labor Thomas Perez to the Occupational Safety and Health Administration's Whistleblower Protection Advisory Committee. She has taught courses on immigration, labor and employment, and international human rights at Tulane Law School, Northeastern Law School, and the University of Nevada, Las Vegas.

Ms. Penny Hunt
Executive Director
The Robina Foundation

Dear Ms. Penny Hunt,

I am writing to let you know how grateful I am to be a recipient of the Robina Foundation Human Rights J.D. Scholarship.

As a third-year law student working to promote human rights, this scholarship has allowed me to pursue academic, clinical, and volunteer work to gain a deeper understanding of the human rights violations plaguing the U.S. criminal justice system. Through Yale's Criminal Justice Clinic, I am representing a man sentenced to effective life in prison for a crime committed when we was only fifteen years old, as we seek a new sentencing hearing that accounts for the youth at the time of his crime. With the Allard K. Lowenstein International Human Rights Clinic, my clinic partners and I recently published a report, *Forced into Breaking the Law*, documenting the ways in which homelessness is criminalized throughout Connecticut. We are now conducting advocacy in New Haven to ensure that nobody is incarcerated for necessary, life-sustaining behavior solely because they lack housing. Also with the Lowenstein Clinic, I am investigating extreme forms of solitary confinement that disproportionately target Muslims and other vulnerable populations.

In addition, under the direction of Professor Kate Stith I am supervising law students and undergraduates as we investigate the extent to which federal prosecutors leverage severe sentencing enhancements to coerce defendants to plead guilty. These experiences build on my work representing indigent defendants at the trial level with The Bronx Defenders my 1L summer, and working with individuals on death row in their post-conviction appeals with The Southern Center for Human Rights during my 2L summer.

Upon graduation, I will serve as a law clerk to Judge Andrew L. Carter in the Southern District of New York. After my clerkship year, I hope to work alongside marginalized individuals who are disproportionately targeted by the criminal justice system. This work would not be possible without the Robina Foundation scholarship.

With sincere gratitude,



Allison Frankel
Yale Law School. Class of 2017

April 6, 2017

To the Robina Foundation,

It is my pleasure to personally thank you for your generous scholarship support at Yale Law School. During my time at the law school, I have had the opportunity to work on a variety of international human rights issues, including U.S. immigrant family detention policies, international standards for criminalization in the sexual and reproductive health spheres, and the protection of human rights defenders in the United States. In connection with my work in the Lowenstein human rights clinic, I was able to travel to Washington, D.C., for meetings with agencies and congressional staffers, and Geneva, Switzerland, for a UN consultation meeting.

I am very proud of the work that I have been able to do as a law student, and I hope to continue pursuing international human rights advocacy throughout my career.

Warmly,
Adrienne Lee

Ms. Penny Hunt
Executive Director
Robina Foundation
4900 IDS Center 80
South 8th Street

Minneapolis, MN 55402

December 1, 2016

Dear Ms. Hunt,

I am writing to thank you for your extremely generous scholarship supporting my studies at Yale Law School. It is truly an honor to be funded by the Robina Foundation, and I am so grateful for your financial support. Thanks to your generous gift, I will be able to continue to pursue my passion for human rights and international law during law school and post-graduation. The scholarship has been instrumental in lifting some of the financial burden of attending law school and will allow me to seek employment opportunities in areas I am truly interested in, such as human rights advocacy.

Human rights advocacy has been at the core of my education and professional development since I was very young. I started by working with international non-profits as a teenager living in Dublin, Ireland. I would collect money for victims of natural disasters, I helped develop an Amnesty International chapter at my local secondary school, and actively wrote in my school newspaper about international human rights issues. Raising both money and awareness of human rights concerns was something I always knew I wanted to pursue as a career.

I began my legal studies at Northwestern University Pritzker School of Law, but soon realized I would not be able to fully pursue my dream of studying international law with a focus on human rights there. At the end of my first year I made the decision to apply for a transfer and was extremely fortunate to be accepted to Yale Law School. Since arriving at Yale, I have devoted my academic studies and extracurricular activities to pursuing a career in human rights advocacy. I am currently enrolled in the Lowenstein International Human Rights Clinic, where I have had the opportunity to work on privacy issues and research the impact of mega dams on human and environmental rights. I am also serving as the Executive Editor of the Yale Journal of International Law and as a Student Director for the Center for Global Legal Challenges. I have also sought opportunities to further human rights here at home, in New Haven, and continue to volunteer as a Reading Tutor at New Haven Reads, an organization aiming to increase the literacy skills of New Haven students to empower their academic success.

As I look towards graduation I am exploring options to continue my passion for international law and human rights and use the skills I have acquired at YLS to further important issues in this area. I am in the process of applying for a Robina Fellowship to spend the first year after graduation at the European Court of Human Rights, and I am seeking ways to engage in pro bono opportunities in human rights upon my return to Washington, D.C.

I am excited about the many opportunities and challenges that lie ahead in the fight for international human rights and I am so grateful for your support as I pursue my passion in this area!

Sincerely,

Iulia E. Padeanu

Yale Law School, J.D. Candidate '17

Hillary Vedvig
215 Dwight Street New
Haven, CT 06511

Robina Foundation

Ms. Penny Hunt
Executive Director

Dear Ms. Hunt,

I am writing to thank you for my scholarship from the Robina Foundation. I am in the first generation of my family to attend college and the first person in my extended family to attend law school. Your support makes a huge difference in my ability to attend law school and to pursue the career options I care about.

I have been involved in the Lowenstein International Human Rights Clinic for two years and have completed both international and domestic projects. I travelled to Liberia last summer to work on agricultural concession reform. I learned so much on that trip and will carry those lessons throughout the rest of my life.

I have also been working on a report covering the criminalization of homelessness in Connecticut. We launched the report a few weeks ago and will be working on advocacy throughout the state to help get some of Connecticut's most vulnerable citizens out of the detrimental cycle of poverty, criminalization and homelessness.

Thank you for allowing me to do this important and fulfilling work. I am so grateful for the education I have received at Yale Law School and will continue to work on human rights issues for the rest of my career.

Sincerely,

Hillary Vedvig



ENDOWMENT REPORT
to the
ROBINA FOUNDATION

December 2016-June 2017
Yale Law School

1. Robina Human Rights Initiative Endowment Fund

Principal:	\$10,000,000.00
Market Value as of 6/30/2017:	\$10,445,005.71
Income Available, 2016-17:	\$ 224,167.31

2. Binger Clinical Faculty Chair in Human Rights Fund

Principal:	\$ 3,000,000.00
Market Value as of 6/30/2017:	\$ 3,133,501.71
Income Available, 2016-17:	\$ 67,250.20

Investment return of 11.3% in FY17 brings Yale endowment value to \$27.2 billion

Yale's endowment earned an 11.3% investment return (net of fees) for the year ending June 30, 2017. The endowment value increased from \$25.4 billion on June 30, 2016, to \$27.2 billion on June 30, 2017.

Spending from the endowment, which is the largest source of revenue for the university and supports faculty salaries, student scholarships, and other expenses, for Yale's 2018 fiscal year is projected to be \$1.3 billion, representing approximately 34% of the University's net revenues. Endowment distributions to the operating budget have increased at an annualized rate of 9.2% over the past 20 years. Those distributions support, among other priorities, Yale's commitment to meeting the full financial need of every student enrolled in Yale College.

The university's longer term results remain in the top tier of institutional investors. Yale's endowment returned 12.1% per annum over the 20 years ending June 30, 2017, exceeding broad market results for domestic stocks, which returned 7.5% annually, and for domestic bonds, which returned 5.2% annually. Relative to the estimated 7.3% average return of college and university endowments, over the past 20 years Yale's investment performance added \$24.3 billion of value in the form of increased spending and enhanced endowment value. During the 20-year period, the endowment grew from \$5.8 billion to \$27.2 billion.

**Robina Foundation
Meeting Minutes
November 16, 2017**

A meeting of the Board of Directors of the Robina Foundation, a Minnesota nonprofit corporation, was held on November 16, 2017, via conference call.

Directors present: Susan Berresford, Kathleen Blatz, Steve Lewis, and Marianne Short.

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

Gretchen Pickeral of OfficeTeam was present and served as recorder.

Welcome and Call to Order

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

Minutes of August 29-30, 2017, Annual Board Meeting

A motion was made and seconded to approve the Minutes of the August 29-30, 2017, Annual Board Meeting included in the Board Book, with the change to specify that Robina's match of major gift donations for student scholarships at the University of Minnesota Law School will be on a 1:2 basis, rather than a 2:1 basis as stated in the draft minutes. That motion was approved unanimously.

Blatz clarified that reference to Sullivan's recommendation in the "Foundation Finances" section of the Minutes regarding the oversight requirement refers to "oversight of bond transactions and not to private equity funds."

Executive Director's Report

Hunt called the Board's attention to information in the report concerning the October 16 event at Yale Law School which was attended by Berresford, Lewis and Hunt. In addition to meeting with Dean Gerken and attending Jim Silk's inaugural address and dinner, Berresford attended a luncheon meeting at the Gilder Lehrman Center, and Lewis and Hunt met with Patty Pedersen. Blatz reported on the November 1 forum and dinner to launch the Binger Center for New Americans described in the Executive Director's Report and attended by Blatz, Hunt and Gilberg. Blatz reported that the Binger family members who attended the event were pleased with the event and with Robina's support of the Center for New Americans.

Treasurer's Report

Lewis called the Board's attention to the audit documents in the Board Book prepared by CliftonLarsonAllen and described the recent discussion he, Blatz, Hunt and Gilberg had with CLA concerning the audit. Lewis noted CliftonLarsonAllen's recommendation concerning monitoring of the foundation's private equity funds and explained Sullivan's recommendation that Robina rely on USBank's valuation given the value of the funds and the cost of the level of scrutiny described by the auditors. Emphasizing that the audit is

a "clean audit," Lewis explained that the Board's role is to accept the audit, which was approved during the discussion with CLA.

A motion was made and seconded to accept the audit of Robina Foundation's 2016 fiscal year prepared by CliftonLarsonAllen. That motion was approved unanimously by the Board.

Going forward, Lewis suggested that CliftonLarsonAllen prepare "Agreed Upon Procedures" rather than an audit of Robina's finances. Lewis and Hunt will discuss this suggestion with CliftonLarsonAllen.

Legacy Project Update

Board Members discussed Melinda Marble's revised draft of the Legacy Report included in the Board Book. Although Board Members proposed several changes and indicated that they would send additional small changes to Hunt, they agreed that the style, substance and balance of the report all are excellent. Board Members directed Hunt to work with Marble on revisions to the report. Once those are made, Hunt will ask Brad Smith to review the report and will discuss with him topics that could be addressed in short essays and disseminated before the final report on Robina's work.

During the course of the Board's discussion of the Legacy Project, Blatz described questions she was asked in a recent interview with a Star Tribune reporter. Blatz was hesitant to provide details on the amount of funding the Foundation has provided to each Robina Grantee. Board Members agreed that Blatz may or could feel free to provide the current amount of grants, while indicating that Robina's work is not yet complete.

Ideas for Future Grants

At the request of the Board, following the August Board Meeting Hunt contacted Yale School of Drama Dean Bundy and University of Minnesota Law School Dean Jenkins to ask them to provide ideas for smaller grants at Yale School of Drama and the Law School. Both deans submitted ideas, which were discussed by the Board.

Yale School of Drama: Of the two ideas submitted by Dean Bundy (Center for Arts Leadership and Equity at Yale and International Experience for All Yale School of Drama Students), Board Members expressed interest in the first idea, but questioned whether training, as proposed by Dean Bundy, is the best approach to equity issues. Board Members asked Berresford and Hunt to meet with Dean Bundy to learn more about his proposed approach, including how funds would be spent and goals for the project, and to discuss other options or partnerships that could prove to be more promising.

University of Minnesota Law School: Of the five ideas put forth by Dean Jenkins, Board Members expressed most interest in #1: Endowment of Robina Postgraduate Public Interest Fellowships; #4: Creation of a Criminal Justice Excellence Fund; #5: Establishment of a Law School Innovation Fund. Blatz and Hunt will meet with Dean Jenkins to discuss these ideas and learn how they fit with the University's capital campaign and how a match to Robina funding could be structured.

Grantee Reports

Council on Foreign Relations: *Expanded Diversity Initiative*: Hunt noted that the Foundation has received the last required report from CFR and asked Board Members what information they would like going forward. Board Members directed Hunt to request that the Robina Board be informed about how the Council will continue the good outreach that has taken place as part of the Expanded Diversity Initiative.

University of Minnesota Law School: *Scholarship Match Program*: Although funding of this grant is complete, Board Members agreed that the Law School will need to provide reports on the status of the program until the balance of funds remaining (\$92,620) has been used to match scholarship contributions.

University of Minnesota Law School: *Sentencing Enhancements*: Blatz described her meeting with Kelly Mitchell, Executive Director of the Robina Center on Criminal Law and Criminal Justice, concerning the future of the Center's work on sentencing issues. Board Members directed Hunt to ask Mitchell for more information on when the work would end if additional funding is not obtained, as well as the level of funding needed for the next two years, and her plans for continued work with the Center.

University of Minnesota Law School: *Binger Center for New Americans and Binger Professorship in Clinical Law*: Board Members acknowledged the excellent work of the Center and asked Hunt to express their positive appreciation and assessment of the Center to Ben Casper.

Yale University Law School: *Robina Human Rights Fellowship Initiative and Binger Clinical Faculty Chair*: Board Members appreciated the form and substance of the report and expressed interest in learning whether the Law School tracks pro bono human rights work undertaken by graduates now working in law firms.

Yale University School of Drama: *Binger Center for New Theatre*: In anticipation of the Board's visit to Yale in February, Board Members requested additional information on the participants in the external review of the Binger Center for New Theatre.

Future Board Meetings

The Board discussed options for meetings in February during the visit to Yale, as well as the meeting dates in 2018 and 2019.

Adjournment

There being no other business, the meeting was adjourned at 12:30 pm

Respectfully Submitted,

Marianne Short, Secretary

Date

**ROBINA FOUNDATION
BOARD OF DIRECTORS MEETING
February 20, 2018
EXECUTIVE DIRECTOR'S REPORT**

Much of my time since we met in November has been spent on follow-up to Board actions at that meeting and preparation for this meeting. As you can imagine, setting up our meetings with Robina's various constituencies at Yale involved a number of people and took considerable time!

Legacy Project

* Following the November meeting, I worked with Melinda to make the revisions to her report suggested by Board Members. Once the draft report was finalized (copy at Tab 7), I contacted Brad Smith, president of the Foundation Center, to ask him to review the report and consider how the Foundation Center might help Robina disseminate the report. Brad submitted the proposal found at Tab 7, which the Board will discuss during the meeting. I also asked Melinda for her ideas concerning dissemination and will share those with you at the meeting.

Audit

CliftonLarsonAllen's audit of Robina's operations in 2016 included several recommendations for changes to our documentation of various transactions, as well as review of financial reports. Nancy and I developed procedures to address CLA's recommendations and have begun implementing the needed changes. A list of the procedural changes is found at Tab 5.

Steve, Nancy and I met with Jennifer Tingley of CliftonLarsonAllen to discuss the appropriate level of auditing of Robina's 2017 work. We agreed that a full audit, as was conducted for 2016, is not necessary, but decided that an audit using "agreed upon procedures" was appropriate. CLA's letter agreement describing the "agreed upon procedures" and CLA's work is found at Tab 5, along with a letter agreement covering CLA's preparation and filing of Robina's 2017 tax exempt return and state filings. Implementation of CLA's work under the "agreed upon procedures" agreement is flexible, so no specific date has been set at this point.

University of Minnesota Law School

To follow up on the Board's November discussion of the five options Dean Jenkins outlined for possible additional support from Robina, Kathleen and I met with Dean Jenkins in early January. (Material provided in November is found at Tab 8.) Since Board Members expressed interest in options 1, 4 and 5, our discussion focused on those options, with the understanding that we are early in the process of determining whether additional grants will be made and that nothing is assured at this point. We mentioned that, as in the past, Robina would like to discuss using a Robina Grant as a match to secure additional funding. We also sought to understand how Robina support – with or without a match – could tie to fundraising in connection with the campaign.

Kathleen and I will fill you in on our meeting with Dean Jenkins during the Board's discussion of new grants.

Yale School of Drama

At the November Board Meeting, Board Members discussed the two ideas submitted by Dean Bundy found at Tab 8 and asked Susan and me to meet with Dean Bundy to learn more about the approach, process and timeline to move the initiative forward. Susan and I visited Yale School of Drama in early January and met with Dean Bundy and Kelvin Dinkins, Jr., Assistant Dean and General Manager, and Chantal Rodriguez, Associate Dean and Lecturer, Dramaturgy. As with the University of Minnesota Law School, we emphasized that we have not determined either the level of grants that might be possible or the timing of any additional grants. Susan and I will describe our meeting during Wednesday's discussion of new grants.

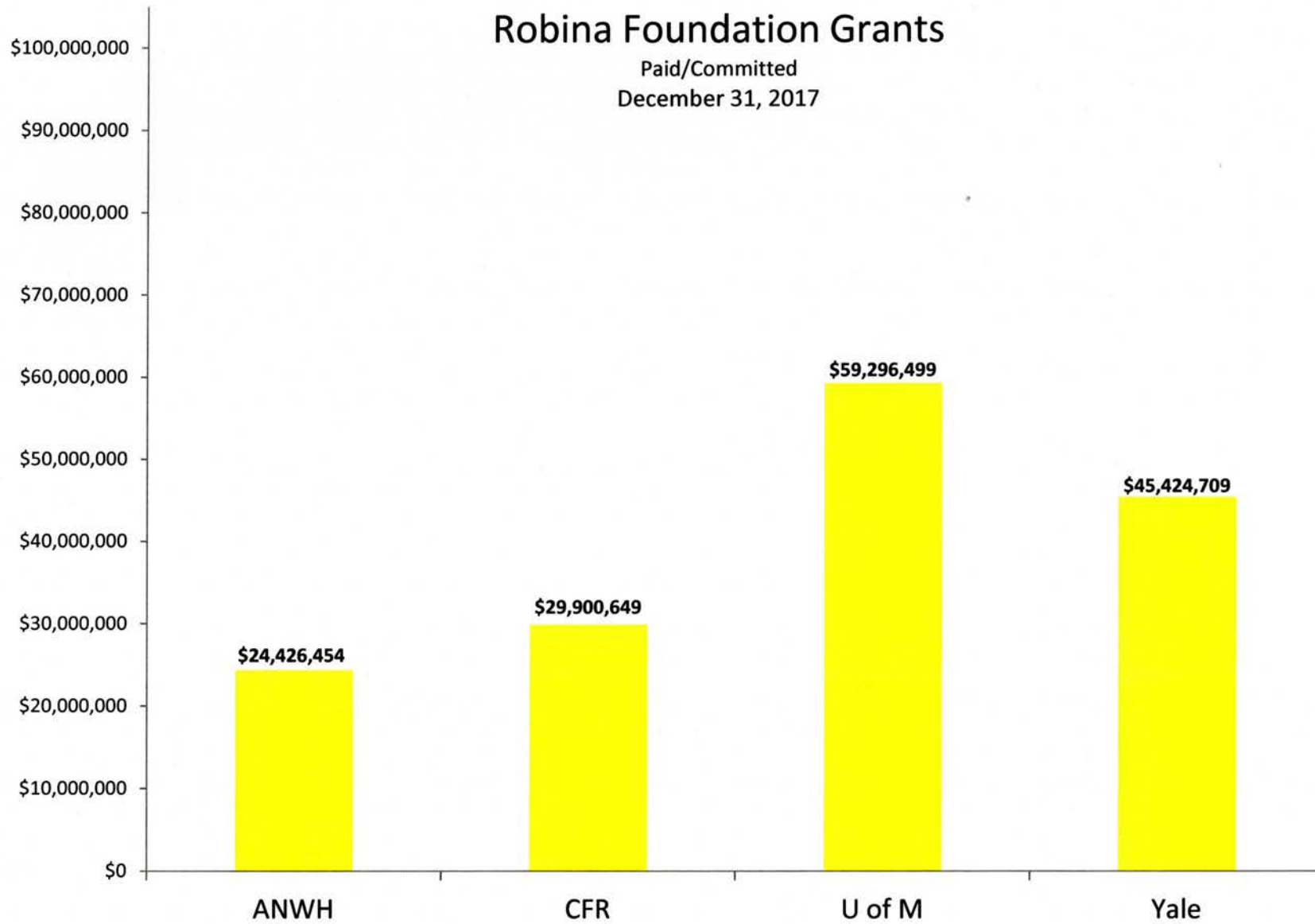
Because the External Review Committee met this month, we will be able to discuss the report with Dean Bundy during our meeting. Dean Bundy also plans to update us on the status of plans for a new building for YSD and Yale Rep.

> Work with Mike S. on report

	2008	2009	2010	2011	2012	ROBINA FOUNDATION GRANTS PAID/COMMITTED					2017	For February 2018 Board Meeting			2021	TOTAL
	2008	2009	2010	2011	2012	2013	2014	2015	2016	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	1,000,000					7,490,000	
														ANWH Total	24,426,454	
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						18,305,355	
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	
Endowed Chair in Global Governance									1,666,667	1,666,667	1,666,666				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 Rig	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	5,043,847	3,864,396	1,491,663	1,050,688		159,048,311	
YEAR END NET ASSETS*				120,827,373	100,568,259	95,132,519	82,796,457	68,168,845	17,913,050	12,637,410	8,487,786	6,626,596	5,153,183			
*Estimated by Mike Sullivan based upon the projected grant programs and using asset allocation and assumed return assumptions.																
Not Included Above: Planning Grants from 2005-2008: Abbott - \$125,000; CFR - \$50,000; U of M Law School - \$375,000; Yale University - \$50,000																
Misc Grants: ArtPlace Initiative-\$500,000; Aspen Institute-\$130,575, The Ctr for Victims of Torture-\$26,000; Tandem-\$25,000; Orthopaedic International Education-\$25,000; Yale School of Drama-\$25,000; Exponent Philanthropy-\$250																
															\$600,000	
															\$731,825	
															\$1,331,825	
														TOTAL	\$160,380,136	
															31-Dec-17	

Robina Foundation Grants

Paid/Committed
December 31, 2017





Robina Foundation

Quarterly Financial Report – Q4, 2017

*Prepared by Michael F. Sullivan, Ph.D. and Nikolas Koenning
Indigo Consulting*

February 1, 2018

Robina Foundation

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Robina Foundation

Executive Summary

Mission Statement

The Robina Foundation, a Minnesota-based private grant making 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.

Executive Summary

The value of our assets was \$12,637,410 on December 31, 2017, a planned decline of \$5,275,640 from \$17,913,050 at the start of the calendar year. The change was mostly due to grant expenses in the amount of \$5,069,097 and operating and bank expenses of \$544,137. Earnings were relatively low as we have moved to a short term fixed income investment strategy.

Total returns (see page 6) were competitive with index benchmarks in all time periods.

In our quarterly projections we do not anticipate revenues from the PE funds. We do not know when we will realize revenues, nor the amounts. Interestingly, we received \$77,439 in revenues from PE in the quarter, but the NAVs declined at a lesser amount, \$46,763, than the revenues due to the accounting lag.

We should point out that the quarterly projections are just that: projections. While most of the larger items (grants, maturing of bonds) are known with certainty, there are a number of elements in the pro forma that are unknown. A few

Robina Foundation

good examples in Q4, 2017 are the additional revenues from the PE funds, and higher operating and bank expenses (actual expense of \$165,258 vs. budget of \$125,000).

