



[Robina Foundation](#)

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Nancy Gilberg

ROBINA FOUNDATION
Board Meeting
Conference Call

Thursday, November 19, 2020

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

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

ROBINA FOUNDATION

ACTIONS FOLLOWING 11/19/20 BOARD MEETING

Minutes of 11/19/20 Board Meeting

Notification of Change in Endowment Reporting following Robina dissolution

Letters to:

- Richard Haass, Council on Foreign Relations
- Dean Garry Jenkins, University of Minnesota Law School, and Christine Searson, University of Minnesota Foundation
- Dean James Bundy, Yale School of Drama, and Joan E. O'Neill, Yale University
- Dean Heather Gerken, Yale University Law School, and Joan E. O'Neill, Yale University

Notification of Change in Reporting for Thomas M. Crosby, Jr. Scholarship Fund following Robina dissolution

Letter to Joan E. O'Neill and Patty Pederson, Yale University

Documentation of Closing Grants approved at 11/19/20 Board Meeting

Letters to:

- Penny Wheeler, M.D.: \$50,000 grant for general operating support as determined by Dr. Wheeler
- Richard Haass and Suzanne Helm: \$50,000 grant for general operating support as determined by Richard Haass
- Dean Garry Jenkins and Christine Searson: \$100,000 grant to support the Dean's Innovation Fund at the U of M Law School to be applied to the available balance of the Fund
- Dean James Bundy and Joan E. O'Neill: \$100,000 grant to support the Dean's Innovation Fund at Yale School of Drama for current use as desired by Dean Bundy.

**Robina Foundation
Meeting Minutes
November 19, 2020**

A meeting of the Board of Directors of the Robina Foundation, a Minnesota nonprofit corporation, was held on November 19, 2020, via conference call.

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

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

Mary Lou White was present and served as recorder.

Welcome and Call to Order

Blatz, Chair, called the meeting to order and welcomed Board Members to Robina Foundation's last Board Meeting.

Minutes of August 25, 2020, Annual Board Meeting

During discussion of the minutes included in the Board Book, Blatz proposed an amendment to the "Dissolution" section to clarify that Faegre Drinker attorney Angela Fogt indicated that no creditors' claims had been received as of the meeting.

A motion was made and seconded to approve the Minutes of the August 25, 2020, Board Meeting included in the Board Book as amended to clarify that no creditors' claims had been received as of the date of the meeting. That motion was approved unanimously.

Executive Director's Report

Hunt informed Board Members that on December 9 representatives of the Minnesota Historical Society will pick up Robina's Board Books for archiving and provided Board Members with additional information concerning "Post-Dissolution Reporting":

- Staff of Robina Grantees who will prepare grant reports after the Foundation's dissolution have received information explaining submission of reports on endowment grants to The Minneapolis Foundation;
- Executives of Robina Grantees who signed endowment grant agreements will receive a formal letter designating The Minneapolis Foundation as Robina's successor to receive future grant reports and explaining that Berresford and Lewis will review reports as consultants to The Minneapolis Foundation.

Hunt and Gilberg reported that all bonds held by the Foundation have matured or been sold, and all distributions have been received. Hunt updated Board Members on the status of activities which need to be completed prior to Robina's dissolution.

Foundation Finances

During review of material in the Board Book, Board Members noted that allocation of Robina funds to Robina Grantees reflects Jim Binger's advice that grants support the most important programs and need not be distributed equally among Robina Grantees. During review of material providing an estimate of available funds through December 31, Hunt emphasized that she and Gilberg continue to monitor operating expenses closely to confirm funds available for grants and payment to The Minneapolis Foundation. At this point, it appears that between \$400,000 and \$450,000 will be available.

Dissolution Update

Board Members reviewed Angela Fogt's memo describing the current status of the dissolution process and discussed execution of the Articles of Dissolution and Notice After Transfer of Assets at the end of the process. Hunt and Gilberg will provide Fogt with information to complete the documents for review by Blatz. Following Blatz's review, the documents will be signed electronically by Blatz as Chair and will be filed with the Minnesota Secretary of State and the Minnesota Attorney General by Fogt.

Gilberg explained that she and Hunt worked with Fogt to identify documents that should be retained on jump drives to be provided to each Board Member, as well as The Minneapolis Foundation. Board Members asked that Faegre Drinker provide the Foundation with information concerning the law firm's retention of Robina documents and the firm's policy concerning retention.

Grant Updates

Hunt called Board Members' attention to material in the Board Book documenting the Foundation's three grants approved in August: \$10,000 to the Minnesota Historical Society; \$2.3 million to endow the Dean's Innovation Fund at the University of Minnesota Law School; and \$2 million to endow the Dean's Innovation Fund at Yale School of Drama.

