



[Robina Foundation](#)

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Penny Hunt

ROBINA FOUNDATION
Board Meeting
Conference Call

Thursday, November 21, 2019

1:00 p.m. to 3:00 p.m. (CST)

2:00 p.m. to 4:00 p.m. (EST)

Robina Foundation Board of Directors Meeting

Thursday, November 21, 2019

Welcome and Call to Order

Kathleen called meeting to order at 1:00 p.m. All members were on call.

Minutes of August 27, 2019 Annual Board Meeting

Motion to accept minutes. Motion accepted. Unanimously approved.

Executive Director's Report

Penny highlighted several items. Transferred Aberdeen three and four to Yale. US Bank has also been advised of the transfer.

Outlined on page 2 of her report is to contact Pfingsten every few months to see where they are. If we get up to March and last asset is not sold, we would talk to Yale about a transfer. Amount is \$85,000. No attorney's fees with Aberdeen transfer. Need to have it off books by Q. three.

Appreciate your questions.

Steve asked by G.P.'s interest in transfer.

Susan: Makes sense to me.

Penny: I'll move forward with it. Andrew P. and I have an email communication.

Have a good contact with Gina in office of Special Assets. I'll raise transfer with her.

Steve: Under Aberdeen, my recollection of their policy is they don't put anything into the account of the School of Drama until they realize the value.

Penny: Right.

Steve: We have options with what they do with it.

Penny: On page 1 of my report, (Penny read part of her report at this point).

They wait for the money to come in. I haven't checked to see if they told the Yale School of Drama that this money has come in. Is that what we want or do we want them to hold it to next summer?

Board members agreed it should be held until next summer.

Penny: My instructions are that they hold it at this point.

Kathleen asked about Angela and Gina's disagreement about the procedure.

Penny will address this.

All Board members were comfortable with above decision.

Kathleen: Penny, find out what the rationale was for their decision.

Foundation Finances – Lewis

- Assets and Grants
- 2019 Third Quarter Financial Report from Mike Sullivan
- 2020 Operating Expenses (preliminary draft)

Anticipated grants

Steve: A superb summary.

Susan: May want to make a small grant to the archives place. Board agreed.

Kathleen: February and May – maybe in February we can figure out the archiving location, and the Minneapolis Club. Put on agenda ideas.

Penny: Going back to Tab 3, we do have a draft of the Operating Budget. Any questions? Total Operating expenses is \$435,000. Mike had been using assumption of \$500,000, so we may be picking up a bit more money for grants.

Susan & Steve: Very well done.

Penny: We're watching this closely.

Kathleen: \$4000 is budgeted, isn't that high?

Penny: We'll look into it.

Cost is about \$340 a month, internet, cell phones .

Legacy Report

- Dissemination Status

Update on Minneapolis Club. Possibility of program. Their committee has shifted their focus. Org. of Mpls. Club event may not be best use of our time. What is your response of doing an event at the Club?

Mary Ann: A great place because they have parking, but it is expensive and hard to have it underwritten. Another angle might be a law firm that had that kind of floor space and parking, might be less expensive. Less prestigious but less costly.

Kathleen: Whole archives and Legacy issues are tied in – what is our goal here? Heard over the years is that it's the limited life and narrow focus in terms of grantees in terms of the goal being focused. Limit number of grantees. Collectively we may come up with something different to accomplish. If what I said captures it, then the audience is national. Then I think where will be put our events, out time and energy. Ann Burns has a national presence, but she is also an officer soon to be head of lawyers who do all the estate work.

What do you all think about how we should focus this?

Susan: A national audience is good if we can reach it in an efficient way. A few organizations that put on annual meetings and draw people together – that's a possibility. But we're looking at people who are looking at philanthropy which makes our Foundation distinctive.

A lot of family foundations have a change of generations and kids come along and ask "why?"

Mary Ann. In this case having no family members was important. But it depends on the family.

Penny: We are distributing it to lots of organizations. Have not been working specifically on an organization to work with at a national meeting. Indicated on page 2 of this report talking to Ann Burns, and they don't see an opportunity at the Chicago meeting. We are still trying to set up a meeting in March or April and Grey, Plant is willing to host. I'll urge all of you to help us with this distribution. We are developing cards to go out with the report and we can personalize cards for you if you wish. If you want me to follow up with Candide for a national meeting, I will do that.

Susan: Do that.

Penny: Members of the Minneapolis Club are people interested in philanthropy.

I'm not pushing for that but just want you to understand.

Mary Ann: Events at Minneapolis Club come through a committee and they charge.

Penny: They used to do these programs, but as far as strategic planning, they are operating differently.

Steve: Seems to me that the large and small local law firms that specialize in estate planning are the most logical place to go and if we had two, three or four, the premiere people in town are refuted to be, I would go to some of those folks , tell them what we've been doing in terms of our experience and would you be interested in hearing the story? This might be a way of testing as to whether or not there is an audience.

Discussion about ACTEC. Penny said she could talk to Angela or Gina about that.

Kathleen: Thinking about people who have foundations, have asked about the bylaws when they found out about our foundation.

Mary Ann: The personal contacts really matter.

Susan: Philanthropic Roundtable. Meyerson is president. I know the president very well and can call him and ask if they would be interested in a representation at their spring meeting. I send a personal letter with the Legacy Reports.

Penny: Kathleen, do you want to contact Ann Burns about an event?

Ann Burns - what she will do are members of ACTEC.

Continue to think about the Report.

Don't think it's bad if Kathleen and Mary Ann send to same people. We have a long list of organizations we're sending to.

Sunsetting Issues

- Revised 2020 Timeline
- Archiving
- Website

Have alerted Angela to spring meeting. We can do our regular disbursements, but not extraordinary things.

Penny: My understanding from Angela is that we can pay operating expenses but not something extraordinary. I will get more detail from her so she can explain it.

Nancy has checked with University of Minnesota which is due to receive funds in August but are fine if they don't get it until September or October. That would be helpful from a cashflow stand point so we don't have to sell some bonds.

Archiving

Steve: Assume you have a lot of information on hard copy and electronic copy.

Penny: Archiving people like hard copy. We have gone through all the Board book, which contains the very important things. We are going through the files and throwing things not important. Most of what is in the Board book we have electronically.

Nancy: We'll be doing a jump drive and maybe we could give archivers a jump drive.

Kathleen: It should be lean. What do we want to leave behind on Robina. Board books have the official key information. They can go to the grantees if they want more information.

Penny: Lawyers have their information and grantees have their information. But the Board books show, for example, when experts have come in.

Nancy: When we talked with the historical society, they will come here and take the files and organize it the way they want done. All tax information will be on the jump drive, which is for the Board members.

Steve: What about proposals we received that we didn't fund?

Penny: They're in the Board books.

Susan: I wouldn't worry about that.

Mary Ann: Important to have a set of something – but if we go to our notes, etc. probably the only person who would want to go through it would be someone challenging it.

I'd be careful of having anything other than the incorporation documents, the gifts.

Susan: I wouldn't put notes of any kind

Penny: We taken out notes.

Board minutes are pretty antiseptic. Most of the notes were Penny's .

Penny: MN Historical Society proposed they do it in batches. We'd like to keep the Board books here until the last because we do go back to them to look up dates and things.

Kathleen: We're down to four and a half drawers, right? (from ten)

Nancy: Yes

Angela looked at a batch of documents at our request. She told us what to save and what to throw.

Website:

Legacy Report and by-Laws are on site. One disappointing thing is that someone researching limited life foundations has not been using the site. I want to figure out how to improve that.

Operations

- Lease

Nancy reported. Approached Jim Peter since my payment comes through Baker Management. He has a right to have someone sitting out front. And he has made an offer for us to do that. It's a great deal. He's been the office manager for a long time and he was here when I started. A wonderful person and everyone highly respects him. It's a fabulous offer because it would be awful to have to move. This offer would be very convenient. A win win situation.

Penny: I won't have the small office but I will come in and perch somewhere.

We have to give notice of termination by the end of February 2020 with a two-month notice payment.

Board agreed to above.

Grantee Reports

- University of Minnesota Law School
 - *James H. Binger Center for New Americans*: Program and Endowment Reports
 - *James H. Binger Professorship in Clinical Law*: Program and Endowment Reports

Penny impressed by Center for New Americans report.

Kathleen: The one thing I couldn't find, in reading their goals, I don't see they're going out to the neighborhood meetings. I think they did that early on but I don't see it now. Doing a lot of training of lawyers and good outreach.

Penny: I think they're doing it with their rural access clinics. I'll look into it.

Kathleen: I'm talking about local in the Twin Cities. Observation: Two to one student and directors.

Steve: Little surprised that our star was not named the first Binger professor. The University (on top of page 8) contributed match but doesn't show up in the Endowment Report.

We gave them a million and they did a \$500,000 match. Page 8, part 3 read.

Steve: On Endowment Report at end it doesn't show. Administrative Fee doesn't get charged.

My question is that if they claim "X" percent endowment return per year – and 1.26 % off of that because you don't get it - management or administrative cost.

Penny: I will follow up on that and the \$500,00 not showing up in the Endowment Report.

Did we do 24.5 for the scholarships? Yes.

Penny: The Endowment 23.5 for Center and a million for the professor and we added on an additional \$500,000 for the scholarships. I will check on this and the administrative fees.

They describe administrative fees in their report. We don't see those fees coming out of Yale.

- Yale University Law School
 - *Robina Human Rights Initiative and Binger Clinical Faculty Chair in Human Rights*: Program and Endowment Reports
 - *Binger Center for New Theatre*: Program and Endowment Reports

They were supposed to put up a match. It came in from one donor and they added some of their own money. Penny will check again – think it was a year ago.

Report on theatre info was good. Feel comfortable that they have a list (see fold out).

No additional questions.

- Schedule of Future Reports

Endowment reports? Yes. Nine reports coming in.

Agreement Angela and Penny are working on for the Minneapolis Foundation to manage our funds going forward.

Issues we need to address: Compensation we want to provide for the people who look at the nine reports in the next two-three years. Do we want it to hourly, quarterly or yearly? Minneapolis Foundation talks about an hourly compensation. What do we think will be the best?

Board: A retainer

Steve: Question about the years.

Penny: 2021-2023.

A retainer, fixed amount and have them "at the ready" and some fees that will be based on an estimation of number of hours?

Kathleen: If we did a retainer, we would make an estimation and put that in retainer and figure out an hourly fee. One number for the year.

Penny: Will talk to Gina about how that would be reflected in the agreement we are working on. Mpls. Foundation said early reports would be sent to them, then designated to certain people and distributed.

Board: Find out what their minimal requirements are.

Steve: Sending reports directly to trustees and have us do some kind of sign off.

Penny: Timing of reports that will come in are scheduled with Board meeting dates. Maybe Angela and I can develop some kind of form that will say Minneapolis Foundation has done their work, etc.

Kathleen: Find out what their minimum requirements are.

Penny: Presumably some money will be left over after expenses, Angela and I can determine what will happen to that left over – that our grantees get a percentage. Think about that and we can deal with it later.

2020 Board Meeting Dates

Schedule in Board Book.

The November meeting for 2020 is the week of Thanksgiving. Meeting for 24 and Thanksgiving is 26.

Steve: Could do something the week before. This is far in advance.

Kathleen: In a Board meeting the 17th in 2020. Thursday the 19th is OK on my calendar.

Steve: Has a mtg scheduled in the morning that day.

Susan: No problem for me.

Mary Ann: Don't know.

Changed to November 19: 1:00 – 3:00 pm

Adjournment

Meeting adjourned at 2:35 pm

12/21/19 Bd Mtg - Mary Ann, NG, PAH

Susan B, Marianne S., Kathleen B, Steve L, MS.

→ Rationale re: Ag-Up

Tab 3 MS's repr -

Call in Feb + May -

meet

1 Feb

Arch. -

Nyph. Fdn

Ideas to spend \$ left.

KB - \$4K

Dissemin. * * NATL. Audience

* Law Firms - large + small

→ Dorsey -

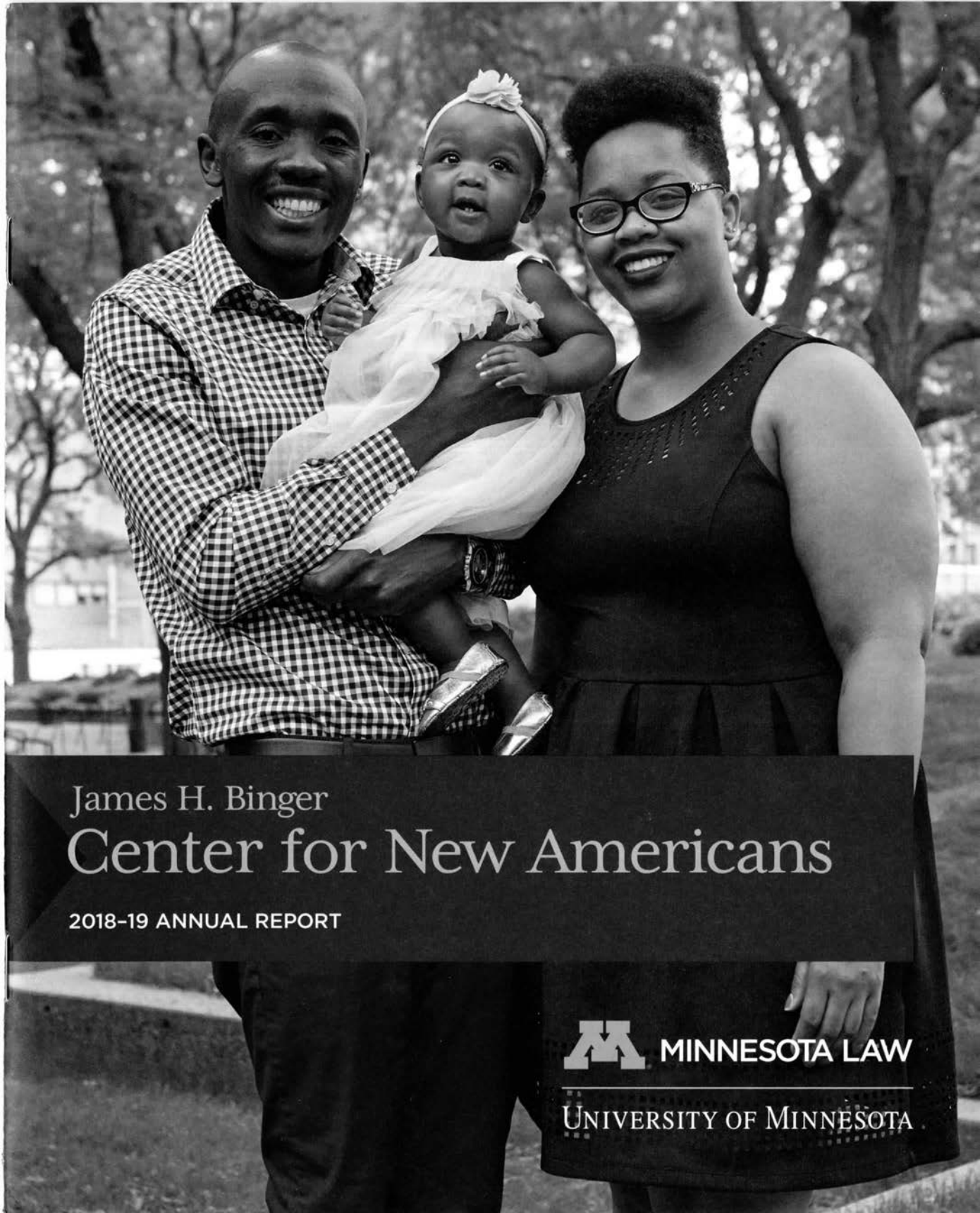
→ Fredrickson - Story?

→ Stinson

→ Faegre

* Philanthropic Roundtable

Adam Meyerson (and)



James H. Binger

Center for New Americans

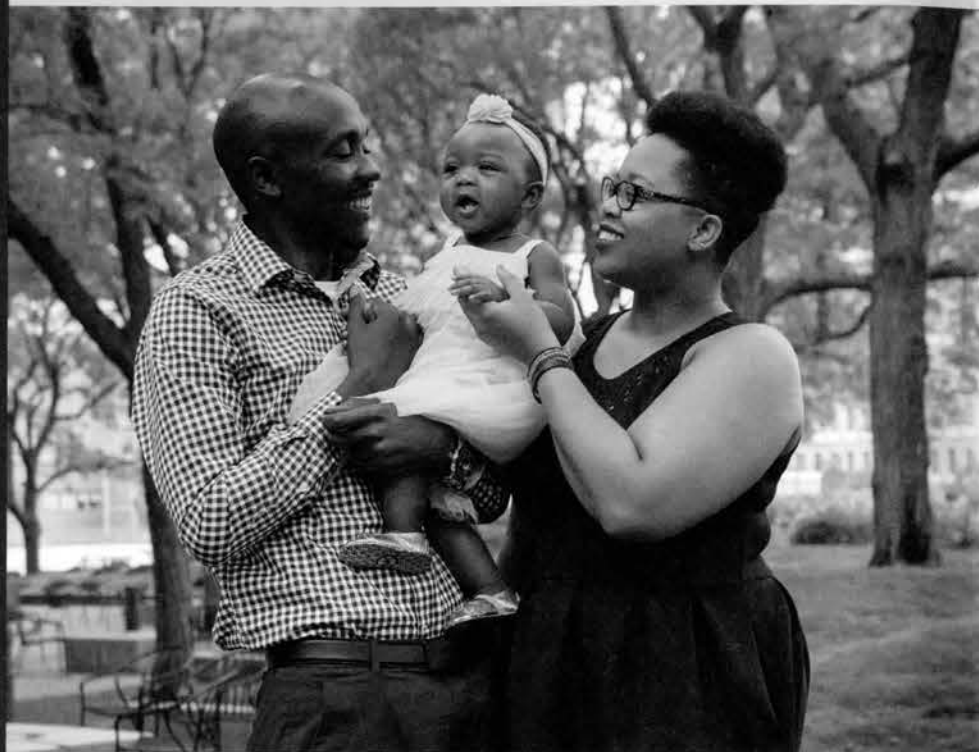
2018-19 ANNUAL REPORT



MINNESOTA LAW

UNIVERSITY OF MINNESOTA

Pictured on the cover:
Wycliffe Alukwe and
Larona Williams with
their daughter Kaylee.



*"Thanks to the Binger Center for New Americans,
I have a new life. I can now hold my lovely daughter.
This wouldn't be possible without the hard work of
the Binger Center student attorneys and lawyers."*

— Wycliffe Alukwe, client, Detainee Rights Clinic

Wycliffe Alukwe lawfully entered the U.S. as a permanent resident, but the U.S. Immigration and Customs Enforcement Agency (ICE) alleged he was deportable and put him in jail to undergo removal proceedings. Student attorneys **Sara Halimah, 2L**, and **Allison Mrakovich, 3L**, along with Binger Center faculty, were able to convince the immigration judge that ICE had wrongly charged Wycliffe. After months of detention, he was released and returned to his life as a lawful permanent resident of the United States.

James H. Binger Center for New Americans

The University of Minnesota Law School established the James H. Binger Center for New Americans—the first of its kind in the nation—in 2013 with a generous gift from the Robina Foundation. The Binger Center, which includes four clinics and an outreach and education program, was designed in formal partnership with the pro bono programs of several of Minnesota's preeminent law firms—Faegre Baker Daniels, Robins Kaplan, and Dorsey & Whitney—and Minnesota's leading immigration nonprofits—the Immigrant Law Center of Minnesota, The Advocates for Human Rights, and Mid-Minnesota Legal Aid. This collaborative clinical model is unique in the country and has allowed the Binger Center to obtain major victories in federal courts and life-changing successes at both local and national levels.



A St. Paul native, **James H. Binger '41** earned an economics degree from Yale University and his LL.B. from the University of Minnesota Law School. He subsequently joined the law firm that would become Dorsey & Whitney, and in 1943 moved to Honeywell, becoming president in 1961 and chairman in 1965.

BINGER CENTER AND PARTNERS



\$25M

In February 2017,
the Law School
announced a
\$25 million gift from
the Robina Foundation
to permanently endow
the Binger Center.

Since the Binger Center's inception in 2013, our law firm partners have contributed more than

8,200

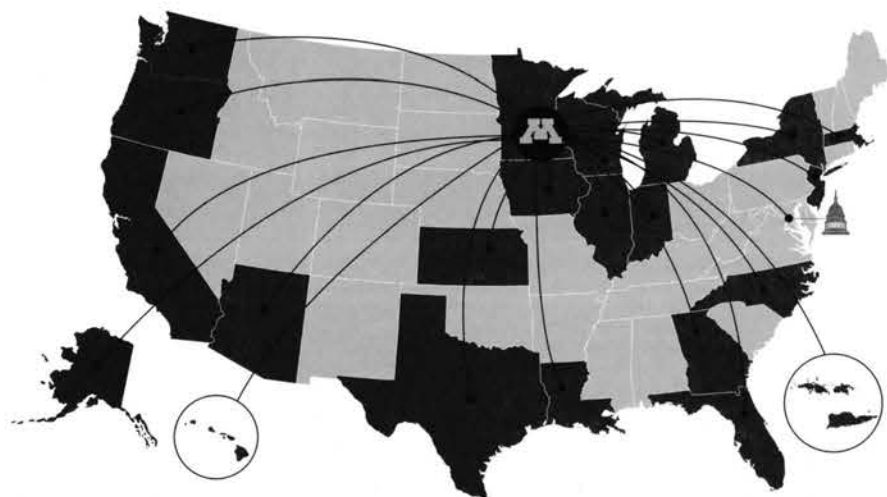
PRO BONO HOURS, an investment that exceeds

\$3.2 million.

A National Impact in an Unprecedented Time

The situation for immigrants in the United States has reached crisis level. Families are being separated, children are being detained without parents or guardians in appalling conditions, and the immigration status of thousands of individuals remains uncertain. Immigrant communities have been targeted by an aggressive immigration system that has ramped up enforcement, reduced protections for refugees and asylum seekers, and jailed thousands of children and families along the U.S. border and across the country. Binger Center faculty, staff, students, and alumni have been on the front lines of protecting the rights of immigrants in a challenging political climate through our innovative model that brings together law students, law firms, nonprofit agencies, and community members.

BINGER CENTER GRADS MAKE AN IMPACT IN IMMIGRATION LOCALLY AND NATIONALLY



Binger Center graduates currently hold positions in law firms focused on immigration, federal and state government agencies, judicial clerkships, and immigration advocacy organizations.



Fighting for Justice on the Southern Border

GUATEMALA

The **Federal Immigration Litigation Clinic** sent student attorney **Paul Dimick, 3L**, to Guatemala to assist *Al Otro Lado*, a nonprofit legal services group, with an imminent deadline in a high-profile class action case. Paul spent 10 days in Guatemala getting declarations from parents who had been removed from the U.S. and whose children remained in U.S. detention centers.

Binger Center alum **Rebecca Cassler '16** is a Law Fellow at the **Southern Poverty Law Center's Immigrant Justice Project (IJP)**. The IJP does impact litigation to strengthen the civil and human rights of noncitizens in the immigration enforcement system and in daily life—at work, at school, and in public places. Cassler's job has included work on *Al Otro Lado v. Nielsen*, a lawsuit challenging the widespread denials of access to the asylum process for people who come to ports of entry on the U.S.-Mexico border.

U.S.-MEXICO BORDER

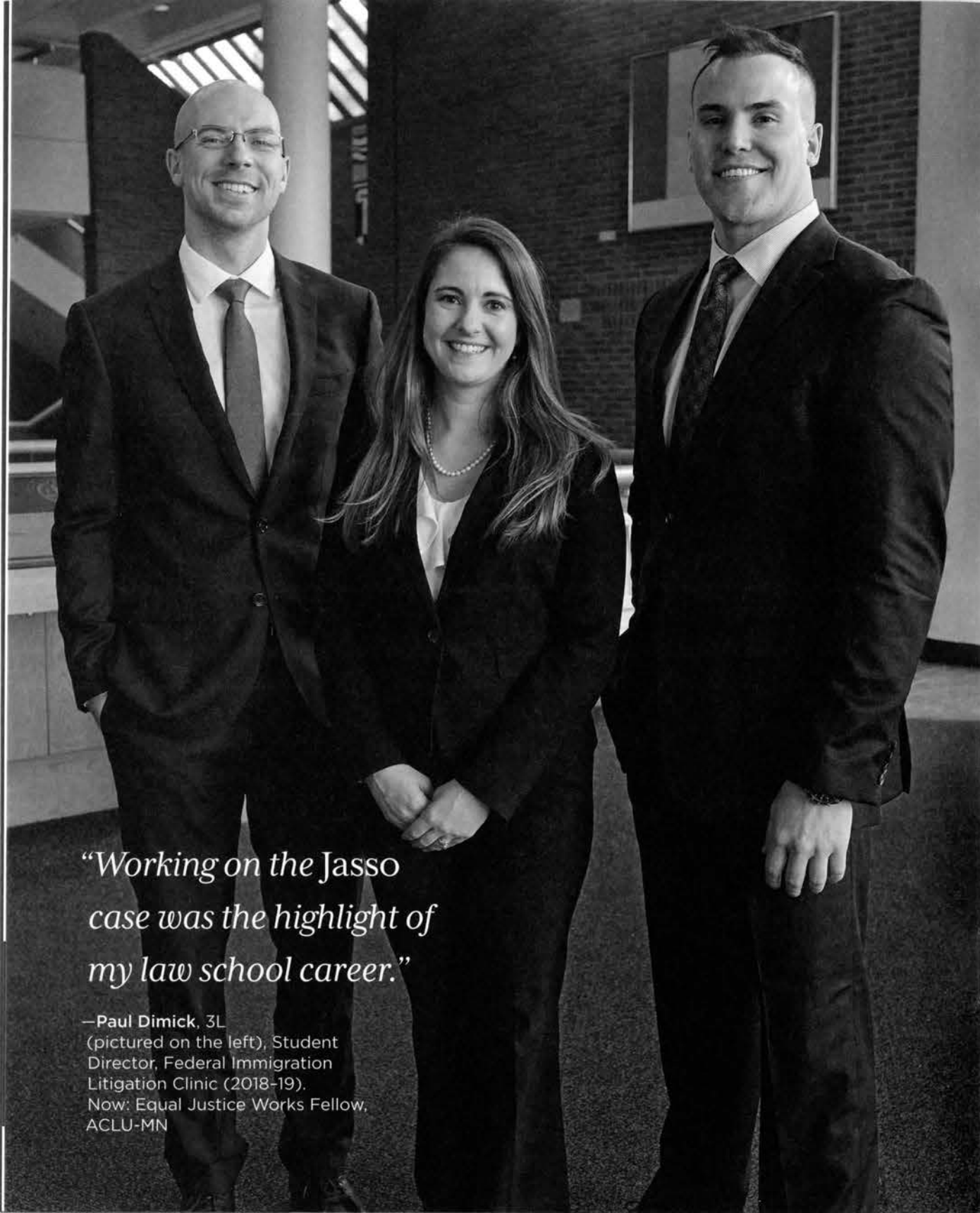
Protecting Detained Immigrants

ALEXANDRIA, LOUISIANA

Binger Center Professor **Kathy Moccio**, Outreach and Education Coordinator **Kjerstin Yager**, and several law students traveled to Alexandria, Louisiana, to work with immigration detainees in rural communities. Students from the Binger Center's **Detainee Rights Clinic** and the **Asylum Law Project** worked with 23 detainees, screening them for bond eligibility and working on bond motions so that detainees could be released from ICE custody. Once released, individuals can continue to work on their case to remain in the U.S. and have a much higher likelihood of success.

Binger Center alum **Kerry McGuire '16** led a team of three **Asylum Law Project** first-year law students to Tacoma, Washington, where they assisted five detained clients with three declarations, country conditions research, and a pro se Board of Immigration appeal.

TACOMA, WASHINGTON



“Working on the Jasso case was the highlight of my law school career.”

—Paul Dimick, 3L
(pictured on the left), Student
Director, Federal Immigration
Litigation Clinic (2018-19).
Now: Equal Justice Works Fellow,
ACLU-MN

Federal Circuit Court Victory Upholds Rule of Law

Federal Immigration Litigation Clinic students Kayla Hoel, 3L, Paul Dimick, 3L, and Zachary Hofeld, 3L, effectively pushed back against potential executive overreach, arguing and winning an important case at the U.S. Court of Appeals for the 6th Circuit. In *Jasso Arangure v. Whitaker*, the court found that immigration officials cannot bring repeat deportation charges on the same facts after losing in immigration court. The team's work reinforces the rule of law and ensures the constitutional principle of res judicata for immigrants facing an aggressive enforcement regime. Their victory is one example of several important cases being litigated by the Federal Immigration Litigation Clinic.

Impact Litigation by the Numbers

3

class action lawsuits
have been filed by the
Federal Immigration
Litigation Clinic
since 2013.

20+

lawsuits filed in
U.S. District Courts.

50+

appeals filed in U.S. Circuit Courts.

5

certiorari petitions filed in the United States Supreme Court
since the Binger Center's inception.

◀ Paul Dimick, 3L, Kayla Hoel, 3L, and Zachary Hofeld, 3L, successfully prepped and argued an immigration case before the 6th Circuit.

Federal Immigration Litigation Clinic

The federal courts have become one of the most important venues for pushing back against egregious immigration policies. Led by Faculty Director Professor Benjamin Casper Sanchez '97 and Visiting Assistant Clinical Professor Kathy Moccio, the clinic has trained 29 law students to navigate complex litigation at all levels of appeals and along with its partners handled 38 separate matters in federal courts this year, including 12 cases at the Court of Appeals and 2 petitions for certiorari to the U.S. Supreme Court. The Center selects cases that have the potential to significantly impact the immigration system nationwide and help thousands of immigrants and their families.

“This experience changed my life. Now I can sleep calmly because I know my life is no longer in danger.”

— Aracely Valle Solis, client of the Immigration and Human Rights Clinic and The Advocates for Human Rights



A Narrowing Path to Safety

The Trump administration has mounted an extraordinary assault on the right to seek asylum both by restricting access to migrants fleeing persecution at the border and also by narrowing the definition of asylum within the law, particularly for gender- and family-based claims from Central America. The administration has also severely restricted refugee admissions to the United States from 85,000 in 2016 to 30,000 in 2019, the lowest in the resettlement program's history.

Immigration and Human Rights Clinic students Emily Ortlieb, 3L, Natacha Garcia, 3L, Brittany Turany, 2L, and Anna Somberg, 2L, under the supervision of Clinic Director Professor Stephen Meili, successfully argued a challenging asylum claim before the immigration court on behalf of Aracely Valle Solis, a Honduran woman, who is also a client of The Advocates for Human Rights. While working as a transit police officer in Honduras, Valle Solis refused to accept bribes from gangs. Because she refused to comply, she was threatened by gang members and eventually she and her family were attacked by gunmen at their home. This was an important victory because asylum claims are facing multiple obstacles that put even the most severe claims in jeopardy.

Immigration and Human Rights Clinic students also led 3 public policy projects on behalf of national and international NGOs, directed at federal and international law:

- A set of model comments in response to the Department of Justice's proposed public charge rule allowing for the removal of any noncitizen based on the public charge ground of inadmissibility.
- An analysis of the Refugee Protection Act, a proposed congressional reform, that may be re-introduced in the U.S. House of Representatives.
- An amicus brief with the Human Rights Ombudsman in Mexico in a case claiming that the long-term detention of asylum-seekers is inconsistent with Mexico's human rights obligations under both domestic and international law.

Immigration and Human Rights Clinic

The Immigration and Human Rights Clinic represents persons seeking asylum in the United States, human trafficking victims, and immigrant detainees. Under the supervision of Clinic Director Professor Stephen Meili, this clinic provides students with extensive client contact, legal writing, and courtroom advocacy experience.



Students, faculty, staff, and volunteers with the Rural Immigrant Access Initiative in October 2017. L to R: Ian Taylor, 3L, Kjerstin Yager, Mary Georgevich, '18, Deepinder Mayell, John Bruning '17, Danielle Robinson Briand, Colleen Beebe, Jess Riemer, Mai Neng Moua, Julio Zelaya, and Henry Pan.