So, we will start referring to the quarterly projections as a MULTI-YEAR BUDGET. There will always be some level of variance from budget. I am confident that the amount still available for additional grants over the next three years will exceed \$5,000,000 by \$100,000 to \$250,000. The amount will become more accurate the closer we get to the terminal date of the end of 2020. Thus, I believe the board can now allocate up to \$5,000,000 in additional grants over the next three years, with a positive residual at the terminal date.

Balance Sheet

	<u>2016</u>	<u>2017</u>			
	Q4	Q1	Q2	Q3	Q4
Beginning Balance:	\$58,526,903	\$17,913,050	\$16,540,138	\$16,501,546	\$14,425,125
Plus: Earnings	(\$102,597)	\$180,809	\$131,956	(\$6,716)	\$69,460
Less: Grants	(\$40,536,667)	(\$1,486,012)	\$0	(\$1,891,168)	\$(1,691,917)
Less: Operating Expenses	(\$173,036)	(\$60,962)	(\$125,209)	(\$178,537)	(152,823)
Less: Bank Expenses	(\$6,747)	(\$6,747)	(\$6,747)	(\$6,747)	(\$12,435)
Ending Balance:	\$17,913,050	\$16,540,138	\$16,501,546	\$14,425,125	\$12,637,410

Robina Foundation

Performance vs. Benchmark:

	Year to Date (1 Year)	3 Year	5 Year
Portfolio % return, annualized	2.10	1.22	3.18
Benchmark % return, annualized	0.84	1.23	3.43

Executive Financial Summary:

	2016	2017			
	Qtr4	Qtr1	Qtr2	Qtr3	Qtr4
Cash	\$9,160,721	\$9,709,493	\$10,494,762	\$2,270,936	\$2,433,123
Fixed Income	\$4,002,138	\$4,074,384	\$3,233,715	\$11,562,760	\$9,659,623
Equities	\$4,750,191	\$2,756,261	\$2,773,069	\$591,428	\$544,665
Grand Total	\$17,913,050	\$16,540,138	\$16,501,546	\$14,425,125	\$12,637,410

Robina Foundation

Sources of Capital

	2016	2017			
	Qtr4	Qtr1	Qtr2	Qtr3	Qtr4
Asset Summary					
Cash					
Pending cash	\$0	\$0	(\$1,865,396)	\$0	\$0
US Bank Private Client MM	\$8,334,134	\$9,043,693	\$0	\$0	\$0
New MM Investment	\$0	\$0	\$12,188,014	\$2,075,557	\$2,292,370
Robina Checking Account	\$139,046	\$99,183	\$172,144	\$195,379	\$142,752
Cash Total	\$8,473,180	\$9,142,876	\$10,494,762	\$2,270,936	\$2,433,123
Cash equivalents – Cash assumption					
IDR Core Equity	\$566,616	\$566,616	\$0	\$0	\$0
GCA Credit Opportunity Fund	\$120,924	\$0	\$0	\$0	\$0
Cash & Cash equivalents Total	\$9,160,721	\$9,709,493	\$10,494,762	\$2,270,936	\$2,433,123

Robina Foundation

	2016	2017			
	Qtr4	Qtr1	Qtr2	Qtr3	Qtr4
Fixed Income					
Bonds					
Bank Of New York Mellon	\$250,868	\$250,340	\$0	\$0	\$0
Bank Of Montreal	\$250,013	\$249,963	\$0	\$0	\$0
Taxable US (MM)	\$0	\$0	\$1,971,355	\$7,892,410	\$6,494,913
Taxable Foreign Bonds (MM)	\$0	\$0	\$1,262,360	\$3,670,350	\$3,164,710
Bonds Total	\$500,880	\$500,303	\$3,233,715	\$11,562,760	\$9,659,623
Bond Hedge Funds					
Gam Absolute Return Bond Fund	\$3,501,258	\$3,574,081	\$0	\$0	\$0
Bond Hedge Funds Total	\$3,501,258	\$3,574,081	\$0	\$0	\$0
Fixed Income Total	\$4,002,138	\$4,074,384	\$3,233,715	\$11,562,760	\$9,659,623

Robina Foundation

	2016	2017			
	Qtr4	Qtr1	Qtr2	Qtr3	Qtr4
Equities					
Hedge					
Pointer Offshore Ltd	\$4,050,702	\$2,097,755	\$2,184,661	\$0	\$0
Private Equity					
Flag Venture Partners III LP	\$186,690	\$186,690	\$156,295	\$159,315	\$143,065
Flag Venture Partners IV LP	\$389,831	\$348,848	\$309,145	\$309,145	\$293,724
Pfingsten Partners III LP	\$122,968	\$122,968	\$122,968	\$122,968	\$107,876
Private Equity Total	\$699,489	\$658,506	\$588,408	\$591,428	\$544,665
Equities Total	\$4,750,191	\$2,756,261	\$2,773,069	\$591,428	\$544,665
Grand Total	\$17,913,050	\$16,540,138	\$16,501,546	\$14,425,125	\$12,637,410

Grants Paid: 2017

	Qtr1	Qtr2	Qtr3	Qtr4	Grand Total
Allina Health System/Abbott Northwestern	\$1,000,000				\$1,000,000
Life Course/Late Life Supportive Care	\$1,000,000				\$1,000,000
Council on Foreign Relations				\$1,666,667	\$1,666,667
Endowed Chair in Global Governance				\$1,666,667	\$1,666,667
University of Minnesota Law School			\$1,891,168		\$1,891,168
Sentencing Law Program Enhancements (CL&CJ)			\$922,980		\$922,980
Public Interest Scholars			\$726,688		\$726,688
Bridge Fellowship Program			\$150,000		\$150,000
Class Agent Pilot Program			\$91,500		\$91,500
Yale University	\$486,012			\$25,000	\$511,012
Gilder Lehrman Center	\$486,012				\$486,012
Gift in memory of Peter Karoff				\$25,000	\$25,000
Exponent Philanthropy				\$250	\$250
Grand Total	\$1,486,012	\$0	\$1,891,168	\$1,691,917	\$5,069,097

Robina Grant Commitments

	Month to be Paid "For 2018"	2018	2019	2020	Grand Total
Council on Foreign Relations		\$1,666,666			\$1,666,666
Endowed Chair in Global Governance	December	\$1,666,666			\$1,666,666
University of Minnesota Law School		\$1,815,688	\$1,318,188	\$1,050,688	\$4,184,564
Public Interest Scholars	July	\$1,074,188	\$1,076,688	\$809,188	\$2,960,064
Bridge Fellowship Program	July	\$150,000	\$150,000	\$150,000	\$450,000
Class Agent Pilot Program	August	\$91,500	\$91,500	\$91,500	\$274,500
Matching Program, Endowed Scholarships	TBD	\$500,000			\$500,000
Yale University		\$382,042	\$173,475		\$555,517
Gilder Lehrman Center	February	\$382,042	\$173,475		\$555,517
Grand Total		\$3,864,396	\$1,491,663	\$1,050,688	\$6,406,747

Grant Long Term History and Projections

Grants Paid and Committed	2012	2013	2014	2015	2016	2017	2018	2019	2020	2008-2020
	Actual	Actual	Actual	Actual	Actual	Actual	Budget	Budget	Budget	Grand Total
Allina Health System/Abboft Northwestern	\$2,356,696	\$4,245,492	\$4,334,266	\$3,990,000	\$2,500,000	\$1,000,000				\$24,426,454
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	\$1,000,000				\$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	\$1,666,666			\$29,900,649
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
Endowed Share in Global Governance					\$1,666,667	\$1,666,667	\$1,666,666			\$5,000,000
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	\$29,651,097	\$1,891,168	\$1,815,688	\$1,318,188	\$1,050,688	\$59,296,499
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
James H. Binger Center for New Americans					\$23,500,000					\$23,500,000
Matching Program, Endowed Scholarships							\$500,000			\$500,000
James H. Binger Professorship in Clinical Law					\$1,000,000					\$1,000,000
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	\$14,383,180	\$486,012	\$382,042	\$173,475		\$45,424,709
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
Gilder Lehrman Center					\$383,180	\$486,012	\$382,042	\$173,475		\$1,424,709
Robina Human Rights Initiative Endowment Fund					\$10,000,000					\$10,000,000
Binger Clinical Faculty Chair in Human Rights					\$3,000,000					\$3,000,000
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
Other					\$50,000	\$25,750				\$75,750
Tandem, Partners in Early Learning – Steve Schroeder's Board Service					\$25,000					\$25,000
Orthopedic International Ed at UofM – Gordy Aamothe's Board Service					\$25,000					\$25,000
Gift in memory of Peter Karoff						\$25,000				\$25,000
Exponent Philanthropy						\$250				\$250
Grand Total	\$26,428,609	\$13,152,126	\$13,576,037	\$13,245,756	\$51,843,497	\$5,069,097	\$3,864,396	\$1,491,663	\$1,050,688	\$160,024,560
Outstanding Commitments							\$3,864,397	\$1,491,663	\$1,050,688	\$6,406,747

USBank Performance Report 12/31/2017

Selected Period Performance ROBINA FOUNDATION MGMT AGY Period Ending: 12/31/2017

Sector	Market Value	Year to Date (1 Year)	3 Years	5 Years
Total Portfolio Gross of Fees	12,554,224	1.99	1.42	3.20
Total Managed Portfolio	12,009,559	2.10	1.22	3.18
<i>Robina Custom Benchmark</i>			1.23	3.43
<i>Citigroup 3 Mo T-Bill Index</i>		.84		
Domestic Fixed	6,539,878	.72	1.03	1.50
<i>BARC 1-3 Yr Gov/Cr</i>		.84	.93	.84
Foreign Fixed Income	3,175,586	.68	1.92	.68
Total Cash Equivalents	2,294,095	.47	.28	.24
<i>Citigroup 3 Mo T-Bill Index</i>		.84	.38	.24
Non-Mgd Other	544,665	-1.46	-12.37	-12.30

Portfolio Inception: 06/01/2007

Performance layout adjusted for illustrative purposes. Performance data is not altered in any manner.

Robina Foundation

Implementation of Maturity Matching Investment Strategy

December 31/2017 – December 31/2020

Maturity Matching Investment Strategy

The following schedule provides an in-detail guidance of the future cash flows. It combines the grants, operating expenses, bond principal income as well as the dividend income schedules.

Underlying Assumptions:

1. Current equity investments are expected to come due in the next 2-3 years and will be invested in the money market thereafter.
2. The beginning balance is AS OF 12-31-2017. The beginning balance includes the present value of the three PE funds as well as the balance in the Robina Checking account.
3. The maturities of the bonds and the obligations for payments are matched closely enough so that the balance of cash and cash equivalents generally varies between \$2.5 and \$3.5 million which will be invested at all times in the Money Market Fund.
4. If needed, the 2020 bonds can be sold early at a discount to market, so we in essence have placed no time limits on the board's ability to make additional grants of \$5,153,183.
5. We have assumed quarterly expenses of \$125,000 for operating and bank expenses. While we exceeded that amount in Q4, 2017, (actual expenses of \$169,456), and indeed for the entirety of 2017 (budget of \$500,000, actual expenses of \$544,432), over time it is expected that the actual expenses will decline, providing a boost to available funds for grants.

Beginning Balance 12/31/2017	12,637,410
Minus: Operating expenses	(1,500,000)
Minus: Committed Grants	(6,406,747)
Plus: Bond Dividends	441,143
Minus: Adjustments for Unrealized Losses	(18,623)
Ending Balance	5,153,183

	12/31/2017	12/31/2018	12/31/2019	12/31/2020
Balance Available for new Grants	2,977,787	2,646,163	2,784,973	5,153,183

Cash Flow Schedule – Q1 and Q2 2018

Date	Dividend or Grant/Expenses	Description	Cash and Cash Equivalents Balance
12/31/2017		Balance of Cash, Cash Equivalents and Outstanding Equities	2,977,787
2/15/2018	5,156	Bond Dividend: RABOBANK MTN	2,982,944
Q1 2018	(125,000)	Quarterly operating expenses	2,857,944
2/17/2018	25,556	Bond Dividend: BNP PARIBAS MTN	2,883,499
2/20/2018	7,350	Bond Dividend: BERKSHIRE HATHAWAY	2,890,849
2/28/2018	(382,042)	Grant: Gilder Lehrman Center	2,508,807
3/1/2018	3,549	Bond Dividend: BANK NY MELLON MTN	2,512,356
3/2/2018	3,188	Bond Dividend: STATE STREET CORP	2,515,544
3/6/2018	3,188	Bond Dividend: CISCO SYSTEMS INC	2,518,731
3/6/2018	1,344	Bond Dividend: BANK OF NY MELLO MTN	2,520,075
3/7/2018	725	Bond Dividend: BERKSHIRE HATHAWAY	2,520,800
3/7/2018	100,000	Bond final Payment: BERKSHIRE HATHAWAY	2,620,800
3/12/2018	2,600	Bond Dividend: JOHN DEERE CAPI MTN	2,623,400
3/12/2018	400,000	Bond final Payment: JOHN DEERE CAPI MTN	3,023,400
3/16/2018	7,200	Bond Dividend: BURLINGTN N SANTA FE	3,030,600
3/16/2018	3,188	Bond Dividend: GILEAD SCIENCES INC	3,033,787
4/19/2018	4,700	Bond Dividend: BANK OF NOVA SCOTIA	3,038,487
5/8/2018	5,625	Bond Dividend: SHELL INTERNATIONAL	3,044,112
5/14/2018	4,375	Bond Dividend: ASTRAZENECA PLC	3,048,487
5/14/2018	6,750	Bond Dividend: AUST NZ BANKING MTN	3,055,237
Q2 2018	(125,000)	Quarterly operating expenses	2,930,237
5/18/2018	875	Bond Dividend: PACCAR FINANCIA MTN	2,931,112
5/18/2018	125,000	Bond final Payment: PACCAR FINANCIA MTN	3,056,112
5/20/2018	6,125	Bond Dividend: PNC BANK NA MTN	3,062,237
5/22/2018	1,156	Bond Dividend: INTEL CORP	3,063,394
6/7/2018	4,000	Bond Dividend: ROYAL BANK OF MTN	3,067,394
6/9/2018	1,313	Bond Dividend: BANK OF MONTREAL MTN	3,068,706
6/18/2018	3,900	Bond Dividend: WAL MART STORES	3,072,606
6/20/2018	1,250	Bond Dividend: HOME DEPOT INC	3,073,856
6/21/2018	6,375	Bond Dividend: WELLS FARGO MTN	3,080,231

Cash Flow Statement – Q3 and Q4 2018

Date	Dividend or Grant/Expenses	Description	Cash and Cash Equivalents Balance
7/31/2018	(150,000)	Grant: Bridge Fellowship Program	2,930,231
7/31/2018	(1,074,188)	Grant: Center for New Americans	1,856,043
8/14/2018	5,156	Bond Dividend: RABOBANK MTN	1,861,199
Q3 2018	(125,000)	Quarterly operating expenses	1,736,199
8/18/2018	25,556	Bond Dividend: BNP PARIBAS MTN	1,761,755
8/18/2018	1,893,000	Bond final Payment: BNP PARIBAS MTN	3,654,755
8/19/2018	7,350	Bond Dividend: BERKSHIRE HATHAWAY	3,662,105
8/28/2018	3,549	Bond Dividend: BANK NY MELLON MTN	3,665,654
8/29/2018	3,188	Bond Dividend: STATE STREET CORP	3,668,841
8/31/2018	(91,500)	Grant: Class Agent Pilot Program	3,577,341
9/2/2018	3,188	Bond Dividend: CISCO SYSTEMS INC	3,580,529
9/2/2018	1,344	Bond Dividend: BANK OF NY MELLO MTN	3,581,873
9/12/2018	7,200	Bond Dividend: BURLINGTON N SANTA FE	3,589,073
9/12/2018	3,188	Bond Dividend: GILEAD SCIENCES INC	3,592,260
10/16/2018	4,700	Bond Dividend: BANK OF NOVA SCOTIA	3,596,960
11/4/2018	5,625	Bond Dividend: SHELL INTERNATIONAL	3,602,585
11/10/2018	6,750	Bond Dividend: AUST NZ BANKING MTN	3,609,335
11/12/2018	4,375	Bond Dividend: ASTRAZENECA PLC	3,613,710
11/12/2018	500,000	Bond final Payment: ASTRAZENECA PLC	4,113,710
Q4 2018	(125,000)	Quarterly operating expenses	3,988,710
11/16/2018	6,125	Bond Dividend: PNC BANK NA MTN	3,994,835
11/18/2018	1,156	Bond Dividend: INTEL CORP	3,995,991
12/6/2018	1,313	Bond Dividend: BANK OF MONTREAL MTN	3,997,304
12/6/2018	4,000	Bond Dividend: ROYAL BANK OF MTN	4,001,304
12/6/2018	400,000	Bond final Payment: ROYAL BANK OF MTN	4,401,304
12/15/2018	3,900	Bond Dividend: WAL MART STORES	4,405,204
12/15/2018	400,000	Bond final Payment: WAL MART STORES	4,805,204
12/17/2018	1,250	Bond Dividend: HOME DEPOT INC	4,806,454
12/18/2018	6,375	Bond Dividend: WELLS FARGO MTN	4,812,829
12/31/2018	(500,000)	Grant: James H. Binger Center for New Americans	4,312,829
12/31/2018	(1,666,666)	Grant: The Council at 100 Campaign	2,646,163

Cash Flow Schedule – 2019

Date	Dividend or Grant/Expenses	Description	Cash and Cash Equivalents Balance
2/10/2019	5,156	Bond Dividend: RABOBANK MTN	2,651,319
2/15/2019	7,350	Bond Dividend: BERKSHIRE HATHAWAY	2,658,669
Q1 2019	(125,000)	Quarterly operating expenses	2,533,669
2/24/2019	3,549	Bond Dividend: BANK NY MELLON MTN	2,537,218
2/25/2019	3,188	Bond Dividend: STATE STREET CORP	2,540,406
2/28/2019	(173,475)	Grant: Gilder Lehrman Center	2,366,931
3/1/2019	1,344	Bond Dividend: BANK OF NY MELLO MTN	2,368,274
3/1/2019	3,188	Bond Dividend: CISCO SYSTEMS INC	2,371,462
3/1/2019	300,000	Bond final Payment: CISCO SYSTEMS INC	2,671,462
3/11/2019	7,200	Bond Dividend: BURLINGTN N SANTA FE	2,678,662
3/11/2019	3,188	Bond Dividend: GILEAD SCIENCES INC	2,681,849
4/14/2019	4,700	Bond Dividend: BANK OF NOVA SCOTIA	2,686,549
5/3/2019	5,625	Bond Dividend: SHELL INTERNATIONAL	2,692,174
5/9/2019	6,750	Bond Dividend: AUST NZ BANKING MTN	2,698,924
5/15/2019	6,125	Bond Dividend: PNC BANK NA MTN	2,705,049
Q2 2019	(125,000)	Quarterly operating expenses	2,580,049
5/17/2019	1,156	Bond Dividend: INTEL CORP	2,581,206
6/4/2019	1,313	Bond Dividend: BANK OF MONTREAL MTN	2,582,518
6/15/2019	1,250	Bond Dividend: HOME DEPOT INC	2,583,768
6/15/2019	125,000	Bond final Payment: HOME DEPOT INC	2,708,768
6/16/2019	6,375	Bond Dividend: WELLS FARGO MTN	2,715,143
7/31/2019	(150,000)	Grant: Bridge Fellowship Program	2,565,143
7/31/2019	(1,076,688)	Grant: Center for New Americans	1,488,455
8/9/2019	5,156	Bond Dividend: RABOBANK MTN	1,493,611
8/9/2019	750,000	Bond final Payment: RABOBANK MTN	2,243,611
8/14/2019	7,350	Bond Dividend: BERKSHIRE HATHAWAY	2,250,961
8/14/2019	700,000	Bond final Payment: BERKSHIRE HATHAWAY	2,950,961
Q3 2019	(125,000)	Quarterly operating expenses	2,825,961
8/23/2019	3,549	Bond Dividend: BANK NY MELLON MTN	2,829,510
8/24/2019	3,188	Bond Dividend: STATE STREET CORP	2,832,698
8/28/2019	1,344	Bond Dividend: BANK OF NY MELLO MTN	2,834,042
8/31/2019	(91,500)	Grant: Class Agent Pilot Program	2,742,542
9/7/2019	7,200	Bond Dividend: BURLINGTN N SANTA FE	2,749,742
9/7/2019	3,188	Bond Dividend: GILEAD SCIENCES INC	2,752,929
10/11/2019	4,700	Bond Dividend: BANK OF NOVA SCOTIA	2,757,629
10/30/2019	5,625	Bond Dividend: SHELL INTERNATIONAL	2,763,254
11/5/2019	6,750	Bond Dividend: AUST NZ BANKING MTN	2,770,004
11/11/2019	6,125	Bond Dividend: PNC BANK NA MTN	2,776,129
11/13/2019	1,156	Bond Dividend: INTEL CORP	2,777,285
Q4 2019	(125,000)	Quarterly operating expenses	2,652,285
12/3/2019	1,313	Bond Dividend: BANK OF MONTREAL MTN	2,653,598
12/3/2019	125,000	Bond final Payment: BANK OF MONTREAL MTN	2,778,598
12/13/2019	6,375	Bond Dividend: WELLS FARGO MTN	2,784,973

Cash Flow Schedule – 2020

Date	Dividend or Grant/Expenses	Description	Cash and Cash Equivalents Balance
Q1 2020	(125,000)	Quarterly operating expenses	2,659,973
2/19/2020	3,549	Bond Dividend: BANK NY MELLON MTN	2,663,522
2/20/2020	3,188	Bond Dividend: STATE STREET CORP	2,666,709
2/24/2020	1,344	Bond Dividend: BANK OF NY MELLO MTN	2,668,053
2/24/2020	125,000	Bond final Payment: BANK OF NY MELLO MTN	2,793,053
3/5/2020	7,200	Bond Dividend: BURLINGTN N SANTA FE	2,800,253
3/5/2020	3,188	Bond Dividend: GILEAD SCIENCES INC	2,803,441
4/8/2020	4,700	Bond Dividend: BANK OF NOVA SCOTIA	2,808,141
4/27/2020	5,625	Bond Dividend: SHELL INTERNATIONAL	2,813,766
5/3/2020	6,750	Bond Dividend: AUST NZ BANKING MTN	2,820,516
5/9/2020	6,125	Bond Dividend: PNC BANK NA MTN	2,826,641
5/11/2020	1,156	Bond Dividend: INTEL CORP	2,827,797
5/11/2020	125,000	Bond final Payment: INTEL CORP	2,952,797
Q2 2020	(125,000)	Quarterly operating expenses	2,827,797
6/10/2020	6,375	Bond Dividend: WELLS FARGO MTN	2,834,172
7/31/2020	(150,000)	Grant: Bridge Fellowship Program	2,684,172
7/31/2020	(809,188)	Grant: Center for New Americans	1,874,984
Q3 2020	(125,000)	Quarterly operating expenses	1,749,984
8/17/2020	3,549	Bond Dividend: BANK NY MELLON MTN	1,753,533
8/17/2020	273,000	Bond final Payment: BANK NY MELLON MTN	2,026,533
8/18/2020	3,188	Bond Dividend: STATE STREET CORP	2,029,720
8/18/2020	250,000	Bond final Payment: STATE STREET CORP	2,279,720
8/31/2020	(91,500)	Grant: Class Agent Pilot Program	2,188,220
9/1/2020	7,200	Bond Dividend: BURLINGTN N SANTA FE	2,195,420
9/1/2020	3,188	Bond Dividend: GILEAD SCIENCES INC	2,198,608
9/1/2020	400,000	Bond final Payment: BURLINGTN N SANTA FE	2,598,608
9/1/2020	250,000	Bond final Payment: GILEAD SCIENCES INC	2,848,608
10/7/2020	4,700	Bond Dividend: BANK OF NOVA SCOTIA	2,853,308
10/7/2020	400,000	Bond final Payment: BANK OF NOVA SCOTIA	3,253,308
10/26/2020	5,625	Bond Dividend: SHELL INTERNATIONAL	3,258,933
10/26/2020	500,000	Bond final Payment: SHELL INTERNATIONAL	3,758,933
11/1/2020	6,750	Bond Dividend: AUST NZ BANKING MTN	3,765,683
11/1/2020	500,000	Bond final Payment: AUST NZ BANKING MTN	4,265,683
11/5/2020	6,125	Bond Dividend: PNC BANK NA MTN	4,271,808
11/5/2020	500,000	Bond final Payment: PNC BANK NA MTN	4,771,808
Q4 2020	(125,000)	Quarterly operating expenses	4,646,808
12/7/2020	6,375	Bond Dividend: WELLS FARGO MTN	4,653,183
12/7/2020	500,000	Bond final Payment: WELLS FARGO MTN	5,153,183

Committed Grant Payment Schedule

Date	Dividend or Grant/Expenses	Description
2/28/2018	(382,042)	Grant: Gilder Lehrman Center
7/31/2018	(150,000)	Grant: Bridge Fellowship Program
7/31/2018	(1,074,188)	Grant: Center for New Americans
8/31/2018	(91,500)	Grant: Class Agent Pilot Program
12/31/2018	(500,000)	Grant: James H. Binger Center for New Americans
12/31/2018	(1,666,666)	Grant: The Council at 100 Campaign
2/28/2019	(173,475)	Grant: Gilder Lehrman Center
7/31/2019	(150,000)	Grant: Bridge Fellowship Program
7/31/2019	(1,076,688)	Grant: Center for New Americans
8/31/2019	(91,500)	Grant: Class Agent Pilot Program
7/31/2020	(150,000)	Grant: Bridge Fellowship Program
7/31/2020	(809,188)	Grant: Center for New Americans
8/31/2020	(91,500)	Grant: Class Agent Pilot Program
Total	(6,406,747)	

Expense Payment Schedule

Date	Dividend or Grant/Expenses	Description
Q1 2018	(125,000)	Quarterly operating expenses
Q2 2018	(125,000)	Quarterly operating expenses
Q3 2018	(125,000)	Quarterly operating expenses
Q4 2018	(125,000)	Quarterly operating expenses
Q1 2019	(125,000)	Quarterly operating expenses
Q2 2019	(125,000)	Quarterly operating expenses
Q3 2019	(125,000)	Quarterly operating expenses
Q4 2019	(125,000)	Quarterly operating expenses
Q1 2020	(125,000)	Quarterly operating expenses
Q2 2020	(125,000)	Quarterly operating expenses
Q3 2020	(125,000)	Quarterly operating expenses
Q4 2020	(125,000)	Quarterly operating expenses
Total	(1,500,000)	

Bond Principal Income Schedule

Date	Dividend or Grant/Expenses	Description
3/7/2018	100,000	Bond final Payment: BERKSHIRE HATHAWAY
3/12/2018	400,000	Bond final Payment: JOHN DEERE CAPI MTN
5/18/2018	125,000	Bond final Payment: PACCAR FINANCIA MTN
8/18/2018	1,893,000	Bond final Payment: BNP PARIBAS MTN
11/12/2018	500,000	Bond final Payment: ASTRAZENECA PLC
12/6/2018	400,000	Bond final Payment: ROYAL BANK OF MTN
12/15/2018	400,000	Bond final Payment: WAL MART STORES
3/1/2019	300,000	Bond final Payment: CISCO SYSTEMS INC
6/15/2019	125,000	Bond final Payment: HOME DEPOT INC
8/9/2019	750,000	Bond final Payment: RABOBANK MTN
8/14/2019	700,000	Bond final Payment: BERKSHIRE HATHAWAY
12/3/2019	125,000	Bond final Payment: BANK OF MONTREAL MTN
2/24/2020	125,000	Bond final Payment: BANK OF NY MELLO MTN
5/11/2020	125,000	Bond final Payment: INTEL CORP
8/17/2020	273,000	Bond final Payment: BANK NY MELLON MTN
8/18/2020	250,000	Bond final Payment: STATE STREET CORP
9/1/2020	400,000	Bond final Payment: BURLINGTN N SANTA FE
9/1/2020	250,000	Bond final Payment: GILEAD SCIENCES INC
10/7/2020	400,000	Bond final Payment: BANK OF NOVA SCOTIA
10/26/2020	500,000	Bond final Payment: SHELL INTERNATIONAL
11/1/2020	500,000	Bond final Payment: AUST NZ BANKING MTN
11/5/2020	500,000	Bond final Payment: PNC BANK NA MTN
12/7/2020	500,000	Bond final Payment: WELLS FARGO MTN
Total	9,641,000	

Bond Dividend Income Schedule

Date	Dividend or Grant/Expenses	Description	Date	Dividend or Grant/Expenses	Description
2/15/2018	5,156	Bond Dividend: RABOBANK MTN	3/1/2019	1,344	Bond Dividend: BANK OF NY MELLO MTN
2/17/2018	25,556	Bond Dividend: BNP PARIBAS MTN	3/1/2019	3,188	Bond Dividend: CISCO SYSTEMS INC
2/20/2018	7,350	Bond Dividend: BERKSHIRE HATHAWAY	3/11/2019	7,200	Bond Dividend: BURLINGTN N SANTA FE
3/1/2018	3,549	Bond Dividend: BANK NY MELLON MTN	3/11/2019	3,188	Bond Dividend: GILEAD SCIENCES INC
3/2/2018	3,188	Bond Dividend: STATE STREET CORP	4/14/2019	4,700	Bond Dividend: BANK OF NOVA SCOTIA
3/6/2018	3,188	Bond Dividend: CISCO SYSTEMS INC	5/3/2019	5,625	Bond Dividend: SHELL INTERNATIONAL
3/6/2018	1,344	Bond Dividend: BANK OF NY MELLO MTN	5/9/2019	6,750	Bond Dividend: AUST NZ BANKING MTN
3/7/2018	725	Bond Dividend: BERKSHIRE HATHAWAY	5/15/2019	6,125	Bond Dividend: PNC BANK NA MTN
3/12/2018	2,600	Bond Dividend: JOHN DEERE CAPI MTN	5/17/2019	1,156	Bond Dividend: INTEL CORP
3/16/2018	7,200	Bond Dividend: BURLINGTN N SANTA FE	6/4/2019	1,313	Bond Dividend: BANK OF MONTREAL MTN
3/16/2018	3,188	Bond Dividend: GILEAD SCIENCES INC	6/15/2019	1,250	Bond Dividend: HOME DEPOT INC
4/19/2018	4,700	Bond Dividend: BANK OF NOVA SCOTIA	6/16/2019	6,375	Bond Dividend: WELLS FARGO MTN
5/8/2018	5,625	Bond Dividend: SHELL INTERNATIONAL	8/9/2019	5,156	Bond Dividend: RABOBANK MTN
5/14/2018	4,375	Bond Dividend: ASTRAZENECA PLC	8/14/2019	7,350	Bond Dividend: BERKSHIRE HATHAWAY
5/14/2018	6,750	Bond Dividend: AUST NZ BANKING MTN	8/23/2019	3,549	Bond Dividend: BANK NY MELLON MTN
5/18/2018	875	Bond Dividend: PACCAR FINANCIA MTN	8/24/2019	3,188	Bond Dividend: STATE STREET CORP
5/20/2018	6,125	Bond Dividend: PNC BANK NA MTN	8/28/2019	1,344	Bond Dividend: BANK OF NY MELLO MTN
5/22/2018	1,156	Bond Dividend: INTEL CORP	9/7/2019	7,200	Bond Dividend: BURLINGTN N SANTA FE
6/7/2018	4,000	Bond Dividend: ROYAL BANK OF MTN	9/7/2019	3,188	Bond Dividend: GILEAD SCIENCES INC
6/9/2018	1,313	Bond Dividend: BANK OF MONTREAL MTN	10/11/2019	4,700	Bond Dividend: BANK OF NOVA SCOTIA
6/18/2018	3,900	Bond Dividend: WAL MART STORES	10/30/2019	5,625	Bond Dividend: SHELL INTERNATIONAL
6/20/2018	1,250	Bond Dividend: HOME DEPOT INC	11/5/2019	6,750	Bond Dividend: AUST NZ BANKING MTN
6/21/2018	6,375	Bond Dividend: WELLS FARGO MTN	11/11/2019	6,125	Bond Dividend: PNC BANK NA MTN
8/14/2018	5,156	Bond Dividend: RABOBANK MTN	11/13/2019	1,156	Bond Dividend: INTEL CORP
8/18/2018	25,556	Bond Dividend: BNP PARIBAS MTN	12/3/2019	1,313	Bond Dividend: BANK OF MONTREAL MTN
8/19/2018	7,350	Bond Dividend: BERKSHIRE HATHAWAY	12/13/2019	6,375	Bond Dividend: WELLS FARGO MTN
8/28/2018	3,549	Bond Dividend: BANK NY MELLON MTN	2/19/2020	3,549	Bond Dividend: BANK NY MELLON MTN
8/29/2018	3,188	Bond Dividend: STATE STREET CORP	2/20/2020	3,188	Bond Dividend: STATE STREET CORP
9/2/2018	3,188	Bond Dividend: CISCO SYSTEMS INC	2/24/2020	1,344	Bond Dividend: BANK OF NY MELLO MTN
9/2/2018	1,344	Bond Dividend: BANK OF NY MELLO MTN	3/5/2020	7,200	Bond Dividend: BURLINGTN N SANTA FE
9/12/2018	7,200	Bond Dividend: BURLINGTN N SANTA FE	3/5/2020	3,188	Bond Dividend: GILEAD SCIENCES INC
9/12/2018	3,188	Bond Dividend: GILEAD SCIENCES INC	4/8/2020	4,700	Bond Dividend: BANK OF NOVA SCOTIA
10/16/2018	4,700	Bond Dividend: BANK OF NOVA SCOTIA	4/27/2020	5,625	Bond Dividend: SHELL INTERNATIONAL
11/4/2018	5,625	Bond Dividend: SHELL INTERNATIONAL	5/3/2020	6,750	Bond Dividend: AUST NZ BANKING MTN
11/10/2018	6,750	Bond Dividend: AUST NZ BANKING MTN	5/9/2020	6,125	Bond Dividend: PNC BANK NA MTN
11/12/2018	4,375	Bond Dividend: ASTRAZENECA PLC	5/11/2020	1,156	Bond Dividend: INTEL CORP
11/16/2018	6,125	Bond Dividend: PNC BANK NA MTN	6/10/2020	6,375	Bond Dividend: WELLS FARGO MTN
11/18/2018	1,156	Bond Dividend: INTEL CORP	8/17/2020	3,549	Bond Dividend: BANK NY MELLON MTN
12/6/2018	1,313	Bond Dividend: BANK OF MONTREAL MTN	8/18/2020	3,188	Bond Dividend: STATE STREET CORP
12/6/2018	4,000	Bond Dividend: ROYAL BANK OF MTN	9/1/2020	7,200	Bond Dividend: BURLINGTN N SANTA FE
12/15/2018	3,900	Bond Dividend: WAL MART STORES	9/1/2020	3,188	Bond Dividend: GILEAD SCIENCES INC
12/17/2018	1,250	Bond Dividend: HOME DEPOT INC	10/7/2020	4,700	Bond Dividend: BANK OF NOVA SCOTIA
12/18/2018	6,375	Bond Dividend: WELLS FARGO MTN	10/26/2020	5,625	Bond Dividend: SHELL INTERNATIONAL
2/10/2019	5,156	Bond Dividend: RABOBANK MTN	11/1/2020	6,750	Bond Dividend: AUST NZ BANKING MTN
2/15/2019	7,350	Bond Dividend: BERKSHIRE HATHAWAY	11/5/2020	6,125	Bond Dividend: PNC BANK NA MTN
2/24/2019	3,549	Bond Dividend: BANK NY MELLON MTN	12/7/2020	6,375	Bond Dividend: WELLS FARGO MTN
2/25/2019	3,188	Bond Dividend: STATE STREET CORP			

Total 441,143

Total Budget Long-Term History and Projections

	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	\$17,913,050	\$12,637,410	\$8,487,786	\$6,626,596
Plus Revenues	\$6,822,930	\$8,418,009	\$2,077,836	-\$542,089	\$2,268,454	\$337,889	\$172,741	\$112,217	\$77,275
Less Expenses	-\$653,435	-\$701,623	-\$837,861	-\$839,767	-\$680,752	-\$544,432	-\$500,000	-\$500,000	-\$500,000
Less Grants Paid	-\$26,428,609	-\$13,152,126	-\$13,576,037	-\$13,245,756	-\$51,843,497	-\$5,069,097	-\$3,864,396	-\$1,491,663	-\$1,050,688
Year End Net Assets	\$100,568,259	\$95,132,519	\$82,796,457	\$68,168,845	\$17,913,050	\$12,637,410	\$8,487,786	\$6,626,596	\$5,153,183

January 25, 2018

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

We are pleased to confirm our understanding of the terms and objectives of our engagement and the nature and limitations of the agreed-upon procedures engagement CliftonLarsonAllen LLP ("CLA," "we," "us," and "our") will provide for the Robina Foundation ("you," "your," or "the entity") as of for the year ended December 31, 2017.

Jennifer Tingley is responsible for the performance of the agreed-upon procedures engagement.

Scope, objective, and responsibilities

We will apply the agreed-upon procedures which the Robina Foundation has specified and agreed to, listed in the attached schedule, to inspect a sample of disbursements from the Robina Foundation for the year ended December 31, 2017, prepared in accordance with generally accepted accounting and business practices related to financial records.

Our engagement to apply agreed-upon procedures will be conducted in accordance with attestation standards established by the American Institute of Certified Public Accountants. The sufficiency (nature, timing, and extent) of the procedures performed or to be performed is solely the responsibility of Robina Foundation and we will require a written acknowledgment of this responsibility. Consequently, we make no representation regarding the sufficiency of the procedures enumerated in the attached schedule either for the purpose for which this report has been requested or for any other purpose. Robina Foundation assume the risk that such procedures might be insufficient for your purposes and the risk that you might misunderstand or otherwise inappropriately use findings properly reported by CLA.

Our responsibility is to perform the specified procedures and report the findings in accordance with the attestation standards. Because the agreed-upon procedures listed in the attached schedule do not constitute an examination, audit, or review, we will not express an opinion or conclusion on the scope of services listed or Robina Foundation's financial statements or any elements, accounts, or items thereof. Also, we will not express an opinion or conclusion on the effectiveness of Robina Foundation's internal control over financial reporting or any part thereof. In addition, we have no obligation to perform any procedures beyond those listed in the attached schedule.

We will issue a written report upon completion of our engagement that lists the procedures performed and our findings. This report is intended solely for the information and use of Robina Foundation, and should not be used by anyone other than the specified parties. If, for any reason, we are unable to complete the procedures, we will describe any restrictions on the performance of the procedures in our report, or will not issue a report and withdraw from this engagement. Our report will include a statement indicating that had we performed additional procedures, other matters might have come to our attention that would have been reported to you.

An agreed-upon procedures engagement is not designed to detect instances of fraud or noncompliance with laws or regulations; however, we will communicate to you any known and suspected fraud and noncompliance with laws or regulations affecting the scope of services listed, that come to our attention, unless they are clearly inconsequential. In addition, if, in connection with this engagement, matters come to our attention that contradict the scope of services, we will disclose those matters in our report. Such disclosures, if any, may not necessarily include all matters that might have come to our attention had we performed additional procedures or an examination or review.

Robina Foundation is responsible for selecting the criteria and determining that such criteria are appropriate for your purposes.

Management is responsible for providing us with (1) access to all information of which you are aware that is relevant to the agreed-upon procedures, such as records, documentation, and other matters, and for the accuracy and completeness of that information; (2) additional information that we may request for the purpose of performing the agreed-upon procedures; and (3) unrestricted access to persons within the entity from whom we determine it necessary to obtain evidence relating to performing the procedures. You agree to inform us of events occurring or facts discovered subsequent to the date of the agreed upon procedures that may affect the scope of services listed.

For all accounting services we may provide to you, management agrees to assume all management responsibilities; oversee the services by designating an individual, preferably within senior management, who possesses suitable skill, knowledge, and/or experience to understand and oversee the services; evaluate the adequacy and results of the services; and accept responsibility for the results of the services.

Engagement administration and other matters

The workpapers supporting the services we perform are the sole and exclusive property of CLA and constitute confidential and proprietary information. We do not provide access to our workpapers to you or anyone else in the normal course of business. Unless required by law or regulation to the contrary, we retain our workpapers in accordance with our record retention policy that typically provides for a retention period of seven years.

CLA will not disclose any of your confidential, proprietary, or privileged information to any persons without the authorization of your management or unless required by law. This confidentiality provision does not prohibit us from disclosing your information to one or more of our affiliated companies in order to provide services that you have requested from us or from any such affiliated company. Any such affiliated company shall be subject to the same restrictions on the use and disclosure of your information as apply to us.

Our engagement and responsibility end on delivery of our signed report. Any additional services that might be requested will be a separate, new engagement. The terms and conditions of that new engagement will be governed by a new, specific engagement letter for that service.

Mediation

Any disagreement, controversy, or claim ("Dispute") that may arise out of any aspect of our services or relationship with you, including this engagement, shall be submitted to non-binding mediation by written notice ("Mediation Notice") to the other party. In mediation, we will work with you to resolve any differences voluntarily with the aid of an impartial mediator.

The mediation will be conducted as specified by the mediator and agreed upon by the parties (i.e., you and CLA). The parties agree to discuss their differences in good faith and to attempt, with the assistance of the mediator, to reach an amicable resolution of the Dispute.

Each party will bear its own costs in the mediation. The fees and expenses of the mediator will be shared equally by the parties.

Any Dispute will be governed by the laws of the state of Minnesota, without giving effect to choice of law principles.

Time limitation

The nature of our services makes it difficult, with the passage of time, to gather and present evidence that fully and fairly establishes the facts underlying any Dispute that may arise between the parties. The parties agree that, notwithstanding any statute or law of limitations that might otherwise apply to a Dispute, including one arising out of this agreement or the services performed under this agreement, for breach of contract or fiduciary duty, tort, fraud, misrepresentation or any other cause of action or remedy, any action or legal proceeding by you against us must be commenced within twenty-four (24) months ("Limitation Period") after the date when we deliver our final report under this agreement to you, regardless of whether we provide other services for you relating to the report, or you shall be forever barred from commencing a lawsuit or obtaining any legal or equitable relief or recovery.

The Limitation Period applies and begins to run even if you have not suffered any damage or loss, or have not become aware of the existence or possible existence of a Dispute.

Fees

Our fees for these services will be based on the time involved and the degree of responsibility and skills required, plus expenses including internal and administrative charges. Based on our preliminary estimates, the fee for the engagement will range from \$3,500-5,000. The fee estimate is based on anticipated cooperation from your personnel and their assistance with preparing confirmations and requested schedules. If the requested items are not available on the dates required or are not accurate, the estimated fee for services will likely be higher. If unexpected circumstances require significant additional time, we will advise you before undertaking work that would require a substantial increase in the fee estimate. Our invoices for these fees will be rendered each month as work progresses and are payable on presentation. In accordance with our firm policies, work may be suspended if your account becomes 60 days or more overdue and will not be resumed until your account is paid in full. If we elect to terminate our services for nonpayment, our engagement will be deemed to have been completed even if we have not issued our report. You will be obligated to compensate us for all time expended and to reimburse us for all out-of-pocket expenditures through the date of termination.

Other fees

You also agree to compensate us for any time and expenses, including time and expenses of legal counsel, we may incur in responding to discovery requests or participating as a witness or otherwise in any legal, regulatory, or other proceedings that we are asked to respond to on your behalf.

Finance charges and collection expenses

You agree that if any statement is not paid within 30 days from its billing date, the unpaid balance shall accrue interest at the monthly rate of one and one-quarter percent (1.25%), which is an annual percentage rate of 15%. In the event that any collection action is required to collect unpaid balances due us, reasonable attorney fees and expenses shall be recoverable.

Agreement

We appreciate the opportunity to be of service to you and believe this letter accurately summarizes the significant terms of our engagement. This letter constitutes the entire agreement regarding these services and supersedes all prior agreements (whether oral or written), understandings, negotiations, and discussions between you and CLA. If you have any questions, please let us know. If you agree with the terms of our engagement as described in this letter, please sign, date, and return to us.

If the need for additional procedures arises, or the procedures need to be modified, our agreement with you will need to be revised. It is customary for us to enumerate revisions in an addendum to this letter. If additional specified parties of the report are added, we will require that they acknowledge in writing their agreement with the procedures performed or to be performed and their responsibility for the sufficiency of the procedures.

Sincerely,

CliftonLarsonAllen LLP

Jennifer Tingley, CPA
Principal
612-376-4773
Jennifer.tingley@CLAconnect.com

Enclosure

Response:

This letter correctly sets forth the understanding of Robina Foundation.

Authorized Signature: _____

Title: _____

Date: _____

Agreed-Upon Procedures:

Our engagement will consist of the following procedures as of and for the year ending December 31, 2017.

We will haphazardly select 25 disbursements from Robina's checking and investment accounts, as provided to us, from January 1, 2017 through December 31, 2017 and perform the following:

1. Verify the amount of the disbursement and date
2. Observe who and what the disbursement was for
3. Compare the amount of the disbursement and verify disbursement was approved by the Foundation for payment and by whom
4. Inspect documentation supporting the disbursement

**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
12/31/16	17,913,050	148,904,293	11,450,594
03/31/17	16,540,138	150,390,304	9,964,582
06/30/17	16,501,546	150,390,304	9,964,582
09/30/17	14,425,125	152,306,472	8,073,414
12/31/17	\$12,635,704	\$153,973,389	\$6,406,747 (1)

(1) Includes the following commitments:
\$1,666,666 (2018) CFR's Endowed Chair in Global Governance

\$2,960,064 (2018-2020) *Public Interest Scholars*; \$450,000 (2018-2020) for *Bridge Fellowship Program*; and \$274,500 (2018-2020) for *Class Agent Fundraising Pilot Program*; \$500,000 (2018) for balance of \$25M to Center for New Americans

\$555,517 (2018-2019) for Yale's *Gilder Lehrman Center for the Study of Slavery, Resistance and Abolition*

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	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	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
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
Assets	12/31/16	03/31/17	06/30/17
USbank Checking	\$139,046	99,183	172,144
USbank Investment	17,774,004	16,440,955	16,329,402
Total	17,913,050	\$16,540,138	\$16,501,546
Assets	09/30/17	12/31/17	03/31/18
USbank Checking	195,379	\$139,046	
USbank Investment	14,229,746	12,496,658	
Total	\$14,425,125	\$12,635,704	



CliftonLarsonAllen

CliftonLarsonAllen LLP
220 South Sixth Street, Suite 300
Minneapolis, MN 55402-1436
612-376-4500 | fax 612-376-4850
CLAconnect.com

January 29, 2018

Robina Foundation
Attention: Ms. Nancy Gilberg
80 S 8th St, Suite 4900
Minneapolis MN 55402

Re: 2017 Tax Exempt Returns and State Filings

We are pleased that Robina Foundation ("you," "your," or "the organization") has engaged CliftonLarsonAllen LLP ("CLA," "we," "us," and "our") to prepare the organization's federal Form 990-PF, 990-T and applicable state filings. This letter confirms the scope, limitations, and related terms of our engagement for the year ended December 31, 2017.