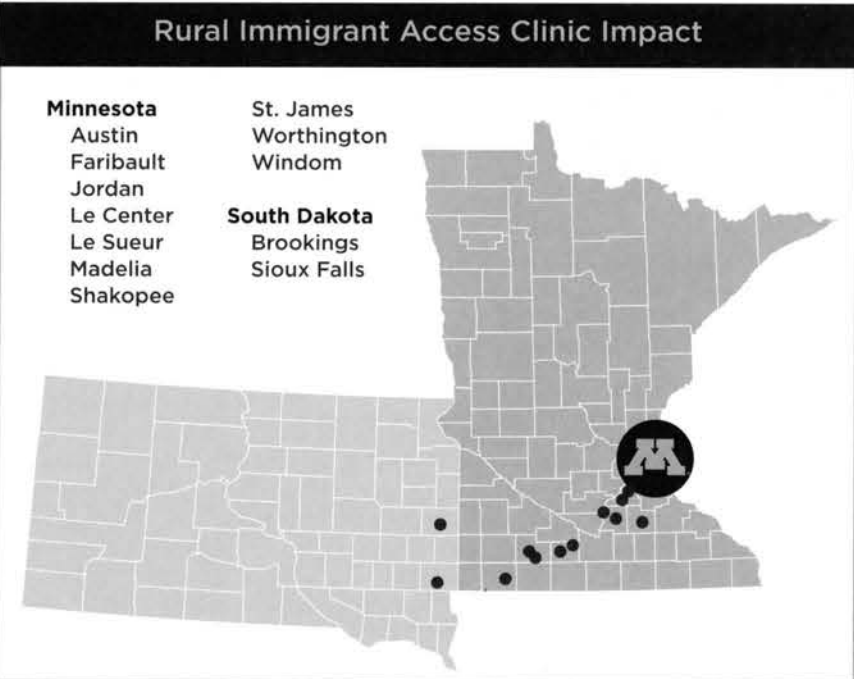


Providing Support to Rural Immigrants

The Binger Center launched the Rural Immigrant Access Clinic

after a successful two-year initiative in which Law School faculty and students, along with volunteer attorneys, have provided legal assistance to immigrants in pop-up legal clinics in greater Minnesota and South Dakota. Deepinder Mayell, executive director of the Binger Center, said that at the start of the rural immigrant access initiative in January 2017, it quickly became apparent that there was a tremendous need and serious community concerns. "We immediately began seeing very large turnouts," he observed. Mayell also noted that immigrants are a fast-growing segment of the population in a number of rural regions.

The pop-up clinics are run in partnership with other legal assistance providers, including the ACLU-MN, Volunteer Lawyers Network, the Immigrant Law Center of Minnesota, and The Advocates for Human Rights.



Rural Immigrant Access Clinic

Added as Minnesota Law's 25th clinic, the Rural Immigrant Access Clinic offers students the opportunity to participate in pop-up legal clinics in rural communities that have limited access to immigration attorneys and that have experienced dramatic increases in immigration apprehension and detention. Led by Binger Center Executive Director Professor Deepinder Mayell, and Outreach and Education Coordinator Kjerstin Yager, these full-day legal clinics are held in community centers, churches, schools, and libraries across rural Minnesota. Students conduct comprehensive legal intakes with noncitizens and their families and with a rapidly growing detained immigrant population held in rural county jails to identify potential avenues for immigration relief.

“I had the incredible experience of following clients from their very first immigration hearings to briefing an argument at the 8th Circuit Court of Appeals.”

—Alicia Granse, 3L,
Student Director,
Detainee Rights Clinic
(2018–19).
Now: Assistant Public
Defender, Hennepin County



Record Numbers of Immigrants Are Being Detained

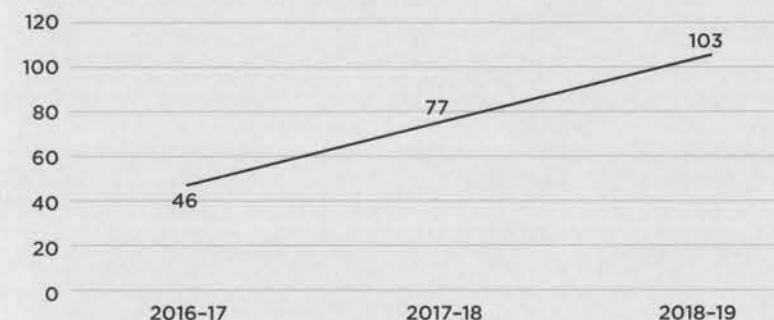
A rapid escalation of interior enforcement has led to record numbers of immigrants detained and facing deportation.

The Detainee Rights Clinic has provided merits and bond representation to immigrant detainees held in county jails in Minnesota. Release on bond allows an immigrant to fight their deportation while they are not in custody which dramatically increases their chance of obtaining counsel and succeeding in their case. Along with its partners, the clinic provided representation in 45 bond cases and reached more than 385 detainees through the **Legal Orientation Program**, which offers general presentations to groups of detainees and one-on-one consultations.

Clinic Director Professor Linus Chan testified before the Minnesota State Legislature regarding a criminal post-conviction relief bill that would allow immigrants who were unfairly convicted in a criminal court and are facing deportation to reopen their cases. He also spoke at the Minnesota State Judicial Conference to nearly 40 judges about advanced criminal and immigration matters.

Representing the Most Vulnerable

Immigrant Detainees Represented by the Binger Center and Partners for Full Representation in Bloomington Immigration Court



Detainee Rights Clinic

.....
In 2013, given the desperate needs of detained immigrants in the region, the Center, along with its partners, set a goal to provide full merits representation to 60 detained immigrants. This year the Center and its partners have handled 103 merits cases, increasing from 77 cases last year and 46 cases in 2017, an overall increase of over 100%. With the support and leadership of Clinic Director Professor **Linus Chan** and Visiting Assistant Clinical Professor **Kathy Moccio**, the Detainee Rights Clinic addresses one of the most significant unmet needs in our community.

“Protecting immigrants from deportation made a real difference in their lives.”

—Kimberly Medina, 2L
Student Director, Detainee Rights Clinic (2019–20)



Participants in a training of the Court Observation Program.

Education and Outreach

The Binger Center houses a robust education and outreach program, led by Executive Director Deepinder Mayell and Outreach and Education Coordinator Kjerstin Yager, that brings vital support to noncitizen communities, trains the legal sector, and engages community members to bring transparency to the legal system through volunteerism.

The Human Rights Defender Project’s Court Observation Program, in partnership with The Advocates for Human Rights and Robins Kaplan, gives community members the opportunity to see what detained immigration court is like and provide court monitoring at an increasing troubling time. **The Center received an interdisciplinary research grant** with the University’s Department of Sociology to analyze these court observers’ perceptions on whether immigration proceedings are just and fair.

Human Rights Defender Project by the Numbers

168
Court Observers

3,125
Court Observations

1,345

individuals participated in Binger Center programming in 2018–19, including events, presentations, and legal workshops that offered free legal screenings.

Translation and Interpretation Project

169

volunteers who are fluent in

29

languages participated in the Translation and Interpretation Project last year.

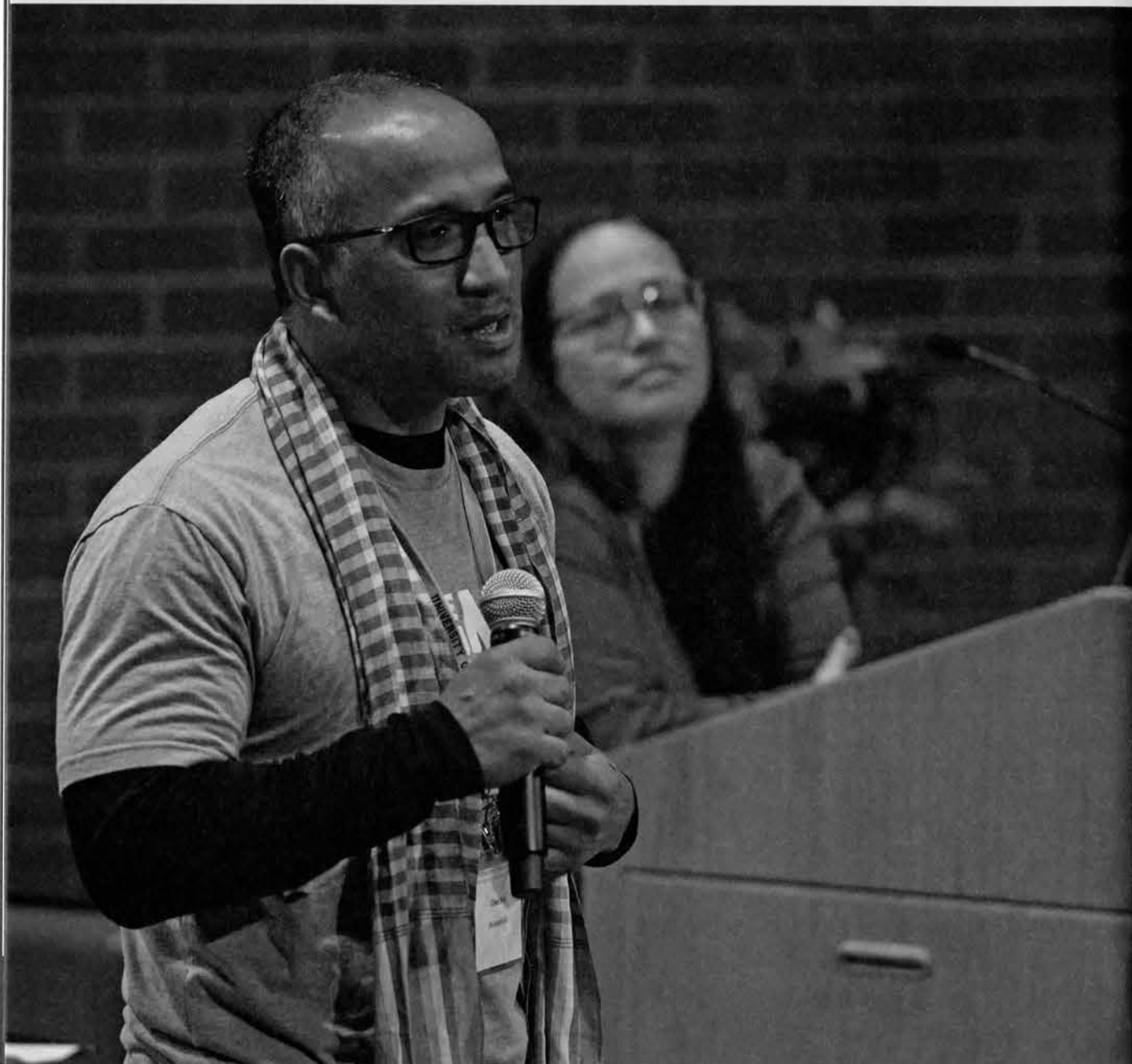
In 2018–19

14

students returned as student directors, and

43

students participated in Binger Center clinics.



Ched Nin, a client of the Detainee Rights Clinic, and his wife, Jenny Srey, at the 2018 Immigration Law Forum: Civil Rights Behind Bars.



Lee Gelernt, deputy director of the ACLU's Immigrants' Rights Project and lead counsel on the ACLU's family separation lawsuit.

Engaging Our Community and Building Capacity

2018 Immigration Law Forum: Civil Rights Behind Bars

Immigration Law Forum: Civil Rights Behind Bars focused on the troubling trends in immigration enforcement and detention, the use of federal court litigation to protect immigrants, and lessons from the civil rights era.

Advanced Immigration Law Series

Held across partner firm offices in Minneapolis, this series focused on practical information for handling immigration cases and provided resources regarding complicated and quickly changing immigration law. Topics included litigation strategies for removal cases and changes to the public charge definition.

Public Charge Forum

In partnership with the University of Minnesota Immigration Response Team, the Binger Center hosted a forum that explained the Trump Administration's proposed public charge rule and how to participate in the rulemaking process.

Human Rights Bond Training

The Advocates for Human Rights, Robins Kaplan, and the Binger Center held pro bono bond training that provided attendees with an introduction on immigration bond proceedings and how to handle a case.

Conferences and Events

The James H. Binger Center hosts nationally recognized events that convene influencers and litigators, including the Annual Immigration Forum, which brought together federal litigators, activists, academics, and policymakers around issues of immigration, enforcement, and reform.

1,000+

people attended conferences featuring Binger Center faculty and staff in 2018-19.

“Where I come from,
there was no school,
no jobs, no good water
to drink. Now I can
work hard, go to college,
and build a career.
I want to be a great
example for other
refugees. I want to make
our future better.”

—Junior Smith, client of the Detainee
Rights Clinic

Faculty and Staff



Benjamin Casper Sanchez '97
Faculty Director
Associate Clinical Professor
Federal Immigration Litigation Clinic



Deepinder Mayell
Executive Director
Director, Education and Outreach
Lecturer in Law
Rural Immigrant Access Clinic



Linus Chan
Associate Clinical Professor
Detainee Rights Clinic



Stephen Meili
Associate Professor
James H. Binger Center Professor
in Clinical Law
Immigration and Human Rights Clinic



Kathy Moccio
Visiting Assistant Clinical Professor
Federal Immigration Litigation Clinic



Nadia Anguiano-Wehde '17
Visiting Assistant Clinical Professor
Immigration Advocacy Fellow



Kjerstin Yager
Education and Outreach Program
Coordinator



Elizabeth Coffield
Administrative Coordinator

BINGER CENTER AWARDS & RECOGNITION

The James H. Binger Center for New Americans received The Advocates for Human Rights' **2019 Human Rights Volunteer Award** and the American Immigration Lawyer Association's **2019 Arthur C. Helton Memorial Human Rights Award** because of the work done by the "Somali 92" volunteer team last year.

Associate Professor **Stephen Meili** has been named the inaugural **James H. Binger Professor in Clinical Law**.

SELECTED PUBLICATIONS

Linus Chan & Kathryn Burkart, "Unjust Deserts: How the Modern Deportation System Lacks Moral Credibility", *Ohio State Journal of Criminal Law* (forthcoming 2019).

Stephen Meili, "The Effectiveness of an Emerging Pathway of Rights: The Constitutionalization of Human Rights Law," in **CONTESTING HUMAN RIGHTS: NORMS, INSTITUTIONS AND PRACTICE**, Edward Elgar publishing (2019).

Stephen Meili, "Constitutionalized Human Rights Law in Mexico: Hope for Central American Refugees?", *Harvard Human Rights Journal* (forthcoming 2019).

EAST METRO

Ramsey County chosen to study how to reduce probation violations

It's among 10 jurisdictions across U.S. investigating how to tackle the problem.

By Shannon Prather (<http://www.startribune.com/shannon-prather/188067161/>) Star Tribune

SEPTEMBER 25, 2019 — 8:35PM

More than one-fifth of the 20,400 people sentenced to felony probation in Ramsey County from 2002 to 2016 had their probation revoked. That means time behind bars — away from families, jobs and community supports — and additional costs to taxpayers.

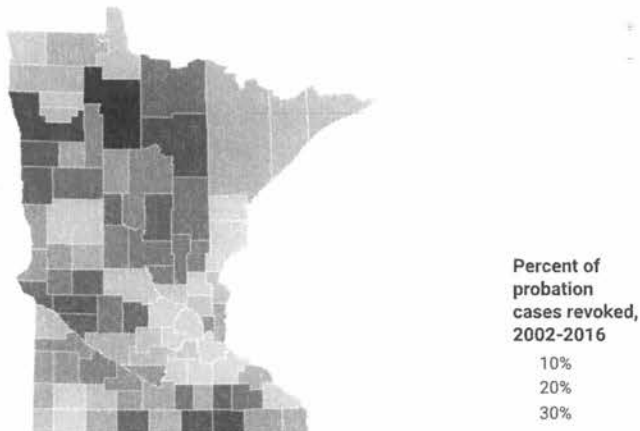
Now, Ramsey County is one of 10 jurisdictions across the United States that will study how to reduce the number of offenders who end up going to jail or prison for violating probation.

The county's Community Corrections department, along with the Robina Institute of Criminal Law and Criminal Justice at the University of Minnesota, will participate in the "Reducing Revocations Challenge." It's aimed at raising the success rate of people serving probation through new strategies and a better understanding of why revocations occur.

The challenge is organized by Houston-based Arnold Ventures and the City University of New York (CUNY) Institute for State and Local Governance in New York City. Probation violations send almost 350,000 people to jails and prisons nationally each year, according to the CUNY institute.

Ramsey County has the highest percent of probation cases revoked in metro area

Of all felony offenders in Minnesota initially sentenced to probationary sentences from 2002 to 2016, 16.5 percent had their stayed sentences revoked due to probation violations. Ramsey County had the highest rate of the metro counties.



Map: Raymond Grumney, Star Tribune • Source: Minnesota Sentencing Guidelines Commission • Get the data
• Created with Datawrapper

"Probation violations have resulted in significant increases to prison populations to no good effect, and it's time to refocus resources on policies and practices that will help people succeed and increase public safety," said Michael Jacobson, executive director of the CUNY institute and former commissioner of New York City's Department of Probation, in a statement.

Besides Ramsey County, other jurisdictions taking part in the study include Cook County, Ill., which has Chicago as its county seat; Denver; and Harris County, Texas, where Houston is the county seat.

The Robina Institute will receive a \$197,000 grant to conduct research and data analysis on what is causing probation failures. The findings will be used to craft solutions for both policies and practices. Some strategies may receive additional funding.



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Calendar for Year 2020 (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 2:☉ 10:☉ 17:☉ 24:☉	February Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 1:☉ 9:☉ 15:☉ 23:☉	March Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 2:☉ 9:☉ 16:☉ 24:☉
April 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 1:☉ 7:☉ 14:☉ 22:☉ 30:☉	May 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 7:☉ 14:☉ 22:☉ 29:☉	June 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 5:☉ 13:☉ 21:☉ 28:☉
July Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 5:☉ 12:☉ 20:☉ 27:☉	August Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 3:☉ 11:☉ 18:☉ 25:☉	September 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 2:☉ 10:☉ 17:☉ 23:☉
October Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 1:☉ 9:☉ 16:☉ 23:☉ 31:☉	November Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 8:☉ 15:☉ 21:☉ 30:☉	December Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 7:☉ 14:☉ 21:☉ 29:☉

Holidays:

Jan 1	New Year's Day	Jul 3	'Independence Day' observed	Nov 11	Veterans Day
Jan 20	Martin Luther King Jr. Day	Jul 4	Independence Day	Nov 26	Thanksgiving Day
Feb 17	Presidents' Day (Most regions)	Sep 7	Labor Day	Dec 25	Christmas Day
May 25	Memorial Day	Oct 12	Columbus Day (Most regions)		

Robina Foundation 2020 Board Meeting Dates

DATE (2020)	PLACE/TIME
February 20, 2020 (Thursday) Conference Call	11:00 a.m. to 1:00 p.m. (CST) 12:00 Noon to 2:00 p.m. (EST)
May 21, 2020 (Thursday) Conference Call	11:00 a.m. to 1:00 p.m. (CST) 12:00 Noon to 2:00 p.m. (EST)
August 24-26, 2020 (Mon, Tues, Wed) Annual Meeting Minneapolis, Minnesota	Minneapolis, MN Monday, August 24 – 6:00 p.m. Dinner Tuesday, August 25 – 8:00 a.m. to 5:00 p.m. Tuesday, August 25 – 6:00 p.m. Dinner Wednesday, August 26 – 8:00 a.m. to 12 noon
November 24, 2020 (Tuesday) Conference Call	10:00 a.m. to 12:00 noon (CST) 11:00 a.m. to 1:00 p.m. (EST)

ROBINA FOUNDATION

TO: Robina Foundation Board of Directors
FROM: Penny Hunt
RE: November 2019 Board Meeting

Preparing for this meeting has been interesting since our focus continues to evolve as we move toward Robina's dissolution in December 2020.

As we will discuss, Nancy and I have made progress in several areas. To provide background for our discussions, Tabs 4, 5 and 6 include memos summarizing work to-date and in some cases, options going forward.

In preparation for Robina's sunset, Robina's website has been modified, and the Legacy Report is now available on the site. You will find copies of the Foundation's web pages under Tab 5. Although the copies of the pages are a bit different from the actual pages, they will help you see the "look" of the website and the content of the pages. You may want to visit the website to view the site online.

As always, please feel free to get in touch with me if you have questions or concerns about the Board material or other items. I look forward to our telephone meeting!

Robina Foundation Board of Directors Meeting

Conference Call

Thursday, November 21, 2019

1:00 p.m. to 3:00 p.m. (CST)

2:00 p.m. to 4:00 p.m. (EST)

Participant Dial-In Instructions:

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

Time	Agenda Item	Tab #
1:00 p.m.	Welcome and Call to Order – Blatz	
1:05 p.m.	Minutes of August 27, 2019 Annual Board Meeting – Short – Action	1
1:15 p.m.	Executive Director's Report – Hunt	2
1:25 p.m.	Foundation Finances – Lewis • Assets and Grants • 2019 Third Quarter Financial Report from Mike Sullivan • 2020 Operating Expenses (preliminary draft)	3
1:45 p.m.	Legacy Report • Dissemination Status	4
1:55 p.m.	Sunsetting Issues • Revised 2020 Timeline • Archiving • Website	5
2:15 p.m.	Operations • Lease	6
2:35 p.m.	Grantee Reports • University of Minnesota Law School ➤ <i>James H. Binger Center for New Americans</i>: Program and Endowment Reports ➤ <i>James H. Binger Professorship in Clinical Law</i>: Program and Endowment Reports • Yale University Law School ➤ <i>Robina Human Rights Initiative</i> and <i>Binger Clinical Faculty Chair in Human Rights</i>: Program and Endowment Reports ➤ <i>Binger Center for New Theatre</i>: Program and Endowment Reports • Schedule of Future Reports	7 8
2:50 p.m.	2020 Board Meeting Dates	Front Pocket
3:00 p.m.	Adjournment	

1	MINUTES August 27, 2019
2	EXECUTIVE DIRECTOR'S REPORT
3	FOUNDATION FINANCES 2019 3rd Quarter Financial Report 2020 Operating Expenses
4	LEGACY REPORT
5	SUNSETTING ISSUES
6	OPERATIONS
7	GRANTEE REPORTS University of Minnesota Yale University
8	SCHEDULE OF FUTURE REPORTS

**Robina Foundation Annual Meeting
Meeting Minutes
August 27, 2019**

The Annual Meeting of the Board of Directors of the Robina Foundation, a Minnesota nonprofit corporation, was held on August 27, 2019, at the offices of Faegre Baker Daniels in Minneapolis, MN.

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

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

Mary Lou White was present and served as recorder.

Call to Order and Welcome

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

Minutes from May 21, 2019, Board Meeting

A motion made and seconded to approve the Minutes of the May 21, 2019 Board Meeting included in the Board Book was approved unanimously.

Executive Director's Report

Hunt called Board Members attention to information in the Executive Director's Report describing Robina's involvement in Campden Research and Rockefeller Philanthropy Advisors' project regarding attitudes in the family foundation sector/private foundation sector. Following an interview with Blatz, it was decided that a case study of the Robina Foundation would be included in the report. Timing for the report is not known.

Foundation Finances

Q2 Financial Report

Robina's Investment Consultant Mike Sullivan joined the meeting by phone to discuss his report for Q2 of 2019. Sullivan emphasized the following:

- Report shows Robina's past performance, but also what we expect to happen through December 2020.
- Assuming payment of all current commitments, funds remaining in 2020 would be \$5 – \$6 million, although transferring Robina's private equity funds will reduce that number by \$100,000 - \$150,000.
- • Out of the approximately \$5 million that would remain, approximately \$3 million will be available in cash.
- Approximately \$600,000 would remain if the Board makes the following new grants:
 - \$100,000 to Yale School of Drama and the University of Minnesota Law School payable now as additional support for Dean's Innovation Funds.
 - Payment in 2020 of up to \$4.3 million for Dean's Innovation Fund Endowments at Yale School of Drama and the University of Minnesota Law School.

Private Equity Funds

Hunt updated Board Members on the status of plans to transfer the Foundation's interest in Aberdeen Venture Partners III, LP and Aberdeen Venture Partners IV, LP to Yale University.

Following discussion,

A motion made and seconded to authorize Blatz to execute Assignment and Assumption agreements for the transfer of the Foundation's interest in Aberdeen Venture Partners III, LP and Aberdeen Venture Partners IV, LP and take all other actions necessary to complete the Foundation's transfer of its interest in the two funds to Yale University effective as of September 30, 2019, was approved unanimously.

→ Board Members directed Hunt to confirm with Yale that funds generated by Yale's interest in the Aberdeen funds will go into the endowment to be established for the Dean's Innovation Fund at Yale School of Drama.

Yale School of Drama

Board Members welcomed James Bundy, Dean, Yale School of Drama, to update Board Members on Yale School of Drama's use of the Foundation's 2018 grant of \$100,000 to pilot a Dean's Innovation Fund and his proposal for an endowed Dean's Innovation Fund. Dean Bundy described the three projects funded with the pilot grant, emphasizing the mixture of the projects and the potential for impact within Yale School of Drama as well as the field.

* Board Members expressed the importance of assuring that the Dean has the authority to make decisions concerning grants, notwithstanding the Dean's "shared leadership" structure, which he believes results in better decisions. To assure the Dean's decision-making discretion, Board Members expressed the desire that any agreement connected with the Foundation's endowment of the Dean's Innovation Fund confirm that the Dean has this discretion.

At Board Members' request, Dean Bundy explained Yale's proration of endowment funds depending on the timing of receipt of funds and provided an update on funding for a new facility.

University of Minnesota Law School

Board Members welcomed Garry Jenkins, Dean of the Law School, Deepinder Mayell, Executive Director of the Binger Center for New Americans, and Ben Casper-Sanchez, Faculty Director of the Binger Center.

Binger Center for New Americans

Mayell and Casper-Sanchez provided the Board with a comprehensive update on the work of the Center, emphasizing:

- Annual Rept w Front of Book
- The unique level of experience and education the Binger Center provides;
 - Students' involvement in multi-layered and complex work, including arguing successfully before the Sixth Circuit Court of Appeals;
 - The number and success of students' work on federal litigation;
 - Community partners' donation of 1280 hours of pro bono work this year;
 - Launch of a fourth student clinic as well as "pop-up" legal clinics in 6 towns in rural Minnesota;
 - Key initiatives for the coming year, including southern border service trips and a new "Court Observation Project."

Law School Update

As part of his update on the status of the Law School, Dean Jenkins expressed optimism about the future and addressed a number of important items, including:

- The Law School's progress toward eliminating its structural imbalance;
- Reduction in additional support from the University;

- Increase in annual fund and reunion ^{and} giving and the status of the Law School Campaign;
- A surge in applications, enrollment ^{and} employment;
- Minnesota's ranking in the top 20 law schools in the country.

Dean's Innovation Fund

Before describing the two grants made with Robina funding, Dean Jenkins outlined the guiding principles of the initiative: Promote Faculty Research and Engagement, Enhance Student Experiences, and Advance Institutional Goals. With a grant from the Dean's Innovation Fund, Professor Perry Moriearty will partner with a number of University and community organizations to measure the impact of incarceration on families and communities. The second initiative, identified by Dean Jenkins, will enhance student experiences through the development of a mobile campus communication tool to better connect students with necessary resources and advising tools.

During a discussion of reporting on Robina endowment grants after Robina's termination in December 2020, Jenkins proposed that both the Dean of the Law School and the University of Minnesota Foundation Chief Financial Officer certify reports and that the University of Minnesota Provost serve as Successor Representative. Robina Board Members concurred with this approach.

Blatz thanked Jenkins on behalf of the Board and expressed Board Members' appreciation for the Law School's programs funded by the Foundation.

Innovation Fund Proposals

Following further discussion of the financial ramification of awarding new grants,

A motion made and seconded to grant \$100,000 payable in September to the University of Minnesota Law School to support the Dean's Innovation Fund as described in its 2018 Proposal to the Robina Foundation and \$100,000 to Yale School of Drama to support the Dean's Innovation Fund as described in Yale School of Drama's Proposal to the Robina Foundation dated August 2018, was approved unanimously.

Board Members directed Hunt to notify Dean Bundy and Dean Jenkins of these new grants and to convey that subject to events that may transpire between now and August 2020, the Board expects to consider endowment grants of up to \$2 million to each institution to sustain the two Dean's Innovation Funds.

Sunsetting Discussion

Hunt distributed a memorandum from Faegre Baker Daniels attorney Angela Fogt addressing various sunseting issues. Fogt joined the meeting by telephone.

Dissolution Process

Board Members discussed two timetables prepared by Fogt for dissolution work in 2020 and talked with Fogt about the ramification of commencing the dissolution process in May. Fogt explained that Robina will not be able to make grants during the creditors' 90-day claim period but that grants can be made after that period. Payment of regular operating expenses is permissible during the creditors' claim period. Based on Fogt's explanation of the timetable if the dissolution process begins in May, Board Members decided to begin the dissolution process in May. Fogt will prepare a detailed timetable for the process.

Board Members also asked Fogt about work the Minneapolis Foundation might perform on behalf of Robina after dissolution. Fogt confirmed that work must be structured so that the Minneapolis

Foundation is responsible for the work, not Robina. Board Members discussed briefly the Minneapolis Foundation proposal to assist the Foundation with post-termination expenses and directed Hunt to work with Fogt and the Minneapolis Foundation to develop an agreement for Board consideration.

Audit

Board Members discussed whether a formal audit or agreed upon procedures review is required or needed as the Foundation winds down. Since we have received somewhat conflicting advice, Board Members asked Hunt to work with Fogt to resolve the question. Hunt and Gilberg will work with CliftonLarsonAllen to assure that whichever approach is taken, CLA's work will be completed by May when the dissolution process will begin.

Lease

Board Members discussed several ways to handle Robina's current lease in the IDS Tower, which runs until May 31, 2021. Gilberg and Hunt will provide further information on the options at the November Board Meeting.

Archiving Records

The process of reviewing Robina records and files to identify documents that should be archived has progressed, but Board Members urged Gilberg and Hunt to speed up the process and report on the status at the November Board Meeting.

Post Sunset Reporting

Duration

After discussion, Board Members determined that reporting will take place for five years following Robina's dissolution as follows: two Robina Board Members will be designated by the Board in August 2020 to receive reports for three years, followed by two years of reporting to the Successor Representatives designated to receive reports.

Reports

Board Members confirmed that certification and submission of reports on endowment grants will be as follows:

Council on Foreign Relations: certification by Chief Financial Officer or General Counsel of CFR; successor representative: Head of the Department overseeing the program endowed by the Foundation.

Yale Law School: certification by Yale University Provost; successor representative: Yale Vice President for Alumni Affairs and Development.

Yale School of Drama: certification by Yale University Provost; successor representative: Yale Vice President for Alumni Affairs and Development.

University of Minnesota Law School: certification by Law School Dean and University of Minnesota Foundation Chief Financial Officer; successor representative: University of Minnesota Provost.

Hunt will follow up with Robina Grantees to explain the process and request that Robina Board Members continue to receive information on events connected to Robina Grants. Blatz reported that Noa Staryk would also like to receive reports.

Legacy Report

Board Members expressed satisfaction with the final Legacy Report, which has been printed and needs to be sent to various organizations and individuals. Hunt will follow up on opportunities for discussions, meetings and articles and will work with Board Members to facilitate distribution of the Report by members of the Board.

Grant Report

Board Members discussed the University of Minnesota Law School's annual report on the *Class Agent Fundraising Pilot Program* included in the Board Book. No follow-up action was required.

Board Governance

Election of Directors

After discussion,

In order to assure that the current Board Members continue to serve until 12/31/2020, the Board of Directors unanimously approved the following: extension of the third terms of Berresford and Blatz to 12/31/2020 and election of Lewis and Short to a third term from 9/1/19 – 12/31/2020.

Election of Officers

After discussion,

In order to assure that the current officers continue to serve until 12/31/2020, the Board of Directors unanimously approved the following: extension of the terms of Berresford and Short as Vice Chair and Secretary, respectively, to 12/31/2020 and election of Blatz and Lewis to serve as Chair and Treasurer, respectively, from 9/1/2019 to 12/31/2020.

Conflict of Interest Policy

Board Members completed their annual disclosure of conflicts of interest with the operation of Robina Foundation.

Meeting Dates

Board Members confirmed 2019 and 2020 meeting dates.

Other Business / Executive Session

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

Adjournment

There being no other business, the meeting was adjourned.

Respectfully Submitted,

→ **Marianne Short, Secretary**

Date

**ROBINA FOUNDATION
BOARD OF DIRECTORS MEETING
November 21, 2019
EXECUTIVE DIRECTOR'S REPORT**

As you can imagine, the bulk of my time following the busy August meeting was spent following up on the many items we discussed at the meeting. My work on a number of the items will be covered during the meeting – Tabs 4, 5, and 6.

Private Equity Funds

Aberdeen III and IV

I worked with Aberdeen and Yale to assure that the transfer process moved forward in a timely manner to finalize the transfer effective September 30, 2019. It took more time than I anticipated for everything to fall into place, but the transfer was accomplished.

I made sure that Yale understood the nature of our contribution of the Aberdeen Funds:

- These donations are for the benefit of Yale School of Drama's "Dean's Innovation Fund";
- Robina plans to consider a cash donation to endow the Dean's Innovation Fund in 2020;
- If a cash endowment grant is made, funds generated by the transfer of the Aberdeen interests should be added to the cash endowment pursuant to Yale's treatment of private equity donations;
- If a cash endowment grant is not made, funds generated by the transfer of the Aberdeen interests would continue to be held for the benefit of the Dean's Innovation Fund as described above.

My understanding is that Yale recognizes the estimated investment value of the two Aberdeen Funds to be \$234,101, but plans to hold the Funds for the time being.