Our responsibility to you

We will prepare the organization's federal Form 990-PF, 990-T and applicable state filings in accordance with the applicable tax laws. We will use our judgment in resolving questions where the law is unclear, and where there is reasonable authority, we will resolve questions in your favor whenever possible. We will not audit or independently verify the accuracy or completeness of the information we receive from you for the preparation of the returns and filings, and our engagement cannot be relied upon to uncover errors or irregularities in the underlying information.

Your responsibilities

It is your responsibility to provide us with all of the information needed to prepare complete and accurate returns and filings. We will have no obligation to prepare the returns and filings until you have provided such information to us. We will prepare filings for the same states where the organization filed last year unless organization personnel notify us to the contrary or other information clearly indicates the need for an additional return or state filing.

Please note that if the organization had a taxable presence in more than one state, such as an employee or sales within the state or any tangible property owned or rented within the state, the organization may be required to register in the state. The organization also may be subject to state income, sales, use, or franchise tax in that state, depending upon the particular facts. It is the organization's responsibility, not CLA's, to determine if assistance is needed in deciding whether the organization must register or may be liable for state income, sales, use, or franchise tax or may have a filing requirement in various states.

For all nonattest services we may provide to you, including the preparation of the federal Form 990-PF, 990-T and applicable state filings, management agrees to assume all management responsibilities; oversee the services by designating an individual, preferably within senior management, who possesses suitable skill, knowledge, and/or experience to understand and oversee the services; evaluate the adequacy and results of the services performed; and accept responsibility for the results of the services. You are responsible to carefully review the federal Form 990-PF, 990-T and state filings that we prepare on your behalf before signing and submitting them to tax authorities. We will advise you with regard to tax positions taken in the preparation of the federal Form 990-PF, 990-T and state filings, but the responsibility for the federal Form 990-PF, 990-T and state filings remains with you.

Tax examinations

All returns and filings are subject to potential examination by the IRS and state authorities. In the event of an examination, we will be available, at your request, to assist or represent the organization and its directors or officers. Services in connection with tax examinations are not included in our fee for preparation of the federal Form 990-PF, 990-T and state filings. Our fee for such services will be billed to you separately, along with any direct costs.

Record retention

You are responsible for retaining all documents, records, canceled checks, receipts, or other evidence in support of information and amounts reported on the federal Form 990-PF, 990-T and state filings. These items may be necessary in the event the taxing or other authority examines or challenges your federal Form 990-PF, 990-T and state filings. These records should be kept for at least seven years. Your copy of the federal Form 990-PF, 990-T and state filings should be retained indefinitely.

If carryover item(s) exist (e.g., capital loss, net operating loss, tax credits, etc.), you should retain the supporting records related to the carryover item(s) until the item has either been utilized (and the statute of limitations associated with the year of utilization has expired) or the carryforward period has expired.

In preparing the federal Form 990-PF, 990-T and state filings, we rely on your representation that organization personnel and its directors or officers understand and have complied with these documentation requirements. The management of the organization is responsible for the proper recording of transactions in the books of accounts, for the safeguarding of assets, and for the substantial accuracy of the organization's financial records.

All of the records that you provide to us to prepare your federal Form 990-PF, 990-T and state filings will be returned to you after our use. Our working papers, including any copies of your records that we chose to make, are our property and will be retained by us in accordance with our established records retention policy. This policy states, in general, that we will retain our working papers for a period of seven years. After this period expires, our working papers and files will be destroyed. Furthermore, physical deterioration or catastrophic events may shorten the time our records are available. The working papers and files of our firm are not a substitute for the records of the organization.

Tax consulting services

This engagement letter also covers tax consulting services that may arise for which the organization seeks our consultation and advice, both written and oral, that are not the subject of a separate engagement letter. These additional services are not included in our fees for the preparation of the federal Form 990-PF, 990-T and state filings.

We will base our tax analysis and conclusions on the facts you provide to us, and will not independently verify those facts. We will review the applicable tax law, tax regulations, and other tax authorities, all of which are subject to change. At your request, we will provide a memorandum of our conclusions. Written advice provided by us is for the organization's information and use only and is not to be provided to any third party without our express written consent.

Unless we are separately engaged to do so, we will not continuously monitor and update our advice for subsequent changes or modifications to the tax law and regulations, or to the related judicial and administrative interpretations.

Communications and confidentiality

The Internal Revenue Code contains a limited privilege for confidentiality of tax advice between you and our firm. In addition, the laws of some states likewise recognize a confidentiality privilege for some accountant-client communications. You understand that CLA makes no representation, warranty or promise, and offers no opinion with respect to the applicability of any confidentiality privilege to any information supplied or communications you have with us, and, to the extent that we follow instructions from you to withhold such information or communications in the face of a request from a third party (including a subpoena, summons or discovery demand in litigation), you agree to hold CLA harmless should the privilege be determined not to apply to particular information or communications.

CLA will not disclose any confidential, proprietary, or privileged information of the entity to any persons without the authorization of entity management or unless required by law. This confidentiality provision does not prohibit us from disclosing your information to one or more of our affiliated companies in order to provide services that you have requested from us or from any such affiliated company. Any such affiliated company shall be subject to the same restrictions on the use and disclosure of your information as apply to us.

CLA may, at times, use subcontractors to perform services under this agreement, and they may have access to your information and records. Any such subcontractors will be subject to the same restrictions on the use of such information and records as apply to CLA under this agreement.

Consent to send you publications and other materials

For your convenience, CLA produces a variety of publications, hard copy and electronic, to keep you informed about pertinent business and personal financial issues. This includes published articles, invitations to upcoming seminars, webinars and webcasts, newsletters, surveys, and press releases. To determine whether these materials may be of interest to you, CLA will need to use your federal Form 990-PF, 990-T and state filings information. Such information includes the organization name and address as well as the business and financial information you provided to us.

By signing and dating this engagement letter, you authorize CLA to use the information that you provide to CLA during the preparation of your federal Form 990-PF, 990-T and state filings to determine whether to offer you relevant materials. Your consent is valid until further notice. If you do not wish to authorize such use, please strike out this paragraph prior to signing the engagement letter.

Limitations

You agree that it is appropriate to limit the liability of CLA, its partners, principals, directors, officers, employees, and agents (each a "CLA party") and that this limitation of remedies provision is governed by the laws of the state of Minnesota, without giving effect to choice of law principles.

You agree that the total liability, if any, of CLA and any other CLA parties arising out of this engagement, any advice and planning, and for the federal Form 990-PF, 990-T and state filings and schedules that any CLA party prepares, will be limited to the fees paid to CLA for this engagement.

The nature of our services makes it difficult, with the passage of time, to gather and present evidence that fully and fairly establishes the facts underlying any dispute that may arise between you and any CLA party. The parties (you and CLA) agree that, notwithstanding any statute or law of limitations that might otherwise apply to a dispute, including one arising out of this agreement or the services performed under this agreement, for breach of contract or fiduciary duty, tort, fraud, misrepresentation or any other cause of action or remedy, any action or legal proceeding by you against any CLA party must be commenced as provided below, or you shall be forever barred from commencing a lawsuit or obtaining any legal or equitable relief or recovery. An action to recover on a dispute shall be commenced within the shorter of these periods ("Limitation Period"):

- For federal Form 990-PF, 990-T and state filing preparation, separately within thirty-six (36) months after the date when we deliver the tax returns and filings under this agreement to you on which the dispute is based, regardless of whether any CLA party provides other services for you or relating to said returns and filings.
- For tax consulting engagements, separately within thirty-six (36) months from the date of our last billing for services on each consultation on which the dispute is based.
- For all tax return, state filing, and tax consulting engagements, within twelve (12) months from the date when you terminate this or any other engagement of our services.

The applicable Limitation Period applies and begins to run even if you have not suffered any damage or loss, or have not become aware of the existence or possible existence of a dispute.

Fees

Our fees for tax compliance services for the federal Form 990-PF, 990-T and state filings are estimated to be \$3,500. You will also be billed for expenses, including internal and administrative charges. This will include customary fact finding inquiries and information gathering incident to preparation of the federal Form 990-PF, 990-T and state filings. The fee estimate is based on anticipated cooperation from your personnel and their assistance with locating requested documents and preparing requested schedules. If the requested items are not available on the dates required or are not accurate, the estimated fee for services will likely be higher. If unexpected circumstances require significant additional time, we will advise you before undertaking work that would require a substantial increase in the fee estimate. Our invoices for these fees are payable on presentation.

Other fees

You also agree to compensate us for any time and expenses, including time and expenses of legal counsel, we may incur in responding to discovery requests or participating as a witness or otherwise in any legal, regulatory, or other proceedings that we are asked to respond to on your behalf.

Finance charges and collection expenses

You agree that if any statement is not paid within 30 days from its billing date, the unpaid balance shall accrue interest at the monthly rate of one and one-quarter percent (1.25%), which is an annual percentage rate of 15%. In the event that any collection action is required to collect unpaid balances due us, reasonable attorney fees and expenses shall be recoverable.

Termination of agreement

Either party may terminate this agreement at any time by giving written notice to the other party. In that event, the provisions of this agreement shall continue to apply to all services rendered prior to termination.

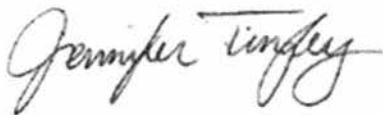
Agreement

Please sign and date the enclosed copy of this letter to confirm your agreement and return it to us at your earliest convenience.

We are looking forward to working with you.

Sincerely,

CliftonLarsonAllen LLP



Jennifer Tingley, CPA
Principal
612-376-4773
Jennifer.Tingley@CLAconnect.com

Accepted on behalf of the organization:

Signature

Title

Date

ROBINA FOUNDATION

Operational Changes Suggested in CLA 2016 Audit

Documentation of the following:

- Monthly reconciliation of cash accounts: NG prepares; PAH reviews, dates and signs
- Monthly review of USbank checking and investment statements: NG reviews; PAH reviews, dates and signs
- Monthly comprehensive investment reconciliation to include all activity (purchases, sales, unrealized and realized gains and losses): Sullivan prepares quarterly report for review by Board
- PAH credit card charges and expense reimbursements: NG assembles; KB reviews and signs at monthly or quarterly meetings
- Wire transfers for Robina grants: NG prepares forms; PAH signs
- Transfer of funds from investment account to checking account: NG copies PAH on emails to USbank requesting the transfer; PAH emails approval to NG and USbank; USbank contacts PAH by phone to confirm approval of transfer; NG keeps paper file of PAH approval via emails

2/2018

				2018 OPERATING BUDGET					
OPERATING EXPENSES				2017 Budget		2017 Actual		2018 Budget	
Administration: Contract Services									
	Penny Hunt			\$124,000		124,000.00		\$124,000	
	Baker Management (Nancy Gilberg)			50,160		50,160.00		50,160	
	Outside Consultants			20,000		41,500.00		20,000	
	Gilberg Overtime			1,600		1,363.58		1,500	
Accounting-Audit Fees				40,000		30,833.09		13,000	
Directors' Fees				168,000		145,500.00		138,000	
Insurance									
	D&O			2,250		2,250.00		2,250	
	Property			505		504.51		505	
Investment Management Fees (Usbank and Mike Sullivan)				50,000		57,692.20		75,000	
Legal-Prof Fees				20,000		3,282.00		4,000	
Meeting Expense				28,000		28,733.40		28,000	
Membership Dues				750		750.00		750	
Misc Expense				3,500		350.00		1,000	
Office									
	Equipment and Furnishings			300		9.71		100	
	Misc			1,500		2,389.15		2,000	
	Supplies			1,000		461.86		600	
Parking and Mileage				2,800		3,095.61		3,250	
Postage and Delivery				1,200		778.20		700	
Printing, Web Design and Maintenance				800		426.79		500	
Rent				26,000		26,115.72		26,297	
Taxes									
	Excise, State, Federal			10,000		10,025.00		19,617	
Telephone/Internet				4,000		3,970.52		4,000	
TOTAL OPERATING EXPENSES				556,365		534,191.34		515,229	
GRANTS (2017 - \$25K to YSD for Karoff Memorial/\$250 Exponent Philanthropy)				5,043,847		5,069,097.00		3,864,396	
TOTAL EXPENDITURES				5,600,212		5,603,288.34		4,379,625	

Robina Foundation Budget Notes
01/01/18 – 12/31/18

Operating Expenses

Administration – Consultants

Penny Hunt – annual contract: \$124,000
Baker Management (contract employer for Nancy Gilberg) - \$50,160 annual
External Consultants - \$20,000: Legacy writing and dissemination

Accounting/Audit Fees

CliftonLarsonAllen(CLA)
\$7,000: Tax Related Work
\$3,500 - \$5,000: Audit Expense (Agreed Upon Procedures)

Directors' Fees

\$138,000: \$30,000 annual fee for four directors plus \$18,000 additional fee for Chair

Insurance

Directors and Officers: Annual premium of \$2,250.
Property: \$505: Basic policy to cover office equipment/furnishings

Investment Management Fees

USbank Fees: \$50,000: USbank's current annual management fee is 0.35%
Michael Sullivan: \$25,000

Legal/Professional Fees

\$4,000: Legal fees in connection with sunseting and other issues

Meeting Expense (Board and Staff)

\$28,000: Includes travel, accommodations and meals for board meetings, grantee visits, staff meetings with advisors/outside consultants

Membership Dues

\$750: Exponent Philanthropy's annual membership dues

Miscellaneous

\$1,000: Certificate of Incorporation annual fee (\$25), gifts, compensation and bonus adjustments, etc.

Office Expense

Equipment and Furnishings: \$100
Misc: \$2,000: Computer and technology consulting/maintenance/repair
Supplies: \$600: Paper products, 3-ring binders, file folders, toner cartridges, etc.

Rent

\$26,297: \$2,191.40/month lease for current space

Taxes

Excise Tax: \$19,617; estimated at 1% by CLA; tax will be reviewed/revised by CLA during the year

Telephone/Internet

\$4,000: Approximately \$340/month including Conference Calls

Grants

\$3,864,396: Grant payments currently scheduled for 2018. Additional grant payments will be made if approved by the Board.

ROBINA FOUNDATION LEGACY PROJECT

By Melinda Marble

The Robina Foundation Legacy Project started with a question: what lessons might a limited-life foundation, smaller in scale and more modest than some of its well-known national counterparts, offer to donors contemplating the best structure and operations for their philanthropy?

Robina was designed by its founder, James H. Binger, to spend down assets of more than \$150 million within a time frame of roughly 20 years. Limited-life rather than perpetuity is an option chosen by growing numbers of donors today, spurred in part by the Giving Pledge and other efforts. Another aspect of Binger's design is more unusual, however: he designated four institutions to be the recipients of the Foundation's funding – yet gave the board great freedom as to how each would be supported.

Robina will be winding down its operations soon, having fully spent out its assets during nearly two decades of close partnership with its four designees. As its trustees prepare for closure, they sought to reflect upon the Foundation's evolution over time. During the summer of 2017, I was retained to interview 21 current and former trustees and grantees to shed light on how Binger's unusual approach to structuring his foundation had played out over time, and to capture lessons that might be useful to other donors and the field.

Those interviewed generally agreed on five key findings:

- While they were given great freedom and flexibility, the Foundation's board showed strong fidelity to the donor's vision;
- The Foundation formed unusually strong partnerships with its four designees, who deeply appreciated the experience of being discovered, supported, understood and trusted by Robina.
- The limited-life, limited-designee structure allowed Robina to make investments on the scale of a major donor without the infrastructure.
- The partnership approach and scale of gifts resulted in significant learning and transformational impact within the four designated grantees and in the larger community of interest.
- A strong and active working board was critical to Robina's success, allowing it to achieve impact with a staff of two seasoned professionals. A CEO who welcomed the board's deep engagement was critical.

This report focuses on the grantee and board experience, not on the investment, financial, or procedural aspects of managing a limited life foundation. It does not attempt to assess Robina's impact, though Robina engaged consultants to evaluate many of the programs it funded. Rather, it is an attempt to chronicle one model of a sharply-focused, limited-life foundation as seen by its board members and grantees.

Robina's origins.

Shortly before his passing at age 88, James H. Binger created the Robina Foundation. Binger was an attorney who served as the in-house counsel and later CEO of the Honeywell corporation. He was married for 60 years to Virginia McKnight, whose parents founded the McKnight Foundation. A life-long Minneapolis resident, Binger was also a race horse owner, an avid polo player, and the

owner of a group of Broadway theaters. When he died November 3, 2004, the lights on Broadway were dimmed in his honor.

Binger established the Robina Foundation late in life, when he knew did not have long to live. He began by engaging The Philanthropic Initiative (TPI), a charitable advisory firm, to help him draw up by-laws and select and recruit the board. According to TPI, he envisioned Robina as a limited-life foundation from the start, driven in part by concern about possible dilution of vision over successive generations of trustees and the desire that the assets be put to immediate use. While he did not designate a particular spend down date, he thought that roughly twenty years was an appropriate life span. He knew that he wanted a small and active board rather than a heavily-staffed organization.

Binger took the unusual step of designating four disparate grantees as recipients of the Foundation's funding: the Council on Foreign Relations, Abbott Northwestern Hospital (later encompassed within Allina Health Care), the University of Minnesota Law School, and Yale University. He encouraged the Foundation's board to make significant gifts to these institutions, ones that would be transformational for the recipient organizations and have significant impact on society.

Binger had a personal connection to each of his designees. He was an alumnus of Yale and of the University of Minnesota Law School. He was a long-time member of the Council on Foreign Relations, and regularly attended events there. He and his wife had been treated by Abbott Northwestern physicians for many years, and he understood the hospital's significance as a major health care provider in Minneapolis.

In the foundation's by-laws, Binger accorded the board great freedom to enact his vision within the structure provided by the limited-life time frame and the four designees. He did provide general guidance within the by-laws via a Mission Statement on Charitable Activities, in which he briefly outlines principles for the board's consideration. These included encouraging innovation and creativity, forward-thinking projects and initiatives, and major projects as opposed to normal ongoing operating expenses. He also made it clear that resources did not have to be divided evenly among the designees. He expressed the hope that the four organizations might work together on some common issues – the one aspect of his vision that was not fully realized.

In the same document, Binger defined his standard for trustees:

The members of the Board should each evince qualities that the Founder believes will promote the success of the Foundation. These qualities include an inquiring and critical mind, the ability for long-term strategic thought, creativity, open-mindedness, and respect for unconventional ideas and notions of futurism.

According to those who knew him, Mr. Binger was very comfortable with the foundation's design, and was confident that the board would "do the right thing." He did not provide the trustees he knew with additional direction. As one trustee said:

He had thought this out and, at the end of the day, he trusted other people. He had confidence that there'd be a board and that they'd figure it out. He found the right balance between prescription and discretion. He clearly was interested in the four institutions and *what they could contribute* to society...he wanted there to be a group of people to work with them over time.

Launch and early operations

Prior to his passing, Mr. Binger met with the four designee organizations and indicated his intention that they would receive support from his estate. He did not specify the scope, duration, or amount of these gifts. He met with potential board members, although he did not notify most that they had been selected to serve; nor did he provide them with direction beyond the Foundation's bylaws. He decided to provide modest compensation to board members in order to encourage their active engagement. His initial trustee choices brought deep experience in and knowledge of civic engagement, national foundations and philanthropy, and board leadership to the Foundation.

(Binger had not staffed or activated the foundation when he died. As a result, Robina operated as an independent foundation from the start, with no donor or family presence on the board.)

Leadership changes and departures soon required the board to recruit new members, most of whom had not met Binger. Candidates were interviewed by the board unless they were known to a trustee. The full board discussed and approved new members. The Board has ranged from four to seven members during the life of the foundation. Presently, there are four trustees. The foundation has been staffed since 2010 by an executive director, who had substantial previous foundation experience, and an administrative consultant.

This exceptionally lean staffing structure required the board to be more directly engaged with grantees than at many more institutional foundations. The executive director, an exceptionally secure and sophisticated professional, was a critical bridge among trustees and to grantees. Interviewees agree that her deft counsel, clear communication, and ability to synthesize different board perspectives helped to make the Foundation's unusual structure work and was critical to its success.

From the beginning, the board members showed extraordinary sensitivity and fidelity to Binger's intent as a donor. There was deep and continuous conversation among the board about "what would Jim want?" They understood that he wanted his gifts to create transformational change within the recipient institutions and have deep impact on society. *What that meant* in the context of each designated grantee was a continual theme that board members delved into at board meetings. As one trustee recalls:

The (founding) document set such a high bar that it made us all rise to that occasion. There was a richness, a calmness to the discussions. It would coalesce and gel... We were all on the same search to stay loyal to the document and to Mr. Binger.

Per Binger's wishes, the board asked each designated grantee to identify potential major projects for support. One of the board's first grant actions was to award each institution a planning grant that would help them prepare their proposal. While the designees were invited to think big and outside the box, the board felt that some were not ambitious enough in their initial requests. "People brought out their favorite stuff, standard things they would have done anyway," recalls a founding trustee. "They were less imaginative and flexible than I'd hoped."

As another board member put it:

There was an interesting tension between the desire of institutions to fulfill their perennial needs and the desire of the donor to be transformational. These seldom were in alignment. Getting to the best possible outcome within the tension was the work of the board.

From time to time, the board requested proposals addressing a particular issue that they thought Binger would have been interested in.

From the start, the trustees said no, often multiple times, to designees when the projects they presented did not seem transformative enough. An early board member recalls:

We didn't force it, but we were more involved in the shaping than they would have experienced elsewhere. That could be frustrating for the recipient. That's why there was a lot of discussion, debate, soul searching in our meetings...Sometimes I think the organizations would be happy to present, have us decide, and leave. The recipients had to adjust to something that was worthwhile but out of their comfort zone.

The board took care to identify projects within each institution that they thought addressed Binger's interests. At Yale, for example, the board homed in on the Yale School of Drama early on, because of Binger's love of theater and Broadway interests. They supported programs in human rights and immigration at both universities because they knew Binger thought these were important issues – and because they thought that the proposed work would change and shape the universities in productive ways.

A pattern of support and engagement, partnership and trust

Having only four designated grantees “gave us focus, the mandate to build deep relationships, and to be helpful to the institutions over time,” according to one board member.

As the foundation developed, a pattern of support began to emerge. When the board identified a promising project, they provided support to plan and to test the idea. This was followed with three to five years of implementation and operating support, renewed for as long as ten years. While board members decided initially not to fund endowment requests, they altered that position over time, making several capstone endowment gifts to sustain projects once they had proven themselves. After the programs originally funded had largely run their course, the board began to think about its final phase. To launch that, they developed and distributed Guiding Principles for new grants and conducted a “listening tour,” visiting all four institutions to learn more about their priority projects.

The board sought to build measurable process outcomes into each grant, and, over time, to identify long term impact outcomes of the work. Defining and negotiating these has been a key aspect of the Executive Director's work. From time to time, the board commissioned external assessments of projects funded by the Foundation. How impact – particularly transformative change – can be defined and measured has been another ongoing subject of conversation at the trustee level.

From the outset, the board engaged deeply and directly with the four designees, through formal opportunities to present priority requests, site visits, and informal advice and counseling. The grantees interviewed appreciate the care Robina took to learn about their work. One grantee recalled:

I don't think I'd ever met another foundation trustee. It was stimulating. These were very high-powered people. With a larger foundation, with a broader portfolio, it would have been hard, but with a boutique enterprise, they could engage...It aerated the pot. They forced us to articulate our rationale in language that could be understood by non-practitioners.

Within these large institutions, the individuals whose projects were funded described an experience of being discovered, understood, supported and trusted that was inspiring, confirming, and deeply unusual. One grantee summed it up:

They gave their all. It felt like Jim Binger was sitting in the room with them. They were determined to do what he wanted...Their motivation was long-term, and when you think that way, you do things differently.

Another grantee described the benefits of deep partnership:

The board was six intellectually curious people who wanted to bring transformative change to society. I understood that this was an opportunity almost as great as the resources. There were open, direct, free-flowing conversations about our work and what we could do to make a difference. There was realism and flexibility.

Over time, the board evolved a structure where one or more board members served as “lead” trustee for each grantee. The lead trustee spent additional time getting to know the organization and its work. The lead often had deep knowledge of the designee’s field and was able to provide guidance and context on the work to both board and grantee.

With one exception, grantees found the lead trustee model extremely valuable:

The liaison trustee is somebody who has a special familiarity with the organization. That can lead you to be more critical – in constructive ways.

Doing what the trustee did with us was very enjoyable and liberating. She was clearly a champion. She understood us and seemed to love what we were doing. Robina took a chance on us.

We established a connection that was more personal. He gave us some good ideas, and he understood that some weren’t always practical to execute. The interactions always showed a great deal of open mindedness, flexibility and pragmatism...I thought that having the personal relationship with one trustee who was interested, not obtrusive, and eager to be involved at a deeper level was very valuable.

The Minnesota-based designees particularly appreciated having access to the board’s national expertise and connections.

The lead trustee played many of the same roles that a program officer might in a more intensively-staffed foundation. In addition, from the beginning, the board occasionally hired outside consultants with strong subject expertise to review and comment on funding proposals.

Board members saw the value of the lead trustee model. As one put it:

In the end, it was very useful and a strength for us. Often in a discussion, the lead would answer questions the other might have. It worked really quite well. We all realized that the (final funding) decision was the group’s.

But they also recognized its limitations:

It's a delicate balance between being an advocate for the organization versus a critical friend. There is strength in the lead trustee role, but it should be a time-limited one. I don't think it's good to hold on to the role for too long.

I was not as strong of an advocate as I might have been. The potential issue with the linkage of a board member to the grantee is that you become too much of an advocate. I didn't want to fall into that trap.

Upon reflection, the current board believes that the lead trustee model has most value when the lead role is rotated regularly over time.

The grantee experience

Generally, grantees found the process of applying to Robina rigorous, but transparent and reasonable. They appreciated the lack of bureaucratic layers characteristic of larger institutional foundations. They particularly valued the trust that developed over time between foundation and grantee – a trust they have rarely experienced with other donors. They have high regard for the foundation's small staff, feeling they have provided crucial guidance, and clear information that has helped them understand and interpret the board's wishes.

Some of that trust, they believe, happened as a natural result of their designation. "Once we got chosen, we felt the foundation was looking out for us," as one put it. Others noted:

The Foundation could be hard on us. But as they became more experienced, as they understood the work we were doing and its success, they relaxed. I felt an unconditional trust.

Being a designated entity is a very nice thing for the recipient. It's been great for me. It's allowed me to explore new areas. The freedom of not having to apply continuously, being given trust and room to roam, forcing me to wrestle with impact, have all been invaluable.

There were, of course, challenging moments during the deep partnerships Robina forged. A few grantees felt they were asked to spend too much time developing proposals that did not move forward:

I thought we put forth some good ideas that they did not support. Quite honestly, I was disappointed.

We got far down the road with some of our ideas...possibly too far down the road. A mini admonition here: how far do you go on a proposal before you've invested too much time? But, to be fair, they (Robina) never said "we're definitely funding this." Maybe they needed to know what came from a deeper dive.

Two grantees lamented the lack of the expertise and deep subject knowledge that specialist program officers bring to proposal review:

The trustees did not have the background to make these kinds of decisions...Robina helped us build something that is a real strength. That said, I think we could have accomplished more together. It was a missed opportunity.

Others found the reporting requirements initially onerous, but these were changed following feedback. Grantees wanted more say in negotiating how external assessments would be conducted, and even more communication from Robina. At times they felt the feedback was not clear when the answer was “no.”

Despite these challenges, representatives of the grantee organizations interviewed felt that working with Robina has been an unusual and positive experience:

There was a high degree of attention to process and transparency. This is extremely rare in my experience.

The amount of the funding was monumental for us. Robina was a very significant donor and an outlier by a couple of factors: their willingness to give a large grant over a relatively short period of time...we benefited from the wisdom of some very smart people.

Most institutional funders are larger, but they have a broader mandate and do not provide this kind of comprehensive support over time, the kind that lets you develop the work. They have a more formal process, and program staff who vet everything. Robina didn't have those layers. You could talk directly to the decision-makers.

Having advisors from Robina was an amazing strength. They came to be helpful, to advise and push us.

Both grantees and board members shared a sense that being limited life and by designating a small number of recipients, Robina was able to “punch above its weight,” providing the grants of a major national foundation without the staff and infrastructure.

Impact

As noted earlier, this report is not a full-scale evaluation and does not attempt to assess the impact of the Robina Foundation's work. Based on these interviews and the external assessments of key projects, however, there are several things that can be said about impact.

Virtually every Robina-funded project has, over time, met the outcomes outlined in its initial proposal. The four designated institutions can articulate how the projects they undertook with Robina support changed their institutions and can document broader impact in many cases.

There is strong consensus among board members that the work of two of the designees was transformational for the institution, had deep impact, would not have happened without Robina support, and will be sustained over time. They feel that the work of a third designee had a transformational impact on the institution – showing it the way to a new business model - but that shifting political and societal conditions since its inception limited its ability to achieve impact in the short term. In the case of the fourth grantee, trustees feel that the work was transformational and will have deep impact on the institution and society – but that it was likely that most of the work would have been undertaken without Robina support.

The board regrets that Robina was not successful in addressing one aspect of Binger's vision: the desire that the grantees, if the right opportunity presented, find a way to work together on a major initiative. While the board broached this idea with designees repeatedly, there was resistance to collaboration in the early years, and trustees felt that a forced collaboration would be disrespectful

to grantees and unlikely to yield results. The different sizes, geography, and interests of the institutions made a natural collaboration topic difficult to identify. There is a sense that fulfilling this vision would have required more bandwidth and resources than the foundation had.

Each of the Foundation's grantees believe that the projects they undertook would not have happened – at least in a timely way – without the Robina's support:

If Robina had not come along, we would have been able to generate some resources, probably less than ten percent of what we have spent in the past ten years. There would be virtually no field-wide impact.

We would not ever have thought of doing this work without Robina. It's allowed us to re-imagine our models of care at a critical time. That's the way fee for service is, you scramble for very payment and you can't ever think about a big, seeded investment. There aren't the resources to collect data. This work would not even have gotten started.

As I began to understand more about fundraising, I began also to understand and appreciate what was distinctive about Robina. You gave adequate and long-term funding. You tended to trust people. There was a kind of trust and assurance (in the continuity of funding) that allowed us to create a much greater program.

A rich and satisfying board experience

Binger's decision to limit the life and designate a small number of grantees lent a focus and urgency that made this board an intriguing challenge to prospective trustees. His invitation to think strategically and futuristically, coupled with the freedom and trust he afforded board members, attracted individuals of national stature and strong experience in philanthropy and civic life.

The Foundation's past and current trustees feel deep satisfaction with the experience of service on the board. They feel that Robina provided the opportunity to support important work, and to explore the meaning of transformational impact in a practical context. They are appreciative of the chairs' work to design engaging meetings that use their time well and allow every member to contribute.

In the course of the Foundation's life, board members have formed deep relationships with each other and with the designees. Board meetings have been structured as a mix of site visits, presentations on progress by grantees, and discussion of the grants under consideration. A dinner the night before each board meeting allows the trustees, who seldom see each other outside quarterly meetings, get to know each other more personally. As one said:

Trust is key. We have high caliber board members. We get along. We genuinely care about each other and yet are very professional. We still have the ability to maintain independent thinking and collegiality.

Board members particularly appreciate the guidance Binger provided in his founding documents, and the freedom and discretion he afforded them to carry out his vision. They believe that the care and attention given to designing and structuring board meetings allowed a disparate group of individuals get to know each other and to build trust:

Our time was efficiently used. We really were dialoging. We didn't waste time, the lack of pushing us to resolve worked well. We were all very proud of the projects we funded and the outcomes.

We have been lucky to have chairs who cared what everyone thought, who managed various tensions and sensitivities well. In my tenure, they've been two people who, by personal or professional background, were skilled at managing conversations about complex subjects.

Board members particularly appreciate the atmosphere of open conversation, civility, and respectful challenge established by the chairs:

There are no shrinking violets. Everyone says what is on their mind., Everyone listens. These are genuine conversations, not everybody staking out positions. That is rarer than it should be. That has made it a lot of fun. People have different experiences, and we take advantage of their knowledge.

We can come into a meeting knowing what we're likely to do, and the chair will ask us to put that aside for a moment and go back to basics. She makes sure everyone has their say before the final decision. It's the right approach.

Board members also appreciate being compensated for their work, and feel that practice has encouraged accountability and making Robina work a priority. They took care to periodically review compensation levels, basing them on norms in the field, the number of hours spent by trustees, and their responsibility levels.

There is a sense that, by choosing the limited life model and focusing on a small number of grantees, Robina was able to attract very experienced board and staff who might not otherwise have served on a foundation board of this size.

Lessons for the field

In reflecting on their experience, board members articulated lessons that may be useful for other donors contemplating a foundation, and for foundation leadership in general.

For donors:

- Think deeply about what matters most to you, what you believe about doing good in the world. Then capture that in founding documents that will provide guidance to the board long after you are gone. A donor who articulates an ideal vision of how the foundation should operate provides its trustees with a great and lasting gift.
- Strive for Jim Binger's balance of control through structure and freedom for trustees. If the foundation's resources are not major, limiting program areas can ensure that the foundation will remain strategic and focused. Designating beneficiaries can encourage deep partnership between the foundation and its grantees. Limiting the foundation's life span provides the opportunity for deeper immediate impact.
- Think about the implications of these structural decisions for board and staff. If, like Robina for example, you choose to keep staff small, understand that larger demands will

be placed on board members, particularly if you also want close partnerships with grantees. Augmenting staff with external consultants may be necessary.

- Give attention to structuring and appointing the board:
 - In addition to conveying specific preferences, founding documents can be used to set the tone and culture of the organization, covering such issues as how the donor wants board members to work together and with grantees. They can also encourage transparency, accountability, and partnership with grantees if those are important to the donor.
 - Attention to board processes, setting term limits and selecting trustees who are committed to group process will result in a better experience for trustees.
 - Reflect on the commitment board members are being asked to make and compensate them if appropriate, benchmarking against norms in the field.
- Set clear expectations for how impact will be tracked and assessed. Help board members understand what level of risk is acceptable, and what impact would be meaningful to you.

For foundation leadership

- It is possible to make major gifts and have significant impact with minimal infrastructure and lean staffing. But deep partnership in these circumstances is only possible if trustees engage deeply or if there is heavy reliance on external consultants. Foundation staff must also welcome and support this level of deep board engagement.
- Frequent visits with grantees and deep immersion in their work builds trusting relationships that can deepen the impact of funding.
- Clear communications and rapid responses are key to grantee satisfaction.
- Attracting strong experienced trustees requires thought and care to the design of board meetings. Giving trustees the opportunity for significant conversations about issues that matter, time to form relationships and get to know one another, and encouraging free and frank discussion are key to trustee satisfaction.
- If trustees are to be deeply engaged in the work, consider the lead trustee model, but rotate lead trustees regularly.
- Take time to regularly assess how the board process is working and whether the foundation is honoring the wishes of its founder.
- A culture of civility and partnership that is continually nurtured and reinforced will yield dividends in positive relationships and strong impact. Cultivating trust among board members, staff, and grantees is a key management skill.

Final thoughts

The story told in these interviews is of a committed and thoughtful group of trustees who formed unusually deep and respectful partnerships with a small group of grantees. Robina's success has been based, in large part, on attracting high caliber board members who were challenged by the mix of freedom and responsibility Binger afforded them. These trustees generally did not know each other well when they came together. (One wonders if the dynamic would have been different had the trustees been family members or if more of them had known Binger well.) Would those trustees have interpreted his wishes for the rest of the board, eliminating some of the ongoing, thoughtful conversation about transformation or change that board members found so valuable? Would outside trustees have been too deferential? Might family members be daunted by outside trustees' expertise? Donors cannot control those dynamics beyond their lifetime, but they can be clear about the kind of culture and open exchange they want to see on the boards they are establishing.

Robina's active board was, by all accounts, supported by a tiny but stellar staff, experienced, knowledgeable and secure, who kept things moving, structured extraordinary learning opportunities for the board, and skillfully served as a bridge between the designees and board. Not every foundation executive is comfortable with this kind of deep board engagement; but this case shows that it can be a deeply productive relationship when staff are seasoned and secure enough to appreciate the value added by an experienced and active board.

While the programs Robina funded covered a wide range and breadth of topics, one of Robina's most unusual aspects is its focus on four pre-designated grantees. Nevertheless, aspects of their partnership model: the deep listening, frequent visits and soundings, engagement beyond check writing, and clear communications, are applicable to other types of foundations, a reminder of what grantees value most. The feeling of being deeply understood – its value, and its rarity in the world of fund raising - was something that surfaced in virtually every grantee interview.

Robina also illustrates how a foundation that lacks the assets and resources of a large national funder can still make the grants and strive for the impact of one, through limiting life and the numbers of grantees. One board member talked about the powerful forcing function of a time limit:

In some ways, we were a typical model, but accelerated. We funded institutions to develop, prove ideas, then endowed them. We can't bring in new things, so naturally we focused on the need to sustain what we've done.

Finally, the Robina experience highlights the importance of trust in philanthropy. Jim Binger laid out a vision, then trusted a board to carry it out, even though he did not know all the members personally. While the trustees were a disparate bunch, they undertook a process together that built deep bonds of trust and affection among them. When asked what they valued most about Robina, grantees often talked about the trust they felt they earned over time. Being trusted made them bolder and more imaginative in their work, and, they believe, ultimately more effective. Building and sustaining relationships of trust, then, emerges as a key skill in this work, one that can be cultivated in any type of foundation, among and with trustees, staff, and grantees.

ROBINA FOUNDATION LEGACY PROJECT: SHARING PATHWAY AND LEARNING THROUGH FOUNDATION CENTER

The Robina Foundation's decision to spend down by 2020—and the intention with which the foundation is doing it—offers a valuable example to the field of philanthropy. The comprehensive report put together by Melinda Marble tells an important story. Foundation Center is well-positioned to adapt and promote the report's content through its GrantCraft and IssueLab platforms and social media channels—here and abroad—which will increase visibility and utility, and contribute to a growing body of knowledge about limited-life foundations.

→ **Deliverables:** Foundation Center will complete the following activities in support of the Robina Foundation Legacy Project:

- Seven Part Blog Series: GrantCraft is our free knowledge sharing platform for funders to learn from one another. We will adapt the primary sections in the paper to bite-sized GrantCraft blog posts that together are a series but independently are stand-alone, sharable pieces with a clear story and takeaway. This will include updates to the style, content synthesis, and ideally e-mails or brief calls with the foundation to fill in any gaps. The "learnings for funders" section would be spread across all posts to ensure tangible knowledge sharing throughout the series. We also hope to bookend the series with a post by a Robina board member (if possible) about what they hope other foundations can learn from their experience, and a post from our GrantCraft director reflecting on the growing body of learnings across various spend down foundations who have shared their process and reflections publicly. The blog topics would be:
 - Board member perspective
 - Robina's formation charter and operating framework *Principles?*
 - Support and engagement, partnership and trust
 - The grantee experience
 - Outcomes and Impact
 - Leadership
 - GrantCraft perspective

(There would also be an editorial note directing readers to the full report with each post.

- Ensure paper visibility: Foundation Center's IssueLab service assigns digital object identifiers (DOIs) to knowledge published by the social sector. Once the Robina Foundation independently publishes Melinda Marble's report, we will assign a DOI, ensuring that it will always be discoverable online and in new ways. The paper will also be searchable and actively shared through both IssueLab and GrantCraft.

- 7.
- **Outreach:** We will develop a social media toolkit for promoting the blog series and paper that Robina can share with its network and which will be implemented through several of Foundation Center's wide-reaching social media channels.

Timeline: The blog posts can be completed over an eight week timeline, with a series launch date to be jointly determined. Should there be a delay in any point in the timeline, the parties will communicate as soon as the issue is known to determine if more time should be allowed or if the deliverables should be completed on time with available information.

Budget: The costs for this project will be \$12,000 and reflect staff time for writing, editing, web hosting, and promoting.

Metinda Marble

- > Enthusiastic about FC proposal.
FC = gold standard
- > MM has talked w/ Center for Effective Philanthropy
Natl. Center for Family Philanthropy -
talked abt perhaps a Panel at a conference.
- > TPI may be interested in posting rept on website.
- > Jan Jaffek who writes Philanthropy's Reflective Practices
may want to write a piece
(founded ~~Grat~~ GrantCraft. Wkd at Ford Fdn.)

Nancy Gilberg

From: Garry Jenkins <gjenkins@umn.edu>
Sent: Friday, November 03, 2017 5:42 PM
To: Penny Hunt; Nancy Gilberg
Subject: UMLS ideas to Robina
Attachments: Robina Ideas.docx

Dear Penny and Nancy:

Thank you for the opportunity to send our list of ideas for additional funding that would advance the Law School's strategic objectives. Attached you will find a list of five ideas. All of the ideas are aligned with key elements of our work and the current campaign and its goals.

I'd be happy to answer any questions or work with you to provide more information/detail if that would be helpful to you or the board.

Best,
Garry

Garry W. Jenkins
Dean & William S. Pattee Professor of Law
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UNIVERSITY OF MINNESOTA

Option #1

Endow Robina Postgraduate Public Interest Fellowships

Resources Needed: \$1.25-\$2.75 million

Since 2012, the Robina Postgraduate Public Interest Fellowships have provided graduates of the Law School with pathways into high quality regional and national public interest positions. Graduates have used the fellowships to begin their careers with Chicago Volunteer Legal Services, United Nations Development Programme, Sierra Club, American Red Cross, several state ACLU organizations, Federal Defender of Maryland, Mid Minnesota Legal Aid, and Volunteer Lawyers Network. These fellowships have been enormously successful, as judged by both the feedback from host organizations and placement statistics. Of the 29 Robina Fellows from 2012-2016, 24 (82%) remain in public service, and 12 were converted to permanent positions with their host organizations. These postgraduate fellowships strengthen the public service reputation and enhance the attractiveness of the Law School to prospective students.

It is time to permanently fund the Robina Postgraduate Fellowship Program. Each fellowship is currently funded at \$40,000, but that stipend would likely need to increase by \$5,000 to put it in line with other nationally-recognized fellowship programs. Accordingly, \$1.25 million would be required to permanently endow each fellowship; having two such fellowships would put the program on secure footing and allow the Law School to fundraise for additional endowed fellowships or to provide flexible funding to match contributions from foundations and others (e.g., the Minneapolis Foundation has expressed an interest in further discussions about joint funding a postgraduate fellowship(s) for certain nonprofits serving communities of need in the Twin Cities).

In addition to the current Robina Postgraduate Fellowships, the Law School could also seek to develop a partnership with Abbott Northwestern Hospital to establish an annual fellowship placement at the hospital. The Law School recognizes the value of having strong medical-legal partnerships so that the most vulnerable hospital populations—children, the elderly, pregnant women, and those having terminal illnesses—have access to their basic needs without worry of mounting legal fees that they are unable to pay. Because this medical-legal partnership with Abbott Northwestern has not yet been established and will require additional infrastructure, it would require \$1.5 million to permanently fund. Accordingly, were the Robina Foundation to endow one general purpose post-graduate fellowship and the Abbott Northwestern fellowship, it would require \$2.75 million.

Strategic Importance: Advance the Law School's programs, reputation, and attractiveness for those committed to public interest

Transformative Impact: Develop the next generation of excellent public service lawyers to serve the nonprofit and government sectors

Option #2

Fund Admissions Professional Position with Diversity Recruitment Focus

Resources Needed: \$2 million or \$2.5 million

The Law School's mission is to graduate the next generation of great lawyer-leaders, whether they become leaders of the bench and bar, corporate CEOs and general counsels, pillars of the community, or influential public servants. But in order to fully realize that mission, the Law School must attract and retain a diverse student population. Since 2011, the Law School has seen a 68% decrease in applications from African-Americans (much larger than the overall decline in applications), with applications from other historically underrepresented groups also in significant decline. Furthermore, the Law School has experienced particular difficulties successfully yielding diverse students once they are admitted. Unfortunately, the law school falls in the bottom quartile of law schools when ranked by diversity, even falling behind or other Big 10 peers (University of Iowa, University of Wisconsin, University of Michigan, and Ohio State).

In response to these concerns, in 2017 the Law School increased the size of its pipeline program, the Minnesota Pre Law Scholars Program ("MPLS") by 40%, in the hope that it would increase the number of qualified applications from diverse candidates who have an affinity for the Law School. However, it is clear that this effort alone will likely not be enough to enhance the diversity of the student population to the extent it is needed. In our biennial major study of law student experience and satisfaction, our students consistently noted the lack of opportunities to engage with others from diverse backgrounds as well as the lack of discussions of diversity issues inside and outside of the classroom as significant weaknesses in the law school experience.

Having a dedicated admissions professional at the Law School with a special mandate to focus on diversity recruitment focus would enable the Law School to expand its efforts in identifying and cultivating relationships with prospective diverse students. We envision that the staff member in this position would participate in all of the national minority recruiting events, direct the expanded MPLS program, identify other potential pipeline initiatives in which the Law School would be involved, and perform more extensive direct outreach to promising diverse applicants. Moreover, this person would also play an integral role in diversity and inclusion initiatives at the Law School, given their knowledge of diversity issues facing law schools and connections

they have formed with diverse students who are currently enrolled. A \$2 million gift would permanently fund this mid-career admissions professional position. With an additional \$500,000 we could use the funding to be able to fund travel stipends to bring admitted diverse students to Minnesota Law for a visit during our preview weekends. Our yield on students who attend a weekend are considerably higher than for those who do not attend.

Strategic Importance: Increase the Law School's ability to recruit and engage prospective students of color and those from historically underrepresented populations

Transformative Impact: Provide diverse graduates who will be among the next generation lawyer-leaders in Minnesota and throughout the country

Option #3

Expand Partnership with Innocence Project of Minnesota

Resources Needed: \$3.75 million

The Law School currently has a loose affiliation with the Innocence Project of Minnesota (IPM) through which it participates in an offsite legal clinic in which students work with IPM lawyers to investigate claims of actual innocence made by inmates in Minnesota, North Dakota and South Dakota. IPM then represents people who were wrongfully convicted for crimes they did not commit; they have secured the release of five wrongfully convicted men, who combined, served 27 years in prison for crimes they did not commit. They also work to educate lawyers and pursue system reform to prevent wrongful convictions. The University of Minnesota Law School/IPM relationship provides benefits to both the Law School and IPM, in that our students receive practical experience working on issues of critical significance, gain experience in criminal law and public interest lawyering, while IPM receives additional support for its work. Both the Law School and IPM are interested in significantly deepening and expanding this relationship. As part of this expansion, IPM would move its operations from its current location (at a university campus without a law school) to the University of Minnesota Law School.