*Notified US Bank
Pfingsten*

I contacted Andrew Petri of Pfingsten Partners to understand the status of the fund to help us determine how best to divest Robina of its interest. Following is Andrew's response:

You could transfer your interest to a third party, which the GP would need to approve. A transfer generally costs approximately \$5-7k in Kirkland & Ellis legal fees. Hopefully a sale of ACON Suzo-Happ will occur prior to 9/30/2020 and you can realize a majority of the remaining value of your capital account prior to termination. If not, Pfingsten would accommodate relinquishment of your commitments and capital account to the GP at any point you determine that to be necessary.

Mike and I talked about how best to proceed with Robina's ownership of the Pfingsten fund, which was valued at \$85,886 as of Q2. We think the appropriate goal is for Robina's

2020

interest in Pfingsten to be off our books by the end of September, taking into account that the Foundation cannot make transfers during the 90 day period following the commencement of dissolution.

Following is our suggestion:

Thought I will continue to contact Pfingsten every few months to find out the status of the fund and the sale of ACON Suzo-Happ and remind them of our situation. I may mention at some point that we are considering transferring our interest to Yale and ask for information on Pfingsten's transfer process.

If a transfer to Yale makes sense because the sale of Pfingsten's last asset is not moving forward, we would want to start working with Yale in early March or April to allow plenty of time for the transfer. We would engage Faegre to assist with this process, with the goal of transferring the asset by the end of Q3.

If a transfer to Yale doesn't make sense or is not possible, we would work to relinquish our account to the Pfingsten General Partner by the end of September.

Follow up with Angela Fogt

Audit

You will recall that we have received mixed messages from Faegre Baker Daniels about the need for an audit of Robina's operation in 2019: Gina Kastel indicated that Robina's 2019 financials need not be audited; Angela Fogt urged us to have an audit. I asked Angela to consult with Gina about the need for an audit or an "agreed upon procedures" review. Angela and Gina concluded that under the circumstances, an agreed upon procedures review is appropriate.

We have contacted CliftonLarsonAllen to request that the review take place in early 2020. They will accommodate our request.

Agreement with Minneapolis Foundation for post-dissolution work

Although work on an agreement need not take place until 2020, Angela and I talked about potential issues. Because Faegre does legal work for the Minneapolis Foundation, Angela asked the Minneapolis Foundation to waive the conflict so that Faegre can assist Robina. Angela learned recently that the Minneapolis Foundation waived the conflict, so I have begun to work with her on agreements needed to establish a fund for Robina's post-dissolution expenses and grants.

Work with Robina Grantees

As you can imagine, Dean Jenkins and Dean Bundy were very pleased to learn that the Board approved \$100,000 grants to support the two Dean's Innovation Funds. They understand the Board's decision to delay consideration of endowment support of the Funds.

	ROBINA FOUNDATION GRANTS PAID/COMMITTED										For November 21, 2019 Board Meeting				
	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						18,305,357
Online Video Project				419,750	276,805										696,555
Expanded Diversity Initiative				15,000	377,034	426,492	470,722	446,117	157,889						1,893,254
Humanity in Action (Undergraduate) Fellowship								247,878						HIA	247,878
Expanded Diversity Initiative - Additional Activities						837,344	858,278	141,263	*						1,836,885
Humanity in Action Diplomacy and Diversity Fellowship								600,720						HIA	600,720
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
Scholarship Match Program											250,000	200,000	50,000		500,000
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						23,500,000
Endow James H. Binger Professorship in Clinical Law									1,000,000						1,000,000
Dean's Innovation Fund											100,000	100,000			200,000
														U of M Total	59,496,499
YALE															
Yale Drama															
CNT	750,000	750,000	1,350,000	950,000	18,000,000					25,000					21,825,000
Dean's Innovation Fund											100,000	100,000			200,000
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	45,649,709
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	5,068,847	2,147,730	3,558,329	1,100,688		159,473,311
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	10,284,767	6,683,273	5,272,565		
*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															\$600,000
Misc Grants: ArtPlace-\$500,000; Aspen Institute-\$130,575; Ctr for Victims of Torture-\$26,000; Tandem-\$25,000; Orthopaedic International Education-\$25,000; Exponent Philanthropy-\$1,150															\$707,725
															\$1,307,725
													21-Nov-19	TOTAL	\$160,781,036

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
03/31/18	10,139,247	154,405,731	5,974,705
06/30/18	12,028,330	154,455,731	5,924,705
09/30/18	10,459,956	156,021,419	4,559,017
12/31/18	10,284,768	156,121,419	4,659,317
03/31/19	8,350,036	158,061,560	2,519,476
06/30/19	8,175,840	158,111,860	2,469,176(1)
09/30/19	\$6,573,919	\$159,680,048	\$1,100,988

(1) Includes the following commitments:

University of Minnesota Law School: \$1,885,876 (2019-2020) for *Public Interest Scholars*; \$300,000 (2019-2020) for *Bridge Fellowship Program*; and \$183,000 (2019-2020) for *Class Agent Fundraising Pilot Program*; \$250,000 (2019-2020) for *Endowed Scholarship Match Program*; \$100,000 (2019) for *Dean's Innovation Fund*; \$100,000 (2019) for Yale School of Drama; Exponent Philanthropy: \$300 (\$300 Annual Donation) (2020)

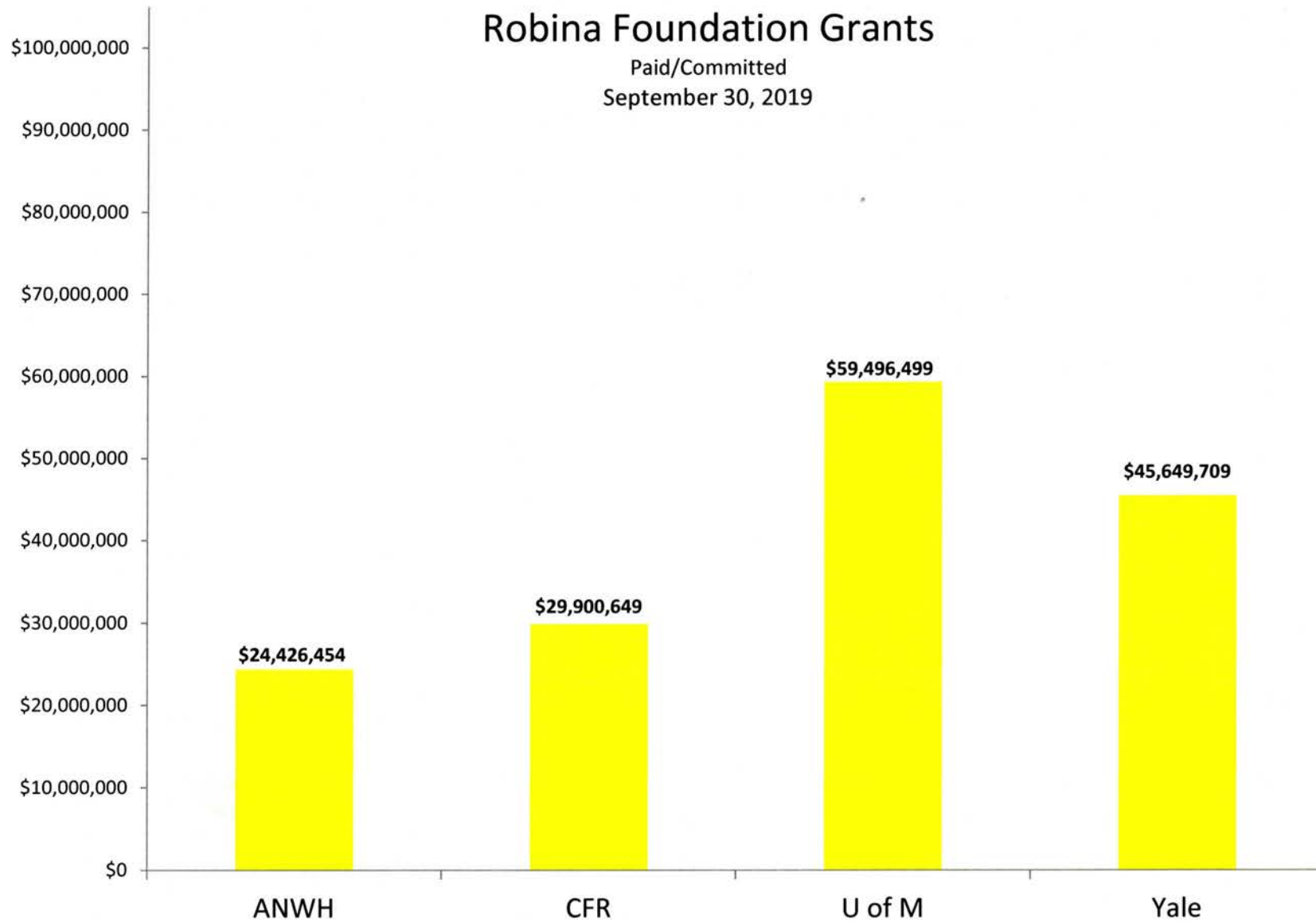
ROBINA FOUNDATION

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	\$150,533
USbank Investment	14,229,746	12,496,658	9,988,714
Total	\$14,425,125	\$12,635,704	\$10,139,247
Assets	06/30/18	09/30/18	12/31/18
USbank Checking	\$153,861	\$82,536	48,116
USbank Investment	9,865,907	8,359,209	8,207,466
Vanguard	2,008,562	2,018,211	2,029,186
Total	\$12,028,330	\$10,459,956	\$10,284,768
Assets	03/31/19	06/30/19	09/30/19
USbank Checking	\$65,767	45,729	58,672
USbank Investment	6,243,419	6,077,367	4,451,446
Vanguard	2,040,850	2,052,744	2,063,801
Total	\$8,350,036	\$8,175,840	\$6,573,919

Robina Foundation Grants

Paid/Committed
September 30, 2019



Robina Foundation

Quarterly Financial Report 3Q 2019

*Prepared by Michael F. Sullivan, Ph.D.
Navassa Lane Consultants*

November 11, 2019

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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

There are three sections in the 3Q 2019 report:

1. Standard quarterly balance sheet and income statement with performance comparative. This is for actual activity through September 30, 2019 (3Q 2019).
2. Maturity matching schedule of grants and investments. This is for activity through December 31, 2020 (4Q 2020).
3. Available Funds

Available Funds *assuming indorsements for Dean's Innovation Funds*

Projected Balance	\$5,272,405
Adjusted for:	
Endowments to Yale, MN	-\$4,300,000
Write-off of PFINGSTEN	-\$85,886
Adjust for gift to Yale of 2 Aberdeen PE Funds	-\$50,885
	-\$144,921
No change in operating revenue or expenses	\$0
Bonds held to maturity	\$0
Available Funds	\$690,713
	<i>in Q4 2020</i>

Executive Financial Summary - Assets

	2018	2018	2018	2018	2019	2019	2019
	1Q	2Q	3Q	4Q	1Q	2Q	3Q
Cash	\$2,515,397	\$3,765,235	\$2,902,095	\$4,072,476	\$2,444,835	\$2,467,105	\$2,323,597
Fixed Income	\$9,079,493	\$7,754,623	\$7,055,170	\$5,776,409	\$5,512,533	\$5,411,182	\$3,968,262
Equities	\$544,665	\$508,471	\$493,690	\$435,882	\$392,668	\$297,553	\$282,060
Grand Total	\$12,139,555	\$12,028,329	\$10,450,955	\$10,284,767	\$8,350,036	\$8,175,840	\$6,573,919

Cash and Cash Equivalents	3Q 2019
Cash	\$2,323,597
PE Equity (PFINGSTEN)	\$86,254
Total Cash	\$2,409,851

Assets	3Q 2019
Total Assets	\$6,573,919
Less Transfers of PE in Progress	
Aberdeen III	-\$50,885
Aberdeen IV	-\$144,921
Adjusted Total Assets	\$6,378,113

Balance Sheet/Net Income

	<u>2018</u>				<u>2019</u>		
	1Q	2Q	3Q	4Q	1Q	2Q	3Q
Beginning Balance:	\$12,637,410	\$12,139,555	\$12,028,329	\$10,450,955	\$10,284,767	\$8,350,036	\$8,246,992
Plus: Earnings	\$46,256	\$29,247	\$50,166	\$75,485	\$18,873	\$83,600	\$70,975
Less: Grants	(\$432,042)	\$0	(\$1,565,688)	(\$100,000)	(\$1,890,141)	(\$50,300)	(\$1,368,188)
Less: Operating Expenses	(\$101,249)	(\$131,986)	(\$165,203)	(\$134,406)	(\$57,354)	(\$130,052)	(\$87,062)
Less: Bank Expenses	(\$10,820.00)	(\$8,697)	(\$7,875)	(\$7,267)	(\$6,109)	(\$6,292)	(\$7,569)
Ending Balance:	\$12,139,555	\$12,028,329	\$10,450,955	\$10,284,767	\$8,350,036	\$8,246,992	\$6,855,148

Portfolio Return vs. Benchmark – through September 30, 2019 (3Q 2019)

Produced by US Bank

	1 Year	3 Year	5 Year
Portfolio % return, annualized	3.59	2.30	1.54
Benchmark % return, annualized	2.36	2.38	1.67

Sources of Capital

	2018				2019		
	1Q	2Q	3Q	4Q	1Q	2Q	3Q
Asset Summary							
Cash							
US Bank MM	\$356,040	\$1,602,812	\$801,348	\$1,995,174	\$338,217	\$368,632	\$201,125
Vanguard MM	\$2,000,252	\$2,008,562	\$2,018,211	\$2,029,186	\$2,040,850	\$2,052,744	\$2,063,801
US Bank Cash	\$8,571	\$0	\$0	\$0	\$0	\$0	\$0
Robina Checking Account	\$150,534	\$153,861	\$82,536	\$48,115	\$65,767	\$45,729	\$58,671
Cash Total	\$2,515,397	\$3,765,235	\$2,902,095	\$4,072,475	\$2,444,835	\$2,467,105	\$2,323,597
Fixed Income							
Bonds							
Taxable US	\$5,943,260	\$4,618,015	\$3,920,565	\$3,526,044	\$3,245,554	\$3,882,413	\$2,436,041
Taxable Foreign Bonds	\$3,136,179	\$3,136,608	\$3,134,605	\$2,250,365	\$2,266,980	\$1,528,769	\$1,532,221
Fixed Income Total	\$9,079,493	\$7,754,623	\$7,055,170	\$5,776,409	\$5,512,533	\$5,411,182	\$3,968,262
Equities							
Private Equity							
Aberdeen Venture Partners III LP	\$143,065	\$111,055	\$122,655	\$76,050	\$76,050	\$52,320	\$50,885
Aberdeen Venture Partners IV LP	\$293,724	\$289,540	\$263,149	\$282,283	\$229,604	\$159,347	\$144,921
Pfingsten Partners III LP	\$107,876	\$107,876	\$107,876	\$77,550	\$87,014	\$85,886	\$86,254
Private Equity Total	\$544,665	\$508,471	\$493,690	\$435,883	\$392,668	\$297,553	\$282,060
Equities Total	\$544,665	\$508,471	\$493,690	\$435,883	\$392,668	\$297,553	\$282,060
Grand Total	\$12,139,555	\$12,028,329	\$10,450,955	\$10,284,767	\$8,350,036	\$8,175,840	\$6,573,919
					Less Transactions in Progress		-\$50,885
							-\$144,921
					Adjusted Grand Total		\$6,378,113

Robina Grant Commitments

	Month to be Paid	2019	2020	Grand Total
Council on Foreign Relations		\$1,666,666		\$1,666,666
Endowed Chair in Global Governance	January	\$1,666,666		\$1,666,666
University of Minnesota Law School		\$1,668,188	\$1,050,688	\$2,718,876
Public Interest Scholars	July	\$1,076,688	\$809,188	\$1,885,876
Bridge Fellowship Program	July	\$150,000	\$150,000	\$300,000
Class Agent Pilot Program	August	\$91,500	\$91,500	\$183,000
<i>Dean's Innovation Fund</i> Matching Program, Endowed Scholarships	Q1 (\$50K), Q2 (\$50K), Q3 (\$50K), Q4 (\$100K)	\$250,000		\$250,000
Yale University		\$273,475		\$273,475
Gilder Lehrman Center	February	\$173,475		\$173,475
Dean's Innovation Fund	September	\$100,000		\$100,000
Exponent Philanthropy	September	\$300		\$300
Grand Total		\$3,608,629	\$1,050,688	\$4,659,317

Grants by Quarter

	2019	2020
1Q	\$1,890,141	\$0
2Q	\$50,000	
3Q	\$1,568,488	\$1,050,688
4Q	\$100,000	\$0
	\$3,608,629	\$1,050,688

Implementation of Maturity Matching Investment Strategy

Expense Payment Schedule

Date	Amount	Description
4Q 2019	(125,000)	Quarterly Operating Expenses
1Q 2020	(125,000)	Quarterly Operating Expenses
2Q 2020	(125,000)	Quarterly Operating Expenses
3Q 2020	(125,000)	Quarterly Operating Expenses
4Q 2020	(125,000)	Quarterly Operating Expenses

Total:	\$625,000
3Q 2019 Actual	\$94,631
	\$719,631

?

Robina Grant Commitments

	Month to be Paid	2019	2020	Grand Total
Council on Foreign Relations		\$1,666,666		\$1,666,666
Endowed Chair in Global Governance	January	\$1,666,666		\$1,666,666
University of Minnesota Law School		\$1,668,188	\$1,050,688	\$2,718,876
Public Interest Scholars	July	\$1,076,688	\$809,188	\$1,885,876
Bridge Fellowship Program	July	\$150,000	\$150,000	\$300,000
Class Agent Pilot Program	August	\$91,500	\$91,500	\$183,000
Matching Program, Endowed Scholarships	Q1 (\$50K), Q2 (\$50K), Q3 (\$50K), Q4 (\$100K)	\$250,000		\$250,000
		\$273,475		\$273,475
Yale University				
Gilder Lehrman Center	February	\$173,475		\$173,475
Dean's Innovation Fund	September	\$100,000		\$100,000
Exponent Philanthropy	September	\$300		\$300
Grand Total		\$3,608,629	\$1,050,688	\$4,659,317

Grants by Quarter

	2019	2020
1Q	\$1,890,141	\$0
2Q	\$50,000	
3Q	\$1,568,488	\$1,050,688
4Q	\$100,000	\$0
	\$3,608,629	\$1,050,688

Bond Dividend Income Schedule

Bond Dividend Income Schedule

Date	Dividend	Description
8/9/2019	5,156	Bond Dividend: RaboBank
8/14/2019	7,350	Bond Dividend: Berkshire Hathaway
8/23/2019	3,549	Bond Dividend: Bank NY Mellon
8/24/2019	3,188	Bond Dividend: State Street Corp
8/28/2019	1,344	Bond Dividend: Bank of NY Mello
9/7/2019	7,200	Bond Dividend: Burlingtn N Santa Fe
9/7/2019	3,188	Bond Dividend: Gilead Sciences Inc
10/11/2019	4,700	Bond Dividend: Bank of Nova Scotia
10/30/2019	5,625	Bond Dividend: Shell International
11/5/2019	6,750	Bond Dividend: Aust NZ Banking
11/11/2019	6,125	Bond Dividend: PNC Bank NA
11/13/2019	1,156	Bond Dividend: Intel Corp
12/3/2019	1,313	Bond Dividend: Bank of Montreal
12/13/2019	6,375	Bond Dividend: Wells Fargo
2/19/2020	3,549	Bond Dividend: Bank NY Mellon
2/20/2020	3,188	Bond Dividend: State Street Corp
2/24/2020	1,344	Bond Dividend: Bank of NY Mello

Date	Dividend	Description
3/5/2020	7,200	Bond Dividend: Burlingtn N Santa Fe
3/5/2020	3,188	Bond Dividend: Gilead Sciences Inc
4/8/2020	4,700	Bond Dividend: Bank of Nova Scotia
4/27/2020	5,625	Bond Dividend: Shell International
5/3/2020	6,750	Bond Dividend: Aust NZ Banking
5/9/2020	6,125	Bond Dividend: PNC Bank NA
5/11/2020	1,156	Bond Dividend: Intel Corp
6/10/2020	6,375	Bond Dividend: Wells Fargo
8/17/2020	3,549	Bond Dividend: Bank NY Mellon
8/18/2020	3,188	Bond Dividend: State Street Corp
9/1/2020	7,200	Bond Dividend: Burlingtn N Santa Fe
9/1/2020	3,188	Bond Dividend: Gilead Sciences Inc
10/7/2020	4,700	Bond Dividend: Bank of Nova Scotia
10/26/2020	5,625	Bond Dividend: Shell International
11/1/2020	6,750	Bond Dividend: Aust NZ Banking
11/5/2020	6,125	Bond Dividend: PNC Bank NA
12/7/2020	6,375	Bond Dividend: Wells Fargo
Total	158,919	

Actual 2Q 2019 34,889
TOTAL 193,808

Q2 Bond Dividend Income Received

Date	Dividend	Description
4/14/2019	4,700	Bond Dividend: Bank of Nova Scotia
5/3/2019	5,625	Bond Dividend: Shell International
5/9/2019	6,750	Bond Dividend: Aust NZ Banking
5/15/2019	6,125	Bond Dividend: PNC Bank NA
5/17/2019	1,156	Bond Dividend: Intel Corp
6/4/2019	1,313	Bond Dividend: Bank of Montreal
6/15/2019	1,250	Bond Dividend: Home Depot Inc
6/16/2019	6,375	Bond Dividend: Wells Fargo
	1,595	First Am Govt
Total	34,889	

Revenues

	2019 Actual 3Q	2019 Projected 4Q	2020 Projected 1Q-4Q	Total
Income				
Bond Interest	\$30,975	\$40,125	\$87,819	\$158,919
PE Earnings (Estimated 30,000/Qtr thru 9-30-19, then 3,000/Qtr thereafter)	\$4,342	\$3,000	\$12,000	\$19,342
Vanguard Interest Income @ 2%/annum (10,000/Qtr)	\$11,057	\$10,000	\$40,000	\$71,057
Total	\$46,374	\$53,125	\$139,819	\$239,318

Bond Principal Maturity Schedule

Date	Amount	Description
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 of NY Mello MTN
8/18/2020	250,000	Bond Final Payment: State Street Corp
9/1/2020	400,000	Bond Final Payment: Burlington 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	\$5,398,000
3Q 2019	\$1,450,000
	\$3,948,000

End of Quarter Fund Balances

2019	Actual	Projected				Total
	1Q	2Q	3Q	4Q		
Beginning Balance:	\$10,284,767	\$8,350,036	\$8,246,992	\$6,855,148	\$10,284,767	
Plus Earnings:	\$18,873	\$83,600	\$70,975	\$53,125	\$226,573	
Less:						
Grants	\$1,890,141	\$50,300	\$1,368,188	\$100,000	\$3,408,629	
Operating and Banking Expenses	\$63,463	\$136,344	\$94,631	\$125,000	\$419,438	
Ending Balance:	\$8,350,036	\$8,246,992	\$6,855,148	\$6,683,273	\$6,683,273	

2020	Projected				Total
	1Q	2Q	3Q	4Q	
Beginning Balance:	\$6,683,273	\$6,593,268	\$6,503,263	\$5,362,570	\$6,683,273
Plus Earnings:	\$34,995	\$34,995	\$34,995	\$34,995	\$139,980
Less:					
Grants	\$0	\$0	\$1,050,688	\$0	\$1,050,688
Operating and Banking Expenses	\$125,000	\$125,000	\$125,000	\$125,000	\$500,000
Ending Balance:	\$6,593,268	\$6,503,263	\$5,362,570	\$5,272,565	\$5,272,565

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	\$10,284,767	\$6,683,273
Plus Revenues	\$6,822,930	\$8,418,009	\$2,077,836	-\$542,089	\$2,268,454	\$337,889	\$312,590	\$226,573	\$139,980
Less Expenses	-\$653,435	-\$701,623	-\$837,861	-\$839,767	-\$680,752	-\$544,432	-\$567,503	-\$419,438	-\$500,000
Less Grants Paid	-\$26,428,609	-\$13,152,126	-\$13,576,037	-\$13,245,756	-\$51,843,497	-\$5,069,097	-\$2,097,730	-\$3,408,629	-\$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	\$10,284,767	\$6,683,273	\$5,272,565

	Total 2019-2020
Beginning Year Net Assets	\$10,284,767
Plus Revenues	\$366,553
Less Expenses	-\$919,438
Less Grants Paid	-\$4,459,317
Year End Net Assets	\$5,272,565

P.3 = 5,272,565

Note: 2019 is Actual activity for 1Q - 3Q, and projections for 4Q 2019 and all of 2020.

2020 OPERATING BUDGET					
OPERATING EXPENSES			2019 Budget	2020 Budget	
Administration: Contract Services					
	Penny Hunt		\$124,000		\$124,000
	Baker Management (Nancy Gilbert)		50,160		50,160
	Outside Consultants		5,000		5,000
	Gilberg Overtime		1,500		1,500
Accounting-Audit Fees			6,000		11,000
Directors' Fees			138,000		138,000
Insurance					
	D&O		2,250		4,500
	Property		506		506
Investment Management Fees (Usbank and Mike Sullivan)			60,000		56,000
Legal-Prof Fees			5,000		15,000
Meeting Expense			18,000		5,000
Membership Dues			750		750
Misc Expense			1,000		1,000
Office					
	Equipment and Furnishings		100		100
	Misc		400		2,000
	Supplies		400		800
Parking and Mileage			3,000		3,000
Postage and Delivery			700		700
Printing, Web Design and Maintenance			5,700		1,000
Rent			11,000		7,120
Taxes					
	Excise, State, Federal		18,690		4,347
Telephone/Internet			4,000		4,000
TOTAL OPERATING EXPENSES			456,156		435,483
GRANTS			3,608,629		1,100,988
TOTAL EXPENDITURES			4,064,785		1,536,471
Robina's 2020 Operating Expenses and Grants would be increased by the following:					
	Prepayments to Faegre, CLA, etc. for work in 2021; Grants to Yale and U of M to endow Dean's Innovation Funds;				
	Grant to the Minneapolis Foundation to establish the "Robina Foundation Fund"; Grant to the Minnesota Historical				
	Society to support archiving of Robina records				

*

Robina Foundation Budget Notes
01/01/20 – 12/31/20

Operating Expenses

Administration – Consultants

Penny Hunt – annual contract: \$124,000
Baker Management (contract employer for Nancy Gilberg) - \$50,160 annual
External Consultants - \$5,000 Dissemination Costs

Accounting/Audit Fees

CliftonLarsonAllen(CLA)
\$11,000: Tax Related Work including "Agreed Upon Procedures" for 2019

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 + \$2,250 to extend coverage three years
Property: \$506: Basic policy to cover office equipment/furnishings

Investment Management Fees

USbank Fees: \$31,000:
Michael Sullivan: \$25,000

Legal/Professional Fees

\$15,000: Legal fees in connection with sunseting

Meeting Expense (Board and Staff)

\$5,000: Includes travel, accommodations and meals for Annual Board Meeting

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: \$800: Paper products, 3-ring binders, toner cartridges, etc.

Printing, Web Design and Maintenance

\$1,000: Assistance to finalize Robina's website

Rent

\$7,120: \$890.09/month lease for current space to June 30, 2020 + 2 months' termination fee

Taxes

Excise Tax: \$4,347; estimated at 2% by CLA; tax will be reviewed/revised by CLA during the year

Telephone/Internet

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

Grants

\$1,100,988: Grant payments currently scheduled for 2020. Additional grant payments will be made if approved by the Board.

ROBINA FOUNDATION

TO: Robina Foundation Board of Directors
FROM: Penny Hunt
RE: Legacy Report Dissemination Update
Date: November 11, 2019

Dissemination of the report is moving forward, albeit rather slowly. Following is an update on several of the strategies we have considered. There are undoubtedly other options we should discuss.

Program at the Minneapolis Club

Beginning about a year ago, I have been in contact with Kate Gillette, chair of the Minneapolis Club Program Committee. When we began talking, Kate was waiting for direction from the Club's strategic planning process to determine the direction of the work of the Program Committee. When I checked back with Kate recently, I learned the following:

- The Program Committee is now focused on the Club's larger signature events;
- More specialized events are now developed by members who help sponsor and promote the events, although the Club handles all of the logistics, costs, etc.

If we think an event at the Minneapolis Club would be a good way to talk about Robina's work (and distribute the Legacy Report), those of you who are members of the Club could sponsor an event, perhaps involving other members and/or foundations. According to Kate, her committee could provide support and direction. The primary job of program sponsors is to promote the event to their network – Club staff will design the marketing materials, promote the event in publications, rent the room and design the menu.

* (We would undoubtedly want to be involved in an event that includes other foundations or philanthropists, so organization of a Minneapolis Club event might not be the best use of our time.

Work with Candid (the name of the organization resulting from the merger of the Foundation Center and GuideStar)

Candid's IssueLab has created a DOI (Digital Object Identifier) for Robina's Legacy Report and has posted the Report on IssueLab. When site visitors and others who are interested in downloading the Legacy Report use the Report's DOI link, their click on that link is captured by the DOI system so that a record of the number of times the report is accessed is available. I am working with my contact at IssueLab to assure that access to the Report via Robina's website will also be captured by the DOI system.

Done
Unfortunately, people searching for info on United Life fdn's don't necessarily go to RF website & find RF info on Candid's website

Article in the Minneapolis Star Tribune

I contacted editorial writer Lori Sturdevant, who had expressed interest in writing an article on Robina, and Shannon Prather, who wrote an article on Robina about 1 ½ years ago, about writing an article as Robina winds down. Both Lori and Shannon referred me to Katie Humphrey, the StarTribune's philanthropy editor, and Kelly Smith, the new philanthropy beat reporter. Katie and Kelly expressed interest in publishing an article in November, and Kathleen and I are scheduled to meet with Kelly on November 25 to talk about Robina. I have emphasized with Kelly that she should speak with each of you!

Meeting with members of ACTEC and other local lawyers

Ann Burns, attorney at Gray Plant Mooty and member of ACTEC continues to be interested in hosting a meeting with members of ACTEC and other trust and estate/charitable giving attorneys. Scheduling an event this fall was not possible, so we will look for a date in early 2020.

Program or work with St. Paul & Minnesota Foundations

Several months ago staff at the St. Paul & Minnesota Foundations indicated that they wanted to wait for the publication of the Legacy Report to decide if a program about Robina or other outreach to their donors would be appropriate. To follow up, I recently sent the report to my contact at the Foundation.

Per Jeremy Wells, Senior Vice President of Philanthropic Services, although they will keep Robina in mind as they work with their donors, they are not interested in sharing it with a larger group at this time. Jeremy explained: "We're very particular about what/how much we share with our donors (primarily based on what they have shared they'd like to learn about), and this hasn't risen up at this point. As I said, though, we will keep it in mind for individual cases when that idea might arise."

Distribution by Board Members and Others

I am making a list of organizations that should receive hard copies of the report as well as information on how to access the report online and will share it with you soon. Melinda Marble has also agreed to provide a list of her contacts so that we can follow up with them as well. I plan to keep a master list of the Report's distribution.

ROBINA FOUNDATION SUNSETTING TIMELINE

Assumption: Termination of Foundation: 12/31/20

<u>Activity</u>	<u>17</u>	<u>18</u>	<u>19</u>	<u>20</u>	<u>21</u>	<u>Responsible</u>	<u>Notes</u>
<u>Grants</u>							
Determine criteria for new grants, deadline for proposals and for decisions	X	X				Board	8/17 – Decision to consider proposals from U of M and YSD 8/18 – Decision re timing of grants to U of M and YSD
Communicate criteria for new grants to Robina Grantees	X	X				Hunt	2/18 – Decision to consider proposals from U of M and YSD for “Innovation Funds”
Approve new grants to UofM and YSD and determine timing, process, payment, etc.		X	X	X		Board	8/18 – Consideration of proposals and determination of timing, use of illiquid assets 8/20 – Make decision re: Endowment grants
Continue regular cycle of grant reports and grant payments per commitments	X	X	X	X		Gilberg	
Designate a post-dissolution point person to receive grant reports, address concerns, etc. Discuss with Grantees.			X	X		Board	
Determine reporting requirements for endowment grants after Robina sunset. Discuss with Robina Grantees.			X			Board, Hunt, Gilberg	2019 – Reached agreements with UofM, Yale and CFR re: post-sunset reporting
Document reporting requirements with Grantees.			X	X		Hunt	

<u>Legacy Project</u>	<u>17</u>	<u>18</u>	<u>19</u>	<u>20</u>	<u>21</u>	<u>Responsible</u>	<u>Notes</u>
Assess results of interviews	X					Marble, Board	
Discuss dissemination / communication of Legacy Project Report	X	X	X			Marble, Smith, Board	
Prepare Legacy Project Report for Board approval	X	X				Marble	
Review & finalize Legacy Project Report		X	X			Marble, Board	5/18 – Consideration of report with attachments 8/18 – Consideration of Foreward and change to Report
Finalize dissemination/communication plan		X	X			Board	Work with Foundation Center and other organizations on dissemination
Prepare Legacy Report Brochure		X	X			Hunt, Gilberg	
Implement dissemination/communication plan, including e.g. events, articles, etc.			X	X		Hunt, Gilberg, Board	

<u>Finances</u>	<u>17</u>	<u>18</u>	<u>19</u>	<u>20</u>	<u>21</u>	<u>Responsible</u>	<u>Notes</u>
Implement/Monitor Sullivan Model D	X	X	X	X		Sullivan, Lewis, Hunt, Gilberg	
Conduct Audit of FY 2016	X					CLA, Gilberg, Hunt	
Implement any recommended procedural changes		X	X	X		Gilberg, Hunt	
Conduct "Agreed Upon Procedures" Audits	X			X		CLA	
Determine if additional audit or "agreed-upon procedures" is needed for 2019			X				
Develop and revise operating budgets for final years, including reserve to pay final expenses/filing fees/accounting fees/legal expenses/post-closing costs	X	X	X	X		Gilberg, Hunt, Sullivan, Board	
Develop and implement plan to manage/pay post-closing costs and distribute remaining grant funds			X	X		Board, Hunt	
Determine use of any funds remaining after sunset				X		Board	
Take steps to terminate interest in Loring Pasta Bar	X					Hunt, Blatz	Termination finalized 07/28/17
Prepare final financial reports				X		Sullivan, CLA (?)	Ask CLA who should prepare final financial reports.
Prepare and file final Form 990-PF, marked as "FINAL RETURN" – pay any outstanding taxes					X	CLA	

<u>Operations</u>	<u>17</u>	<u>18</u>	<u>19</u>	<u>20</u>	<u>21</u>	<u>Responsible</u>	<u>Notes</u>
Discuss and set closing date		X	X			Board	Ongoing
Communicate plans to Robina Grantees and Binger family members			X	X		Hunt	When ready
Develop and revise timeline for closing	X	X	X	X		Board	
Identify all legal agreements: review termination language, provide notice of termination as necessary			X	X		Gilberg, Hunt	
Explore move to smaller office		X				Gilberg, Hunt,	Approved by IDS. Executed new lease (09/18) 06/1/19 – Start date of new lease
Move to smaller 4900 IDS office		X					
Determine and execute plans for office space through dissolution			X	X		Gilberg, Hunt, Board	
Close office				X		Gilberg, Hunt	
Research Directors and Officers insurance coverage and options		X				Gilberg	
Determine whether need to extend D&O Insurance & Statute of Limitations Issues			X	X		Board	
Cancel memberships and subscriptions			X			Gilberg	
Identify recipients of furniture and equipment; transfer as needed		X	X	X		Board, Gilberg, Hunt	
Determine and execute archival plan and document destruction/retention plan			X	X		Board, Hunt, Gilberg	
Terminate email servers				X		Gilberg	

<u>Operations (con't)</u>	<u>17</u>	<u>18</u>	<u>19</u>	<u>20</u>	<u>21</u>	<u>Responsible</u>	<u>Notes</u>
Develop and implement plan for post-termination website			X	X		Gilberg, Hunt	
Assign intellectual property owned by Foundation as needed (e.g. domain name, logos, images, etc.)				X		Hunt, Faegre	
Continue regular Board Meetings	X	X	X	X		Board, Hunt, Gilberg	Suggestion: 2018: 4 (2 in person; 2 phone); 2019: 4 (3 phone; 1 in person in Mpls) ? 2020: 4 (3 phone; 1 in person in Mpls)

<u>Legal</u> (statutory requirements to wind up and dissolve MN nonprofit corporation)	<u>17</u>	<u>18</u>	<u>19</u>	<u>20</u>	<u>21</u>	<u>Responsible</u>	<u>Notes</u>
Approve plan of dissolution				X		Faegre / Board	Faegre draft resolution
File Notice of Intent to Dissolve with Sec. of State				X		Faegre	Once filed, Robina activities are limited to winding up the Foundation
File Notice of Intent to Dissolve with MN AG				X		Faegre	Once sent, Robina must wait 45 days before distributing any additional assets, other than to pay creditors.
Determine whether to provide notice to creditors (Faegre recommends)				X		Faegre	If file notice, creditors have 90 days to make claims
Provide notice to creditors: mail/publish notice of intent to dissolve				X		Faegre	Mail known creditors; publish for 4 weeks
Resolve claims: claimants have 90 days to submit.				X		Faegre	
Distribute remaining assets after payment of remaining expenses; transfer remaining assets to charitable organization(s) appropriate for Robina				X		Faegre	
Send Notice to Attorney General				X		Faegre	Notice confirms transfers according to plan
File Articles of Dissolution with MN Sec of State.				X		Faegre	Sec of State will issue a Certificate of Dissolution

**Robina Foundation
Dissolution Timeline¹ from Faegre Baker Daniel**

* Early 2020	Robina Foundation signs Fund Declaration and MOU with Minneapolis Foundation
March 2020	FaegreBD prepares drafts of the legal dissolution documents
May 2020	Receive and review CLA report associated with 2019 Agreed Upon Procedures
May 15, 2020	Filing deadline 2019 Form 990-PF without extension (CLA)
May 21, 2020	Board meeting; Board approves the plan of dissolution and directs the officers to wind-up the affairs of the Foundation
May 24, 2020	Notice of Intent to Dissolve is signed by an officer and electronically filed with the Minnesota Secretary of State's Office (FaegreBD)
May 29, 2020	Notice of Intent to Dissolve is signed by an officer and filed by mail with the Minnesota Attorney General's Office (FaegreBD); 45-day waiting period for Attorney General review begins—Foundation is prohibited from making payments outside the normal course of business
May 29, 2020	Notice to known creditors is mailed (FaegreBD)
May 29, 2020	Notice to unknown creditors is published in a legal newspaper for four consecutive weeks (FaegreBD); 90-day creditors claim period begins
July 13, 2020	45-day waiting period for Attorney General review ends
Aug. 2020	Board meeting; Board appoints designated representatives of the Foundation post-dissolution; Board recommends to The Minneapolis Foundation individuals who can serve as consultants and review grant reports from Robina Grantees
Aug. 27, 2020	90-day creditors claim period ends; resolve claims
Sept.-Nov. 2020	Make any remaining grants; prepay expenses associated with 2021
Nov. 15, 2020	Filing deadline 2019 Form 990-PF with extension (CLA)
Dec. 1, 2020	Pay remaining assets to Robina Foundation Fund at The Minneapolis Foundation
Dec. 10, 2020	File Articles of Dissolution with the Minnesota Secretary of State, effective December 31, 2020 (FaegreBD)
Dec. 10, 2020	File Statement After Transfer of Assets with the Minnesota Attorney General, indicating that dissolution will be effective as of December 31, 2020 (FaegreBD)
May 15, 2021	Filing deadline 2020 Form 990-PF without extension (CLA)

¹ All dates are approximate.
US.125336210.01

ROBINA FOUNDATION

TO: Robina Foundation Board of Directors
FROM: Penny Hunt and Nancy Gilberg
RE: Archiving Robina Records
Date: November 14, 2019

Status of work with Minnesota Historical Society

Since our earlier conversations with the Minnesota Historical Society, our primary contact Duane Swanson, Curator of Manuscripts, retired and Kate Hujda now holds that position. We spoke with Kate and Anneliese Verhoeven, who also works at the Historical Society, on September 24. In particular, we talked about the content of our Board Books and files to understand the Historical Society's archiving interests and policies, including items the Society does not wish to archive (e.g. tax returns).

Per Kate and Anneliese Verhoeven, we can provide our material in several batches over the course of the coming year. At least for the first batch of documents, Kate and Anneliese will come to our office to look at the files and assist with boxing the files for transmittal to the Historical Society. Assuming we provide our material in three batches, our first transmittal would be in early 2020, the second after the May Board Meeting, and the third in the fall of 2020, perhaps shortly after the November Board Meeting.

Board Books List
On behalf of Robina, several months ago Kathleen executed the Historical Society's "Donor Agreement" to establish Robina's archives. We discussed the agreement with Kate and Anneliese and have sent them our executed agreement.

* If we are interested in making a contribution to the Historical Society in appreciation of the establishment of Robina's files, we need to speak with the Historical Society's development department. We can wait until next fall to make the contribution.

On the subject of archiving: Attachment 1 is the article "Keeping what counts – Should limited-life foundations create archives?" written by Matthew La Rocque, Senior Associate, Effectiveness Team, D.D. Bechtel, Jr. Foundation. In September I sent you this article via email, but I thought you would like to see it in hard copy.

Status of Purging of Files

Board Books

Both of us have reviewed all 54 Board Meeting books, as well as Robina's Minute Books, Robina Foundation Policy and Procedures Manual, book containing the Foundation's Articles of Incorporation, Bylaws and Certificate of Incorporation and miscellaneous books for Listening Tour, etc. to prepare them for archiving.

Files

Purging of files is guided by information from Faegre Baker Daniels concerning record retention:

- Below is a list of legal and tax documents that should be retained in the corporate records following dissolution. Most documents should be retained for seven years following dissolution.
 - Articles of Incorporation
 - Bylaws
 - Board policies
 - Resolutions and filings associated with dissolution
 - Financial statements – last 4 years
 - Audit reports (including modified review during last few years of existence)
 - Record of accounts and all transfers pursuant to dissolution
 - IRS Form 1023
 - IRS Determination Letter
 - Federal tax records – last 4 years
 - State tax records – last 4 years
 - Annual corporate filings with Minnesota Secretary of State and Attorney General – last 3 years
 - Copies of insurance policies
 - Copies of grant agreements and final grant reports - last 4 years
 - Copies of grant agreements, and interim reports for any open grants
 - Copies of any contracts terminated during dissolution.

Foundation files originally filled 10 drawers in the Foundation's file cabinet. As of today, Foundation records remain in 6 drawers (3 of which are half filled).

Note: As indicated on Faegre's list, we need to keep federal and state tax records for the last four years of Robina's operations. The Historical Society does not want us to archive tax returns. In addition, including insurance policies, leases, and other contracts in our archives doesn't seem necessary since the goal of the archives is to preserve material that documents the work and impact of Robina. Presumably, these documents and many others will be on the jump drives given to Board Members. }

Keeping what counts

Should limited-life foundations create archives?

Matthew La Rocque, Senior Associate, Effectiveness Team, S. D. Bechtel, Jr. Foundation

Introduction

When a foundation chooses to wind down and close its doors, it confronts a range of new questions. The most obvious relate to when it should close and what it should do in the time remaining. A major focus is on getting results for the grantees and communities it serves. But as programs conclude and grant dollars dwindle, foundations will at some point confront the question of what to leave behind. In approaching that question, some consider establishing a foundation archive.

As the S. D. Bechtel, Jr. Foundation prepared for its final chapter, it considered establishing an archive. To inform that decision, a cross-functional task force reviewed available research on foundation archives, studied the archiving practices of other limited-life foundations, and spoke with experts at four archival research centers.¹ The goal was to better understand what, how, and why foundations archive.

We learned that funders preserve their knowledge for different purposes and in different ways.² Some have sought to make significant contributions to the history of philanthropy by placing documents and other artifacts in established archives housed within universities or other institutions. Others have found ways to make relevant knowledge available through third-party communication channels that serve their specific audiences and issue areas. Some have employed a mix of these or other approaches.

We also learned that creating an archive is hard work and can involve significant expense. In other words, there are clear tradeoffs when considering the benefits and costs of archiving information.

While there is no common playbook when it comes to archiving, foundations considering an archive might ask:

- 1 Do we have knowledge or experience that could benefit others?
- 2 Which people, organizations, and networks do we most want to reach with that knowledge?
- 3 Is an archive the right or best way to reach them?

Knowing something about the role of archives and the opportunities and challenges associated with creating and maintaining them is a good place to start.

¹ In addition to learning from the websites of five limited-life foundations, staff reviewed case studies and conducted interviews to understand the archival decisions of the Orfalea Foundation, the AVI CHAI Foundation, and The Atlantic Philanthropies. Staff also interviewed archival professionals at the Rockefeller Archive Center, Indiana University-Purdue University Indianapolis (IUPUI), UC Berkeley's Bancroft Library, and the California Historical Society.

² In 2017, the Center for Effective Philanthropy (CEP) interviewed leaders of 11 foundations sunsetting between 2016 and 2026. The study found that while most of these foundations wanted to preserve their knowledge to share lessons learned, there was no clear point when they finalized their archiving plans, and they did not adopt a uniform approach to knowledge preservation. From: The Center for Effective Philanthropy. [A Date Certain: Lessons from Limited Life Foundations](#). 2017.

What Foundations Leave Behind: Archives in Context

As limited-life foundations wrestle with the question of what to leave behind, they can highlight their knowledge through a range of platforms.

- **Foundation websites:** Websites can be tailored to funders' knowledge-sharing goals and live on for years at minimal cost. The websites of five closed foundations considered for this analysis are retrospective in nature. While they vary in design and format, they feature similar information, including detail on grantmaking programs, grantee highlights, spend-down reflections, and evaluation reports.

EXAMPLES: WEBSITES OF CLOSED FOUNDATIONS

The Beldon Fund closed in May 2009. Its website hosts resources on the practical implications of the foundation's sunset, a final impact assessment conducted five years after closure, and independent evaluations of Beldon's strategies and results.

beldon.org

The Noyce Foundation closed at the end of 2015. For a time, the foundation hosted a website with information on its initiatives, a final report, videos about grantees, and a repository for the foundation's annual reports. As of September 2018, however, the site's landing page had disappeared, suggesting that it is no longer maintained.

The Orfalea Foundation closed at the end of 2015. Its website features case studies, evaluations, multimedia, and data about its impact. It also links to a Fall 2015 supplement to the Stanford Social Innovation Review, which Orfalea sponsored to detail lessons learned through its grantmaking.

orfaleafoundation.org

Orfalea preserved its original, pre-sunset website in a separate web archive.

archive.orfaleafoundation.org

The Andrea & Charles Bronfman Philanthropies closed in 2016. Its website includes details on the foundation's spend-down strategy, a report reflecting its thirty years of philanthropy, and a library featuring knowledge products related to its grantmaking areas.

acbp.net

The Hagendorn Foundation closed at the end of 2017. Its website has pages about what it funded, research and publications it commissioned, and a 20-chapter retrospective telling its story.

hagedornfoundation.org



Partially Scanned Material

The remainder of this page/item has not been digitized due to copyright considerations. The original can be viewed at the Minnesota Historical Society's Gale Family Library in Saint Paul, Minnesota. For more information, visit www.mnhs.org/library/.

Robina Foundation

[HOME](#) [MISSION](#) [FOUNDER](#) [BOARD OF DIRECTORS](#) [LEGACY REPORT](#) [CONTACT](#)



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 institutions partners.

Learn more about our [Founder](#) and [Mission](#).

Robina Foundation
80 South 8th Street, Suite 4900
Minneapolis, MN 55402
Phone: 612-333-2313

Robina Foundation

[MENU](#)

Mission

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 institutions 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.

The Robina Foundation exclusively supports the four institutions selected by its founder.

The Foundation's grantmaking program is proactive and collaborative, driven by a strong commitment to the development of new ideas and models that have the potential to significantly improve both the selected institutions and the larger society in which we live.

As directed by Robina Foundation's Founder, Robina is a limited-life foundation. The Foundation plans to dissolve effective December 31, 2020.

Robina Foundation

[MENU](#)

Founder

James H. Binger, 1916-2004

Jim Binger lived almost all of his life in the Twin Cities of Minnesota, but he was a man of the world.

Born on May 16, 1916, in St. Paul, Mr. Binger was the son of Henry Binger, a physician, and Mrs. Vida Binger. He grew up on St. Paul's Summit Avenue, down the street from his high school sweetheart, Virginia McKnight. Her parents were William L. McKnight, the man who built the 3M Company into an international powerhouse, and Maude McKnight. Jim Binger and Virginia McKnight were married for more than 62 years and had three children, James (Mac), born in 1941; Cynthia, 1942; and Judith, 1946. (Judith died in 1989.) Virginia died in December 2002.



James H. Binger, 1916-2004

Mr. Binger graduated from St. Paul Academy in 1934 and from Yale University, where he studied economics, in 1938. He entered law school at the University of Minnesota in 1939 and completed his L.L.B. degree in 1941. His first job out of school

was with the law firm that is now Dorsey & Whitney. One of his clients was Minneapolis-Honeywell Regulator Company, which later became Honeywell, Inc. Mr. Binger joined Honeywell in 1943, rising through the ranks to become president (1961-1965), chairman of the board (1965-1974), and chairman of the executive committee (1974-1978). He led the company through a remarkable expansion into the defense, aerospace, and computer industries.

A Quiet Philanthropist

Mr. Binger's generosity with his time, money and intellect improved the quality of life in the Twin Cities.

In 1974, when his father-in-law asked Virginia Binger to run The McKnight Foundation, Mr. Binger joined McKnight's board of directors, along with the couple's children. He headed the investment committee and helped establish the fiscal policies that remain in place today, including managing the Foundation's investment portfolio to keep grantmaking capacity ahead of inflation. He extended the Foundation's grantmaking into brain research, the arts and international grantmaking.

In 1976, Jim and Virginia Binger took over William L. McKnight's struggling theater enterprise, which included two Broadway theaters. They named their company Jujamcyn, after their children's names: Judy, James and Cynthia. Theater is a notoriously difficult business, but Jujamcyn thrived, eventually owning five of Broadway's most successful theaters, with such hits as *Angels in America* and *The Producers*.

Mr. Binger also was a director of the Vivian Beaumont Theaters, a member of the executive committee of the League of American Theaters, and a lifetime member of the board of the Guthrie Theater.

A lifelong polo player who competed internationally, Jim Binger purchased land to found the Twin Cities Polo Club in Maple Plain and helped purchase land for the Gulfstream Polo Club in Florida, where the Bingers owned a house in the 1960s. His interest in horses also



led to another of his successful businesses. From 1978 to 1987, Mr. Binger owned Tartan Farms Corporation, a Florida company founded by his father-in-law that bred and raced champion thoroughbreds.

Mr. Binger also served as a director of several for-profit and nonprofit boards, including the International Peace Academy, the Atlantic Institute of Foreign Affairs, Northwest Airlines, 3M Company, Chase Manhattan Bank, and the Advisory Committee on Trade Relations. He founded his own investment firm, Tartan Investments, in

1978.

He demonstrated his personal commitment to philanthropy by establishing the Robina Foundation in 2004. Through the work of the Foundation, significant philanthropic investments will be made in pursuit of innovation in critical social issues.

On November 3, 2004, James H. Binger died at age 88. His vision, sense of adventure and generosity, and commitment to creative endeavors will endure.

Read a more detailed biography about James Binger

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Board Of Directors

SUSAN V. BERRESFORD, *Vice Chair*

Susan V. Berresford is the former President of the Ford Foundation.

Susan V. Berresford was President of the Ford Foundation and served in that role from 1996-2008. She first joined the Ford Foundation in 1970 and during her 38-year tenure held numerous positions including Project Assistant and Program Officer in the Division of National Affairs; Officer in Charge of the Foundation's Women's Programs; Vice President, U.S., and International Affairs Programs; Vice President of the Program Division, and Executive Vice President.

Prior to joining the Ford Foundation, she served as a Program Officer for the Neighborhood Youth Corps from 1965-1967. From 1967-68, she worked for the Manpower Career Development Agency where she was responsible for the evaluation of training, education, and work programs.

Berresford attended Vassar College and then studied American history at Radcliffe College, where she graduated cum laude in 1965. She currently serves on the board of United States Artists which she helped found, the Trust for Mutual Understanding, the Japan Center for International Exchange, The Brearley School,

and the Robina Foundation. Additionally, she is a member of the Council on Foreign Relations. She convened the US-Vietnam Dialogue Group on Agent Orange/Dioxin. She has also served on the boards of The California Endowment, The Henry J. Kaiser Family Foundation, Independent Sector, The Council on Foundations, Women in Philanthropy, and was a member of the Vestry of Trinity Church, and the Trinidad California Trust Fund. Today, she works from her office at The New York Community Trust.

KATHLEEN BLATZ, *Chair*

Kathleen Blatz is an attorney in private practice, specializing in arbitration and mediation. Prior to re-entering private practice, Kathleen was Chief Justice of the Minnesota Supreme Court from 1998 to 2006 and served as Associate Justice from 1996 to 1998. Prior to her appointment to the Supreme Court, she served as a Fourth Judicial District Court Judge, chambered in Hennepin County, Minnesota. Kathleen began her legal career in private practice at a large Minneapolis law firm before serving as an Assistant County Attorney in Hennepin County. In 2007, she was recognized by Minnesota Law & Politics as one of the “100 Most Influential Attorneys in State History.”

Beginning in 1979, Kathleen Blatz served eight terms in the Minnesota House of Representatives, which included five years as an Assistant Minority Leader. She also has an extensive record of service on national and regional boards, including serving as a Trustee of St. Thomas University, a board member of the Minneapolis Big Brothers Big Sisters, and as a member of the Judicial Conference Committee on Federal-State Jurisdiction.

Presently, Kathleen serves as a Director of the Columbia Funds Board and as a Trustee of Blue Cross Blue Shield of Minnesota.

Kathleen Blatz has received numerous national and regional honors, awards, and honorary degrees. She holds a B.A., summa cum laude, from the University of Notre Dame, and an M.S.W. and J.D. with honors from the University of Minnesota.

STEPHEN R. LEWIS, JR., *Treasurer*

Stephen R. Lewis, Jr. is President Emeritus and Professor of Economics Emeritus at Carleton College, where he served as president from 1987 to 2002. He began senior administrative experience at Williams College, where he twice served as Provost of the College (1968-71 and 1973-77). In January 2007 he was elected Chairman of the Boards of Columbia Funds, the mutual fund group formerly IDS and American Express Funds.

An economist with a specialty in developing countries, Lewis received his BA, Phi Beta Kappa, from Williams in 1960, and his PhD in Economics from Stanford in 1963. He taught Economics at Stanford (1962-63), Harvard (1965-66), the University of Nairobi (1971-72) and Williams (1966-87), where he held the Herbert H. Lehman Professorship.

As Research Advisor to the Pakistan Institute of Development Economics in Karachi (1963-65), Lewis headed a research section on fiscal policy; his work resulted in two books, including *Pakistan: Industrialization and Trade Policy* (1970). He also lived in Nairobi (1971-73) where he served as an Economic Advisor to the Ministry of Finance and Economic Development of the Government of Kenya.

In 1975, Lewis began a long association with Botswana, serving as Economic Consultant to the Ministry of Finance and Development Planning on a resident basis in 1977-78 and 1980-82, on short term assignments from 1975 to 1988, and occasionally until 1998. With Charles Harvey he coauthored *Policy Choice and Development Performance in Botswana* (1990). Lewis edited Q.K.J. Masire's *Very Brave or Very Foolish? Memoirs of an African Democrat* (Macmillan, 2006). Masire served as Botswana's Vice President and Minister of Finance from Independence in 1966 until 1980, and as its second President from 1980 to 1998. Lewis was awarded the Presidential Order of Meritorious Service by the Botswana Government in 1983.

As a result of his work in Southern Africa, Lewis was asked by the Council on Foreign Relations to analyze the South African economy, which resulting in his 1990 book *The Economics of Apartheid*.

Lewis is a member of the Council on Foreign Relations and the Dean's Advisory Council of the Hubert H. Humphrey School of Public Affairs, a trustee of William Mitchell College of Law and of Wallin Education Partners, and Vice Chairman of the Carnegie Endowment for International Peace. He is a Director of Columbia Funds and from 2002-13 of Valmont Industries, Inc. He chairs the Visiting Committee of the Center for Development Economics at Williams, and also serves as a consultant to colleges and their presidents. Among his awards are honorary degrees from Williams, Carleton, Macalester College, Doshisha University in Kyoto, Japan, and Lingnan University in Hong Kong.

In 1996 Lewis married the former Judith Frost Flinn. They each have three grown children and several grandchildren.

MARIANNE D. SHORT, *Secretary*

Marianne D. Short joined UnitedHealth Group as Executive Vice President and Chief Legal Officer in January 2013. She is responsible for overseeing legal, regulatory and compliance matters across the enterprise. UnitedHealth Group is the most diversified health care company in the United States and a member of the Dow Jones Industrial Average, serving more than 80 million individuals worldwide with operations in all fifty states and 20 other nations.

In addition, Ms. Short is the internal lead director of UnitedHealth Foundation, which is devoted to improving access to quality, cost-effective medical care and enhancing community well-being. She is also chairperson of the Charitable Giving Committee, helping to raise funds for the communities where the people of UnitedHealth Group live and work.

Prior to joining the company, Ms. Short had over 35 years of courtroom and management experiences. From 2007-2012, she was the Managing Partner at Dorsey & Whitney LLP with responsibility for over 600 attorneys in 19 offices world-wide. In addition to her management responsibilities, Ms. Short was an active litigation partner, co-chair of the firm's Appellate and Health Litigation practice groups, and is a member of the American College of Trial Lawyers, the American Academy of Appellate Lawyers, certified by the Minnesota State Bar

Association as a Civil Trial Specialist, and ranked among America's leading business lawyers by Chambers USA.

From 1988-2000, Ms. Short served as a judge on the Minnesota Court of Appeals and authored more than 900 opinions in virtually every area of civil and criminal law. Prior to 1988, Ms. Short was an attorney at the Minnesota Attorney General's Office and the Dorsey firm. She is a native of Minnesota, serves on numerous non-profit boards, including Boston College Board of Trustees, the Board of Trustees of the Minneapolis Institute of Arts, and the Leadership Council on Legal Diversity. Ms. Short earned her Bachelor of Arts degree from Newton College of the Sacred Heart in 1973, and her law degree from Boston College Law School in 1976.

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Legacy Report

The Robina Foundation is a limited-life foundation slated to end on December 31, 2020. As the Foundation neared the end of its term, the Board of Directors engaged a philanthropic giving expert to discuss Robina's work with the Board and Robina's grantees. Robina's Legacy Report describes the lessons learned from the Robina experience and includes the Foundation's "Guiding Principles" and a list of Robina's grants. Throughout the operation of the Foundation, the Board was informed by Jim Binger's vision for the Foundation, which the Founder set forth in the Robina's Bylaws.

Hard copies of the Legacy Report are available on request.

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Contact

PENNY HUNT, *Executive Director*

Penny has been Executive Director of the Robina Foundation since 2009. Prior to joining the Robina Foundation, Penny was Vice President, Community Affairs and Executive Director of The Medtronic Foundation at Medtronic, Inc., the world's largest medical technology company.

For nearly 15 years at Medtronic, Penny had primary responsibility for the development of major partnerships and strategic relationships and grants with local, national and international organizations. Leading the development and implementation of Medtronic's worldwide philanthropy strategies, Penny launched Medtronic's international philanthropy. During her tenure, Medtronic Foundation grants grew from \$2.4 million to more than \$25 million per year, with focus in the areas of health, education and community.

Before joining Medtronic, Penny was Director of Public Affairs for the Dayton Hudson Department Store Company (now Target Corporation), where she managed charitable giving, government and public affairs. An experienced lawyer, Ms. Hunt spent more than 14 years working for law firms and in private practice, with a

concentration in real estate law and development. She also taught French at the high school and college levels.

Ms. Hunt holds a bachelor's degree magna cum laude in French from Carleton College, a master's degree in arts and teaching from Duke University, Durham, North Carolina, and a juris doctor degree magna cum laude from William Mitchell College of Law, St. Paul, Minnesota. Penny was a Fulbright Scholar in Lyon, France.

Penny's community involvement has included membership in the Minnesota Women's Economic Roundtable and on the boards of MacPhail Center for Music, Mill City Commons, Housing 150, an affordable housing collaboration, William Mitchell College of Law, the Minnesota Council on Foundations, the corporate committees of the Conference Board and the Council on Foundations, the Minnesota Women's Campaign Fund (now WomenWinning), and the United Way of Minneapolis.

NANCY GILBERG, *Administrative Consultant*

Write to us at:

Robina Foundation
80 South 8th Street, Suite 4900
Minneapolis, MN 55402

Or fill out the form below and we will get back to you.

Your Name (required)

Your Email (required)

Subject

Your Message

Send

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ROBINA FOUNDATION

TO: Robina Foundation Board of Directors

FROM: Penny Hunt and Nancy Gilberg

RE: Robina Foundation Office Options

Date: November 11, 2019

As you know, we have been working to identify options that will accommodate what we believe will be our office needs until Robina's dissolution on December 31, 2020. To date Robina's landlord has refused to agree to our occupancy of the current space with the payment of our monthly rent through the end of 2020.

Nancy recently identified an option that we had not considered before. We believe the following option meets our needs and will provide maximum flexibility during 2020.

Terminate lease effective June 30, 2020, and work in space adjacent to current Robina office

Jim Peter, whose office is next to the Robina office, has offered to let Nancy continue to use the desk and file cabinets she currently uses. (Jim has access to this space in connection with his office.) Penny would not have an office after June 30, 2020. FYI, Jim is authorized to sign checks for Robina and advises us regarding the office space as he has been the "unofficial manager" of the 4900 Association since its inception. We currently pay Jim \$1,000 annually.

Lease term: ends May 31, 2021

Termination of lease: notice to be given to lessor by the end of February 2020 to terminate lease as of June 30, 2020.

Termination Cost: \$1,780.18: 2-month lease payment required when we terminate our lease.

Although we believe this option works best for Robina, following are other options we considered:

Continuation of the current lease for the Robina office

Lease term: ends May 31, 2021

Cost: \$890.09/monthly.

Terminate lease effective June 30, 2020, and move to a Coworking space or other office option

Termination Cost: \$1,780.18: 2-month lease payment required when we terminate our lease.

Approximate cost of Coworking space: \$420/month (dedicated desk/filing cabinet)

* Note - # of articles
abt CNA



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James H. Binger Center for New Americans ANNUAL REPORT – July 1, 2018 – June 30, 2019

PART 1 | OVERVIEW

The James H. Binger Center for New Americans is a nationally recognized immigration clinical program designed to impact the immigration system and provide students with exceptional educational opportunities. The Center's groundbreaking model and innovative design has attracted talented students from across the country to engage in some of the most pressing human rights issues facing the nation. During the reporting period the Center has protected the rights of noncitizens and vulnerable families in immigration proceedings and driven transformative change to support thousands of immigrants and refugees.

The Center has built a national reputation in training law students to understand immigration law and navigate its complexity in several immigration settings. Last year, the Center enrolled **29 clinical students, plus 14 student directors, 7 summer student directors, and 3 students for externships**. This year the Center successfully launched its fourth clinic, the Rural Immigrant Access Clinic which brought much needed services to rural immigrants and offered free comprehensive legal screenings throughout the state.

The Center's team includes 3 full-time clinical faculty professors, 1 full-time Executive Director and Education and Outreach Director, 1 full-time Program Coordinator, two Fellows, and 1 Administrative Coordinator. The Center's law-firm partners—Faegre Baker Daniels, Dorsey & Whitney, and Robins Kaplan—have now contributed nearly **8,200 pro bono hours** to Center matters since our launch, a matching investment that now **exceeds \$3.2 million**.

Some highlights from this year include:

- The **Federal Immigration Litigation Clinic** led impact litigation and with our partners handled **38 matters before federal courts and completed 21 cases** and succeeded in 13 (62%).
- The **Detainee Rights Clinic** provided comprehensive representation to a growing detainee population, including **45 bond hearings and merits representation in 103 matters**.
- Students, partners and staff in the **Education and Outreach Program** educated **over 1,345 immigrants and community members** and trained **over 540 lawyers and community attendees at continuing legal education programs**.
- The Center's newest clinic, the **Rural Immigrant Access Clinic** provided comprehensive screenings to **177 noncitizens** in vulnerable communities.

PART 2 | DETAILS OF PROGRESS

GROWTH AND SUCCESS IN CHALLENGING TIMES

Over the past year the Center continues to respond to an unprecedented attack on immigrant rights on several fronts. The current administration has reduced refugee admissions to historic lows, stifled asylum seekers' ability to request relief at the border, sought to narrow the definition of asylum and intensified mass incarceration and detention for immigrants in removal proceedings. These restrictive policies have also been coupled with the ongoing humanitarian and human rights crisis at the southern border that has unfolded in national view particularly the widely criticized zero tolerance policy that left over 5,400 children separated from their parents or guardians.

During this period, the Center has played a critical role in training law students to engage in much-needed federal litigation. Since its creation, the Center has trained 29 law students to handle complex federal appellate matters and filed over 50 appeals in U.S. Circuit Courts. The Center's efforts serve as a force multiplier and several of the Center's alumni have joined high profile federal litigation efforts in the region and across the country.

In December 2018, three law students with the Federal Litigation Immigration Clinic successfully argued a challenging case, *Jasso Arangure v. Whitaker*, before the Sixth Circuit Court of Appeals to protect the principle of *res judicata* and limit the government's efforts to unfairly retry cases. Center students argued another circuit court argument before the Eight Circuit Court of Appeals in June 2019 and are preparing for four more cases before the Eight Circuit Court of Appeals this fall.