This move would facilitate direct collaboration between the Law School, its clinical programs, and IPM, and it would give IPM a suitable space and administrative support from which it can operate. Second, the Law School would use a substantial part of the endowment to provide a matching pool of funds (i.e., \$100,000 to \$125,000) for money raised by IPM in furtherance of its work. With the \$100,000+ payout and the

potential of an additional \$100,000 raised in supplemental matching funds, IPM could significantly expand its geographic reach and depth of its work. The Law School would work with IPM to develop additional clinical learning opportunities, both around investigating claims of wrongful conviction as well as educational and policy reform work. These additional opportunities will be easier to develop and execute once IPM has moved its operations to the Law School. Several other law schools, including the University of Washington and the University of Cincinnati have successfully developed such partnerships with Innocence Project state affiliates.

Strategic Importance: Create a strategic alliance between the Innocence Project of Minnesota and position the Law School as a regional and national leader in clinical and experiential programs as well as strengthening our public interest opportunities

Transformative Impact: Expand the availability of legal services offered to inmates in Minnesota and neighboring states who have been wrongfully convicted; provide law students with additional experiential learning opportunities on cases of critical significance to the lives of their clients

Option #4

Create a Criminal Justice Excellence Fund

Resources Needed: \$1-\$3 million

The Law School is recognized as a national leader in criminal law and justice scholarship and advocacy efforts. With Professors Richard Frase, Kevin Reitz, Michael Tonry, and Perry Moriarty, among others, the Law School boasts one of the top criminal justice faculties in the country. Our students may earn a criminal justice concentration, in which they take specialized courses, or participate in one of several criminal law and policy related clinics. Of course, the Law School also is notably home to the Robina Institute of Criminal Law and Criminal Justice.

A Criminal Justice Excellence Fund would advance criminal justice work at the Law School in several ways. At the outset, the Fund could be used to provide a base level of support for the Robina Institute for Criminal Law and Criminal Justice—funding for the core staffing and operational needs. This financial foundation would provide the infrastructure to allow the Robina Institute to secure grants for research and policy programming, both to augment base operations and to eventually help transition the Robina Institute into a robust self-sustaining entity. A similar model is already in place for the Human Rights Center (HRC) at the Law School; through two major gifts,

our HRC is able to rely on a \$3+ million endowment that provides a consistent source of core support enabling it to secure successfully additional funds for research and student programming.

In addition to supporting the Robina Institute, the payout from such an excellence fund might also be used by the Dean to support cutting-edge faculty research on criminal justice issues, host conferences that bring together criminal justice scholars, practitioners, and policymakers to discuss emerging issues of importance, or to expand the experiential learning opportunities available to our students. An excellence fund would provide the Dean with flexibility to deploy the resources generated by the funds in a variety of ways to support faculty and students working in critical areas.

Strategic Importance: Sustain and strengthen the position of the Law School and its faculty as leaders, innovators, and experts in criminal justice issues

Transformative Impact: Continue the groundbreaking work of the Robina Institute of Criminal Law and Criminal Justice in impacting public policy and advising on systems reforms related to criminal law and justice issues, and support additional research in the area of criminal justice influencing the course of criminal justice theory, policy, and practice in Minnesota and throughout the country

Option #5

Establish Law School Innovation Fund

Resources Needed: \$1.5-\$2+ million

Over the last several years, the Law School has been a national leader in reimagining legal education. The establishment of the James H. Binger Center for New Americans exemplifies the Law School's commitment to innovation, as the Center provides our students while life-changing educational opportunities while simultaneously driving transformative change to the benefit of thousands of immigrants and refugees.

In the face of a rapidly changing higher education system as well as a changing legal landscape, the Law School must be poised to identify, develop, and launch new programs to meet needs as soon as they arise. A Law School Innovation Fund would enable the Dean to launch and support new strategic and academic programs that enable the law school to stay on the cutting-edge of ever-shifting market conditions. The fund will launch new programs, such as efforts focusing on student formation, and will

help us gain sustainable advantage in the legal education market. A lead gift of \$1.5-2+ million from the Robina Foundation would be used to establish the fund, and other gifts would be solicited to grow the fund so that it could provide greater program support over time.

Strategic Importance: Advance the Law School's reputation as a leader in legal education; attract top faculty and students engaged in innovative work

Transformative Impact: Develop and support transformative programs through the proof of concept phase until permanent funding can be identified; support core strengths and foster a culture of innovation for students and faculty at the University of Minnesota Law School

From: "Bundy, James" <james.bundy@yale.edu>

Subject: Proposals

Date: November 6, 2017 at 11:39:34 AM CST

To: 'Penny Hunt' <pennhunt@gmail.com>

Cc: "Nolan, Victoria" <victoria.nolan@yale.edu>, "Rodriguez, Chantal" <chantal.rodriguez@yale.edu>, "Dinkins, Kelvin" <kelvin.dinkins@yale.edu>, "Berman, Deborah" <deborah.berman@yale.edu>

Dear Penny,

I hope this finds you well and that you had a good weekend!

Thank you and the Board for your encouragement to float two ideas for your consideration. I believe both of these have the potential to foster consequential strategic change in the field, albeit on different time horizons, with the firstâ€”the Center for Arts Leadership and Equityâ€”having the greatest potential as a transformational force in the American theatre over the next decade.

I would be very pleased to discuss these ideas with you and the board as you see fit, and I look forward to the possibility of pursuing the conversation further.

Warm regards,

James

James Bundy
Dean/Artistic Director
Yale School of Drama/Yale Repertory Theatre
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Center for Arts Leadership and Equity at Yale

Vision

The Yale School of Drama seeks a six-year grant of \$3,000,000 to support a partnership with artEquity, a nonprofit organization based in Los Angeles, to establish national training programs for leadership in arts management, with a focus on promoting Equity, Diversity, and Inclusion ("EDI") for the benefit and development of the American theatre and related fields. In conjunction with the Theater Management program at the School of Drama, and the Knowledge Base, the School's internet-based compendium of case studies, interviews, and articles, the Center will serve students, early career professionals, artists, managers, executive leaders, non-profit theater organizations and staff, board members, and philanthropists/funders. We anticipate the Center will be most valuable in addressing three priority areas:

- 1) generating programmatic redress of the historical imbalance of financial resources directed from the philanthropic community to predominantly white theatres over theatres of color;
- 2) fostering communication and knowledge-sharing among organizations and individuals facing the challenges and successes that occur when EDI is becoming a part of organizational culture;
- 3) facilitating difficult conversations concerning EDI with boards of trustees and executive leadership to promote ethical and strategic change.

We expect the Center will comprise training in EDI for all YSD students, faculty, and staff, and also engage up to 40 participants in three separate 5-day training sessions annually occurring in New Haven or another host city in the U.S. Each session will be programmed for specific subject matter relevant to equity, diversity, and inclusion in the three identified focus areas. Program coordinators from both Yale School of Drama and artEquity will oversee the program's management, outreach and curriculum/training.

Background

In 2015, YSD began to work with artEquity, which provides tools, resources, and training to support the intersection of art and activism. Carmen Morgan, founder of artEquity, is one of the leading figures in the social justice movement in the arts, as a long-time consultant for both the Theater Communications Group and Oregon Shakespeare Festival, among many other organizations. She serves on the YSD faculty, offering sequential workshops entitled *Beyond Diversity: Practicing Equity and Inclusion* and *Facilitation for Social Change*. These workshops have enabled faculty, staff, and students to participate in life-changing conversations about these issues, which will be of increasing importance as the United States and other parts of the world experience some of the fastest demographic and cultural change in history.

Witnessing the impact of this work in our community has inspired us to replicate this work for maximum national impact. ArtEquity's leadership and Yale's positional power present an opportunity not only to address and dismantle racist and patriarchal paradigms in our own organization, but also to highlight, develop and export practices and understandings that will raise the standard of practice elsewhere the arts and entertainment industry.

Currently, we require all first-year students take a required three-day (15 hour) version of *Beyond Diversity* during Seminar Week each January, and second- and third-year students are offered an optional five-day (25 hour) version of *Facilitation for Social Change* in August. A similar workshop is now required for all benefited employees. Participants have emerged from these workshops with a common vocabulary, exposure to what members of our community are experiencing, and increased appetite for the rewarding and sometimes difficult conversations that allow us to comprehend and welcome difference while promoting a more inclusive and equitable environment for all who work and study here. The School and Yale Rep now maintain an EDI Working Group including more than 20 people: faculty, staff, and students who meet regularly to support a fair and welcoming workplace for all, and to hold the institution accountable to its values. Results of these efforts include revamping of recruiting practices, improved rehearsal guidelines and a focus on addressing and eliminating sexual misconduct, institutional support for affinity groups, historical recognition for marginalized communities and their contribution to the School's history: other programs seeking to emulate Yale's work with Carmen Morgan and artEquity include Juilliard, NYU, Kennesaw State University, and Brown University.

Objectives

The Center will promote change in historic funding inequity: since the regional theatre movement began, predominantly white theatre organizations have been consistently prioritized over culturally-specific organizations—widely known as “theaters of color” (TOC)—by the funding community. Such imbalance leaves artists of color and theatres of color starved for capital investment and without a methodology to appropriately address historical exclusion. The center will engage a wide range of theatres and artists of color in the process of co-creating necessary training and program support that highlights this issue, as well as the importance of TOC, and opportunities for better practice. We know that philanthropic organizations are devoting significant resources to predominantly white organizations undertaking work in EDI, while theatres of color have been doing the same work for years and not supported for doing so. Yale's partnership with artEquity will first promote the work of TOC, modeling inclusive leadership, consultative and responsive program development, and responsible service to communities that have been marginalized.

Second, there are theatres throughout the country that are already ushering in progress with initiatives that support a more inclusive work environment, plans for equitable staff recruitment, and addressing retention of diverse employees. The Center will bring these organizations and their leadership into intersectional, in-depth knowledge-sharing and skill-building to support strategic development of institutionalized EDI policies and practice nationwide.

Such discourse among institutions will promote an environment for innovative thinking and the development of more thought leadership in the maintenance of organizational culture. Cultural leaders with deep understanding of and skills in managing EDI issues and best practices are required in executive leadership and board rooms across the country. Joined with the School's expertise in Theater Management the Center's programming and training will navigate the politics of language, social location, and identity; explore how to manage complex power dynamics; and create environments conducive for constructive conversations around issues of EDI in theatre organizations.

Finally, the center will provide trainings and tools to boards of trustees that are seeking to address white supremacy culture, unconscious bias, and the equitable recruitment of executive leadership and board members. This education and training in governance structures is required to ensure that

board members are versed in the key concepts that underpin such work: this kind of familiarity and open discourse will offer the most productive environment for modeling change and higher standards of conduct in the field.

The Center for Arts Leadership and Equity will bring together national leaders to develop and focus training and resources to catalyze rapid change in the field with respect to Equity, Diversity, and Inclusion. Just as Yale School of Drama graduates move into leadership positions across the country, participants in the Center's programming will be able to develop and transmit best practices to their home organizations.

A six-year grant of \$3,000,000 will allow the School to seek additional grant resources and dedicate funds to the sustainability of this initiative.

International Experience for All Yale School of Drama Students

Vision

Theater makers in all disciplines thrive on robust cultural exchange. Fostering relationships to artists and theatre practitioners from other cultures is essential to the vitality of world theatre, strengthening the inclusivity and diversity of our work. We know from the few international trips we have supported over the years and from the international visitors to our NO BOUNDARIES series, that there are enormous benefits to ongoing relationships that include the deepening of mutual understanding, empathy, and collaboration.

A grant of \$3,000,000 over a six-year period augmented by support from international partners would enable us to build a robust program guaranteeing an opportunity for every student in the school to engage in an international experience through travel to and immersion in a different culture. YSD students' exposure to the work of international artists abroad will expand their artistic imaginations and vision for the roles they, as theatre leaders, might play in our society, and set a standard for global citizenship in the field.

Background

YSD students are passionate about greater exposure to world theatre in production across a wide range of aesthetics and cultures. The composition of our student body is diverse across many measures—92% of our students are on financial aid the majority of whom come with no family assets, 15% are international from 19 countries, and 39% of our American students are people of color—we have little opportunity to see firsthand the oeuvre of major international artists and organizations working in models unfamiliar in the American theatre, or for our students to study abroad during summers.

Our NO BOUNDARIES series explores the frontiers of theatrical invention through cutting-edge and thought-provoking performance from around the world. It has introduced students and Yale Rep audiences to an astonishing array of performances— theatre, dance, music, and multimedia—from the Netherlands, the Czech Republic, Poland, Peru, Colombia, Spain, Germany, Japan, Israel, Georgia, East Africa, and West Africa.

International experiences for students occur intermittently, often as a result of one-time grants, collaborations with international partners who provide hospitality, and/or through student-organized crowd-sourcing campaigns to cover travel and housing. For the past two years, three first year directing students have travelled to the Sibiu Festival in Romania, and this year, with support from the Adam Mickiewicz Institute in Poland, students visited the Poznan Festival in Poland. Last summer six acting students traveled to China. They were hosted by the Beijing Center for the Exploration of Western Acting Art where they studied traditional Chinese acting techniques in exchange for teaching workshops on their own practice. Through an on-going relationship with the British Academy of Dramatic Arts (BADA), scholarships are awarded to two YSD actors annually to attend a summer training program at Oxford.

For the past two years the School has hosted internationally renowned Dimitri Krymov, who has worked for several weeks each year with director, actor, designer, production, and management students on reimagining works by Chekhov. Support from the Trust for Mutual Understanding and private donors made it possible for this project to appear in the 2016 International Festival of Arts and Ideas in New Haven. Still we could not muster the necessary resources to mount an international tour, despite a great deal of interest expressed in taking the piece to Holland, Great Britain, and Russia.

While YSD has been nimble and keen when opportunities arise, these rarely come with complete funding and benefit only a fraction of YSD students. Some examples of fully funded opportunities have included the 2010 Commedia Project (with twelve third-year actors, a stage manager, a technical student and manager) was mounted at Boğaziçi University in Istanbul hosted by the Yale Alumni Association in Turkey. In 2010 and 2011, with the help of CEC ArtsLink, Renova; a private Russian foundation, and the Trust for Mutual Understanding, we participated in a reciprocal exchange whereby four Russian students came to New Haven and four YSD playwriting students were hosted at the Playwright and Director Center in Moscow. In 2011 and 2012 we mounted a theatre-training project in Tanzania collaborating with elementary school students at the Babawatoto Centre for Children and Youth. Five YSD students joined with students from Yale Divinity School and the Institute for Sacred Music to teach theater as a tool for social change.

Objectives

A Robina Foundation grant for travel and staffing would allow us to secure partners who will support our students on the ground. Major theater schools and festivals worldwide seek an affiliation with YSD, and invitations to host groups of our students and their productions abound. On-going partnerships, such as the ones we have with CEC ArtsLink, the Adam Mickiewicz Institute in Poland and the Trust for Mutual Understanding, will help us leverage other partners. Typically, they include in-country hospitality and production support but require our capacity to get our students there.

A grant of this magnitude would enable the school to build more consistent engagement with international artists such as Dimitri Krymov here in New Haven and to develop and support a travel program that enables every student at the school to participate in a significant international experience during their three years of study. We imagine a variety of opportunities with existing programs and developing a “design your own” component for students who have very specific ideas about cultures and artists they might study. During the first several months of the grant period, we would build partnerships beyond those that currently exist to expand on placement opportunities and establish guidelines for “design-your-own” experiences. The deans would work across all departments to develop specific opportunities similar to those listed above, and we are confident that international relationships will be easily established including in-country support for hospitality and housing.

Finally, by making this grant last over six years, the Robina Foundation will make it possible for the School to set aside the operating resources to make this a sustainable feature of the YSD program.

**COUNCIL *on*
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RELATIONS**

Stewart P.

- ① Profic & busy
 - ② Sovereignty = hot topic
Interviews / Mags / Articles
Reddit Administration
 - ③ 28 Briefings of Gov. Officials
or Policy Experts
Prominent
- When next payment?

The James H. Binger Chair in Global Governance Fund Report

Prepared for: **Robina Foundation**

Project Director: **Stewart M. Patrick**, James H. Binger Senior Fellow in Global Governance and
Director of the International Institutions and Global Governance Program

Reporting Period: **September 2017–January 2018**

Submission Date: **February 5, 2018**

The Council on Foreign Relations (CFR) is pleased to submit the first annual report of the James H. Binger Chair in Global Governance Fund. To accompany this narrative, a financial statement, as well as an annex on the chairholder's activities, events, media appearances, and publications during the reporting period, are enclosed.

Overview

During the reporting period, Dr. Stewart Patrick, the inaugural James H. Binger senior fellow in global governance and director of the International Institutions and Global Governance (IIGG) program, published his book, *The Sovereignty Wars*; hosted two roundtable meetings; co-organized the tenth regional Council of Councils meeting in Argentina; and provided commentary on the nature of U.S. sovereignty to multiple audiences. This included discussions on local radio, interviews with national media outlets, book talks throughout the country, and outreach to new audiences through Facebook Live and Reddit. He also authored several articles and op-eds, analyzing actions by the Trump administration taken in the name of sovereignty and assessing how the United States can advance its interests through multilateral cooperation.

Chairholder's Activities

Publications

On September 19, 2017, President Donald J. Trump gave his first address to the United Nations General Assembly. His threat to "totally destroy" North Korea overshadowed the core theme of the speech, namely a problematic understanding of the centrality of sovereignty in international relations. Just six weeks later, on October 31, 2017, Dr. Patrick released *The Sovereignty Wars: Reconciling America with the World*. Published by the Brookings Institution Press, this timely book is intended to help today's policymakers shape U.S. destiny in a global age, by allowing them to think more clearly about what is actually at stake in debates on U.S. sovereignty and by providing criteria for determining when it is appropriate to make bargains over sovereignty—and how to make them.

* The book has generated considerable praise. An anonymous external manuscript reviewer described it as "incredibly timely," in addition to being "both historically informed and forward-looking." Another noted that it is "exceptionally researched, comprehensive in its scope, and clearly argued." James Traub, columnist for *Foreign Policy*, implores "the nationalist crowd to overcome its resistance and read this book," while for Francis Fukuyama of Stanford University, the book is a "perfect Guide to the Perplexed that helps sort through the muddled arguments being thrown about today regarding perceived threats to American sovereignty." Dr. Patrick also learned that the book has been closely read by senior members of President Trump's national security team.

* In addition to *The Sovereignty Wars*, Dr. Patrick published a number of articles during the reporting period that reflected on U.S. sovereignty and the Trump administration's efforts to jealously protect it. In an article titled "Trump's Sovereignty Doctrine" in *U.S. News & World Report*, Dr. Patrick assessed what President Trump got right and wrong about sovereignty in his first address to the UN General Assembly. In another article for *Real Clear World*, "The Self-Defeating Sovereignty Obsession," Dr. Patrick explains how President Trump is exchanging America's long-valued 'soft power' for a narrow and transactional notion of U.S. sovereignty. Dr. Patrick also published articles examining aspects of U.S. sovereignty in the *Hill* and *World Politics Review*.

In addition to his analysis on U.S. sovereignty, Dr. Patrick also published an article in *Daedalus* titled "Civil Wars & Transnational Threats: Mapping the Terrain, Assessing the Links," which was part of a series of articles on civil wars and global disorders. Dr. Patrick's article questions the oft-cited rationale for engagement in war-torn states, namely the assumption that civil war creates risks for U.S. and global security. Closer examination suggests that the connection between internal disorder and transnational threats is situation-specific, contingent on an array of intervening factors and contextual conditions, and that the most important considerations for the United States in countries mired in civil war are typically moral and humanitarian.

At the close of the year, Dr. Patrick published "Desperately Seeking Sherpas: Ten Global Summits to Watch in 2018." This expert brief details ten critical global summits in the year ahead and argues that the Trump administration's approach to these meetings will demonstrate whether its pullback from multilateralism in 2017 was an aberration or the start of a new normal.

Dr. Patrick also continues to regularly post articles on his blog, *The Internationalist*. During the reporting period, the blog featured twenty-three articles and was viewed over thirty thousand times. In one post, which has been viewed over three thousand times and was republished in *Newsweek*, "[Trump, the World Bank, and the IMF: Explaining the Dog that Didn't Bark \(Yet\)](#)," Dr. Patrick outlines how international financial institutions have developed partnerships with the Trump administration. In another popular post, which was also republished in *Newsweek*, "[Year One of America First: Global Governance in 2017](#)," Dr. Patrick and IIGG intern Anne Shannon identify the important achievements in international cooperation in 2017.

Meetings

During the reporting period, Dr. Patrick hosted two roundtable meetings. The first meeting, held in cooperation with the American Academy of Arts and Sciences, focused on civil wars and international responses and included expert contributors to the launch of the first volume of *Daedalus*, "Civil Wars & Global Disorder: Threats & Opportunities." The second meeting focused on the role of democracy promotion in U.S. foreign policy and featured two distinguished speakers: Michael Abramowitz, president of Freedom House, and Elliott Abrams, senior fellow for Middle Eastern studies at the Council on Foreign Relations.

Dr. Patrick also participated as a panelist in a number of public events. At a *Foreign Affairs* LIVE event, Dr. Patrick discussed the Trump administration and its effect on the international order and U.S. alliance system with Mr. Abrams and Kori Schake, research fellow at the Hoover Institution. Dr. Patrick also participated in a panel discussion, [Public Perspectives Toward Democracy](#), with Katie Simmons, the associate director of research at the Pew Research Center, and Kenneth Wollack, president of the National Democratic Institute. In addition, Dr. Patrick participated in the tenth regional Council of Councils meeting in Buenos Aires, Argentina. Further details on this conference are provided in the next section.

Travel

During the reporting period, Dr. Patrick traveled to Buenos Aires, Argentina, to participate in the tenth regional meeting of the Council of Councils, a CFR initiative previously supported by a Robina Foundation grant to the IIGG program. The conference brought together thirty-one delegates from participating Council of Councils think tanks in twenty countries and included sessions on how to revitalize the Bretton Woods institutions, reverse the fade of liberal democracy, combat transnational organized crime and corruption, and mitigate the humanitarian and political crises in Venezuela. The conference also featured a keynote address from Gustavo Rodolfo Zlauvinen, undersecretary of Foreign Affairs in Argentina and a briefing from Pedro Villagra Delgado, the Argentine Sherpa (diplomatic representative) for the 2018 Group of Twenty meeting.

During the conference, Dr. Patrick moderated two discussions. The first was a conversation on the common challenges that think tanks face with respect to maximizing domestic and international impact, exploring new opportunities, and responding to threats. The second discussion focused on a new category of Council of Councils publications, the Global Governance Working Papers. Targeting critical global problems where new, creative thinking is needed, the working papers identify new

principles, rules, or institutional arrangements that can improve international cooperation in addressing longstanding or emerging global problems. The first working paper, "[The Challenge of North Korea](#)," was published in November 2017. During this trip he also gave a book talk at the Argentinian Council on Foreign Relations.