The Center expanded capacity in the region to reach vulnerable immigrants with the launch of its fourth clinic. The Rural Immigrant Access Clinic is the successful outgrowth of the Rural Immigrant Access Initiative launched by the Education and Outreach Program in January 2016. With 6 law students, 10 pro bono attorneys and a host of community partners, the clinic provided ongoing access to immigrants in areas of the state that were identified as being underserved.

The Center's court monitoring project, the Human Rights Defenders Project, grew significantly over the past year and has engaged a growing cadre of non-attorneys in the process of monitoring immigration court proceedings for due process violations. This project is operated in partnership with The Advocates for Human Rights and Robins Kaplan, and in January 2019 Professor Linus Chan and Jack DeWaard, professor of sociology in the College of Liberal Arts, received a faculty research award to develop criteria to help standardize the subjective input that they receive and train volunteers using those techniques. The funding will chiefly be used to hire a graduate assistant to assist in recruitment, training, and data compilation.

The Center maintains an excellent national reputation and was awarded the American Immigration Lawyer Association's 2019 Arthur C. Helton Memorial Human Rights Award and The Advocates for Human Rights 2019 Human Rights Volunteer Award for the work done by the "Somali 92" volunteer legal team last year.



Much of the Center's success is due to its integrated model and diverse network of service providers and advocates. The Center's dedicated and inspiring community grows more effective and efficient with each year and includes law school staff, faculty, and students, as well as undergraduate students, members of the social work and medical community, legal aid providers, law firms and community volunteers. In this challenging environment, the Center continues to lead the response to multiple crises in a thoughtful and impactful way to drive change into the future.

FEDERAL IMMIGRATION LITIGATION CLINIC

The Binger Center seeks to transform our immigration laws through collaborative impact litigation in federal courts. During the year, the Center coordinated with local partners and national allies to pursue litigation priorities and respond with critically needed litigation in a changing environment.

Federal Immigration Litigation Clinic | 2019 goals and progress

Goals	Status
Set litigation priorities with partners	Completed. Litigation priorities included: • Protecting the rights and liberty of noncitizens facing deportation proceedings, including those detained by the Department of Homeland Security • Expanding asylum protection for victims of persecution • Securing the rights of immigrant and refugee children • Protecting family unity • Countering arbitrary agency action and delays
Handle 24 appellate and district court matters	Exceeded. The Center and our partners handled 38 litigation matters (a 26% increase from last year) completed 21, and succeeded in 13 (a 62% success rate): • 2 cases at U.S. Supreme Court ▪ 2 losses • 2 petitions for rehearing at U.S. Courts of Appeals: ▪ 2 losses • 10 petitions for review in U.S. Courts of Appeals: ▪ 4 wins / 0 losses / 6 pending



	▪ 4 with amicus support • 8 cases in U.S. District Courts: ▪ 5 wins / 3 pending • 6 cases at Board of Immigration Appeals (BIA): ▪ 2 wins / 2 losses (2 losses on appeal to U.S. circuit courts) / 2 pending • 10 amicus curiae briefs: ▪ 6 at U.S. Courts of Appeals / 3 at BIA or U.S. Atty General / 1 at Minnesota Ct. Court
Enroll 12-16 students in clinic or with partner organizations	Completed. The clinic enrolled 8 students and 6 student directors in the 2018-19 academic year plus 3 summer student directors for a total of 17 enrollments.

Federal Immigration Litigation Clinic | Successes, results and impact

- **Sixth Circuit victory establishes important legal principle to protect immigrants from repeat trials based on one set of underlying facts**

In December 2018, Federal Immigration Litigation Clinic students argued *Jasso Arangure v. Whitaker* in the Sixth Circuit Court of Appeals which covers Kentucky, Michigan, Ohio and Tennessee. The case involved a legal permanent resident who was placed into removal proceedings for a "crime of violence" however the Department of Homeland Security lost their case when the Circuit Court declared a "crime of violence" as unconstitutionally vague. The Department of Homeland Security then attempted to bring a second deportation action based on the same facts of the earlier case. The court ruled that the principle of *res judicata* applied to preclude the second administrative proceeding. Without *res judicata* in immigration proceedings, the government could bring charge after charge, based on the same set of underlying facts. The case upheld a vital check that is fundamental to the rule of law.

- **On the ground in Guatemala to support litigation to stop child separation**

The Center supported a high profile class-action lawsuit surrounding the administration's zero tolerance/child separation policy by gathering declarations from parents who had been removed from the U.S. and whose children remained in U.S. detention centers. Center student, Paul Dimick '19, whose combined knowledge of the law and the local language (K'iche') assisted him as he travelled to Guatemala and gathered statements from parents who described a process wrought with due process concerns. In many cases, parents had been convinced to sign away their procedural rights in the hopes of keeping their children from being returned to Guatemala, where criminal gang activity posed an immediate danger to them. The

administration ultimately stopped the child separation policy after public pressure and successful federal litigation.

DETAINEE RIGHTS CLINIC

The Detainee Rights Clinic defends indigent noncitizens in immigration court after they are incarcerated by the Department of Homeland Security. Law students work with our partners to increase representation, expand earlier access to legal advice, and advocate for better conditions on behalf of immigrant detainees.

Detainee Rights Clinic | 2019 goals and progress

Goals	Status
Represent detainees in 50 bond hearings	Near complete. The Center and its partners represented clients in 45 bond hearings. Center faculty continue to provide mentorship to volunteer attorneys in the region via the Pro Bono Bond Representation Project.
Represent detainees in 60 merits cases	Exceeded. The Center and its partners expanded capacity by an additional 34 % this year to provide merits representation to detained immigrants in Minnesota in a total of 103 matters, completed 42, and succeeded in 23. This represents a 72% increase in presentation from the original benchmark set for clinic. Additional merits representation was also provided in 288 non-detained matters for children and families fleeing violence from Central America.
Enroll 12-16 students in clinic or with partner organizations	Completed. The clinic enrolled eight students and three student directors in the 2018-19 academic year plus three summer student directors for a total of 14 enrollments.

Detainee Rights Clinic | Successes, results and impact

- **Students represent immigrant in novel pardon plea**

The Detainee Rights Clinic represented a domestic violence victim in June 2019 before the Minnesota Board of Pardons who completed a sentence for killing her husband during a severe domestic assault. The client feared returning to her home country where she would be targeted by her deceased husband's family. The pardon case is still pending and has received local press attention and led to discussions with the governor's office regarding reform of Minnesota's pardon system. (See Appendix B)

- **23 life-changing merits cases won, 25 bond requests won**

The Detainee Rights Clinic successfully represented a lawful permanent resident who was held in county jail for over six months. Center students worked to have his underlying criminal conviction and immigration case terminated. Their work allowed him to reunite with his family, including his newborn daughter who was born while he was in custody. In addition to 23 successful merits hearings, of the 45 bond cases argued by the Detainee Rights Clinic and its partners this past year, 25 were successful in reducing bond or winning release.

- **Expert testimony and support to systemic legal reform**

Professor Linus Chan testified before the Minnesota State Legislature regarding a criminal post-conviction reform bill that would allow immigrants unfairly convicted in criminal proceedings to reopen their cases. This was an outgrowth of the clinic's work with Release Minnesota 8, a community group created to advocate for several Cambodian men (including the Center's former client) who were swept up for deportation after living safely under supervised release for decades.

EDUCATION AND OUTREACH PROGRAM

The Education and Outreach Program teaches noncitizens about their legal rights and informs the wider community about issues of immigration policy. The Program also trains lawyers to provide high-quality pro bono services to immigrants.

Education and Outreach Program | 2019 goals and progress

Goals	Status
Maintain and expand network of University and community allies	Completed. The Center maintained a broad network of allies and community partners that continues to grow including consistent ongoing collaboration with: • American Civil Liberties Union of Minnesota • Release MN 8 • NAVIGATE MN • University of Minnesota Community University Health Clinic • University of Minnesota School of Social Work • Council on American Islamic Relations
Regularize and expand educational and outreach programming for noncitizens	Completed. The launch of the <u>Rural Immigrant Access Clinic</u> provides a stable and consistent group of students to serve immigrants in rural communities and offer services in remote county jails.
Expand programs and materials for pro bono lawyers	Completed. The Center's signature Annual Immigration Forum attracts advocates, litigators and academics from across the country and brought <u>223</u> attendees this past year. The Center also offered an Advanced Immigration Law Series and a Pro Bono Bond Representation

Build capacity among community partners to respond to critical legal needs of noncitizens	Training. Completed. The Human Rights Defender Project trained volunteer observers to monitor immigration court and coordinated nearly 168 volunteers to make 3,125 court observations. Translation and Interpretation Project. The volunteer language services program grew to 169 people with language capability in 29 languages and continues to provide critical services to the Center and its partners in supporting litigation and the pool of volunteers.
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Education and Outreach Program | Successes, results and impact

- **The Rural Immigrant Access Clinic**

The Rural Immigrant Access Clinic taught by Executive Director Deepinder Mayell works in tandem with the Education and Outreach program's Rural Immigrant Access Initiative. During the fall semester rural sessions are offered as a volunteer program that enlist a variety of students including 1L's, LLM's and public policy students. The Clinic enrolled 6 second and third year law students for the spring semester to provide in-depth services to immigrants including follow-up legal research and analysis, direct referrals to legal aid partners for viable cases and the completion of 64 Declarations of Parental Authority which are custodial documents that designate temporary caregivers in the event of deportation of a parent. Overall, the Clinic and the Initiative conducted 177 individual intakes and travelled 936 miles to 6 towns in rural Minnesota during the year. The Center's rural outreach efforts are coordinated with the ACLU-MN, Volunteer Lawyer's Network and the Immigrant Law Center of Minnesota

- **Event Highlights:**

The Center hosted several events for the pro bono legal community as well as the general public. Over 1000 people attended conferences featuring Center faculty and staff.

- **2018 Immigration Law Forum: Civil Rights Behind Bars**

On November 2 and 3, 2018, the Center's Annual Forum brought together 223 community members and attorneys to learn about the immigration trends, practices and key development in the law. This year's forum was held over two days in conjunction with *Law & Inequality: A Journal of Theory and Practice* and featured nationally renowned leaders such as Katie Shepherd from the American Immigration Council and the forum's keynote speaker, Lee Gelernt, lead counsel on the family separation lawsuit before the U.S Supreme court.

- **Advanced Immigration Law Series**

This series was held across partner firm offices in Minneapolis and featured

law student presentations. Topics included advanced litigation strategies for removal cases and changes to the public charge definition. The series attracted 129 attendees.

PART 3 | JAMES H. BINGER PROFESSORSHIP IN CLINICAL LAW

→ In FY17, the Robina Foundation contributed \$1 million to create the James H. Binger Professorship in Clinical Law; the University contributed a \$500,000 match. As is typical with other newly endowed professorships at the Law School, the Binger Professorship was not awarded in the first few years of its existence. This approach allows a balance to accumulate, which will ensure that there will be a steady revenue flow to the Law School in the event of a market downturn.

In January 2019, Associate Professor Steve Meili was named the inaugural James H. Binger Professor in Clinical Law. Professor Meili, who has a J.D. and M.A. from New York University and an LL.M. from Georgetown University, entered law teaching in 1991 and joined the Law School faculty in 2008 as a clinical professor. He received tenure as an associate professor in 2018.

Professor Meili writes and teaches about the rights of noncitizens, particularly those seeking asylum. As part of the Center, he serves as director of the Immigration and Human Rights Clinic, where students represent asylum-seekers and trafficking victims. Professor Meili's law review articles have appeared in numerous publications, including the *Georgetown Immigration Law Journal*, the *New York University Journal of International Law*, and the *Columbia Human Rights Law Review*. At the Law School, he was awarded the Law School's Stanley V. Kinyon Clinical Teacher of the Year Award in 2011 and held the Vaughn G. Papke Clinical Professorship in Law from 2012 to 2014. He currently teaches Immigration Law and has taught Refugee and Asylum Law, Civil Procedure, and legal practice as a member of the faculty.

The Law School plans to celebrate Professor Meili and his appointment as our inaugural James H. Binger Professor in Clinical Law with a lecture and reception in Fall 2020.

PART 4 | THE YEAR AHEAD

The Center meets twice a year for strategic analysis and planning and in the coming year the Center has set an ambitious agenda to address this crucial moment in immigration policy. The Center will work closely with alumni who have entered the immigration legal sector and continue to lead advocacy efforts for immigrants.

(This fall the Center welcomed Nadia Anguiano-Wehde as an Immigration Advocacy Fellow and visiting assistant professor for a three year term. Nadia is a Center alum

and recently served as a clerk at the Eighth Circuit Court of Appeals. Nadia has an interest in practicing immigration law in the upper Midwest and her fellowship is designed to offer extensive training as a litigator both in immigration court and at the appellate level. Her contributions will add to the innovative and dynamic environment of the Center and she will serve as a valuable mentor to students as they prepare to argue influential cases at the circuit court level. (See Appendix A)

The Center will launch a concerted effort to utilize habeas corpus petitions in federal court to challenge mass incarceration of immigrant detainees. Long term detention has become commonplace across the country and the Center will engage in strategic litigation to challenge this inhumane practice. Center students will be supported by Center alumni who are driving this strategy forward in the region. The Center chooses cases with the potential to significantly impact the immigration system nationwide and student teams will be filing several cases on an ongoing basis throughout the year.

This winter and spring the Center will send 2 teams of law students, supervised by Center alumni and staff, to represent children and families seeking asylum that are detained in Dilley and Harlingen, Texas. A third team will travel to Tijuana, Mexico to support asylum seekers that are restricted from seeking asylum in the U.S. due to the Remain in Mexico policy. These trips place the Center on the frontlines of an ongoing humanitarian crisis and provides one-of-a-kind educational opportunities for law students.

The Center's administrative coordinator Elizabeth Coffield left the Center at the end of August 2019 to teach English in Spain. Liz was a wonderful staff member and contributor to the Center's program and events. The Center has hired Lorena Anderson as the new Administrative Coordinator for the Center and she started at the beginning of the fall 2019 semester.

Through innovative litigation and educational opportunities the Center has positioned itself as a critical member in a national network of organizations and litigators working to reform a broken immigration system. In the coming year, the Center community is driven to continue to pursue impact litigation and systemic change by training students and working closely with community partners.

APPENDICES

Appendix A - Faculty and staff biographies

Appendix B - Selected press and publicity

Appendix A - Faculty and staff biographies (alphabetical order)

Nadia Anguiano-Wehde

Nadia Anguiano-Wehde '17 joined the law school's James H. Binger Center for New Americans in September 2019 as an **Immigration Advocacy Fellow** and a **visiting assistant clinical professor**. Nadia's fellowship focuses on providing comprehensive legal representation to detained noncitizens, combining individual representation, impact litigation, and grassroots advocacy. As a law student, Nadia spent two years with the Center's Federal Immigration Litigation Clinic, representing immigrants and refugees before the U.S. Citizenship and Immigration Services, immigration courts, and U.S. Courts of Appeals. During this time, she also represented noncitizens in conjunction with attorneys in the Immigration Unit at Mid-Minnesota Legal Aid and the National Immigrant Justice Center in Chicago. In recognition of her commitment to public service and defending the rights of immigrants and refugees, Nadia was awarded the Excellence in Public Service Award by her law school graduating class and the University of Minnesota Human Rights Law Award by the law school's Human Rights Center.

Before rejoining the Center as a fellow, Nadia clerked for judges on the Eighth Circuit Court of Appeals and the U.S. District Court for the District of Minnesota. Prior to attending law school, she worked as a mechanical design and integration engineer for six years.

Lorena Anderson

Lorena Anderson joined the James H. Binger Center for New Americans in August 2019 after serving as a paralegal for an immigration law office in the Twin Cities. As **administrative coordinator**, Anderson supports the Center's four clinics and the Education and Outreach Program.

Benjamin Casper Sanchez

Associate Clinical Professor of Law Benjamin Casper Sanchez '97 joined the faculty as a visiting associate professor in 2013. He is **Faculty Director** of the James H. Binger Center

for New Americans and teaches the Federal Immigration Litigation Clinic, which engages students in strategic impact litigation on behalf of immigrants and refugees. He has more than 16 years of experience litigating cases before immigration courts, the Board of Immigration Appeals, U.S. District Courts, U.S. Courts of Appeal, and the U.S. Supreme Court. Before joining the Law School, Professor Casper Sanchez was in private practice. From 2008 to 2013, he was also Director of the Pro Bono Litigation Project at the Immigrant Law Center of Minnesota. He has previously served as an adjunct clinical professor of immigration law at the University of Minnesota Law School, William Mitchell College of Law, and the University of St. Thomas School of Law. From 1997 to 2001, he was an attorney for the nonprofit immigration law office Centro Legal, where he focused on deportation defense. He graduated with honors from the University of Minnesota Law School in 1997. Since 2011, Professor Casper Sanchez has served on the amicus curiae committee of the American Immigration Lawyers Association. He writes and lectures on immigration law topics for both local and national audiences.

Linus Chan

Associate Clinical Professor of Law Linus Chan joined the faculty at the end of 2013 as a visiting associate professor of clinical law. Prior to joining the James H. Binger Center for New Americans, he taught at DePaul College of Law in Chicago and at the DePaul Asylum and Immigration Law Clinic. He has practiced immigration law for more than 10 years with a focus on representing people who are detained by Immigration and Customs Enforcement. He teaches the Detainee Rights Clinic which provides representation and support for those facing removal from the United States detained in the Twin Cities area.

Elizabeth Coffield

Liz Coffield joined the James H. Binger Center for New Americans in July 2016 after graduating from Macalester College with a degree in Hispanic studies. Before formally joining the Center, Liz was a volunteer translator with its Translation and Interpretation Program; she has also translated for The Advocates for Human Rights. Liz left her role as **administrative coordinator** with the Center in August 2019 and will be teaching English in Spain.

Deepinder Mayell

Deepinder Singh Mayell is the **Executive Director** of the James H. Binger Center for New Americans and **Director** of the Center's Education and Outreach Program. Mayell works closely with Center faculty, staff and law firm and non-profit partners to develop, implement and resource Center programs. Mayell provides leadership and management for the Center's administrative and programmatic operations. The Education and Outreach Program engages law students in collaborative projects that teach noncitizens about their legal rights and train lawyers to provide high-quality pro bono representation to immigrants. Mayell designs initiatives in cooperation with faculty from the Center's three

immigration clinics and the Center's partners. Before coming to the Law School, Mayell was the director of the Refugee & Immigrant Program at The Advocates for Human Rights in Minneapolis. In that role, he directed the organization's legal services program and provided representation to asylum seekers at all levels of litigation. Mayell led the organization's national asylum law project, which supported pro bono attorneys representing asylum seekers throughout the United States. At The Advocates, Mayell supported the Center by serving as co-counsel in asylum litigation before the U.S. Supreme Court, as a co-organizer of numerous educational programs for law students and volunteer lawyers, and through his frequent appearances as a guest lecturer at clinical seminars.

Mayell spent several years as a staff attorney with Merrimack Valley Legal Services in Massachusetts, where he represented victims of domestic violence in family, immigration, and housing proceedings. Mayell served on the Massachusetts Race Equity Coalition and was a member of the Massachusetts Legal Services Retention Task Force, convened by the Massachusetts Legal Assistance Corporation to address diminishing diversity in legal aid organizations across the state.

A graduate of Brooklyn Law School, Mayell has a diverse background working for vulnerable populations. His past research work has included the constitutionality of prolonged detention of prisoners at Guantanamo and research on labor conditions in apparel factories in Jakarta, Indonesia. Prior to law school, Mayell was a community organizer in Boston, working with community members, primarily youth, on a variety of issues related to anti-racism and anti-militarism.

Stephen Meili

Associate Professor of Law Stephen Meili is our **inaugural James H. Binger Professor in Clinical Law**. He writes and teaches about the rights of noncitizens, particularly those seeking asylum. His recent publications include a comparative study of the detention of asylum-seekers in the U.S. and the U.K, the right *not* to hold a political opinion as the basis for asylum, and a human rights-based analysis of U.S. refugee resettlement policy. He has published empirical studies on the impact of human rights treaties on asylum jurisprudence in Canada and the United Kingdom. His current research concerns the constitutionalization of human rights law in the context of refugee crises in Europe and Latin America. His past research has been funded by grants from the National Science Foundation and the Robina Foundation.

Meili has taught international refugee law and been an Academic Visitor at the Faculty of Law at Oxford University. He has also taught at several law schools in Medellin, Colombia, and at Uppsala University in Sweden. At the University of Minnesota he teaches immigration and human rights law, as well as civil procedure and legal practice.

Meili also serves as director of the Law School's Immigration and Human Rights Clinic, where students represent asylum-seekers and detained individuals in various immigration and appellate court proceedings. Over the past few years, the IHR Clinic has obtained asylum or other forms of protection for applicants from Cameroon, the Democratic

Republic of Congo, El Salvador, Eritrea, Ethiopia, The Gambia, Guinea, Honduras, Iran, Liberia, Syria, Sudan, Turkmenistan, and Zimbabwe. He has also supervised outreach projects in the Twin Cities immigrant community. Meili was awarded the Law School's Stanley V. Kinyon Clinical Teacher of the Year Award in 2011 and held the Vaughn G. Papke Clinical Professorship in Law from 2012 to 2014.

Prior to coming to Minnesota, Meili was director of the Consumer Law Litigation Clinic at the University of Wisconsin Law School. And before entering academia, he was a partner in a plaintiffs'-side labor law firm in Hartford, Connecticut.

Kathleen Moccio

Kathy Moccio joined the James H. Binger Center for New Americans in August 2017 as a **visiting assistant clinical professor**. She has more than 25 years of experience practicing immigration law. From 2009 to 2017, Moccio served as an assistant Hennepin County public defender, a position in which she helped noncitizen defendants navigate the intersection of criminal and immigration laws. She is recognized nationally as a researcher, author, and educator of lawyers on such "crim-imm" issues. Prior to her time with the Hennepin County Public Defender's office, Moccio was in private immigration practice at a number of firms, including Minneapolis-based Dorsey & Whitney, and also worked for and consulted with numerous immigration nonprofits. Moccio has long been active with the Binger Center's nonprofit partners, as well as such national organizations as the American Immigration Lawyers Association and the American Immigration Council. In 2015, the National Immigration Project of the National Lawyers Guild selected Moccio as the sole recipient of its annual award, in recognition of her outstanding contributions to the cause of immigrant justice.

Kjerstin Yager

Kjerstin Yager joined the James H. Binger Center for New Americans in 2014 and is currently the **program coordinator** of its Education and Outreach Program. She is a graduate of Concordia College in Moorhead, Minn., and previously worked in Argentina for a human rights organization serving immigrants and refugees. Yager facilitates education and outreach programming, organizes legal education events, and helps develop communication materials and resources. She founded and now directs the Center's volunteer Translation and Interpretation Program (TIPs), which provides the Center's clinics and partners with essential services in more than 15 foreign languages. Yager was the Center's first administrative coordinator from January 2014 until June 2016. Yager recently obtained Master in Public Policy from the Humphrey School of Public Affairs.

Appendix B – selected press and publicity

- "The Trump administration's proposed changes to the 'public charge' rule lack merit," MinnPost, December 12, 2018
- "A Second Chance: A Somali immigrant was deported, then returned. His Georgia community is still reeling from the ICE raid that ensnared him," The Intercept, December 22, 2018
- "As shutdown continues, thousands of immigration court hearings have been canceled," MinnPost, January 17, 2019
- "Law School opens clinic for rural immigrants," Minnesota Daily, February 11, 2019
- "Pop-up law clinics to serve rural immigrants," MPR News, February 12, 2019
- "Access clinic: a win-win for Minnesota's rural immigrants and U of M law students," MinnPost, March 18, 2019
- "Her time served, a rape survivor in Willmar asks for a reprieve," Star Tribune, March 29, 2019
- "As push to deport felons grows, Minnesota man fears he'll be next," Star Tribune, March 29, 2019
- "Pardon hearing set for rape survivor who served time after killing husband," Star Tribune, June 17, 2019
- "Minnesota woman convicted of killing her husband pleading for a pardon," KSTP, June 25, 2019
- "Richfield woman asks pardons board to help her avoid persecution in home country," MPR News, June 26, 2019
- "ICE & Immigrants: What are the laws?," Kare 11 News, July 16, 2019
- "Upcoming Supreme Court decision creates more uncertainty for DACA students," Minnesota Daily, July 16, 2019

MINNPOST

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COMMUNITY VOICES

Community Voices features opinion pieces from a wide variety of authors and perspectives. (Submission Guidelines)

The Trump administration's proposed changes to the 'public charge' rule lack merit

By Ryan Allen, Jack DeWaard, Erika Lee, Christopher Levesque and 3 others | 12/12/2018



REUTERS/Brendan McDermid

The Statue of Liberty is seen in New York Harbor.

"Give me your tired, your poor," Emma Lazarus' well-known poem at the foot of the Statue of Liberty says. And for much of its history, the United States has welcomed many poor immigrants. That began



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The Intercept

A SECOND CHANCE

A Somali Immigrant Was Deported, Then Returned. His Georgia Community Is Still Reeling From the ICE Raid That Ensnared Him.

Illustration: Katherine Lam for The Intercept



Maryam Saleh

December 22 2018, 9:44 a.m.

Ibrahim Musa lived a quiet life in Duluth, a small Georgia town about 27 miles northeast of Atlanta. The Somali immigrant worked as a technician at a local Nissan dealership, and he spent most of his free time with his wife and their four children. He watched his daughter Iqran, now 20, grow into a young woman; he played basketball with his sons Khalid, 17, and Khadar, 14; and he played with Abdirhman, the 10-year-old baby of the family. “The joyfulness, being around them, being the provider, being a dad, and now raising my kids,” he told me. “That was more important to me than my [immigration] papers, you know?”

It became a predictable pattern: work and family, family and work, and, when there was time, friends and community. Once a year, he would take a break from the humdrum routine of his everyday life for a check-in at the Immigration and Customs Enforcement office in Atlanta. Musa had a final order of deportation, but given his clean record and family ties to the country, he was not a priority for removal. As long as he showed up when ICE asked, he stayed in the agency’s good graces. To him, these annual appointments merely gave him a chance to “kick the can down the road,” as he puts it, to postpone the inevitability of his



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MINNPOST

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NATIONAL

As shutdown continues, thousands of immigration court hearings have been canceled

By Greta Kaul | 01/17/2019



CC/Flickr/SalFalko

If the shutdown continues until Feb. 1, an estimated 2,300 hearings will have been canceled, and if the federal government doesn't open by March 1, nearly 3,700.

Twenty-seven days into the government shutdown, many functions of the federal government have stopped as President Donald Trump and Congress have come to an impasse on funding it.

That includes much of what typically happens at the Federal Immigration Court in Bloomington, Minnesota.



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The Rural Immigrant Access Clinic aims to assist immigrants in rural areas with legal issues.

By FARRAH MINA



ELLE MOULIN

Emily Ortlieb poses for a portrait on Saturday, Feb. 9 at Mondale Hall on West bank. Ortlieb serves as a certified student attorney for a new clinic for immigrants at the University's law school.

The University of Minnesota Law School launched a new clinic late last month that aims to provide legal assistance to immigrants in rural areas.

Because the need for immigration services is increasing in rural areas, the Law School decided to open the Rural Immigrant Access Clinic to fulfill the need, said Deepinder Mayell, executive director of the James H. Binger Center for New Americans, a center that provides legal assistance to noncitizens.

"People in St. Paul or Minneapolis have a lot of great resources," said Julio Zelaya, the racial justice project coordinator at the American Civil Liberties Union, an organization that works to preserve individual rights and liberties. "That's not the reality [in southern Minnesota]."

Some rural communities do not have an immigration attorney for 80 miles, Zelaya said. "They're new to the community and there's not a lot of resources out here. And when there's not a lot of resources, these communities are isolated," he added.

The RIAC is the product of a two-year initiative where volunteer students and attorneys provided legal assistance to immigrants in rural regions.



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Pop-up law clinics to serve rural immigrants

Riham Feshir February 12, 2019 3:47 p.m.



Thousands of protesters make their way down the streets of downtown Minneapolis during a march protesting federal immigration policies in June 2018. Lacey Young | MPR News 2018

Share story

A new pop-up law clinic will soon set up at community centers, libraries and church basements in rural communities around the state.

ON AIR 0:00

The Takeaway with Tanzina Vega

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NEW AMERICANS IN GREATER MINNESOTA

MinnPost's coverage of new Americans in Greater Minnesota is made possible by several foundations, led by the Blandin Foundation. Learn more about these foundations and their support of MinnPost here.

Access clinic: a win-win for Minnesota's rural immigrants and U of M law students

By Andy Steiner | 03/18/2019



Courtesy of the Binger Center
Students and volunteers from 2018, when it was a volunteer program, from left: Benjamin Gronowski, Xinge He, Zakaria Almulhim, Chelsea Bodin, Tae Eun Ahn, and Deepinder Mayell, executive director of the James H. Binger Center for New Americans.



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LOCAL

Her time served, a rape survivor in Willmar asks for a reprieve

By Brandon Stahl (<http://www.startribune.com/brandon-stahl/186499941/>) Star Tribune

MARCH 29, 2019 — 7:37PM

WILLMAR — Amreya Shefa hasn't known freedom since setting foot in the United States.

After her husband brought her from Ethiopia in 2012, Shefa says he kept her a prisoner in their home and threatened to take their children away if she reported his continuing abuse. One December night in 2013, she stabbed him to death.

A judge found that Shefa had been raped and beaten by her husband that night but convicted her of manslaughter in 2014.



She has completed her prison term, but at 41 remains jailed while the Department of Homeland Security works to deport her, a fate she believes would be worse than prison. She's certain if she steps foot back on her home soil, she would be murdered as revenge by the family of the man she killed.

Her appeals all but exhausted, Shefa's last hope would be for the state's pardons board to clear her name — something that has not happened since 1984.

The board is made up of three people — Gov. Tim Walz, Attorney General Keith Ellison and Supreme Court Chief Justice Lorie Gildea. Two of them would have to agree to hold a hearing for her. A pardon requires a unanimous vote.

Linus Chan, Shefa's attorney, has made a bid for his client to get a hearing before the board. Chan acknowledges the request is extraordinary, but so are the circumstances of this case.

"A way to remedy this is to force a look at whether this conviction was just," said Chan, a professor at the University of Minnesota School of Law. "This is our client's life. It's her children, her family. A pardon is understanding and correcting what happened."

Shefa remains in federal custody at the Kandiyohi County jail. In a recent interview, she was calm when she recounted the abuse she endured, the night she killed her husband and the time she served in prison. She began to cry only when contemplating another chance at freedom and seeing her children again.

"I'm asking, please God, please give me one more chance," she said. "Please God, put me with my kids. Please."

Hennepin County Attorney Mike Freeman, whose office charged Shefa with murder, said the county would likely oppose any pardon for a serious crime.



PROVIDED

Amreya Shefa at the Kandiyohi County Jail in Willmar



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LOCAL

As push to deport felons grows, Minnesota man fears he'll be next

By Matt McKinney (<http://www.startribune.com/matt-mckinney/10645411/>) Star Tribune

MAY 29, 2019 — 5:28AM

Every year, the dental hygienist drives to federal immigration offices near Fort Snelling and prepares for the worst.

A Vietnamese refugee who fled his native country with his mother when he was a child, he's lived with deportation orders for 16 years after a drug arrest at age 18. Now a father, husband, and Twin Cities homeowner who works for a large health care company, deportation is a sentence he's desperate to appeal.

"Being sent back to Vietnam is the worst thing that could happen to me and my family," said the man, who asked to not be identified for fear of a backlash from his employer and immigration officials.



RICHARD TSONG-TAATARI — MINNEAPOLIS STAR TRIBUNE

This green-card holder has been checking in annually for 16 years after being convicted of a felony at age 18. He fears U.S. efforts to forge

His deportation has never been carried out because Vietnam has long refused to accept deportees from the U.S. who fled the country before 1995, as he did. But it's a constant threat — once a year at a required immigration check-in, he learns whether he will be allowed to stay for another year.

The exercise has become especially harrowing now that the U.S. has sought a new agreement with Vietnam that would allow for the deportation of pre-1995 arrivals. The Southeast Asian community is rife with such stories as a broad push from the highest levels of the U.S. government opens new channels for deportations.

A record number of Cambodian deportees were sent back to the country last year, a country many people fled after a brutal 1970s regime left millions dead. The Laotian and Hmong communities in the Twin Cities have lobbied local politicians to step in on behalf of their communities.

"There has been tremendous fear," said Quyen Dinh, executive director of the Southeast Asia Resource Action Center, a group advocating on behalf of Cambodian, Laotian and Vietnamese Americans nationwide.

A spokesman for the U.S. Immigration and Customs Enforcement (ICE) office said there are about 8,700 Vietnamese nationals with deportation orders living in the U.S.

Emigration

American voters' support for deportation depends on who's being targeted, polls have shown. While a majority want a pathway to citizenship for illegal immigrants who came here as children, most — from both political parties — support deportations when they are triggered by criminal acts.