Dr. Patrick made a number of additional trips to promote *The Sovereignty Wars* during the reporting period (these trips are noted in the Annex).

Outreach and Media

During the reporting period, Dr. Patrick engaged a diverse range of audiences from government, business, civil society, and academia on the deeply contested issue of sovereignty, coinciding with publication of *The Sovereignty Wars*. These included speaking before fifty senior Democratic and Republican congressional staffers from both the U.S. Senate and House of Representatives, as well as one hundred senior executives from Lazard, one of the world's leading financial advisory and asset management firms. Dr. Patrick also addressed audiences at Columbia University, the Foreign Policy Research Institute, Perry World House at the University of Pennsylvania, Stanford University, the University of Texas, and at CFR National events in Dallas, Houston, Los Angeles, San Francisco, Portland, Seattle, and Louisville.

Dr. Patrick was also interviewed by numerous media outlets on the book's central arguments and how its recommendations could be implemented by the United States. These interviews have given Dr. Patrick the opportunity to engage with local, national, and international audiences. Outlets include *Al Jazeera*, Australian Broadcasting Company, BBC, *Boston Herald*, CBS Radio, *Christian Science Monitor*, CNN.com, KQED Radio, *Le Monde*, the *Los Angeles Times*, MSNBC, the *New York Times*, PBS Newshour, *Politico*, *Quartz*, Radio France Internationale, *Time Magazine*, *USA Today*, and *Washington Examiner*. He was also a guest on a number of podcasts, including Bill O'Reilly's No Spin News, New Books Network, Global Dispatches, and CFR's podcasts, *The President's Inbox* and *The World Next Week*.

Dr. Patrick also participated in a [Reddit Ask Me Anything](#) (AMA) which focused on the themes of *The Sovereignty Wars*. The AMA was the most successful ever run on the Geopolitics subreddit, generating over 108,000 page views and 240 'upvotes.' He also cohosted a [Facebook Live](#) with CFR Senior Vice President, Director of Studies, and Maurice R. Greenberg Chair James Lindsay to discuss the main messages of *The Sovereignty Wars*, which was viewed over five thousand times.

Future Activities

In the coming year, Dr. Patrick will continue promotion and outreach efforts to maximize the impact of his book, *The Sovereignty Wars*. He has a number of book talks planned, including at the International Studies Association Annual Meeting in San Francisco, the Mexican Council on Foreign Relations, the Committee on Foreign Relations of Santa Fe, the University of Central Florida, and the Young Professionals in Foreign Policy group. This travel will include interviews with local media outlets. In addition, he will continue to write articles and op-eds exploring how U.S. sovereignty is exercised and contested in the Trump administration.

He will also continue to direct the activities of the IIGG program, including the Council of Councils, a roundtable series on the United States and the future of global governance, and a new study group on transformational technology.

Annex: The List of Chairholder's Activities and Outputs

Events

September 12, 2017: hosted a roundtable meeting on civil wars and international responses.

September 12, 2017: participated in a *Foreign Affairs LIVE* panel discussion with Elliott Abrams, senior fellow at the Council on Foreign Relations, and Kori Schake, research fellow at the Hoover Institution.

September 13, 2017: provided a briefing on global governance to Stanford University's Center for International Security and Cooperation (CISAC) Honors Program.

September 13, 2017: hosted a roundtable, "What Role Should Democracy Promotion Play in U.S. Foreign Policy?," featuring Michael Abramowitz, president of Freedom House, and Elliott Abrams, senior fellow of Middle Eastern studies at the Council on Foreign Relations.

October 26, 2017: participated in a panel discussion, *Public Perspectives Toward Democracy*, with Katie Simmons, the associate director of research at the Pew Research Center, and Kenneth Wollack, president of the National Democratic Institute.

November 5–7, 2017: participated in the tenth regional Council of Councils meeting in Buenos Aires, Argentina.

Book Outreach

September 19, 2017: participated in a *CFR media call* with Carla Robbins, adjunct senior fellow at the Council on Foreign Relations. The interview was quoted in the *Globe and Mail* article "*Trump Stokes Global Tensions With Threats Against North Korea in UN Speech*" and the *DPA International* article "*MAGA Worldview Distilled: What did We Learn From Trump's UN Address?*" Both articles mention the book.

October 12, 2017: gave a book talk at Stanford University's Freeman Spogli Institute.

October 16, 2017: participated in a Council on Foreign Relations book launch event for *The Sovereignty Wars* in Washington, DC.

October 18, 2017: gave a book talk as part of the U.S. State Department Library's speaker's series.

October 23, 2017: participated in a Council on Foreign Relations book launch event for *The Sovereignty Wars* in New York.

October 23, 2017: gave a CFR term member book talk.

November 7, 2017: gave a book talk at the Argentine Council for International Relations.

November 14, 2017: gave a book talk at the Crescent Club in Dallas for CFR National members.

November 15, 2017: gave a book talk at the Clements Center for National Security at the University of Texas at Austin.

November 16, 2017: gave a book talk at the Coronado Club in Houston for CFR National members.

November 30, 2017: gave a book talk for CFR corporate member Lazard.

November 30, 2017: gave a book talk at Columbia University in New York.

December 1, 2017: gave a book talk to senior congressional staff.

January 18, 2018: gave a book talk to the Foreign Policy Research Institute in Philadelphia.

January 18, 2018: gave a book talk to the Perry World House at the University of Pennsylvania.

January 22, 2018: gave a book talk at the University of Southern California in Los Angeles.

January 22, 2018: gave a book talk at the World Affairs Council in Los Angeles.

January 23, 2018: gave a book talk at the University of California.

January 24, 2018: gave a book talk at Stanford University.

January 24, 2018: gave a book talk at the World Affairs Council in San Francisco.

January 25, 2018: gave a book talk at the World Affairs Council in Seattle.

January 30, 2018: gave a book talk at the World Affairs Council of Kentucky in Louisville.

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 - The Sovereignty Wars
- Articles by Stewart Patrick..... 10
 - "Cozying up to strongmen is not in America's diplomatic interests"
 - "Trump and Guterres—A Diplomatic Odd Couple" (coauthored with Megan Roberts)
 - "Trump's Sovereignty Doctrine"
 - "Civil Wars & Transnational Threats: Mapping the Terrain, Assessing the Links"
 - "Trump's Wall Is a Symbol of America's Sacred Sovereignty"

- "The Self-Defeating Sovereignty Obsession"
- "Trump's Withdrawal from Migration Summit Shows his Nationalist Colors"
- "Desperately Seeking Sherpas: Ten Global Summits to Watch in 2018"
- "Trump and Wilson's Ghost: The Fourteen Points Turn 100 Years"
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- Radio.....7
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- Briefings of Government Officials or Prominent Experts.....28

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**Financial Report for the James H. Binger Chair in
Global Governance Fund and the Robina Franklin
Williams Internship Fund**

As of December 30, 2017

Endowment Fund Name	Pledged	Received/ Invested	Return on Investment	Endowment Fund Balance	Draw (FY18)
James H. Binger Chair in Global Governance Fund	\$5,000,000	\$3,333,334	\$167,094	\$3,500,428	\$2,800
Robina Franklin Williams Internship Fund	\$1,320,000	\$1,320,000	\$104,021	\$1,424,021	\$2,500

Calendar for year 2018 (United States)

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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

Robina Foundation 2018 Board Meeting Dates

DATE (2018)	PLACE/TIME
February 26-28, 2018 (Mon, Tues, Wed) New Haven, Connecticut Yale University Lodging: The Study	New Haven 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 Faegre Baker Daniels' Office	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	10:30 a.m. to 12:30 p.m. (CST)

Calendar for Year 2019 (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:● 14:○ 21:○ 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 4:● 12:○ 19:○ 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 6:● 14:○ 20:○ 28:○
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Holidays and Observances:

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Apr 21 Easter Sunday	Oct 14 Columbus Day (Most regions)	Dec 31 New Year's Eve

Robina Foundation 2019 Board Meeting Dates

DATE (2019)	PLACE/TIME
February 25-27, 2019 (Mon, Tues, Wed) Location to be Determined	Location to be Determined Monday, February 25 – 6:00 p.m. Dinner Tuesday, February 26 – 8:00 a.m. to 5:00 p.m. Tuesday, February 26 – 6:00 p.m. Dinner Wednesday, February 27 – 8:00 a.m. to 12 noon
May 14, 2019 (Tuesday) Conference Call	10:00 a.m. to 12 Noon (CDT)
August 26-28, 2019 (Mon, Tues, Wed) Annual Meeting Minneapolis, Minnesota	Minneapolis, MN Monday, August 26 – 6:00 p.m. Dinner Tuesday, August 27 – 8:00 a.m. to 5:00 p.m. Tuesday, August 27 – 6:00 p.m. Dinner Wednesday, August 28 – 8:00 a.m. to 12 noon
November 21, 2019 (Thursday) Conference Call	10:00 a.m. to 12 noon (CST)



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
MacMillan Center for International and Area Studies, Yale University
Robina Foundation Annual Report and Work Plan
Year 2 (2017) and Projection for Year 3 (2018)

February 2018

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INTRODUCTION

The Gilder Lehrman Center for the Study of Slavery, Resistance, and Abolition is pleased to provide a report on the activities supported by a generous four-year grant from the Robina Foundation.

BACKGROUND

In December 2015, the Robina Foundation awarded the Gilder Lehrman Center (GLC) a four-year grant totaling \$1,424,709. The first payment of funds was made in February 2016. This report includes an update on projects undertaken during Award Year 2 (2017) and projection for projects underway during Award Year 3 (2018). The general project areas of the Center covered by Robina Foundation funding include: Human Trafficking and Modern Day Slavery (HTMDS), New Media and Communications Initiatives, Teacher Outreach, including a three-year international Africa Teachers' Institute; and the annual Gilder Lehrman Center-Yale Public History Institute.

GOALS

The primary goal of the Gilder Lehrman Center is to promote rigorous scholarship and outreach concerning all aspects of slavery, its long destruction, and its many living legacies across all borders and all time. As the first and foremost center in the world for the study of slavery, the Center serves as a hub for research, public education, and international academic networking. With support from the Robina Foundation, the goal of the Center is to expand its institutional leadership in the public understanding of and accountability for the profound social injustices caused by historical and modern forms of forced labor.

OBJECTIVES

- Raise the profile of the Gilder Lehrman Center within Yale University and nationally;
- Create knowledge about the history and legacy of slavery through a robust research fellowship program;
- Develop an international network to provide scholarly foundations for activists and policymakers working toward the abolition of contemporary forced labor and human trafficking;
- Promote international interaction between secondary school educators and the Center; and
- Produce and circulate academically grounded educational materials for public schools and general audiences.

PROGRESS TOWARD GOALS

Administration

- Promotion of position from Assistant to Associate Director; Michelle Zacks hired August 2016
- Administrative Assistant, Melissa McGrath: hours increased to 25/week; student assistants Eva Branson, Constance Thurmond, and Sophia Catsambi hired
- Director of Education, Thomas Thurston: increased to full-time
- Media Project Manager, Daniel Vieira: hired December 2016, 25 hours/week; position increased to full-time from February-December 2018

Refer to the Work Plan below (pages 7 through 19) for the detailed goals, strategies, actions, and intended outcomes of Gilder Lehrman Center activities in the four project areas. A brief summary regarding each project area follows:

Program Area 1. Human Trafficking and Modern Day Slavery (HTMDS)

- Postdoctoral teaching and research fellowships granted (3 in 2016-2017; 2 in 2017-2018; 2 planned for 2018-2019), resulting in: expansion of Yale undergraduate course offerings on the topic; research and publications; inter-departmental collaborations; conference presentations; secondary school visits; public lectures and panel discussions; and podcasts on the topic.
- Co-sponsorship of online policy debates; production of one short film; second short film to be produced in Spring 2018.
- Formation of international Modern Slavery Working Group comprised of 13 leading scholars. Two meetings undertaken thus far (March and Sept. 2017); third meeting scheduled for April 20-21, 2018; fourth meeting will take the form of the 20th annual GLC conference (Autumn 2018); edited volume in preparation. *→ where?*
- Development of GLC Modern Slavery web presence; ongoing creation of online resources: <https://glc.yale.edu/ModernSlavery/WorkingGroup>
- Student assistants hired to help with administration of Modern Slavery Working Group.

Program Area 2. New Media and Communications Initiatives

- Media Project Manager Daniel Vieira hired: enhanced video-recording, livestreaming, and photography of GLC public events; short film production and planning; digital communications (website, newsletter, social media) continuously updated and improved; production and editing of podcast interviews with each GLC visiting fellow and affiliated scholars.
- *Slavery and Its Legacies*, a podcast series featuring GLC fellows and associated scholars launched January 30, 2017. Twenty-three podcasts released to date; 13 more recorded and awaiting editing; 7 additional interviews currently scheduled. *hits?*
Listen here: <http://glc.yale.edu/slavery-and-its-legacies>
- *Voices from the Archives*, a digitized primary-source site of research and pedagogy launched: <https://glc.yale.edu/VoicesFromTheArchive>
- Digital Humanities (DH) symposium and advisory workshop planned for May 4, 2018.
- Designated webserver created to host major digital humanities platforms, including *Runaway New England*, a collaborative, public database in development by current GLC DH Postdoctoral Fellow Joseph Yannielli and his undergraduate students.
- Planning for short film, "New Majorities, Renewed Suppression: North Carolina's Movement to Expand the Franchise"; pursuing partnerships with documentary filmmakers at the Public Humanities collective at Yale University; and at Duke University: the Center for Documentary Studies, the Samuel Dubois Cook Center on Social Equity, and the Hart Leadership Program at the Terry Sanford School of Public Policy.

Program Area 3. Teacher Outreach and Africa Teachers' Institute

- January-December 2017: 9 Professional Development Workshops offered: 15-25 regional secondary school teachers participated in each. *Increase?*
Spring 2018: 4 workshops to be held; the new workshop theme for academic year 2017-2018 is "Africa Past and Present" (in conjunction with and to prepare for the Africa Institute programming).

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- April 25-26, 2017: Two-day student workshop on "Slavery and Its Aftermath" held for middle school students at Foote Academy; 80 students in attendance.
- June 2016, June 2017: "Exploring Justice": week-long summer seminar, co-organized with area teachers, for 45-50 high school students
- September, 2017: Planning meeting for 2018 seminar held; 12 students and three teachers attended.
- *How many?* | • February 2-12, 2018, GLC Director of Education, Thomas Thurston: Planning trip to Sierra Leone in preparation for "History & Memory in South Africa, the United States, and Sierra Leone," a two-year series of weeklong, international institutes involving cohorts of 10 teachers from each of three countries.
- July 7-15, 2018, Johannesburg, South Africa: U.S. and South African teachers will meet for their international institute (taught by Prof. Daniel Magaziner, Yale University, with guest lecturers); syllabus in development. Media Project Manager Daniel Vieira will accompany GLC Director of Education Thomas Thurston to document the institute through video and audio recordings, collection of ambient sound and images, and interviewing of participants. Johannesburg venues and institutional partners selected (Apartheid Museum). Recruitment of teachers from U.S. and South Africa completed. Logistical planning (food, lodging, transportation) in process. Interactive web platform development in process.
- December 26, 2018-January 2, 2019, Freetown, Sierra Leone: U.S. and Sierra Leonean teachers will meet for their international institute (taught by Prof. Joe Alie, University of Sierra Leone and Prof. Joseph Opala, emeritus, James Madison University). Freetown venues and institutional partners currently being finalized (possibilities include: University of Sierra Leone, Conforti Primary School, Sierra Leone National Museum, Sierra Leone Peace Museum). Recruitment of teachers from U.S. and Sierra Leone completed. Logistical planning in process.

Program Area 4. Gilder Lehrman Center-Yale Public History Institute

- June 25-30, 2017: Week-long summer seminar under direction of Richard Rabinowitz and Lynda Kaplan of the American History Workshop. Instructors: Christy Coleman (CEO, American Civil War History Museum, Richmond); Jan Ramirez (chief curator, September 11th Memorial Museum, New York); Fath Davis Ruffins (curator, Smithsonian's National Museum of American History, Washington DC); guest lectures by Yale University Professors of History David W. Blight and Stephen Pitti. The Institute was structured around the theme of "Making Difficult History Public" in order to address a broad range of concerns emerging in U.S. history museums in addition to slavery and its legacies (including terrorism, racism, conquest and colonialism, incarceration, and historical trauma). Participants of the 2017 Institute included fifteen mid-career professionals from institutions across the country and six Yale graduate students.
- May, 2018: Two-day Public History Institute (PHI) review and planning session. Six years of the Yale Public History Institute (2012 through 2017) have produced a wealth of feedback about current concerns and trends within cultural institutions focused on the histories and legacies of slavery and emancipation, colonialism, displacement of indigenous peoples, white supremacy, struggles for civil rights and equality, immigration, and many other challenges to the ideals of liberty and justice upon which the United States was founded. In order to think deeply through the successes, limitations, and possibilities of public history efforts in the field of "difficult history," the 2018 PHI will be structured as a two-day evaluation and brainstorming session. Approximately 10-12 participants will include established professionals in the field, mid-career innovators, and future leaders; invitation list (in process): staff of the Smithsonian's National Museum of African American History and Culture, past participants of the Yale-PHI program, and members of institutions outside the PHI network. Invitation will be extended to Stephen Elliott, recently retired Director of the Minnesota Historical Society.

Anyone else at MHS?

UNANTICIPATED RESULTS AND POTENTIAL CHANGES

Program Area I. Human Trafficking and Modern Day Slavery (HTMDS)

Robina-funded expenditures for the first of three Postdoctoral Fellows in HTMDS began in Year 2 (June 2017) and will continue in calendar Year 3 (2018) and Year 4 (2019). These correspond with Academic Years 2016-2017; 2017-2018; and 2018-2019.

Three gatherings in New Haven of the international Modern Day Slavery Working group originally were budgeted for; in consultation with the two co-chairs of the group (Professors Genevieve LeBaron and Jessica Pliley), an additional meeting is planned, for a total of four meetings. The fourth meeting will take the form of the 20th Annual Gilder Lehrman Center Conference, with the theme of "Fighting Modern Slavery: What Works?"

In the 2017 Annual Report, a short film was planned: "Human Trafficking & Slavery Today"- a conversation between GLC scholars Wendy Hesford, Tammy Ingram, and Elena Shih. Scheduling conflicts between the various scholars made it impossible to film the conversation. In its stead, the GLC will film a conversation between Modern Slavery Working Group co-chair Jessica Pliley and GLC Director David Blight (April 2018). Both historians, the two will discuss what studying the past can contribute to analysis of (and actions to combat) contemporary forced labor. A short, edited film based on this conversation will be posted on the GLC website and other Yale and social media platforms and will serve as an introduction to the Robina-funded Modern Slavery initiatives.

Program Area II. New Media Communications

In the 2017 Annual Report, plans were described to develop online curricular resources based on the November 2016 panel discussion "The Right to Vote: Protection or Suppression Since 1965." Teacher focus groups were convened to develop curricular modules regarding efforts to abridge and to ensure the electoral franchise. Preliminary research was undertaken, but the teachers' regular work loads prevented completion of this project. Current plans are to schedule a series of evaluation workshops with small groups of regional secondary school teachers in Fall 2018. Teachers will view recordings of various GLC pubic programs in advance and discuss content, potential for class room use, and teaching strategies. Educational outreach coordinators with PIER program (Programs in International Educational Resources), part of the MacMillan Center at Yale University, will be asked to participate in the workshops and assist in developing evaluation instruments for student and teacher users of GLC digital resources.

Plans to create a short film focused on historical and current attempts to restrict the electoral franchise are still in process. With a working title of "New Majorities, Renewed Suppression: North Carolina's Movement to Expand the Franchise," the film will use the North Carolina movement (2008-present) to expand access to and exercise of the franchise as a case study, framed by the historical context of race- and class-based efforts to restrict voting rights. A film treatment currently is being developed, with the intention to incorporate both footage from and the experiences of a variety of North Carolina institutions. Partnerships for the film are being sought with: the Public Humanities collective at Yale University; and, at Duke University: the Center for Documentary Studies, the Samuel Dubois Cook Center on Social Equity, and the Hart Leadership Program at the Terry Sanford School of Public Policy. Our intention is produce and release the film prior to the November 2018 elections. In order to fulfill remaining media production initiatives, Media Project Manager Daniel Vieira's hours will be increased to full-time from February to December 2018.

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Program Area III. Teacher Outreach and Africa Teachers' Institute

In order to complete the ambitious plans for the Africa-U.S. teachers as well as the ongoing New Haven-based workshops, Director of Education Thomas Thurston's hours were increased to full-time in September 2016.

The South African institute was to be co-taught by Professor Daniel Magaziner (Yale) and Professor Sekibakiba Lekgoathi (University of Witwatersrand). Due to an overextended schedule, Professor Lekgoathi is unable to contribute to the project. Professor Magaziner therefore is inviting guest speakers from a variety of regional institutions to assist in teaching the institute in Johannesburg. Because of the changes in instructors and program structure, the date of the South Africa Institute was changed from August 2017 to July 7-15, 2018. The Sierra Leone Institute is scheduled for December 26, 2018-January 2, 2019. Professor Joseph Opala (emeritus, James Madison University) and Professor Joe Alie (Fourah Bay College, University of Sierra Leone) will be the professors of record. The third phase of this institute will take place at Yale University during July 2019. The ten teachers from South Africa and ten from Sierra Leone will travel to New Haven during July 2019 to engage in workshops focused on Jim Crow and the Civil Rights Movement in the United States. The twenty U.S. teachers who took part in the South African and Sierra Leonean phases of the Institute also will be part of the July 2019 workshops.

In the 2017 Annual Report, plans were described to create video and/or audio recordings of several of the 2017-2018 Teachers' Workshops in order to increase the scope of dissemination of these programs. Due to reservations from some of the participants, these recordings were not made. Objections related to the desire of participants to maintain an informal atmosphere and allow them to speak freely about their questions and concerns. This informal atmosphere helps foster an environment where teachers can develop a sense of trust for collective trouble-shooting of typical classroom challenges. Discussions are ongoing about alternate means for creating broader dissemination networks for workshop materials.

Program Area IV. GLC Yale Public History Institute

In the 2017 Annual Report, plans were described to document and disseminate select sessions and events via video or audio recordings. These recordings were not created for two reasons: limitations of GLC staff time; and, as above, the desire of participants to maintain an intimate and trusting environment where questions and problems could be freely discussed. Plans were also described to create interactive digital platforms to track outcomes and to conduct follow-up site visits to area museums. Additional planning and staff time will be required if these plans are to be realized.