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Chosen For You

Local

Sports



LOCAL

Pardon hearing set for rape survivor who served time after killing husband

She needs her name cleared to stay in the U.S.

By Brandon Stahl (<http://www.startribune.com/brandon-stahl/186499941/>) Star Tribune

JUNE 17, 2019 — 8:42PM

Despite completing her prison term for manslaughter in the death of her abusive husband, Amreya Shefa remains in the Kandiyohi County jail in Willmar, Minn., awaiting deportation by the Department of Homeland Security.

Her appeals all but exhausted, Shefa's last hope to remain in the United States would be for the state's Board of Pardons to clear her name — something that has not happened since 1984. She'll finally get that chance next week.

"I am asking for my freedom to help other victims of abuse," she said in a statement.





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Minnesota woman convicted of killing her husband pleading for a pardon

Minnesota woman convicted of killing her husband pleading for a pardon



Updated: June 25, 2019 10:14 PM

A woman who killed her husband in Richfield is pleading for a pardon.

Amreya Shefa was found guilty of manslaughter for stabbing her husband in 2013.

Shefa says if she does not get a pardon, she will be deported to Ethiopia, where her husband's family will have her killed.

After a two hour meeting with the Minnesota Board of Pardons Tuesday, Shefa's fate is still undecided. In order to grant the pardon, the vote needs to be unanimous.

"Please forgive me," Shefa said in front of the board.



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Richfield woman asks pardons board to help her avoid persecution in home country

Matt Sepic St. Paul June 26, 2019 4:00 a.m.



Ahmed Tesema, right, the brother of homicide victim Habibi Tesema, testifies against a pardon for Amreya Shefa in St. Paul Tuesday. Matt Sepic | MPR News

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ON AIR 0:00

The Takeaway with Tanzina Vega

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ICE & Immigrants: What are the l...

ICE & Immigrants: What are the laws?

ICE officers get something called an administrative warrant. Experts say it's signed by a judge and limits an ICE officer's authority.

MINNEAPOLIS — A Facebook post of [an arrest by U.S. Immigration and Customs Enforcement](#) in south Minneapolis this week has prompted a lot of questions about how ICE operates and what immigrants' are if they're detained.

Here are a few answers:

1. The arrest: Experts say in certain cases, an ICE officer does not need a warrant.

**'Shock' as scientists
find plastic microbeads
in remote Arctic ice**

FEATURED BY

"Obviously, for instance, a border patrol officer who sees people climbing the fence and crossing over obviously don't need a warrant," explained Linus Chan, associate professor of clinical law at the University of Minnesota and Director of the Detainee Rights Clinic.

Chan says when ICE officers do need a warrant, it's a lot different than a warrant in the criminal court system.

ICE officers get something called an administrative warrant. Chan says it's not signed by a judge and limits an ICE officer's authority.

"An administrative warrant does not give immigration officers the right to enter your home to make an arrest," he said, "That said, if they encounter you anywhere else outside your home, then it becomes a more fuzzy about what happens."

2. Right to an Attorney: When a person is taken into ICE custody they have the right to a lawyer.



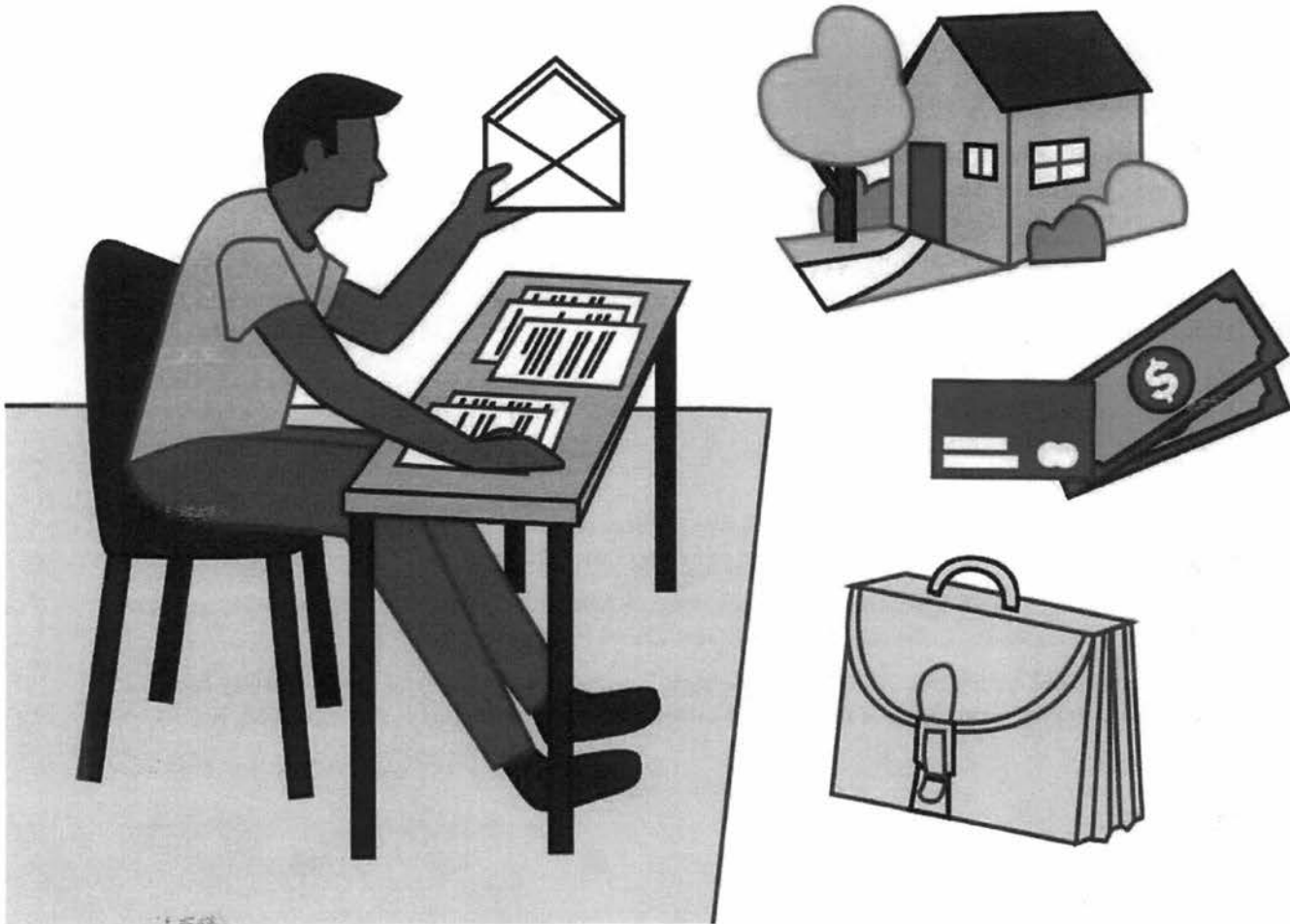
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STUDENTS

The Immigration Response Team at the University of Minnesota is encouraging DACA students to reapply early in case the program is terminated.

By KATRINA PROSS



Illustrated by Morgan La Casse

With the Supreme Court's announcement late last month to review the decision to terminate DACA, recipients remain in limbo as they await the program's fate.

In light of this decision, the general advice given to recipients of the Deferred Action for Childhood Arrivals is to renew their status just in case the program is terminated, even if their status is not near expiration. The University of Minnesota's Immigration Response Team is also recommending students consider reapplying early and has funding available to help students pay the filing costs.

Recipients have to renew their DACA status every two years and it costs almost \$500 each time. University students can apply for funding to help pay for the costs through The Dream Fund, which is run by the response team and provides funding for students.

However, every DACA student's situation is different, so not every recipient may need to file for renewal, said Marissa Hill-Dongre, the director of the response team. But the University can help students decide if renewing is the right step to take, she said.

"We want to make sure DACA students are informed about where they stand and that they have reliable information," Hill-Dongre said. "Immigration advice is different for everyone."



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BINGER CENTER FOR NEW AMERICANS
Income and Expense Statement for 7/1/2018 - 6/30/2019

Income

Fiscal Year Spendable Endowment Earnings	<u>\$1,096,706</u>
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Expenses

Faculty	\$339,754
Executive Director	120,780
Teaching Fellows	88,512
Research Assistants	0
Student Clinic Directors	19,022
Program Staff	113,326
Adjuncts	<u>32,879</u>
Total Compensation	714,273

Co-Partner: Immigrant Law Center of Minnesota (ILCM)	50,000
Co-Partner: Advocates for Human Rights (Advocates)	50,000
Co-Partner: Mid-Minnesota Legal Assistance (MMLA)	50,000

Outreach/General Supplies/Operations	90,128
--------------------------------------	--------

Equipment & Space	24,150
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TOTAL EXPENSES	<u><u>\$978,551</u></u>
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FOUNDATION

McNamara Alumni Center
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Minneapolis, MN 55455-2010
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Robina Foundation
Attn: Penny A. Hunt, Executive Director
Ste 4900
80 S 8th St
Minneapolis, MN 55402-2226

November 2019



Dear Penny,

You are helping to create the University of Minnesota's future, and we could not be more thankful.

On all five U of M campuses, endowment gifts like yours provide a lasting foundation that supports the promise of our students, the field-shaping work of our faculty and researchers, and the University's role as a force for good in the world.

Enclosed, as part of your 2019 Report on Endowments from the University of Minnesota Foundation, are personalized financial updates on the James H. Binger Center for New Americans Fund and the James H. Binger Professorship in Clinical Law. Also included is a booklet with information about the management and performance of the Foundation's overall endowment.

In fiscal year 2019 alone, endowments helped provide \$211 million in funding that touched countless lives through scholarships and fellowships, faculty and research support, and important U of M programs and initiatives.

Thank you so much—for your generosity, your enduring partnership, and all you do to make the University of Minnesota a place of opportunity and discovery today and for generations to come. If you have any questions about your report, please contact us at donorrelations@umn.edu or 612-626-9565.

With sincere gratitude,

Kathleen M. Schmidtkofer
President and CEO

With our deep appreciation!



University of Minnesota FOUNDATION REPORT ON ENDOWMENTS

JAMES H. BINGER CENTER FOR NEW AMERICANS FUND

July 1, 2018–June 30, 2019

A report prepared especially for
Robina Foundation

Fund Purpose



Established by the Robina Foundation in 2016, this fund provides financial support to the University of Minnesota Law School for the operation of the James H. Binger Center for New Americans (CNA). The CNA brings about transformative change by creating a national model for the provision of comprehensive and cohesive legal services for immigrant communities through a variety of means, including improving federal immigration law and policy, protecting the rights of detainees and improving access to legal representation for refugees and immigrants, educating non-citizens about their rights, training law students, and more.

Financial Statement (Endowment Fund No. 21616)

Principal value as of July 1, 2018	\$24,692,980
Gifts received	50
Investment return	1,863,028
Administrative fee	(281,606)
Endowment payout	(1,096,706)
Payout reinvested to principal	500,000
Principal value as of June 30, 2019	<u>\$25,677,746</u>

Historical Market Values

Principal value as of June 30, 2017	\$24,052,630
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University of Minnesota FOUNDATION REPORT ON ENDOWMENTS

JAMES H. BINGER PROFESSORSHIP IN CLINICAL LAW

July 1, 2018–June 30, 2019

A report prepared especially for
Robina Foundation

Fund Purpose



The Robina Foundation established this fund in 2016 to assist the University in recruiting, supporting, and retaining outstanding faculty members in the Law School. James H. Binger Professors in Clinical Law are engaged in clinical instruction within the James H. Binger Center for New Americans and focus on immigration, asylum, detainee rights, and/or refugee law and policy. The University provides additional funding for the professorship through the Permanent University Fund.

Financial Statement (Endowment Fund No. 21617)

Principal value as of July 1, 2018	\$1,047,059
Gifts received	0
Investment return	73,542
Administrative fee	(11,859)
Endowment payout	(46,600)
Principal value as of June 30, 2019	<u>\$1,062,142</u>

Historical Market Values

Principal value as of June 30, 2017	\$1,024,688
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Impact of Permanent University Fund (PUF)

	Principal Value as of June 30, 2019	FY19 Payout
Foundation fund	\$1,062,142	\$46,600
University of Minnesota PUF fund	542,758	22,533
TOTAL	\$1,604,900	\$69,133

If you have questions about your report, please contact the University of Minnesota Foundation at donorrelations@umn.edu or 612-626-9565.



University of Minnesota FOUNDATION REPORT ON ENDOWMENTS

Reading Your Financial Statement

One or more of the terms below appear on your fund report(s).

Gifts received: Represents gift proceeds credited to the fund during fiscal year 2019.

Investment return: Represents market gains or losses and interest and dividends earned during fiscal year 2019, net of external fees.

Administrative fee: Represents the Foundation's administrative fee (currently 1% annually on permanent endowments, and 1.5% annually on quasi-endowments) and the University of Minnesota Foundation Investment Advisors' management fee (approximately 12 basis points annually).

Transfers: Dollars moved into or out of the fund during fiscal year 2019, per donor or department directive.

Permanent Endowment Funds

Principal value: Represents market value of gifts to the fund since inception adjusted for net investment returns, endowment payout, and administrative fees, as well as reinvestments and transfers, if any.

Endowment payout: The annual amount transferred to a spendable account to support the fund's purpose. The current payout rate, set by the UMF Board of Trustees, is 4.5% of the fund's average market value over the previous 20 quarters. Authorized faculty and staff utilize this payout for the designated University program consistent with donor intent. Endowment payout is subject to UMF's underwater fund policy, which requires payout to be reinvested if the fund principal falls below 80% of the original gift value.

Payout reinvested to principal: Endowment payout reinvested to help build principal to targeted levels.

Quasi-Endowment Funds

Total fund value: Represents market value of gifts to the fund since inception adjusted for net investment returns, distributions, and administrative fees, as well as transfers, if any. Quasi-endowment policy permits spending up to 20% of the fund value annually.

Distributions to designated program: Amount distributed as requested by the University to support the fund's designated purpose.

Continued on reverse

Matching Programs

Fast Start 4 Impact Award: Amount provided by the University of Minnesota Foundation's Fast Start 4 Impact Program to support students during the 2019–20 academic year. The program funds the first four years of student awards while the endowment payout is reinvested. After the first four years, the fund operates as a standard endowment. The program ended new enrollments as of December 2015.

21st Century Graduate Fellowship Match: Amount provided by the University of Minnesota's 21st Century Graduate Fellowship Match Program, which matches the fund's payout on a dollar-for-dollar basis to help recruit and retain deserving students enrolled in graduate degree programs. The program ended new enrollments as of December 2010.

President's Scholarship Match: Amount provided by the University of Minnesota's President's Scholarship Match Program, which matches the fund's payout on a dollar-for-dollar basis to help recruit and retain deserving students enrolled in undergraduate or professional degree programs. The program ended new enrollments as of December 2010.

Reaching Higher Scholarship Initiative Match: Amount provided by the University of Minnesota's Reaching Higher Scholarship Initiative Match Program, which matches the fund's payout on a dollar-for-dollar basis to help recruit and retain deserving students enrolled in undergraduate degree programs at the Duluth campus. The program ended new enrollments as of December 2010.

Permanent University Fund (PUF) Payout: The University of Minnesota manages and invests a companion fund that provides additional support for the designated purpose.

2019
**Report on
endowments**

Driven.

The University of Minnesota Campaign

What happens in Minnesota matters to the world

Endowments empower the University to reach far beyond business as usual. Many of the University's most important priorities, such as attracting student and faculty talent and advancing world-changing research, require significant and continuous resources.

Endowments increase in value over time to generate streams of income that create a legacy of learning, research, and scholarship year after year, generation after generation.

Thanks to the generosity of our donors and friends—and the endowment's performance—the University of Minnesota Foundation's endowment has expanded by more than 66 percent, from \$1.5 billion to \$2.5 billion, since the start of the U's comprehensive campaign, *Driven*, in 2011.

This growth has made it possible for the University to:

- ➔ **Compete for high-performing students and support students of promise.**
- ➔ **Attract top faculty and expand their capacity for discovery.**
- ➔ **Provide incentives for outstanding junior faculty to develop their careers.**
- ➔ **Support innovative research, visiting scholars, enhancements in education, and much more.**

Growing the endowment: a campaign priority

The University of Minnesota has embarked on a campaign to set a new course for students, the state, and the world. Through ***Driven: The University of Minnesota Campaign***, we will join forces with our philanthropic partners and friends to raise \$4 billion to strengthen Minnesota's only land-grant research university and fuel our quest to solve the world's great challenges.

Strengthening the endowment is one of the campaign's critical priorities. Endowments form the financial cornerstone of any great university. As an enduring source of funding for immediate and future needs, a robust endowment supports our promise to ensure both stability and growth over the long term.

Behind every endowment gift is someone like you who is driven by a belief in a brighter tomorrow. Thank you for your inspiring partnership.



UNIVERSITY OF MINNESOTA FOUNDATION

endowment update

for the periods ended
June 30, 2019

THE UNIVERSITY OF MINNESOTA FOUNDATION

Designated by the University of Minnesota's Board of Regents as the central development office for the University, the U of M Foundation (UMF) plays a key role in supporting greatness across all five U of M campuses. UMF accomplishes this by raising gifts from individuals and organizations, investing funds for maximum impact, and stewarding gifts to ensure they are used as donors intended.

Donors who wish to leave a lasting legacy at the University of Minnesota may choose to make endowed gifts to create new funds or contribute to existing funds. These funds are pooled and invested together as the UMF endowment. UMF manages the investment and spending of approximately 6,000 endowed funds, each one representing a vision for improving lives and creating a brighter tomorrow.

Managing and investing the endowment

The endowment portfolio is invested by UMF Investment Advisors (UMFIA), a nonprofit subsidiary formed by UMF's Board of Trustees in 1998 to provide dedicated, professional active portfolio management. UMFIA has a board of directors that includes representation from the UMF Board of Trustees as well as from UMF leadership (see back page).

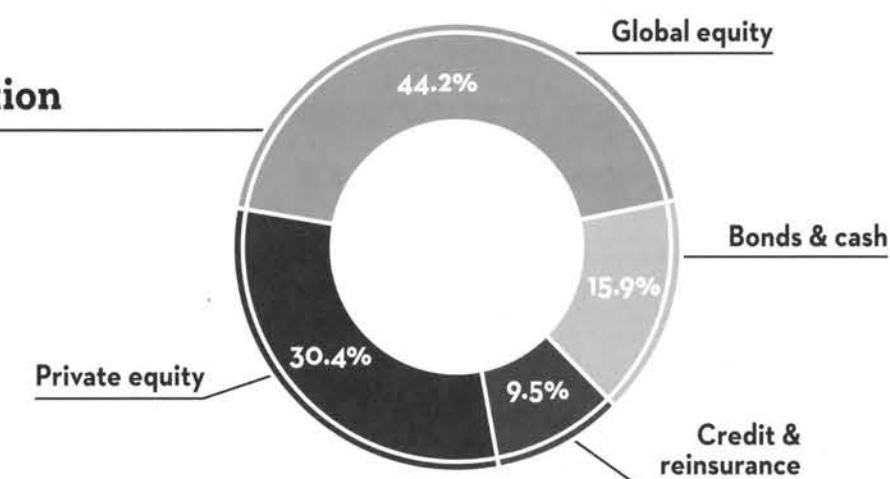
Investment strategy

The UMF endowment portfolio is uniquely structured and managed to meet two goals: preserve the real purchasing power of endowed gifts for the long term while simultaneously supporting a meaningful and dependable rate of spending, currently 4.5% of a fund's average market value over the previous 20 quarters. The

portfolio is highly diversified and actively managed and has less reliance on traditional common stock exposure than what is found in a standard 65/35 equity/bond mix. The goal is to maintain stability and capture equity-like returns over the long term, while avoiding the effects of sharp and prolonged market declines. This means that, while on average, UMF's returns will not experience the highest highs, they will also avoid the lowest lows.

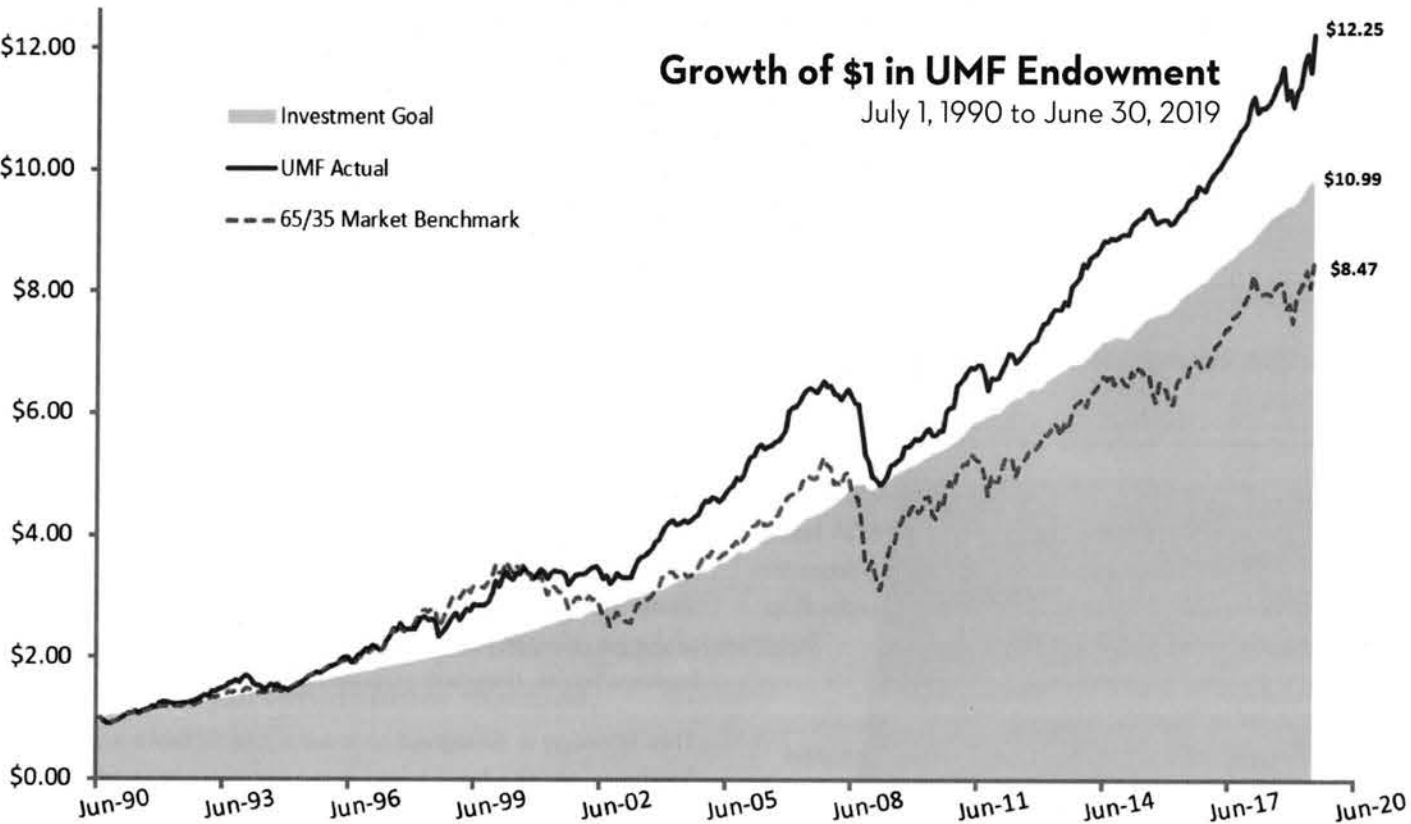
This strategy is designed to create predictable and stable funding over the long term; however, year-to-year short-term results will often look different from those of our peers and the standardized 65/35 market benchmark.

Asset category allocation



How has the UMF endowment performed over the long term?

The UMF endowment has performed well over the long term, making it possible for funds to provide predictable and stable funding to support their designated programs. The chart below shows the growth of \$1 invested in the endowment in 1990 compared with the Foundation's investment goal and a 65/35 market benchmark. Since the inception of UMFIA, our portfolio return has exceeded market benchmark returns by +2.5% annually, with less downside risk.



Investment results

For the periods ended June 30. Total value of UMF endowment: \$2.5 billion.

Year	Actual	Goal	Policy Benchmark ¹	65/35 Benchmark ²
1-Year	9.2%	6.7%	7.4%	6.6%
5-Year	6.7%	6.5%	6.1%	5.0%
10-Year	9.0%	7.0%	8.7%	8.2%
Since inception ³	7.7%	7.9%	6.8%	5.2%

¹The policy benchmark helps measure how well UMFIA is implementing its investment policy. Its components and asset class weightings are based on the portfolio's asset allocation policy.

²The 65/35 market benchmark is a weighted blend of stock and bond indices (65% equities and 35% bonds).

³January 1999.

The investment goal is to achieve an annualized return of 5% in excess of inflation in order to cover the 4.5% spending rate as well as administrative fees. For the one-year period ended June 30, 2019, the endowment pool returned +9.2%. This performance exceeded the one-year market benchmark return of +6.6%, due primarily to UMF's long-term investment strategy, which relies less on common stock exposure than the market benchmark.

Administrative fees

The UMF Board of Trustees establishes fee policies with the objective of keeping fees low to reflect a strong commitment to administrative efficiency. The current annual fee on endowment funds is 1% of the fund's market value. For quasi-endowments, the annual fee is 1.5% of the fund's market value. These fee rates have not increased since 2008.

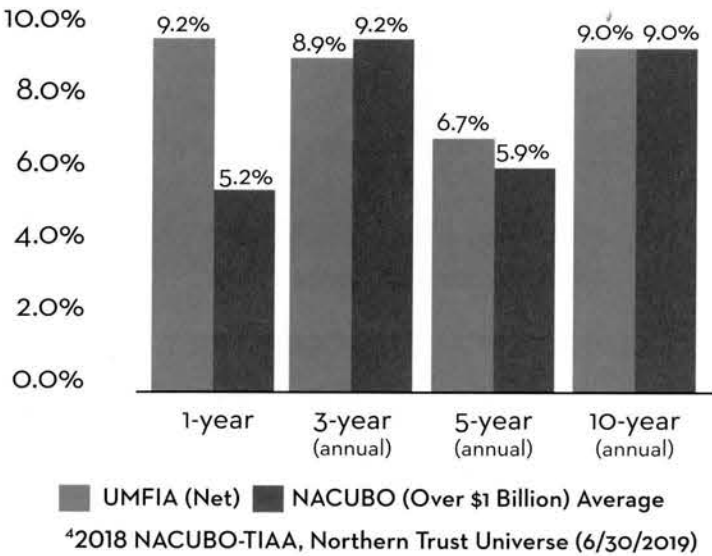
UMF performance compared to our peer group

The chart at right illustrates UMF's performance relative to our peer group: college and university endowments with assets greater than \$1 billion.

UMF's long-term investment strategy will frequently generate one-year returns that will be in the outer quartiles—either high or low—of the distribution of peer returns. More meaningful comparisons are found over the three- to five-year periods, when this variation declines.

Performance vs. peer group⁴

Preliminary as of June 30, 2019. Final results as of June 30, 2019, will become available early in 2020.



Spending the endowment

What is the endowment spending policy?

The UMF Board of Trustees establishes the endowment spending policy. The current spending rate is 4.5% of a fund's trailing average market value over the previous 20 quarters (5 years). These dollars, called the fund's "payout," are transferred to a spending account and made available each year to support the fund's designated program. Funds designated as quasi-endowments allow spending of up to 20% of fund value annually.

Honoring donor intent

One of UMF's most critical responsibilities is to ensure that gifts are used in accordance with donor intent. Stringent controls are in place, and UMF staff work in partnership with the U of M units to monitor funds and optimize the utilization and impact of gifts for their designated purposes.

➔ **Endowment funds and cash gifts provided \$211 million in funding to fuel greatness at the U of M in fiscal year 2019**

University of Minnesota Foundation

Fiscal Year 2019 Operational Highlights

Serving our donors and stewarding their gifts to the University of Minnesota is our highest priority at UMF. The following information is provided to give you additional insights into how we do that, as well as to share highlights of how we're fulfilling our mission to support greatness across all five U of M campuses by raising and managing private support.

Managing gifts for maximum impact today and the years to come

The benefits of active management
Endowment funds, along with the programs they support, have benefited significantly from the UMF Board of Trustees' 1998 decision to form a separate investment subsidiary—the UMF Investment Advisors (UMFIA)—to provide dedicated, active management of the endowment pool.

This year marks UMFIA's 21st anniversary, and under their active management, investment growth is nearly double what could have been realized under the previous more traditional (i.e., passive) investment approach. This growth has created significant added value for endowment funds and their purchasing power to fuel University programs.

Investment performance: FY19 preliminary return of +6.6%; final return of +9.2%

Fiscal year 2019 investment returns of +9.2% exceeded the goal, providing real spending growth to the endowment funds. The FY19 investment return allocated to the individual fund(s) in your Report on Endowments was a preliminary +6.6%, reported prior to receiving quarter-end valuations for private investments that total 30 percent of the portfolio.

Updated quarter-end valuations increased the return by \$59 million to the reported +9.2%. These gains will be allocated to the individual funds and reflected in the Report on Endowments in fiscal year 2020.

Spending policy and oversight
The Foundation designs its spending policies to provide stable and predictable funding for designated programs in perpetuity.

The current endowment spending rate is 4.5% of a five-year average fund balance; using a trailing average helps smooth any effects of short-term market fluctuations. For permanent endowment funds, investment earnings above and beyond the 4.5% payout are reinvested back into the fund's principal to maximize long-term growth and impact.

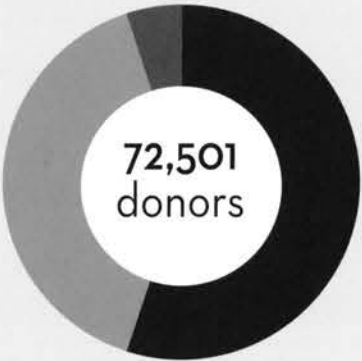
Making an impact today also is of key importance. The Foundation works closely with U of M units to optimize the use and impact of gifts, and maintains rigorous controls to ensure they are spent in accordance with donor intent.

Administrative efficiency
UMF is dedicated to keeping administrative fees low to reflect our strong commitment to efficiency. Fees of 1% for permanent endowments and 1.5% for quasi-endowments have not increased since 2008. These fees help fund the related costs of gift administration, such as gift receipting, credit card fees, and cash management.

Supporting greatness at the University of Minnesota

The University of Minnesota Foundation raises gifts from individuals and organizations for the sole purpose of building and sustaining excellence across all five U of M campuses. We collaborate with University leaders and development officers to ensure that fundraising activities are consistent with the University's highest priorities and the donor's philanthropic intentions.

Fundraising reached an all-time record high in fiscal year 2019, with a total of \$361 million in new gifts and commitments from just over 72,500 donors.



This includes all FY19 donors to the U, with gifts to endowed and/or current use funds ranging from \$1 to \$25 million.

- Alumni 38,291 53%
- Other individuals 30,583 42%
- Organizations 3,627 5%



The \$361 million in FY19 gifts raised includes outright gifts, pledges, and future commitments to endowed and/or current use funds.

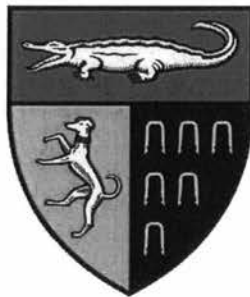
- Program support* \$109 million 30%
- Student support \$107 million 30%
- Research \$72 million 20%
- Capital improvements \$33 million 9%
- Faculty and staff support \$28 million 8%
- Outreach and community engagement \$12 million 3%

* Includes crossdisciplinary support, undesignated planned gifts, and support for campus programs

GOOD TO KNOW				
UMFIA's active management strategy has contributed almost 50% more purchasing power to UMF endowment funds over the past 21 years than would have been possible with a more traditional investment approach	FY19 investment returns of +9.2% exceeded the goal of +6.7%	Endowment fees have not increased since 2008	Endowment funds and cash gifts provided \$211 million in funding to benefit University people and programs this year. Thank you!	

Yale Law School

**THE ROBINA FOUNDATION
HUMAN RIGHTS FELLOWSHIP INITIATIVE**



Annual Report

November 2019

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BACKGROUND

Since May 2008, the Robina Foundation has provided support to the Robina Human Rights Fellowship Initiative at Yale Law School. Between 2008 and 2016, the Foundation made annual \$1 million gifts to support the Initiative that totaled \$9 million. 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 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.

The Robina Initiative is designed to provide support for human rights leaders at all stages of their careers: from first-year law students; to recent law school graduates; to senior human rights scholars and practitioners. 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 and practitioners 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 achieved remarkable success and expanded its scope. Since 2008, the Foundation has supported scholarships for a total of 76 individual Yale Law School students interested in careers in human rights; 375 fellowships for individual law and undergraduate students' summer human rights experiences; and 38 year-long fellowships for recent graduates working in a wide range of human rights institutions. During recent years, the Robina Initiative has also provided student loan repayment support to graduates working in human rights through the Law School's Career Options Assistance Program (COAP).

In 2018-19, the components of the Robina Human Rights Fellowship Initiative were:

- Kirby Simon Summer Human Rights Fellowships
- Post-Graduate Human Rights Fellowships
- Visiting Human Rights Fellowships
- COAP Funding for Graduates Doing Human Rights Work
- Human Rights Clinical Education Innovation and Travel
- Outreach to the Wider Yale Community
- Program Administration

PROGRESS TOWARD GOALS

This report describes the Law School's implementation of each of the Initiative's components in 2018-19.

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

The Robina Initiative fully funds the Kirby Simon Summer Human Rights Fellowships, which enable current Yale students to spend their summers working throughout the world in the field of human rights. The Fellowship provides students with a singularly enriching and illuminating experience that helps them begin to build paths toward careers in public service promoting human rights and justice. These students have travelled to many different countries, working on a wide array of issues at a range of institutions. During the summer of 2019, 26 Yale Law School students and 14 Yale College students received the Kirby Simon Summer Human Rights Fellowships. Their internship placements were as follows:

Yale Law School

- **Neil Alacha '21 J.D.** – International Law Commission, Switzerland
- **Laith Aqel '20 J.D.** – Center for Justice & Accountability, USA
- **Michael Beechert '21 J.D.** – Hong Kong Judiciary High Court, Hong Kong
- **Sarah Bernardo '21 J.D.** – European Court of Human Rights, France
- **Camila Bustos '21 J.D.** – Stichting Urgenda/Climate Litigation Network, Netherlands/USA
- **Kami Choi '21 J.D.** – Amnesty International, UK
- **Joseph Daval '21 J.D.** – Supreme Court of Israel, Israel
- **Sofea Dil '21 J.D.** – UN High Commissioner for Refugees, Americas Office, USA
- **Leanne Gale '20 J.D.** – Lustigman & Blank, Israel
- **Josh Guerra '21 J.D.** – Justice, UK
- **Ezra Husney '21 J.D.** – Supreme Court of Israel, Israel
- **Adair Kleinpeter-Ross '21 J.D.** – Koe Koe Tech, Myanmar
- **Matthew Linsley '21 J.D.** – European Court of Human Rights, France

- **Younghoon Moon '21 J.D.** – United Nations Commission on International Trade Law, Austria
- **Kamini Persaud '21 J.D.** – Caribbean Court of Justice, Trinidad & Tobago
- **Abigail Pershing '20 J.D.** – Accountability Counsel, USA, and Médecins Sans Frontières, France
- **Ben Rashkovich '21 J.D.** – Human Rights Now, Japan
- **Sonya Schoenberger '20 J.D.** – Proyecto Lingüístico Quetzalteco, Guatemala
- **Rebecca Steele '21 J.D.** – Proyecto Lingüístico Quetzalteco, Guatemala
- **Mark Stevens '21 J.D.** – Center for Justice & Accountability, USA
- **Jessica Tueller '21 J.D.** – Center for Justice and International Law (CEJIL), USA
- **Gaby Vasquez '21 J.D.** – New Haven Legal Assistance, USA
- **Emanuel Waddell '21 J.D.** – Helen Suzman Foundation, South Africa
- **Louise Willocx '19 LL.M.** – Doughty Street Chambers, UK, and Jurisdicción Especial para la Paz, Colombia
- **Yerin Yang '21 J.D.** – Justice, UK
- **Caleb Yong '21 J.D.** – European Court of Human Rights, France

Yale College

- **Michael Borger, B.A. '20** – Human Rights Watch, USA
- **Brenda Cachay, B.A. '21** – Latin American Working Group, USA
- **Hana Davis, B.A. '20** – Independent Research, Hong Kong
- **Hala El Solh, B.A. '20** – Carter Center, USA
- **Danielle Harris, B.A. '21** – Scalabrini Centre of Cape Town, South Africa
- **Trent Kannegieter, B.A. '21** – Human Rights Watch, USA
- **Ananya Kumar-Banerjee, B.A. '21** – Asian American Writers' Workshop: A World Without Cages, USA
- **Jever Mariwala, B.A. '21** – Research with Dr. Menaka Guruswamy, BR Ambedkar Research Scholar and Lecturer at Colombia Law School, USA

- **Larissa Martinez, B.A. '20** – Social Justice Collaborative, USA
- **Akhil Rajan, B.A. '21** – Chicago Center on Democracy/Bright Line Watch, USA
- **Nicholas Ruiz-Huidobro Magdits, B.A. '21** – Charité – Universitätsmedizin Berlin (Intercultural Migration & Care Research Working Group), Germany
- **Marwan Safar Jalani, B.A. '20** – Human Rights Watch, USA
- **Rosa Shapiro-Thompson, B.A. '20** – Proyecto Lingüístico Quetzalteco, Guatemala
- **Angela Xiao, B.A. '20** – Brooklyn Defender Services, USA

B. Robina Post-Graduate Human Rights Fellowships

The Robina Post-Graduate Human Rights Fellowships are designed to fund recent graduates of the Law School to work full time in the field of human rights. Robina Human Rights Fellows secure international judicial clerkships or internships with international tribunals and inter-governmental or governmental agencies. They may also receive the fellowship to carry out independent human rights research projects. Increasingly, financial pressures on human rights organizations and the experience requirements for the limited number of available positions in human rights make it difficult for recent law school graduates to enter the field; the Robina Human Rights Fellowships offer them that chance and allow them to gain the knowledge and experience they need to build their careers in human rights. In 2018-19, two graduates received Robina Post-Graduate Human Rights Fellowships, and four graduates are currently being supported by Robina Fellowships for work during the 2019-2020 year (we will report on their activities in the 2020 annual report).

Elena Brodeala (LL.M. '18) was a Robina Fellow at the European Court of Human Rights in Strasbourg, France, where she clerked for Judge Helen Keller of Switzerland and worked with the Research Division of the Court. Elena also completed a Ph.D. thesis on women's rights in Romania at the European University Institute in Florence, Italy. She was a visiting researcher at the Kent Center for Law, Gender and Sexuality in the UK (2018), at the New College Europe in Bucharest, Romania (2016) and at the Central European University in Budapest, Hungary (2015). Elena has also collaborated with two NGOs in Sweden and Romania working in the fields of gender equality, intercultural learning and youth development.

Hyun-Soo Lim (J.D. '18) was a Robina Fellow at the European Court of Human Rights in Strasbourg, France. During her year at the Court, Hyun-Soo researched and drafted opinions for Judge Helen Keller of Switzerland and completed comparative legal research and writing for the Research Division. Prior to attending law school, Hyun-Soo studied East Asian Area Studies and International Development at the University of Pennsylvania and McGill University. During college, she interned at public interest legal organizations in South Korea, assisting asylum litigation and advocating for corporate social responsibility. At Yale Law School, Hyun-Soo was a co-director of the Lowenstein Human Rights Project, co-chair of the Women of Color

Collective, Professional Development Chair of the Yale Society of International Law, Managing Submissions Editor of the *Yale Journal of International Law*, student fellow of the Paul Tsai China Center, and chair of the Korean Graduate Student Association.

C. Robina Visiting Human Rights Fellowships

The Robina Initiative enables the Law School to invite human rights scholars and practitioners to spend time in residence at the Law School. They carry out their own research, teach courses, give talks and interact with students and faculty. Their courses have significantly enriched the international law and human rights curriculum of the Law School and the University. The Visiting Fellows contribute to human rights activities across Yale University and in the wider community of scholars and advocates. During the 2018-19 academic year, funding from the Robina endowment supported three Visiting Human Rights Fellows.

Paul Linden-Retek '12 J.D. '18 Ph.D. was a 2018-19 Robina Visiting Human Rights Fellow at Yale Law School and a Lecturer in the department of Political Science at Yale. Paul's research and teaching interests are in modern and contemporary political theory, international human rights, the study of constitutional democracy, and critical theory. At Yale College, Paul has taught courses on the politics and theory of human rights, the moral foundations of politics, political philosophy, law and globalization, and public international law. In 2014, Paul helped found Yale's Multidisciplinary Academic Program in Human Rights Studies, in which he advises participating students and co-teaches the Program's introductory and capstone courses. In 2018-19, Paul was also a post-doctoral Emile Noël Global Fellow at the Jean Monnet Center for International and Regional Economic Law & Justice at the New York University School of Law. Paul served 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. As a student at Yale Law School, he was awarded the Jerome Sayles Hess Fund Prize for excellence in the field of international law and served as student director of the Allard K. Lowenstein International Human Rights Clinic.

Sari Bashi '03 J.D. was a 2018-19 Robina Visiting Human Rights Fellow at Yale Law School. Prior to her Robina Fellowship, Sari was the Israel/Palestine Advocacy Director at Human Rights Watch and, as a Robert L. Bernstein Human Rights Fellow, co-founded the Israeli human rights organization, Gisha. She served as the executive director of Gisha from its foundation in 2005 until 2014. She writes and lectures on international humanitarian law and Israeli policy toward the occupied Palestinian territories, especially Gaza. Sari has received a fellowship from the Echoing Green Foundation for her work with Gisha and has taught international law at Tel Aviv University. She clerked on the Israeli Supreme Court for Justice Edmond Levi and is a licensed attorney in Israel and New York. She received a B.A. degree (summa cum laude) from Yale College and a J.D. degree from Yale Law School. Prior to studying law, Ms. Bashi worked as a correspondent for the Associated Press in Jerusalem and conducted research on ethnic identity among Ethiopian immigrants to Israel as part of a Fulbright Scholarship.

Lucas Guttentag was a Visiting Lecturer in Law and the Robina Foundation Visiting Human Rights Fellow at Yale Law School in the fall term of 2018. Lucas is the founder and former national director of the ACLU Immigrants' Rights Project, which he led for more than twenty-five years, litigating complex civil rights, class action and constitutional cases in courts throughout the United States, including successful arguments before the Supreme Court. Under his leadership, the Immigrants' Rights Project became the largest litigation program in the country enforcing the civil and constitutional rights of non-citizens. He began teaching at the Law School in 2009. His courses have included immigration law, constitutional litigation, and advanced topics on migration policy

D. COAP Recipients Supported by the Robina Foundation

In 2018-19, income from the Robina endowment provided support to graduates working in human rights and enrolled in the Law School's Career Options Assistance Program (COAP). COAP assists graduates with student loan repayment, in order to enable them to follow a variety of career paths, particularly opportunities in public interest law, without suffering undue financial burden.

In fall 2018 and spring 2019, the Robina Foundation supported eleven Yale Law School graduate COAP recipients working in human and civil rights:

- **Matthew Maddox '11 J.D.** - Assistant US Attorney, United States Department of Justice
- **Thomas Maher '14 J.D.** - Instructor & Curriculum Development, Institute for Higher Learning
- **Roger Maldonado '14 J.D.** - Fair Housing Mobility Advocate, Anti-Discrimination Center Inc.
- **Kathryn Mammel '15 J.D.** - Program Coordinator, Solomon Center for Health Law and Policy, Yale Law School
- **Jonathan Manes '08 J.D.** - Clinical Assistant Professor of Law, University of Buffalo School of Law, State University of New York
- **Itamar Mann-Kanowitz '14 J.D.** - Senior Lecturer, University of Haifa
- **Maria Martinez '17 J.D.** - Profesora Adjunta, Universidad de San Andres
- **Matthew Matera '11 J.D.** - Senior Program Director, Empower Schools
- **Megan McCormack '14 J.D.** - Team Leader, United Nations Population Fund
- **Stephen McKeown '10 J.D.** - Postdoctoral Research Assistant, Princeton University
- **Gabriel Mendlow '11 J.D.** - Professor of Law, University of Michigan

E. Human Rights Clinical Education Innovation and Travel

The Allard K. Lowenstein International Human Rights Clinic provides Yale Law students with experience that is an essential part of their development of the knowledge and skills necessary to be effective human rights advocates. Projects with an investigative component provide students with the intensive field experience that is critical to their practical education. Students also gain real-world experience with written and oral advocacy skills. Nearly every Lowenstein Clinic 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. The Clinic's projects also provide our partner organizations with valuable work that they would not be able to undertake without the Clinic's collaboration. Over the course of the 2018-19 academic year, the Lowenstein Clinic worked with students on several projects that included travel supported by the Robina Initiative. Highlights include:

- The Clinic represented three non-Afghan nationals who were victims of unlawful U.S. detention policy and arbitrary detention in Afghanistan. The three men faced near-certain retribution and possible death in their countries of origin – Tajikistan and Uzbekistan. The Clinic team built on the Clinic's previous work in 2015-16 with the International Justice Network, a small U.S.-based NGO, to prepare petitions to the U.N. Working Group on Arbitrary Detention (WGAD) on behalf of their clients, which resulted in a favorable decision demanding the men's immediate release. Afghan authorities, however, did not honor that decision. In 2018-19, the Clinic explored new avenues for international advocacy on behalf of these clients, for example, by pressuring the Swiss government, Afghanistan's third-largest trading partner, to intervene. Students researched possible legal remedies in Afghanistan and made several trips to Washington, D.C., to speak with U.S. and other government officials. Despite the Clinic's advocacy, all three clients were sent back to face persecution and possible death in Tajikistan and Uzbekistan. The Clinic is exploring what, if any, measures it might take at this point to assist the three men.
- The Clinic worked with an Israeli human rights organization to carry out research on multinational corporations whose business activities in the Occupied Palestinian Territory have contributed directly to abuses of Palestinians' human rights. The Clinic conducted legal and factual research in order to assess the viability of bringing civil or criminal suits against one or more of these companies in appropriate jurisdictions. The research was incorporated in the Clinic's memorandum providing conclusions and recommendations about the possibilities of and obstacles to potential suits. In January 2018, the Clinic travelled to Israel and Palestine to interview affected communities and the staff of non-governmental organizations, as well as to brainstorm with the project partner – and its local partners – on further research and legal strategy.
- The Clinic conducted research for the development and relief organization Mercy Corps on relevant international law and standards on refugees' rights to information and to identity. After its trip to Italy in spring 2018 to examine whether governments, U.N. agencies, and implementing partners, including NGOs, were fulfilling or promoting these

rights, in the 2018-19 academic year, the Clinic conducted further research to investigate the right to information for people migrating through North and West Africa. Research included analyzing data from surveys of migrants conducted by a team of researchers working in key spots along the migration route. The Clinic's report, now being used by Mercy Corps internally and with the donor community, may ultimately be published. The report applies human rights law to the specific needs of refugees, examining how providers of humanitarian services (UNHCR, the International Organization for Migration, host-government agencies responding to refugees, and NGOs) are succeeding or failing to promote refugees' rights to information and to identity. It describes the impact of information deficits on refugees and makes recommendations for how policymakers, in both host and donor governments, and practitioners can better promote these rights.

- Beginning in spring 2019, the Clinic has worked with the LGBT Rights Program at Human Rights Watch and activists in South Korea to conduct research and advocacy on bullying and discrimination against LGBT youth in South Korea. Over spring break in 2019, a team of Clinic students traveled to South Korea to interview activists and LGBT youth and used their findings to draft a report to be published with Human Rights Watch.
- The Clinic is working with a Palestinian women's organization, based in the West Bank, to investigate how Israel's occupation creates obstacles to the education of Palestinian girls living in East Jerusalem. The Clinic drafted a series of memos applying Israel's human rights obligations to the problem. The partner organization's field researchers used a gender-sensitive questionnaire developed by the Clinic to collect testimonies from girls, teachers, and parents. In July 2019, the Clinic team spent a week in Jerusalem and conducted interviews with U.N. and NGO staff, visited schools in key neighborhoods of East Jerusalem, and strategized with staff of the partner organization. The organization and the Clinic will publish a joint report early in 2020 and organize advocacy based on the report, particularly with relevant U.N. bodies.
- In May 2019, the Clinic submitted an allegation letter to the U.N. Special Rapporteur on Torture regarding abuses in Connecticut's prison system. A team of Clinic students documented the use of solitary confinement and other abusive practices by the Connecticut Department of Correction (CDOC), focusing on the "supermaximum" prison, the Northern Correctional Institution (NCI). The team regularly travelled to NCI to collect testimony from prisoners incarcerated there and independently verified the information they provided. The Clinic drafted the allegation letter based on its investigation and, in the letter, argued that the CDOC's practices constitute torture under international law. A local grassroots group, Stop Solitary CT, invited the Clinic to present its findings at a community forum in May 2019. The Clinic is now partnering with Stop Solitary CT to draft litigation to be introduced in January 2020 to drastically reduce Connecticut's reliance on long-term isolation.

F. Outreach to the Wider Yale Community

The Schell Center continues to strengthen its connections and impact across the University, particularly in Yale College, by sponsoring speakers, conferences, social events, and volunteer opportunities. Robina endowment funding has provided support for the following outreach activities:

- **Multidisciplinary Academic Program in Human Rights Studies (MAPHR)** This Yale College program is a core part of the Center's efforts to reach the larger Yale community. The program recognizes the complex and interdisciplinary nature of human rights and gives undergraduates the opportunity to learn the analytical and practical skills necessary for human rights study and human rights-related careers. MAPHR, while administered by the Schell Center, benefits from an 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 sixth year, MAPHR includes Human Rights Scholars from a wide array of majors, including environmental studies, psychology, 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 former Robina Visiting Fellows Jennifer Rosenbaum and Nicholas Robinson. In addition, the Schell Center offers Kirby Simon Summer Human Rights Fellowships to the Human Rights Scholars and other undergraduate students to pursue human rights-related internships during the summers.
- **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 the Lower Shebelle region of 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 World Fellow to design the second year of the curriculum and work with teachers in Hope Village to implement the program. Since then, the Yale team has worked with Solutions for Interrupted Education (SIE), a non-profit focused on refugees' access to education, to further develop the Hope Village curriculum. In June 2019, the Robina Foundation supported then-Community Human Rights Fellow Charlotte Finegold to help organize and attend a week-long conference at the African Leadership University in Rwanda. The conference brought SIE-affiliated educators and the Yale curriculum team together with teachers from Hope Village, as well as from Rwanda and other post-conflict states. During the conference, participants received intensive professional development and Hope Village's teachers attended workshops focusing on how

to implement the human rights curriculum.

G. Program Administration

The work of implementing the Robina Initiative's day-to-day activities, tracking participants and outcomes, and documenting the Initiative's long-term impact is done by the Schell Center Executive Director, Hope Metcalf, and the Community Human Rights Fellow, currently Madeline Batt. 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 and the weekly Human Rights Workshop. She also administers the undergraduate Multidisciplinary Academic Program in Human Rights. The Community Human Rights Fellow is responsible for maintaining comprehensive data regarding Yale Law students and alumni involved in human rights, including all current and former recipients of Robina support, and for handling the Schell Center's outreach to our alumni and the Yale University community. Madeline writes regular newsletters for alumni highlighting the work of the Robina Initiative and the Schell Center. Madeline also coordinates social activities and assists with other administrative tasks for the undergraduate MAPHR.

UNANTICIPATED RESULTS AND POTENTIAL CHANGES

There have been no unanticipated results. Now that 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 in the future.

CONCLUSION

The past year has seen sustained accomplishment across the range of Robina-funded programs. The Robina Initiative has allowed us significantly to enhance the opportunities available to Yale Law School and Yale College students interested in pursuing human rights academically and in practice. Many students cite our strength in human rights as a key motivation in choosing Yale Law School. The Robina Initiative has enabled Yale to expand the network and cohort of well-trained human rights advocates. Many leaders of tomorrow's human rights organizations are likely today's Robina fellows.

FINANCIAL REPORT

JULY 1, 2018-JUNE 30, 2019

Note that FY19 revenues include \$268,371.71 carried over from FY18

FISCAL REPORT			
To:	Robina Foundation	Report Period:	7/1/2018 to 6/30/2019
			<u>FY18 Robina</u> <u>Endowment</u> <u>Actuals</u>
3. Expenditures			
	Kirby Simon Summer Human Rights Fellows		162,165.57
	Robina Post-Graduate Human Rights Fellows		103,922.97
	Robina Human Rights JD Scholars		0.00
	Robina Visiting Human Rights Fellows		292,533.88
	Outreach, including Yale College human rights program		17,560.48
	Administrative Support		36,832.24
	Robina COAP Scholars		101,916.62
4 Total Expenditures			<u>\$714,931.76</u>
	Revenues		757,773.99
	Balance FY19		42,842.23

BINGER CLINICAL PROFESSORSHIP OF HUMAN RIGHTS

ANNUAL REPORT, 2018-2019

Professor Jim Silk was named the inaugural Binger Clinical Professor of Human Rights in December 2016. Professor Silk has been at Yale Law School since the fall of 1999, directing and teaching the Allard K. Lowenstein International Human Rights Clinic and co-directing the Orville H. Schell, Jr. Center for International Human Rights. Since the initial Robina Foundation grant to the Law School in 2008 to support a range of fellowships and other programs, Professor Silk has directed the Robina Human Rights Fellowship Initiative. Professor Silk also continues to direct the undergraduate Multidisciplinary Academic Program in Human Rights Studies, which he founded in the fall of 2014. In January 2019, Professor Silk received the M. Shanara Gilbert Human Rights Award from the Society of American Law Teachers at a ceremony at Loyola New Orleans College of Law in conjunction with the annual meeting of the Association of American Law Schools.

During the 2018-19 academic year, Professor Silk's primary commitment was teaching the Lowenstein International Human Rights Clinic with Hope Metcalf and Ryan Thoreson, the Cover-Lowenstein International Human Rights Clinical Fellow, and supervising the work of Clinic student project teams. The Lowenstein Clinic undertakes a wide variety of projects each term on behalf of human rights organizations and individual victims of human rights abuse. Projects are designed to give students practical experience with the range of activities in which lawyers engage to promote respect for human rights; provide students with the knowledge and skills necessary to be effective human rights lawyers; and contribute to efforts to protect human rights through valuable assistance to appropriate organizations and individual clients. Class sessions provide an overview of basic human rights principles and their application, help students integrate the theory and practice of human rights, and provide training in human rights research, writing, and other advocacy skills.

In addition to teaching or co-teaching two sessions of the Lowenstein Clinic seminar each week, Professor Silk supervises a diverse set of projects. Over the course of the 2018-19 academic year, he supervised projects in which Clinic teams:

- drafted a summary account of violations of international human rights, humanitarian, and criminal law by all parties to the conflict in Syria and applied the relevant law to all categories of violation (with former Cover-Lowenstein Fellow Alisha Bjerregaard);
- carried out pre-litigation research to determine the potential liability and possible venues for accountability for private transnational companies whose business activities contributed directly to human rights violations in the Occupied Palestinian Territories;
- prepared two separate petitions to the European Court of Human Rights alleging human rights violations by Italy arising from its efforts not only to prevent refugees and other

migrants from crossing the Mediterranean from Africa to reach Europe, but also to interfere with private rescue efforts at sea;

- drafted a third-party intervention (like an *amicus* brief in U.S. practice) for the European Court of Human Rights on the proper basis in international law for finding that a state has exercised extraterritorial jurisdiction by preventing migrants from reaching Europe by sea;
- investigated and began to draft a report on obstacles that Palestinian girls in East Jerusalem face in securing access to education as a result of Israel's occupation of East Jerusalem.

As part of his supervision of Clinic projects, Professor Silk traveled with a student team to Israel and the West Bank in January to conduct research on certain companies' business practices that contribute directly to violations of Palestinians' human rights. The team interviewed victims of violations, community leaders, and the staff of a number of NGOs. In May, Professor Silk supervised the travel of a different Clinic team to Jerusalem to interview a range of people on obstacles to Palestinian girls' education in East Jerusalem. The two trips to Israel and Occupied Palestinian Territories were successful in gathering information for the project products, a pre-litigation advisory memo and a report to be published this winter.

As part of that same trip, he met a former Clinic student in Geneva to conduct advocacy meetings with staff of the Office of the U.N. High Commissioner for Human Rights on the recommendations the Clinic made in an Allegation to a U.N. special rapporteur. The team had drafted this Allegation partly on the basis of field research in Bosnia conducted in January 2018, on the Bosnian courts' denial of access to justice to victims of wartime abuse, including sexual violence. These trips were supported by the Robina Initiative. The advocacy meetings in Geneva were surprisingly effective, as staff of several U.N. special rapporteurs made commitments to follow up on our Allegation's concrete recommendations. The students involved in all of this work, particularly the two trips to Israel and the West Bank, had profound learning experiences.

Directing the undergraduate Multidisciplinary Academic Program in Human Rights Studies continues to be a major commitment for Professor Silk. The Program selects 15 sophomores every spring from an average of 75 applicants. The Human Rights Scholars, as we call participants in the Program, take a "gateway" course in the spring of their sophomore year, four electives during that semester and their junior years, and complete capstone projects in a senior capstone colloquium taught by Professor Silk with the assistance of Robina Visiting Fellow Paul Linden-Retek. The colloquium mixes critical discussion of a number of contemporary interdisciplinary themes in human rights with peer review and discussion of students' capstone projects. Professor Silk and Mr. Linden-Retek supervise the students' individual projects. Last fall's projects were emblematic of the multidisciplinary nature of the program and ranged in format from academic papers to a photography exhibition, web-based advocacy resources, oral history, and a plan for piloting a local court watch program. They included:

- Transformative Justice for Sexual Violence: Seeking Reconciliation between Two Movements
- Southeast Asian Women: Voices from the Immigration Resistance
- Nigerian Activists and the International Human Rights Regime: A Case Study of #BringBackOurGirls
- This is Our Land: Land Tenancy, Expropriation without Compensation and Justice in uMgungundlovu, South Africa
- Understanding How the Rule of Law Field Views Itself
- Echoes from the Past: U.S. Policy Towards Haitian Asylum Seekers
- The Special Immigrant Visa Program: Towards Relational Justice in Iraq and Afghanistan
- The New Court Watch Movement: Perspectives from Prison Abolitionism and Human Rights
- Three Faces of Subjectivity: War as Unmaking, Storytelling as Reclaiming, and the Meaning of Human Rights
- Human Rights, Media, and the Kibera Experience
- Reconstituting Far-Right Populism through the Spanish Context

The students whose projects were not academic essays wrote papers to accompany their projects that reflected on the work they performed, the relevance of human rights to their projects, and their learning from their project experiences. All of the students presented their projects, with impressive PowerPoint slide shows, at a public symposium in April.

In January, Professor Silk was Yale Law School's faculty representative at the Salzburg-Cutler Fellows Program in International Law and Public Service, sponsored by the Salzburg Global Seminar. Held at the U.S. Institute of Peace in Washington, D.C. the Program brings together more than 50 law students from 11 participating law schools to present draft papers in various areas of international law. The faculty representatives from the participating schools each manage one of the Program sessions and provide comments on the papers of the students in that session, particularly offering advice on how the students can make their arguments most effective and suitable for publication. In addition, Professor Silk was invited to give opening remarks and facilitate a Distinguished Experts' Roundtable, "The Purposes of Human Rights Fact-Finding: Human Rights Advocacy and Promotion," as part of an all-day conference, *Human Rights Fact-Finding in the Era of Fake News: Interdisciplinary Challenges and Institutional Cooperation*, hosted by the University of Notre Dame's Klau Center for Civil and Human Rights in Washington, D.C. At the same conference in March, Professor Silk was one of three discussants for the keynote address by Dr. Agnes Callamard, the U.N. Special Rapporteur on Extrajudicial, Summary or Arbitrary Execution. Finally, in June, Professor Silk gave a talk, "The Human Rights Clinic and Responses to Human Rights Challenges," to staff of the Minority Rights Group and of Reprieve in London.

Financial Report, Binger Chair 2018-19

Endowment Income: \$146,466.16

Expenditures: \$146,462.88

Balance forward: \$ 3.28



ENDOWMENT REPORT
to the
ROBINA FOUNDATION

July 2018-June 2019
Yale Law School

1. Robina Human Rights Initiative Endowment Fund

Principal:	\$10,055,494
Market Value as of 6/30/2019:	\$11,285,701
Income Available, 2018-19:	\$ 489,402

2. Binger Clinical Faculty Chair in Human Rights Fund

Principal:	\$3,000,000
Market Value as of 6/30/2019:	\$3,386,396
Income Available, 2018-19:	\$ 146,466

Overall Endowment Performance for Fiscal Year 2019

The endowment provides the largest source of support for the academic programs of the university. To balance current and future needs, Yale employs investment and spending policies designed to preserve endowment asset values while providing a substantial flow of income to the operating budget. At June 30, 2019, net assets in the endowment totaled approximately \$30.3 billion, after the allocation of endowment spending of \$1.4 billion to the operating budget during the year.

Investment Performance

For the fiscal year ended June 30, 2019, the endowment earned a 5.7% investment return. During the past decade, the endowment earned an annualized 11.1% return, which added \$3.9 billion of value relative to a composite passive benchmark and \$7.1 billion relative to the mean return of a broad universe of colleges and universities.

Endowment Spending

The endowment spending policy, which allocates endowment earnings to operations, balances the competing objectives of providing a stable flow of income to the operating budget and protecting the real value of the endowment over time. The spending policy manages the trade-off between these two objectives by using a long-term target spending rate combined with a smoothing rule, which adjusts spending in any given year gradually in response to changes in endowment market value. The target spending rate approved by the Yale Corporation currently stands at 5.25%. According to the smoothing rule, endowment spending in a given year sums to 80% of the previous year's spending and 20% of the targeted long-term spending rate applied to the market value at the start of the prior year. The spending amount determined by the formula is adjusted for inflation and an allowance for taxes and constrained so that the calculated rate is at least 4.0%, and not more than 6.5%, of the endowment's inflation adjusted market value at the start of the prior year. The smoothing rule and the diversified nature of the endowment mitigate the impact of short-term market volatility on the flow of funds to support Yale's operations.

Asset Allocation

Asset allocation proves critical to successful endowment performance. Yale's asset allocation policy combines tested theory and informed market judgment to balance investment risks with the desire for high returns. Both the need to provide resources for current operations and the desire to preserve the purchasing power of assets dictate investing for high returns, which leads the endowment to be weighted toward equity. In addition, the endowment's vulnerability to inflation directs the university away from fixed income and toward equity instruments. Hence, over 90% of the endowment is invested in assets expected to produce equity-like returns, through domestic and international securities, real assets, and private equity.

Over the past thirty years, Yale significantly reduced the endowment's exposure to traditional domestic marketable securities, reallocating assets to nontraditional asset classes. In 1989, nearly 70% of the endowment was committed to U.S. stocks, bonds, and cash. Today, Yale targets approximately 10% of the portfolio to domestic marketable securities and around 90% to private equity, absolute return strategies, real assets, and foreign equity. The heavy allocation to nontraditional asset classes stems from the diversifying power they provide to the

portfolio as a whole. Alternative assets, by their nature, tend to be less efficiently priced than traditional marketable securities, providing an opportunity to exploit market inefficiencies through active management. Today's portfolio has significantly higher expected returns and lower volatility than the 1989 portfolio.

JAMES BUNDY, ARTISTIC DIRECTOR
VICTORIA NOLAN, MANAGING DIRECTOR



DARING ARTISTS. BOLD CHOICES. ADVENTUROUS AUDIENCES.

November 1, 2019

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 FY2019 activities of the Binger Center for New Theatre. I am also including charts that show Binger Center commissions, productions, and use of production enhancement funds since 2006.

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 theater 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 theater 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 theater 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 theaters 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 theater (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 2018-19 season featured the world premiere of the Yale Rep-commissioned play *Good Faith* by Karen Hartman and the U.S. premiere of the Yale Rep-commissioned play *The Prisoner* by Peter Brook and Marie-Hélène Estienne. Yale Rep also produced the world premieres of Charise Castro Smith's *El Huracán* and Tori Sampson's *Cadillac Crew*.

Commissions

- In FY2019, we offered commissions for four new plays to nine artists: Lileana Blain-Cruz, Marcus Gardley, Kimberly Hébert Gregory, Branden Jacobs-Jenkins, Raja Feather Kelly, Hana Kim, Diane Rodriguez, Janine Salinas Schoenberg, and Josh Wilder.
- Though no commissioned projects are scheduled for our 2019-20 season, we are producing world premieres by two Yale Rep commissioned artists, Branden Jacobs-Jenkins and Will Eno. Our continued relationship with previously commissioned artists demonstrates their commitment to Yale Rep as an artistic home, a place to develop and premiere their new plays.
- The following commissioned projects are currently in development: Ann Marie Healy's *The Availables*; Carolyn McGraw's *1983*; Mary Kathryn Nagle's *A Pipe for February*, an adaptation of Charles Red Corn's novel; and new plays by Miranda Rose Hall, Julie Marie Myatt, Susan Soon He Stanton, and Leah Nanako Winkler.
- After completing development processes, we passed on optioning for production Amelia Roper's adaptation of the Jane Bowles novel *Two Serious Ladies* and Alice Tuan's *A Humbling in St. Paul* and released both projects back to the authors.