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FINANCIAL REPORT

Financial Report									
MacMillan Center: Gilder Lehrman Center									
Robina Foundation									
12/31/2017									
	YR1 budget	YR1 actuals through 12/31/16	YR1 balance carry into YR2	YR2 budget	YR2 actuals through 12/31/17	YR2 balance carry into YR3	YR3 budget	Projected expenses in YR3	Projected balance by 12/31/18
Teacher Workshops and Outreach	55,000.00	67,861.09	-12,861.09	144,419.00	105,404.66	26,153.25	152,210.25	249,568.18	-71,204.68
Yale Public History Institute	32,000.00	13,977.36	18,022.64	32,000.00	24,010.55	26,012.09	32,000.00	20,000.00	38,012.09
Modern Day Slavery Initiatives	88,000.00	84.00	87,916.00	88,000.00	107,053.22	68,862.78	88,000.00	102,215.00	54,647.78
Media Production and Online Initiatives	118,200.00	34,894.56	83,305.44	118,200.00	68,516.54	132,988.90	20,000.00	123,350.66	29,638.24
Additional Staff Resources	40,000.00	8,084.05	31,915.95	40,000.00	26,633.20	45,282.75	40,000.00	39,597.64	45,685.11
Program total	333,200.00	124,901.06	208,298.94	422,619.00	331,618.17	299,299.77	332,210.25	534,731.48	96,778.54
Indirect costs	49,980.00	18,735.25	31,244.75	63,392.85	49,742.99	44,894.61	49,831.54	80,209.72	14,516.43
Total Expenditures	383,180.00	143,636.31	239,543.69	486,011.85	381,361.16	344,194.38	382,041.79	614,941.20	111,294.97

Teacher Workshops and Outreach line item: expenditures for the Africa Institute were delayed because of changes in the program structure and timing. Significant expenditures for the South Africa and Sierra Leone workshops will be made during Years 3 (2018) and 4 (2019); expenditures for the U.S. workshop will occur in Year 4 (2019). The projected negative balance for that line item (12/31/2018) reflects the increase to fulltime hours for Director of Education Thomas Thurston. We propose to apply carried-over funds from other program areas to meet the shortfall in Thurston's salary.

Modern Day Slavery Initiatives line item: salary expenditures for the first Robina Postdoctoral Fellow in Modern Slavery (Tammy Ingram, Academic Year 2016-2017) were disbursed in June 2017. Salary expenditures for the second Modern Slavery fellow (Gunther Peck, AY 2017-2018) are expected to be disbursed in June 2018. Expenditures for the third and final Modern Slavery Fellow (AY 2018-2019) should be disbursed in June 2019.

Media Production and Online Initiatives: projected expenditures for Year 3 (2018) include an increase to full-time hours for Media Project Manager Daniel Vieira for February-December 2018.

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WORK PLAN

Program Area I: 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) Annually: one Fellow funded through Robina; one through GLC general operating budget	Fall '16-Spring '17: Recruited two full-year GLC postdoctoral teaching fellows: Wendy Hesford; and Tammy Ingram (Robina Fellow in Modern Slavery at the GLC).	Aug. 2016-May 2017 (Hesford & Ingram)	Scholarly community; NGO sector; under-graduate students	Hesford Course: Modern Slavery & Human Trafficking; 14 students. Included guest lecture by GLC fellow Elena Shih Hesford guest lecture: "Human Rights and the Politics of Recognition," New Haven Metro High School Nov. 30, 2016	Fall 2016
					Ingram Course: Neo-Slavery in the Jim Crow South: Sex, Race, and Forced Labor After the Civil War; 12 students	Spring 2017
		Recruited one-month visiting scholar: Elena Shih	October 2016		Hesford publications: Ed., <i>Precarious Rhetorics</i> ; including co-authored chapter (with Amy Shuman) on human trafficking and terrorism	Aug. 2018 (Ohio State Univ. Press)
					<i>Violent Exceptions: Children's Human Rights and Humanitarian Rhetoric</i>	2019 (Ohio State Univ. Press)
					Ingram publication: <i>The Wickedest City in America: Sex, Race, and Organized Crime in the Jim Crow South</i>	May 2018 (contract expected)
					Shih publication: <i>Manufacturing Freedom: Trafficking Rescue, Rehabilitation, and the Slave Free Good</i>	Under peer review, Univ. of California Press
		Fall '17-Spring '18 Recruited 2 full-year GLC postdoctoral fellows: Gunther Peck (Robina Fellow)	Aug. 2017-May 2018 (Peck)	Scholarly community; NGO sector; students	Peck Course: The Shadow of White Slavery: History and Anti-Human Trafficking Campaigns; 14 students enrolled (history and non-history majors; seniors to first-year)	Spring 2018

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Program Area I: Human Trafficking and Modern Day Slavery (cont.)						
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)	Postdoctoral fellow Amelia Hintzen (GLC operating funds)	Aug.-Dec. 2017 (Hintzen)	Scholarly community; NGO sector; students	Dr. Hintzen accepted a job starting Jan. 2018 and thus completed her fellowship earlier than anticipated. Hintzen publication: Completed book manuscript, <i>Sugarcane Citizenship: Migration, Race, and Nation in the Dominican Republic</i>	December 2017 Under peer review, Univ. of Cambridge Press
					Peck publications- two book manuscripts: <i>Race Traffic: Plebeian Antislavery and the Struggle Against White Supremacy, 1640-1865</i> - manuscript completed and workshopped at the Franklin Humanities Institute at Duke University; deemed prizeworthy <i>The Shadow of White Slavery: Race, Empire, and History in Contemporary Campaigns to Abolish Human Trafficking</i> : at work on third chapter, which also will be included in Modern Slavery Working Group edited volume	January 2018 (workshopped) 2019: Expected submission to Univ. of NC Press 2019 expected completion and submission to Oxford Univ. Press
Build field of scholarly research on HTMDS internationally; share scholars' knowledge with broad audience	Create partnerships with international research groups; participate in online publications	Coordination with <i>openDemocracy-Beyond Trafficking and Slavery</i> (UK-based web research & advocacy portal) https://www.opendemocracy.net/beyond-slavery	Sept. 2016	Scholarly community; NGO sector; students and activists	-Two policy debates co-sponsored: <i>Global Supply Chain Debate</i> ; <i>Hidden Costs of Awareness Campaigns</i> -GLC dissemination of Beyond Trafficking & Slavery report, <i>Confronting Root Causes: Forced Labour in Global Supply Chains</i> -Plans to share GLC-produced film on Global Supply Chains	Ongoing

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Program Area I: Human Trafficking and Modern Day Slavery (cont.)						
Goal	Strategy	Actions	Start date	Target audience	Outcome/Dissemination	Completion
Build field of scholarly research on human trafficking and modern slavery internationally; train and equip leaders working to secure human rights against harms caused by contemporary forced labor	Develop ties with individual scholars and academic research centers; create research-based guidelines, analysis and policy recommendations	GLC Modern Slavery Working Group formed to act as hub for collaboration and to steer and advance the field; comprised of thirteen scholars from four countries and from several disciplines: political science, history, rhetoric and literature, sociology, law, and business Co-chairs: - Genevieve LeBaron (Senior Lecturer, Dept. of Politics, Univ. of Sheffield, UK); - Jessica Pliley (Associate Professor, Dept. of History, Texas State Univ.)	Summer 2016 (planning); Meetings: March & Sept. 2017; April 2018; 4 th meeting will consist of GLC annual conference Fall 2018	Research groups across the globe; broad scholarly community; NGO community; engaged members of the public	Anchored by former GLC fellows Genevieve LeBaron and Jessica Pliley. Specific outcomes, determined by group, include: • New web-based resources: bibliographies, blog, syllabi • Interdisciplinary, collaborative projects among working group members • Edited volume: <i>Fighting Modern Slavery: Tales from the Field</i>. Featuring the Working Group scholars, this book will focus on research-based evaluations of what works and what does not in combatting human trafficking and forced labor. Putting storytelling of modern slavery experiences front and center, the book will explore four key arenas: portrayals of exploitation and freedom; legislation and policing; mobilizing civil and worker action; and market-based solutions. Chapter abstracts are in hand; early chapter drafts will be workshopped at April 2018 Working Group meeting. [Working Group Outcomes-continued next page]	Ongoing December 2018 Fall 2018: Preliminary letter of interest from Yale Univ. Press received Fall 2019: Planned submission of book to Yale Univ. Press

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Program Area I: Human Trafficking and Modern Day Slavery (cont.)						
Goal	Strategy	Actions	Start date	Target audience	Outcome/Dissemination	Completion
Build field of scholarly research on human trafficking and modern slavery internationally; share research-based insights on the problems of and solutions to modern slavery with the broad public	Create a forum that brings together experienced scholars and anti-slavery activists to present and discuss their work with engaged members of the public	GLC Modern Slavery Working Group: Planning of free, public conference on the topic	Sept. 2017 (planning)	Research groups across the globe; broad scholarly community; NGO community; engaged members of the public	20th Annual GLC Conference: "Fighting Modern Slavery: What Works?" An international group of scholars and practitioners will shed light on 'what works?' in combatting contemporary forced labor. Working Group scholars are planning and will form the core presenters for the conference; additional scholars and anti-slavery practitioners also will be featured. The conference will serve as a public platform for the main themes of the book, framed by the topic of racial inequalities and the afterlives of chattel slavery. Conference will be livestreamed and panel videos will be available for viewing after the event (pending presenters' permission).	Fall 2018
Bridge academic research and the general public by sharing scholars' knowledge with the broadest possible audience; dissemination of GLC scholars' work	Produce digital resources regarding Modern Slavery & Human Trafficking	<u>"Globalized Goods, Exploitation, and Workers' Rights"</u> Short film (approx. 20 minutes): definitions, history, and scope of the problem of coerced labor	Research & planning begun Oct. 2016; Filming: March '17; Post-production begun: May 2017	General public; activists; scholars in related fields; secondary school teachers & students	- GLC website; Yale YouTube. Once completed and posted, links to additional resources and suggested actions will be added - openDemocracy-Beyond Trafficking & Slavery (UK-based web portal) - Part of curriculum for a MOOC (WG member Joel Quirk, instructor): "Slavery by Another Name? Forced Labour in the Global Economy" - CityWide Youth Coalition (New Haven); and Films for Action; Teaching for Change; Teaching Tolerance (distribution networks for social justice films and curricula)	Feb. 2018: video completed; Dec. 2018: supplementary materials completed

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Program Area I: 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; dissemination of GLC scholars' work	Produce digital resources regarding Modern Slavery & Human Trafficking	<u>"History & Modern Slavery"</u> : Short filmed conversation between GLC Director David Blight and Modern Slavery Working Group co-chair Jessica Pliley	April 2018	Research groups across the globe; broad scholarly community; NGO community; engaged members of the public	Posted on GLC website as introduction to the Working Group and to the connections between the study of slavery, past and present	May 2018
FEEDBACK AND EVALUATION: - Creation of an interactive online space for maintaining contact between meetings - Maintain list of former HTMDS fellows annotated with current publications & projects to promote their work through GLC website, social media & newsletter - Post-event qualitative evaluation forms from Modern Slavery conference will be circulated - Comments from blog posts will be collected - Citations for use of posted syllabi will be requested - Evaluations from the Massive Open Online Course (MOOC), "Slavery by Another Name? Forced Labour in the Global Economy" (taught by GLC Modern Slavery Working Group member Joel Quirk) will be collected, especially pertaining to the use of GLC and Working Group materials Notes: Supplemental funding for Working Group meetings secured through the Yale University MacMillan Center's Kempf Memorial Fund Supplemental funding for Working Group book applied for through the National Endowment for the Humanities; PI: Jessica Pliley, Working Group co-chair						

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Program Area II: 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: Daniel Vieira, Media Project Manager; part-time, two-year position. Increased to full-time February-December 2018	Hired Dec. 2016	GLC audiences at large; Yale University community	• Manage production of digital resources, including GLC photographic archive, short films, podcasts, and multimedia and digital research projects • Develop contracts and manage workflows • Enhance GLC website and social media communications; increase livestreaming of events • Establish designated webserver to host Digital Humanities platforms • Solicit and incorporate feedback from variety of collaborators and stakeholders • Develop and enhance distribution networks	Dec. 2016-Dec. 2018
		GLC website, newsletter, and social media development	Sept. 2016	General public; teachers and students; researchers; partner institutions	• Improved graphics • Major overhauls of GLC website to refresh buried & dormant resources • Continually updated information • New pages devoted to digital resources • New pages devoted to Modern Day Slavery: http://glc.yale.edu/modern-slavery • Expanded audience & networking	Ongoing
	Build GLC capacity to engage Yale students in digital analysis of slavery's national reach	Fall '17-Spring '18 Recruited 1 full-year GLC Digital Humanities postdoctoral fellows (GLC general operating funds): Joseph Yannielli	Aug. 2017-May 2018	Yale students and general Yale/ New Haven community; teachers and students; general public	• Yannielli course: Runaways, Rebels, Wenches, and Rogues- digital histories of fugitive slaves and other freedom-seeking migrants; 35 students enrolled • Yannielli & students: creation of <i>Runaway New England</i>, a collaborative, public database that will allow the public to explore the category and meaning of "unfreedom" in a variety of locations and time periods • Yannielli publication: <i>The Mendi Mission: Africa and the American Abolition of Slavery</i>	Spring 2018 June 2018 (pilot project) 2020-Harvard UP

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Program Area II: New Media – Communications (cont'd)						
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	Expand awareness of historical roots of contemporary human rights problems; bridge academic and popular interest in GLC concerns; increase use of GLC resources by secondary school teachers and students	Produced short documentary film about the legacies of the 14 th Amendment; series of brief clips	July-Oct. 2016	Univ. and secondary school teachers and students; general public	Workshop for small group of regional secondary school teachers on content & pedagogy: view film and clips and discuss potential utility in classroom	Fall 2018
		Produce podcast series, <i>Slavery & Its Legacies</i> . Short audio interviews with GLC visiting fellows and affiliated scholars about their work	Sept. 2016	General public; university students & faculty	Listen: http://glc.yale.edu/slavery-and-its-legacies 23 interviews launched; 13 ready for editing; 7 additional interviews currently scheduled - Over 30,000 plays reported (on iTunes, Soundcloud, YouTube) - Local community and public radio stations will be contacted for increased distribution possibilities	Jan. 2017 (public launch date) April 2018
		Livestreaming of GLC Annual Conference ("Disunion in Civil War America: Parallels for Today?" Nov. 3-4, 2017)	Nov. 2017	General public	- Facebook Livestream: 27,928 people reached; 5,688 views - Videos of conference panels posted on GLC website for permanent access: https://glc.yale.edu/events/conferences/2017-annual-conference/schedule - C-Span taped and broadcast one day of conference; 1,700 online views (number of public broadcast viewers unknown) https://www.c-span.org/video/?436560-4/fugitive-slave-laws-civil-war (Links to videos of additional panels available at bottom right of web page)	Ongoing

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Program Area II: New Media – Communications (cont'd)						
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> —video-recorded GLC panel discussion (Nov. 3, 2016).	Nov. 3, 2016: panel discussion Spring 2017: teacher focus groups	Secondary school teachers and students; general public; voting rights activists	- Live panel discussion; digitized film of event: http://glc.yale.edu/events/lectures-and-panel-discussions/20162017/right-vote-protection-or-suppression-1965 - GLC Director of Education will attend the 48th Annual NE Regional Conference for the Social Studies (Hartford, CT) to solicit ideas for curricular development - Workshop for small group of regional secondary school teachers on content & pedagogy: view film of panel and discuss utility in classroom	Posted Nov. 2016 April 2018 Fall 2018
Share Yale resources with the broadest possible audience; engage Yale and GLC with the growing university & community networks of accountability for legacies of slavery	Expand public awareness of historical roots of contemporary human rights problems; build knowledge of ongoing efforts to resist restrictions to the rights of citizenship	Documentary film in planning: "New Majorities, Renewed Suppression: North Carolina's Movement to Expand the Franchise" (45 minutes): using the NC movement as a case study, the film employs historical context to explore contemporary efforts to expand and constrict the electoral franchise	April 2017	General public; activist communities; scholars in related fields; secondary school teachers & students	Background research begun. Building collaborative partnerships (in process) with: Public Humanities collective at Yale University; and at Duke University: the Center for Documentary Studies, the Samuel Dubois Cook Center on Social Equity, and the Hart Leadership Program at the Terry Sanford School of Public Policy. Distribution: - GLC website; Yale YouTube channel - Democracy NC; Center for the Study of the American South (UNC-Chapel Hill); partner organizations listed above - CityWide Youth Coalition (New Haven youth social justice group) - Films for Action; Teaching for Change; Teaching Tolerance (distribution networks for documentary films and social justice curricula) - Local broadcast stations	September 2018

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Program Area II: New Media – Communications (cont'd)						
Goal	Strategy	Actions	Start date	Target audience	Outcome/Dissemination	Completion date
Share Yale resources with broadest possible audience; engage Yale with networks of accountability for legacies of slavery	Identify, analyze, and circulate Yale archival holdings regarding regional histories of slavery	Digital research project: <i>Voices from the Archives</i> . Short historical narratives regarding slavery based on Yale manuscripts and archival materials	Sept. 2016	Secondary school teachers and students; instructors and graduate students at institutions of higher learning	View: https://glc.yale.edu/VoicesFromTheArchive • Creation of an inquiry-based site of exploration of the enduring legacy of slavery through primary sources, secondary resources, and pedagogical options • Workshop for small group of regional secondary school teachers on content: review of site in advance; discuss pedagogical possibilities	April 2017 (launch date) Fall 2018
		Digital Humanities symposium, “New Directions in Digital Resources on Slavery and Its Legacies”	Sept. 2017 (planning)	Yale faculty, students, and Digital Humanities (DH) experts; academic DH practitioners from the greater NYC/ New Haven/ Boston region; New Haven area publics	A full-day symposium with panels and presentations in the morning and workshops and discussion in the afternoon. Will include student presentations of the new GLC online database <i>Runaway New England</i> , led by current GLC DH Postdoctoral Fellow Joseph Yannielli. Afternoon discussion will include evaluation of GLC digital initiatives, soliciting feedback for improvement and future directions.	May 4, 2018
Social media analytics: Facebook: 1,700 committed followers Twitter: 873 followers; 666 of them new during January-December 2017. Weekly newsletter: 3,300 subscribers Podcast series: over 30,000 plays reported (on iTunes, Soundcloud, YouTube); Soundcloud: 318 Likes, 62 shares C-Span taping and broadcasting of one day of annual conference; 1,700 online views (number of public broadcast viewers unknown).						

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Program Area III: Africa Teachers' Institute and Teacher Outreach						
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; encourage international communication between students	Develop multiyear program: <i>History & Memory in South Africa, the United States, and Sierra Leone</i>	Three week-long institutes with a cohort of ten teachers from South Africa and Sierra Leone and twenty from the United States, focused on learning and teaching about apartheid, slavery, and civil war	Sept. 2016: Planning Dec. 2016: Planning trip to So. Africa & Rwanda Feb. 2018: Planning trip to Sierra Leone <u>Summer '18</u> : South Africa Inst.; <u>Winter '18-19</u> : Sierra Leone Inst.; <u>Summer '19</u> : U.S. Inst.	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
		Africa Institute working groups	Spring 2018		• Periodic meetings of the US-based Africa Inst. Teachers • Introduction to overall project and specific African topics • Occasional guest instructors • Project sharing • Problem solving • Occasional Skype meetings with South African and Sierra Leonean teachers	Spring 2019

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Program Area III: Africa Teachers' Institute and Teacher Outreach (cont'd)						
Goal	Strategy	Actions	Start date	Target audience	Outcome/Dissemination	Completion date
Enhance the intellectual lives of teachers; improve effectiveness of classroom teaching about difficult national issues	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, discussion	Sept. 2016	Secondary school teachers & students	• Eight workshops per school year • Intellectual enrichment • Enhanced teaching methodologies and resources • Engagement of teachers and students with contemporary social and political crises	May 2017
		Teacher Workshop Series: <i>Africa Past and Present</i> - Lectures and pedagogical workshops	Sept. 2017			May 2018
Foster social awareness and community participation among area high school students	Direct engagement between local students, organizations & institutions	"Exploring Justice"-- Weeklong student seminars, co-organized with area teachers: speakers, discussion, field trips, participation in local events	June 2016; June 2017; June 2018	45-50 New Haven area high school students each year	• Teachers use students' summer experience as basis for independent projects in following school year • Community service credits	Projects-ongoing
Enhance the intellectual lives of teachers; improve effectiveness of classroom teaching about difficult national issues	Coordinate professional development institute for middle and high school	Partner with the National Endowment for the Humanities and ACES (a regional educational service center) on a weeklong institute for secondary teachers: "The Long Civil Rights Movement"; funded by the NEH	May 2017 (planning)	South Central Connecticut Secondary school teachers	Pedagogical instruction and intellectual enrichment will include: • Visiting lecturers • Visits to Beinecke Library and Yale University Manuscripts and Archives • Tour of historic sites in Harlem; visit to Schomburg Library	June 17-30, 2018

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Program Area III: Africa Teachers' Institute and Teacher Outreach (cont'd)						
Goal	Strategy	Actions	Start date	Target audience	Outcome/Dissemination	Completion date
Enhance the intellectual lives of secondary school students in the New Haven area; demystify Yale and the college experience	Introduce students to Yale resources, faculty, and graduate students; expose students to humanities' resources at Yale	Work with the New Haven LEAP youth services program (Leadership, Education, and Athletics in Partnership) to develop afterschool and summer program series	Nov. 2017 (planning)	Secondary school students in the New Haven area; prospective first-generation college students	Professors and graduate students at Yale will present afterschool lectures on topics relating to the afterlives of slavery and racial/class inequalities. • Students will visit Yale Libraries and Museums • Intellectual enrichment • Academic Support	February 2018-May 2018: afterschool programs June/July 2018: All-day, 6 week LEAP program
FEEDBACK AND EVALUATION: AFRICA INSTITUTE - Employ "Formative Evaluation" methodologies to collect and respond to real-time feedback from Africa Institute participants. See for example: http://evaluationtoolbox.net.au/index.php?option=com_content&view=article&id=24&Itemid=125 - Create interactive website with Institute syllabus, photos, and daily documentation of participant interactions and reflections (e.g., photos, written reflections, short video and audio observations) - Following each institute: Ongoing evaluation forms and scheduled monthly check-ins with teacher participants; two face-to-face or Skype meetings a year - Curated web-based presentation of teacher-student projects that arise from each Institute TEACHER WORKSHOPS & SEMINARS - Qualitative evaluation forms from participating teachers following each workshop, and from students in document study and "Exploring Justice" seminars - Teacher reports on classroom use of workshop and seminar materials						

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Program Area IV: GLC Yale Public History Institute (PHI)						
Goal	Strategy	Actions	Start date	Target audience	Outcome/Dissemination	Completion date
Bridge academic research and the knowledge of public history practitioners to enhance the field; integrate experience and innovation	Develop models for public history knowledge & interpretation	GLC- Yale Public History Institute: weeklong summer seminar to explore innovative ways to interpret “difficult history” for the broader public, led by eminent public historians and scholars	Jan. 2016 (planning)	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	Ongoing
		PHI 2017: “Making Difficult Histories Public” Working Group	Nov. 2016 (planning)		- Working Group structured by three topics: The Museum as Medium; Constructing the Project Narrative; Fashioning the Visitors’ Pathway - Themes included terrorism, colonialism and conquest, historical trauma, and legacies of slavery - Participants: 15 mid-career professionals from museums and cultural institutions across the country; six Yale graduate students	June 25-30, 2017
		PHI 2018: Evaluation and Planning: “The Future of the Public Past”	Jan. 2017 (planning)		- Two-day planning session to evaluate the past 6 years of the PHI 10-12 participants, including past PHI participants & instructors and members of other institutions - Develop structure and evaluation methods for PHI 2019	May 2018
EVALUATION: The 2018 iteration of the PHI will evaluate the past 6 years of the program. Rapid changes in the museum field are evident: the stance of interpretive institutions vis-a-vis their publics, the substance of what professionals can and should communicate, and methods of interpretation are evolving. Past instructors and participants, along with public history practitioners from outside the PHI network, will brainstorm about where the field is and how we can help move the professional museum world to grapple with fundamental challenges to the national narrative. Fruits of this evaluation will inform the structure of the 2019 PHI. An invitation will be extended to Stephen Elliott, recently retired Director of the Minnesota Historical Society.						