Workshops, Readings, and Residencies

The Binger Center continues to provide ample development opportunities for our commissioned artists and their collaborators. In FY2019, we produced 6 workshops and 7 residencies, an increase from last year. We continue to find new ways to support our commissioned artists. For both Caroline McGraw and Ann Marie Healy, we provided focused work sessions with a director and dramaturg to deeply mine their scripts; having additional collaborators and the time and space for extended and detailed conversations has proved beneficial to both writers.

- Workshop of *Good Faith* by Karen Hartman (New York, September 2018)
- Workshop of *1983* by Caroline McGraw (New York, October 2018)
- Workshop of *Cadillac Crew* by Tori Sampson (New York, October 2018)
- Workshop of *The Availables* by Ann Marie Healy (New York, December 2018)
- Workshop of *Cadillac Crew* by Tori Sampson (New York, February 2019)
- Writer's Residency: Mary Kathryn Nagle (New Haven, March 2019)
- Writer's Residency: Leah Nanako Winkler (New Haven, April-May 2019)
- Writer's Residency: Susan Soon He Stanton (New Haven, May 2019)

- Writer's Residency: Susan Soon He Stanton (New Haven, May 2019)
- Writer's Residency: Mary Kathryn Nagle (New Haven, May 2019)
- Workshop of *A Pipe for February* by Mary Kathryn Nagle (New Haven, May 2019)
- Writer's Residency: Ann Marie Healy (New Haven, June 2019)
- Writer's Residency: Miranda Rose Hall (New Haven, June 2019)

New Play Production

The Binger Center supported four productions in Yale Rep's 2018-19 season: *El Huracán* by Charise Castro Smith, *The Prisoner* by Peter Brook and Marie-Hélène Estienne, *Good Faith* by Karen Hartman, and *Cadillac Crew* by Tori Sampson.

- *El Huracán* by Charise Castro Smith ran at Yale Rep from September 28 to October 20, 2018. This "transfixing and lyrical world premiere" (Talkin' Broadway) was praised for how it was "infused with genuine heart and soul" (*New Haven Register*). The production earned two awards from the Connecticut Critics Circle: Outstanding Projection Design (Yaara Bar) and Featured Actress in a Play (Adriana Sevahn Nichols). The production also was nominated for Outstanding Play, Outstanding Director (Laurie Woolery), Outstanding Costume Design (Herin Kaputkin), and Outstanding Sound Design (Megumi Katayama).
- *The Prisoner* had its U.S. premiere at Yale Rep and ran from November 2 to 17, 2018; the production then went on to New York, where it ran from November 24 to December 16, 2018, at Theatre for New Audience. The *Hartford Courant* described *The Prisoner* as "a story of acceptance and resignation rolled into a search for redemption" and declared it "a story made to be told in the theater. Here we all are in the audience, facing uncomfortable truths, lost in thought, staring straight ahead."
- *Good Faith: Four Chats about Race and the New Haven Fire Department* by Karen Hartman and directed by Kenny Leon, ran in New Haven from February 1 to 23, 2019. A Yale Rep commission about the effects of the U.S. Supreme Court ruling *Ricci v. DeStefano*, *Good Faith* created substantial civic dialogue in New Haven—with heated debates at special post-show conversations and coverage from local news outlets. E. Kyle Minor of the *New Haven Register* praised the "superbly rendered" production for not just being "a play of ideas [but] filled with tension, structure, and suspense" that reveals "the heart and soul" of this court case.
- *Cadillac Crew* by Tori Sampson had its world premiere from April 26 to May 18, 2019. Directed by Ms. Sampson and Jesse Rasmussen, the play's acting company was nominated by the Connecticut Critics Circle for the "Best Ensemble" award. Jesse Green of the *New York Times* called the play "ambitious" and heralded Ms. Sampson's "gift" at juxtaposing the present-day with a moment in 1963: "she is uncowed by the supposed rules of construction, unafraid of genre-switching to make a point." The *Hartford Courant* identifies Ms. Sampson, in this play, as accessing "an energy that many other playwrights can't even perceive, let alone harness" in a "wild, mind-expanding ride."

Production Enhancement Fund

There were no expenditures from the Production Enhancement Fund in FY2019.

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.

Yale Rep has a long and proud history of advancing the work of leading artists of color, including August Wilson and Suzan-Lori Parks. We remain committed to promoting the voices and careers of artists who come from traditionally marginalized communities of all kinds. Time and experience have proven that this not only raises the quality of the work produced by Yale Rep, but it also raises the standard of practice for the broader theatrical culture.

Over the past five years (FY2015-FY2019), we have commissioned 33 artists to write plays and create large-scale projects with multiple authors. Of these 33 commissioned artists, 17 identify as women, and 1 identifies as trans. Of the 15 productions of new plays that the Binger Center supported at Yale Rep from 2015-2019, 13 were written by women. In 2015, our efforts to produce the work of women writers were recognized by the activist group The Kilroys, who advocate for gender parity in the industry. We also have been actively working to commission and produce more artists of color. Of the artists commissioned in the past five years, 22 of the 33 identify as people of color. One hundred percent of the projects commissioned in FY2019 are led by artists of color. Our significant financial investment in each artist further reduces the barriers of participation. Yale Rep's commissioning fees now start at \$28,500 and increase up to \$50,000 for musicals or other projects with multiple authors.

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 we anticipate the Robina Foundation sunsetting in 2020, Yale Rep is confident that the assessment processes we have put in place, including annual reporting and five-year reviews by an outside panel of field experts, will lead to healthy and continued interrogation of our goals and our methods. Thanks to the generosity and vision of the Robina Foundation, the Binger Center has been put on a path towards continued success and national impact in the American theater.

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 FY2019 is attached. Line item differences between the original budget and actual expenses are due to variances in Binger Center activities, specifically commissioning fees; workshops, residencies and retreats; production expenses; production enhancement support; and support for YSD playwriting lecturers.

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

Sincerely,



James Bundy

ARTIST BIOS

LILEANA BLAIN-CRUZ

Lileana Blain-Cruz is a theater director. She recently won the OBIE Award for her production of *Marys Seacole* at LCT3. Other recent projects include *Girls* (Yale Rep); *Faust* (Opera Omaha); *Fabulation, or The Re-Education of Undine* and *The Death of the Last Black Man in the Whole Entire World* (Signature); *Pipeline* (Lincoln Center); *Thunderbodies* and *Revolt. She Said. Revolt Again* (Soho Rep); *The House that will not Stand*, *Red Speedo* (New York Theatre Workshop); *Henry IV Part One*, *Much Ado About Nothing* (Oregon Shakespeare Festival); *War* (world premiere, Yale Rep; LCT3); and *The Bluest Eye* (Guthrie Theater). She was awarded a 2018 United States Artist Fellowship. Upcoming: *Fefu and Her Friends* at Theatre for a New Audience and *Anatomy of a Suicide* at the Atlantic.

MARCUS GARDLEY

Marcus Gardley is a multiple award-winning poet-playwright who won the prestigious 2008 Helen Merrill Award and a Kesselring honor. His play *every tongue confess* had its world premiere at Arena Stage in late 2010. In summer 2010, *On the Levee* (commissioned by Yale Rep) was produced at Lincoln Center's LCT3 and was nominated for seven AUDELCO awards, including Outstanding Playwright. His plays *This World in a Woman's Hands* (2009) and *Love is a Dream House in Lorin* (2007) have been named as the best plays in Bay Area theater, with *Love is a Dream House in Lorin* being nominated for the Steinberg/American Theatre Critics Association New Play Award. Gardley is the author of *the box: play about the prison industrial complex* which premiered in Brooklyn in 2014 at The Foundry; *black odyssey*, which premiered at The Denver Center for the Performing Arts the same year and was subsequently produced at California Shakespeare Theater; *The Road Weeps, the Well Runs Dry*, which had a national tour in 2013; and *Dance of the Holy Ghosts*, which premiered at Yale Rep in 2006. He is the recent recipient of the 2014 Glickman Award for his play *The House that will not Stand*, which was commissioned by Berkeley Rep and had its world premiere in a co-production with Berkeley Rep and Yale Rep. It had subsequent productions at the Tricycle Theater in London and Off-Broadway at New York Theatre Workshop. Gardley was the 2013 USA James Baldwin Fellow and the 2011 PEN Laura Pels award winner for Mid-Career Playwright. Gardley has won the San Francisco Bay Area's Gerbode Emerging Playwright Award, the National Alliance for Musical Theatre Award, and the ASCAP Cole Porter Prize. Gardley has an M.F.A. from Yale School of Drama, where he received the Eugene O'Neill Memorial Scholarship. He is a member of New Dramatists, The Dramatists Guild, and the Lark Play Development Center. Gardley was selected as one of 50 talented playwrights for audiences to follow by the *Dramatists Magazine*. In addition to his work as a playwright, Gardley has written for several television series. He served as a staff writer on the Amazon Prime series *Z: The Beginning of Everything*, and later as an executive story editor for *The Chi*, which premiered on Showtime in 2018.

KIMBERLY HÉBERT GREGORY

Kimberly Hébert Gregory is an actor and writer. She appeared in numerous productions at the Chicago Theatre Company in the late 1990s and received a Joseph Jefferson Award nomination for her performance in *Shakin' the Mess Outta Misery*. In 2012, she was nominated for a Drama Desk Award for Outstanding Featured Actress in a Play for her performance in Lynn Nottage's *By The Way, Meet Vera Stark*. She starred in The Public Theater's production of Tarell Alvin McCraney's *The Brother/Sister Plays*. In 2014 she had a recurring role as Lucinda Miller in the Lifetime comedy-drama series, *Devious Maids*. In 2016 she starred as series regular Dr. Belinda Brown in the HBO comedy

series *Vice Principals* opposite Danny McBride. In September 2016, the trade publication *The Wrap* described Kimberly as the show's "breakout star." She is a series regular on the Showtime series, *The Chi*.

BRANDEN JACOBS-JENKINS

Branden Jacobs-Jenkins is a writer based in Brooklyn. His plays include *Girls* (world premiere, Yale Rep), *Everybody* (Signature Theatre; Pulitzer Prize finalist), *War* (world premiere, Yale Rep; LCT3), *Gloria* (Vineyard Theatre; Pulitzer Prize finalist), *Appropriate* (Signature Theatre; OBIE Award), *An Octoroon* (Soho Rep.; OBIE Award), and *Neighbors* (The Public Theater). A Residency Five playwright at Signature Theatre, his most recent honors include the Charles Wintour Award for Most Promising Playwright from London's *Evening Standard*, a London Critics' Circle Award for Most Promising Playwriting, a MacArthur Fellowship, the Windham-Campbell Prize for Drama, the Benjamin H. Danks Award from the American Academy of Arts and Letters, the Steinberg Playwriting Award, and the inaugural Tennessee Williams Award. Having taught at NYU, Juilliard, and Hunter College, where he was director of the M.F.A. Playwriting program, he now serves on the faculty at University of Texas at Austin.

RAJA FEATHER KELLY

Raja Feather Kelly is a choreographer, director, and the artistic director of the feath3r theory and New Brooklyn Theatre. Since 2016, Raja has choreographed extensively for Off-Broadway theater in New York, most notably for Signature Theatre, Soho Rep., New York Theatre Workshop, and Playwrights Horizons. Frequent collaborators include Lileana Blain-Cruz, Branden Jacobs-Jenkins, Sarah Benson, and Lila Neugebauer. Other theater credits include choreography for *Girls* (Yale Rep), *Skittles Commercial: The Musical* (Town Hall), *The Chronicles of Cardigan and Khente* (Soho Rep.), *Everyday Afroplay* (JACK), *Electric Lucifer* (The Kitchen), *Lempicka* (Williamstown Theatre Festival, upcoming at La Jolla Playhouse), *The House that will not Stand* (New York Theatre Workshop), *Fireflies* (Atlantic Theater Company), *If Pretty Hurts Ugly Must Be a Mufucka* (Playwrights Horizons, nominated for the 2019 Lucille Lortel Award and the 2019 Chita Rivera Award for Outstanding Choreography), *The Good Swimmer* (BAM), and *Faust* (Opera Omaha). Most recent work: *A Strange Loop* (Playwrights Horizons), *Fairview* (Soho Rep., Berkeley Rep, TFANA, and winner of the 2019 Pulitzer Prize for Drama).

HANA KIM

Hana Kim is an award winning projection designer based in Los Angeles. Her design works have been seen across the country, including The Public Theater (New York), A.C.T (San Francisco), LA Opera, Geffen Playhouse, Baltimore Center Stage, Opera Colorado and South Coast Rep. Video art installations have been shown at the Annenberg Space for Photography (Los Angeles) and Baryshnikov Arts Center (New York). She is a 2018 Richard E. Sherwood Awardee from Center Theatre Group and a recipient of a Princess Grace Award in Theater Design. Her designs have won a Helen Hayes Award, Bay Area Theater Critics Circle Awards, Stage Raw Awards and Stage Scene LA Awards.

DIANE RODRIGUEZ

Diane Rodriguez wrote, directed and premiered two of her own full-length works, *Living Large* (2012 premiere at Teatro Luna, Chicago) and *The Sweetheart Deal* (2017 premiere, Los Angeles Theatre Center). *The Sweetheart Deal* was developed at The Black Swan Lab at Oregon Shakespeare Festival,

the New Harmony Project in Indiana, and at Atlantic Theater Company in New York. Diane worked for Mattel, Inc. as the book writer for the Broadway-style musical *Barbie Live*. The show toured Asia in 2013 and Latin America in 2010. She worked as a creative and cultural consultant for the Disney Family animated series, *Elena of Avalor*. Written with the ensemble Latins Anonymous, her two-play anthology of the same name published by Arte Publico is popular with colleges throughout the Southwest for its comedy and enduring relevance. Diane was inducted into the College of Fellows for the American Theatre in 2018. In 2016 she was appointed by President Obama to the NEA's National Council on the Arts, on which she still serves. She was on the board of the Theatre Communications Group for eight years, serving as President from 2013-2016. Her more than 20-year tenure on the artistic staff at Center Theatre Group/Los Angeles included the positions of Associate Artistic Director, Associate Producer, and Director of New Play Production.

JANINE SALINAS SCHOENBERG

Janine Salinas Schoenberg received her M.F.A. from the University of Southern California's Dramatic Writing Program. As a playwright she has had works developed and/or produced at: Atwater Village Theatre, Playwrights' Arena, Los Angeles Theatre Center, Center Theatre Group, South Coast Repertory, and the Oregon Shakespeare Festival. She is the recipient of a MacDowell Fellowship, and a Project Involve Fellowship through Film Independent. Janine was a participant in the American Film Institute Directing Workshop for Women, where she was awarded the Nancy Malone Award in directing for her short film, *Jenny & Lalo*. She is an alumna of the Sundance Institute Screenwriters Intensive, the National Hispanic Media Coalition Television Writers Program, and the Disney/ABC Writing Program. As a television writer, she has written on *American Crime* (ABC), *Snowfall* (FX), and *Riverdale* (CW). She currently lives in Los Angeles with her husband, composer Adam Schoenberg, and their two sons, Luca and Leo.

JOSH WILDER

Josh Wilder is a playwright from Philadelphia. His work has been developed, commissioned, and produced by various regional theaters and festivals across the country, including The Fire This Time Festival, Classical Theatre of Harlem, New York Theatre Workshop, True Colors Theatre Company, The Kennedy Center, Oregon Shakespeare Festival, 2015 O'Neill National Playwrights Conference, PlayPenn, Company One, InterAct Theatre Company, and Yale Rep. Awards include the Holland New Voices Award, the Lorraine Hansberry Award, the Rosa Parks Award, and the ASCAP Cole Porter Prize. Josh is a former Jerome Fellow and the first national recipient of the Jerome Many Voices Fellowship at the Playwrights' Center in Minneapolis, MN. He has been in residence at the Royal Court Theatre and Sundance at Ucross, and he served as Co-Artistic Director of the Yale Cabaret for its 50th season. He received his M.F.A. from Yale School of Drama and is a member of the Dramatists Guild.

Binger Center for New Theatre
Financial Report FY19

	FY2019 Binger Center Budget	FY2019 Other Sources Budget	FY2019 Center for New Theatre Budget Total	FY2019 Binger Center Actuals	FY2019 Other Sources Actuals	FY2019 Center for New Theatre Actuals Total
Income						
Binger Center Endowments	1,264,087		1,264,087	925,369		925,369
Robina Production Enhancement Funds	-		-	-		-
Other (Foundation, Individual, and University support) (1)		675,001	675,001		661,855	661,855
Grand Total Income	1,264,087	675,001	1,939,088	925,369	661,855	1,587,224
Expenses						
Artistic Office Salary and Benefits	385,169		385,169	330,596		330,596
Commissions (2)	68,750		68,750	83,750		83,750
Workshops, Residencies and Retreats (3)	102,500		102,500	58,849		58,849
Production Expenses	707,668	364,640	1,072,308	452,174	364,640	816,814
Enhancement Support (4)	-		-	-		-
YSD Playwriting Lecturers		141,680	141,680		128,535	128,535
YSD Key Staff Time (5)		168,681	168,681		168,681	168,681
Program Review			-			-
Grand Total Expenses	1,264,087	675,001	1,939,087	925,369	661,855	1,587,224

(1) Additional income for the project came from Beinecke Playwriting Residency endowment (\$54.6K), Carol Sirot Foundation for YRT5 (\$10k), NEA for YRT5 (\$30k) Center for New Theater endowment (\$33.2K), Time Warner Foundation Storyteller Gift for YRT1 (\$50K)

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

(3) Expenses for Workshops, Residencies and Retreats reflect their complexity, length, and number of artists involved

(4) There were no expenditures from the Production Enhancement Fund in FY2019

(5) Key Staff Time reflects charging the following % of salary & fringe: 10% of Managing Director, 50% of Production Manager, 88% of Literary Associate, 100% for YRT Director and Playwright

Yale School of Drama/Yale Repertory Theatre
Binger Center for New Theatre
Annual Report - July 1, 2018 - June 30, 2019

Binger Center for New Theatre
Yale Rep Commission History FY2006-FY2019

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	Closed; Converted to FY2019 <i>Song of Solomon</i>		
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>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>	World Premiere 2019-20 at MCC Theater (NYC)		
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	more than 5	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	1	
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		
FY2013	David Adjmi	untitled	In process		
FY2013	Rolin Jones	<i>These Paper Bullets!</i>	World Premiere 2013-14 at Yale Rep	2	
FY2013	Meg Miroshnik	untitled	In process		
FY2013	Amelia Roper	<i>Two Serious Ladies</i>	Completed; Released to author		
FY2013	Sarah Ruhl	<i>Scenes from Court Life</i>	World Premiere 2016-17 at Yale Rep	1	
FY2013	Lucy Thurber	<i>Transfers</i>	World Premiere 2017-18 at MCC Theater (NYC)		

Year	Artist	Play	Result/Status	Subsequent Productions	Notes
FY2014	Karen Hartman	<i>Good Faith</i>	World Premiere 2018-19 at Yale Rep		
FY2014	Rolin Jones	untitled	In process		
FY2014	Caroline McGraw	<i>1983</i>	In process		
FY2014	Julie Marie Myatt	<i>Karen: Frog Queen</i>	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>	In process		
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	<i>A Pipe for February</i>	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	3	Co-commission by Yale Rep; presented in YRT's 2018-19 No Boundaries series
FY2017	Tori Sampson	untitled	In process		
FY2017	Martin Zimmerman	untitled	In process		
FY2018	Peter Brook and Marie-Hélène Estienne	<i>The Prisoner</i>	World Premiere 2017-18 C.I.C.T. - Théâtre des Bouffes du Nord	4	Co-Commission by Yale Rep; U.S. premiere Yale Rep 2018-18 season
FY2018	Larissa Fasthorse	untitled	In process		
FY2018	Miranda Rose Hall	untitled	In process		
FY2018	Basil Kreimendahl	untitled	In process		
FY2018	Harrison David Rivers	untitled	In process		
FY2018	Leah Nanako Winkler	untitled	In process		
FY2019	Josh Wilder	untitled	In process		
FY2019	Marcus Gardley and Kimberly Hébert Gregory	<i>Song of Solomon</i>	In process		
FY2019	Diane Rodriguez, Janine Salinas Schoenberg, Hana Kim	<i>La Pastora</i>	In process		
FY2019	Branden Jacobs-Jenkins, Lileana Blain-Cruz, Raja Feather Kelly	untitled	In process		

Total Commissions: 71
Pre-Robina (FY2006-FY2008): 11
FY2009-FY2019: 60
Produced: 24
World Premiere at YRT: 17
World Premiere elsewhere: 7
Completed, not yet produced: 15
In process: 31

Note: Stats last updated 17 October 2019

Binger Center for New Theatre Production History
FY2009-FY2019

Yale Rep Commissions World Premiere at Yale Rep		
<i>Notes from Underground**</i>	2008-09	
<i>We Have Always Lived in the Castle</i>	2010-11	
<i>Belleville**</i>	2011-12	
<i>The Realistic Joneses**</i>	2011-12	
<i>Marie Antoinette**</i>	2012-13	
<i>Dear Elizabeth**</i>	2012-13	
<i>In a Year with 13 Moons</i>	2012-13	
<i>These Paper Bullets!**</i>	2013-14	
<i>War**</i>	2014-15	
<i>Familiar**</i>	2014-15	
<i>Elevada**</i>	2014-15	
<i>Indecent**</i>	2015-16	
<i>Scenes from Court Life**</i>	2016-17	
<i>Imogen Says Nothing</i>	2016-17	
<i>Mary Jane**</i>	2016-17	
<i>Field Guide</i>	2017-18	
<i>Good Faith</i>	2018-19	
Total		17
Non-Yale Rep Commissions World Premiere at Yale Rep		
<i>POP!**</i>	2009-10	
<i>Compulsion**</i>	2009-10	
<i>Bossa Nova</i>	2010-11	
<i>Good Goods**</i>	2011-12	
<i>The House that Will Not Stand**</i>	2013-14	
<i>peerless**</i>	2015-16	
<i>The Moors**</i>	2015-16	
<i>El Huracán</i>	2018-19	
<i>Cadillac Crew</i>	2018-19	
<i>Girls</i>	2019-20	
<i>The Plot</i>	2019-20	
Total		11
New Plays Produced at Yale Rep (non-commission, non-World Premiere)		
<i>The Fairytale Lives of Russian Girls**</i>	2013-14	
<i>Native Son**</i>	2017-18	
<i>Kiss**</i>	2017-18	
<i>Manhatta**</i>	2019-20	
<i>Testmatch**</i>	2019-20	
Total		5
Yale Rep Commissions World Premiere Elsewhere & Funded by Binger Center		
<i>On the Levee (LCT3)</i>	2009-10	
Total		1
Yale Rep Commissioned Plays World Premiere Elsewhere		
<i>On the Levee</i>	LCT3 (New York City)	
<i>Creation</i>	Theatre @ Boston Court (Los Angeles)	
<i>Transfers</i>	MCC (New York City)	
<i>Lempicka**</i>	Williamstown Theatre Festival (Williamstown, MA)	
<i>What Remains**</i>	Fisher Center for the Performing Arts at Bard College	
<i>The Prisoner**</i>	C.I.C.T. - Théâtre des Bouffes du Nord (Paris, France)	
<i>Perry Street</i>	MCC (New York City)	
Total		6

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

Year	Play	Recipient Theatre	Amount
2010	<i>Notes from Underground</i>	La Jolla Playhouse	\$15,000
2010	<i>Notes from Underground</i>	Tour Coordinator	\$4,100
2010	<i>On the Levee</i>	LCT3 (NYC)	\$15,000
2011	<i>Notes from Underground</i>	Theatre for a New Audience	\$5,100
2011	<i>POP!</i>	City Theatre (Pittsburgh, PA)	\$15,000
2012	<i>Marie Antoinette</i>	American Repertory Theater (Cambridge, MA)	\$100,000
2013	<i>Belleville</i>	New York Theatre Workshop	\$15,000
2013	<i>Marie Antoinette</i>	Soho Rep. (NYC)	\$30,000
2013	<i>POP!</i>	Firehouse Theatre (Richmond, VA)	\$5,000
2014	<i>The Realistic Joneses</i>	Broadway	\$50,000
2014	<i>Marie Antoinette</i>	Woolly Mammoth Theatre (Washington, DC)	\$10,000
2015	<i>These Paper Bullets!</i>	Atlantic Theater Company (NYC)	\$60,000
2016	<i>War</i>	LCT3 (NYC)	\$5,000
2016	<i>These Paper Bullets!</i>	Geffen Playhouse (Los Angeles, CA)	\$6,225
2016	<i>Transfers</i>	NYSF Powerhouse Theater at Vassar	\$5,000
2017	<i>Indecent</i>	Broadway	\$50,000
2018	<i>Familiar</i>	Woolly Mammoth Theatre (Washington, DC)	\$10,000
Total			\$400,425

**Denotes plays supported by the Binger Center that have had multiple productions

World Premiere Productions supported by the Binger Center at Yale Rep since 2008-09	28
New Plays (not WP) supported by Binger Center at Yale Rep since 2008-09	5
WP productions elsewhere funded by the Binger Center since 2008-09	1
Yale Rep commissioned plays world premiere at Yale Rep since 2008-09	17
Yale Rep commissioned plays world premiere elsewhere since 2008-09	6
Plays supported by the Binger Center that have multiple productions	26

ENDOWMENT REPORT
to the
ROBINA FOUNDATION

July 2018-June 2019
Yale School of Drama

1. Binger Center for New Theatre Endowment Fund I

Original Investment:	\$15,000,000
Principal:	\$15,025,000
Market Value as of 6/30/2019:	\$21,811,676
Income Distribution/Expendable FY20	<u>\$989,533</u>

2. Binger Center for New Theatre Endowment Fund II

Original Investment:	\$2,194,203*
Principal:	\$1,038,744
Market Value as of 6/30/2019:	\$1,265,508
Income Distribution /Expendable FY20	\$57,412

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

Overall Endowment Performance for Fiscal Year 2019

Yale's endowment earned a 5.7% investment return (net of fees) for the year ending June 30, 2019. The endowment value increased from \$29.4 billion on June 30, 2018, to \$30.3 billion on June 30, 2019.

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 2020 fiscal year is projected to be \$1.4 billion, representing approximately 34% of the university's net revenues. Endowment distributions to the operating budget have increased at an annualized rate of 8.5% 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 11.1% per annum over the 10 years ending June 30, 2019, trailing broad market results for domestic stocks, which returned 14.7% annually, and exceeding results for domestic bonds, which returned 3.9% annually. Relative to the estimated 8.5% average 10-year return of college and university endowments, Yale's investment performance added \$7.1 billion of value in the form of increased spending and enhanced endowment value. During the 10-year period, the endowment grew from \$16.3 billion to \$30.3 billion.

Yale's endowment returned 11.4% per annum over the 20 years ending June 30, 2019, exceeding broad market results for domestic stocks, which returned 6.4% annually, and for domestic bonds, which returned 4.9% annually. Relative to the estimated 6.5% average return of college and university endowments, over the past 20 years Yale's investment performance added \$28.6 billion of value in the form of increased spending and enhanced endowment value. During the 20-year period, the endowment grew from \$7.2 billion to \$30.3 billion.

9.3.19

Award email
re Dean's
Innovation
Fund

Nancy Gilberg

From: Penny Hunt <pennhunt@gmail.com>
Sent: Tuesday, September 3, 2019 10:15 AM
To: Bundy, James
Cc: Berman, Deborah; Nancy Gilberg
Subject: Robina Foundation

* 1005

Dear James,

First and foremost, thank you so much for attending the Robina Board Meeting! Board Members appreciated very much being able to meet with you to talk about Yale School of Drama, grants you have made with Robina's \$100,000 grant to pilot the Dean's Innovation Fund, and the future of the Fund. Your remarks were excellent, as was your interaction with Board Members. The discussion about your leadership of YSD was particularly helpful, I thought.

Your time with the Board was well spent! The Board approved a second grant of \$100,000 to support YSD projects which meet the criteria described in your "Proposal to the Robina Foundation for The Dean's Innovation Fund" dated August 2018. Funding of this grant will take place this month. Because it is impossible to predict with certainty financial markets and other events that will occur between now and August 2020, the Robina Board was not able to make a firm commitment to provide endowment funding to sustain the Dean's Innovation Fund. However, subject to those unknowables, the Board expects to provide an endowment grant of up to \$2 million, which would be paid before the end of 2020. The Board plans to consider that grant at its August 2020 meeting. As was the case this year, you will be asked to report on your use of the second \$100,000 grant at the time the Board considers the endowment grant.

In addition to discussions concerning the Dean's Innovation Fund, the Board discussed reporting on endowment grants after Robina's dissolution on December 31, 2020. I will provide you and Deborah with detailed information on this in another email.

Once again, thank you for coming to Minneapolis to meet with the Board. It was unfortunate that Marianne was unable to attend the meeting, but we have updated her on the meeting, and she concurs with the Board's decision.

Please let me know you have questions or concerns about the status of funding to support the Dean's Innovation Fund.

My best,

Penny



Penny A. Hunt
Executive Director

Robina Foundation
4900 IDS Center
80 South 8th Street
Minneapolis, MN 55402

REPORTING SCHEDULE

Endowment Grants 2020-2023	Month Due
CFR Endowed Chair in Global Governance \$5M - Approved February 2016	February
CFR Endowed Six Franklin Williams Internships \$1,320,000 – Approved February 2016	February
U of M Endowed James H. Binger Center for New Americans \$23.5M – Approved August 2016	November
U of M Endowed James H. Binger Professorship in Clinical Law \$1M – Approved August 2016	November
U of M Endowed Dean's Innovation Fund	August
Yale Endowed Binger Center for New Theatre \$18M – Approved 2012	November
Yale Endowed Human Rights Fellowship Initiative \$10M – Approved August 2016	November
Yale Endowed Binger Clinical Faculty Chair in Human Rights \$3M – Approved August 2016	November
Yale Endowed Dean's Innovation Fund	August

Program Grants 2020-2021	Month Due
U of M Public Interest Scholars and Bridge Fellowship Program	May
U of M Class Agent Fundraising	August

YSD

Nancy Gilberg

From: Penny Hunt <pennhunt@gmail.com>
Sent: Tuesday, September 3, 2019 12:17 PM
To: Berman, Deborah
Cc: Bundy, James; Nancy Gilberg
Subject: Robina Foundation / Post-Termination Reporting
Attachments: Post Sunset Reporting - YSD Draft.docx

Hi Deborah,

As I mentioned in my email to James, the Robina Board discussed post-termination reporting at last week's meeting. Attached is information about the reporting. Note, in particular:

- Yale's Provost is identified as the person who will certify reports.
- Yale University's Vice President for Alumni Affairs and Development will serve as Successor Representative.
- The reporting period will be five years following Robina's termination: for three years two Robina Board Members will receive reports, followed by two years when reports will be sent to the Yale VP.

Thank you so much for all of your help - and for your patience - as we finalized Robina's plan for reporting. This reporting plan will be duplicated if the Robina Foundation provides endowment funding for the Dean's Innovation Fund.

Please feel free to get in touch with me if you have questions about reporting.

Warm regards,
Penny

ROBINA FOUNDATION
Post-Termination Reporting
The Binger Center for New Theatre
Yale School of Drama

Content of Report

1. Description of key activities during the last twelve months, including any unanticipated results, lessons learned, and adjustments made to the programming of *The Binger Center for New Theatre*.
2. Status of *The Binger Center for New Theater Endowment Fund*: market value, principal, and accumulated spendable amount.
3. Attachment to Report: Indenture Documenting the Endowment and Current Use Gift from the Robina Foundation dated April 2012 and the Amendment to the Indenture dated April 15, 2015.

Certification of *The Binger Center for New Theatre* Report by Yale University's Provost

If no change in circumstances, please check the box below and sign the certification.
(Insert box)

The undersigned confirms receipt of *The Binger Center for New Theatre* Report dated XXX and his/her determination that the report reflects adherence to the use of endowment income set forth in the attached Indenture and other provisions of the Indenture and Amendment and that no change of circumstances has occurred since the last report.

Signed:

Date: _____

Certification by Yale University's Provost in the event of a Change in Circumstances affecting *The Binger Center for New Theatre*

The undersigned confirms receipt of *The Binger Center for New Theatre* Report dated XXX and his/her determination that the use of endowment income has been changed as follows for the reasons and pursuant to the process described in the "Fund Administration" provision in the Indenture:

New Use of *The Binger Center for New Theatre Grant*: Beginning XXX, *The Binger Center for New Theatre Grant* will be used as follows:

Rationale: Description of the change in circumstances making it impractical, inexpedient or impossible to apply distributions from the Fund as originally intended.

Signed:

Date: _____

Timing of Reports

Reports will be due in November of each year during the reporting period.

Reporting Period / Successor Representative

For three years beginning January 1, 2021, reports will be sent to two Robina Board Members to be identified by the Robina Foundation Board of Directors prior to the Foundation's termination.

In 2023 the Robina Board Members will designate Yale University's Vice President for Alumni Affairs and Development as Successor Representative

In 2024 and 2025, reports will be submitted to Yale University's Vice President for Alumni Affairs and Development.

Approved by Robina Foundation Board of Directors on 8/27/2019