Final Distributions before Dissolution

Grant to the Minneapolis Foundation

Board Members agreed that after all expenses are paid and closing grants made, remaining funds will be transferred in December to The Minneapolis Foundation to fund The Robina Foundation Fund at The Minneapolis Foundation which will implement review of grant reports by Berresford and Lewis and payment of expenses that arise after the Foundation's dissolution.

Closing Grants

Board Members confirmed the decision at the August Board Meeting concerning allocation of \$300,000 anticipated to be available for closing grants:

- \$100,000 to the University of Minnesota Law School to support the Deans' Innovation Fund;
- \$100,000 to Yale School of Drama to support the Dean's Innovation Fund;
- \$50,000 to the Council on Foreign Relations for general support;
- \$50,000 to Abbott Northwestern/Allina Health for general support.

During the discussion Lewis proposed that grants to the University of Minnesota Law School and Yale School of Drama be available for current use rather than added to the Dean's Innovation Fund endowments funded by Robina.

A motion was made and seconded that closing grants provided to the University of Minnesota Law School and Yale School of Drama for the Dean's Innovation Funds will be available for current use. That motion was unanimously approved.

Grantee Reports

University of Minnesota Law School

- *James H. Binger Center for New Americans*
- *James H. Binger Professorship in Clinical Law*

Board Members highlighted the impressive work of the Binger Center, notwithstanding the restrictions necessitated by the pandemic, and information that graduates of the Law School are pursuing careers with nonprofit organization working on immigration issues.

Yale University Law School

- *Robina Human Rights Initiative and Binger Clinical Faculty Chair in Human Rights*

Board Members noted the wide reach of the initiative and the importance of the Law School's record keeping as part of the program.

Yale School of Drama

- *Binger Center for New Theatre*

Board Members noted the changes Yale School of Drama has made to extend several key programs due to pandemic restrictions. For the next three years Berresford and Lewis will monitor the program including use of the Production Enhancement Fund, which is not always fully utilized.

Closing

Before ending the meeting Board Members and Hunt and Gilberg reflected on their experience with the Robina Foundation and each other.

Adjournment

There being no other business, the meeting was adjourned at 2:20 pm.

Respectfully Submitted,

Marianne D. Short
Marianne Short, Secretary

11/21/2020
Date

ROBINA FOUNDATION

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

November 25, 2020

Richard M. Haass, President
Council on Foreign Relations
58 East 68th Street
New York, NY 10065

RE: Robina Foundation

Dear Richard,

As planned, the Robina Foundation will be dissolved effective December 31, 2020. Since Robina will cease operations, I am writing to inform the Council on Foreign Relations (the "Council") of a change in the reporting procedure provided in grant agreements for the two endowment grants the Foundation made to the Council:

James H. Binger Chair in Global Governance Fund Grant and Endowment Agreement dated November 17, 2016: As provided in Paragraph 5, the Foundation designates The Minneapolis Foundation ("TMF") as the Foundation's designated successor to receive reports from January 1, 2021, through December 31, 2023. The following two years the designated successor will be the head of the Council department overseeing the person holding the James H. Binger Chair in Global Governance.

Robina Franklin Williams Internship Fund Grant and Endowment Agreement dated December 7, 2016: As provided in Paragraph 4, the Foundation designates TMF as the Foundation's designated successor to receive reports from January 1, 2021, through December 31, 2023. The following two years the designated successor will be the head of the Council department overseeing Franklin Williams Interns.

Contact information for The Minneapolis Foundation:

Jean Adams, Senior Vice President, Strategy and Chief Operating Officer;
jadams@mplsfoundation.org or her designee. (Phone: Office: 612-672-3821)

I worked with Suzanne Helm to establish the form and timing of grant reports, which will be reviewed for the first three years by Susan Berresford and Steve Lewis as consultants to The Minneapolis Foundation. Please contact me if you have questions or concerns about Robina's designation of a successor to receive and review grant reports.

Regards,

Penny Hunt

Penny Hunt
Executive Director

Cc: Suzanne Helm

ROBINA FOUNDATION

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

November 24, 2020

Dean Garry Jenkins
University of Minnesota Law School
381 Walter F. Mondale Hall
229-19th Ave. So., Room 381
Minneapolis, MN 55435

Christine Searson
Vice President & CFO
University of Minnesota Foundation
200 SE Oak St #500
Minneapolis, MN 55455

RE: Robina Foundation

Dear Dean Jenkins and Ms. Searson,

As planned, the Robina Foundation will be dissolved effective December 31, 2020. Since Robina will cease operations, I am writing to inform the University of Minnesota Law School (the "Law School") and the University of Minnesota Foundation of a change in the reporting procedures provided in grant agreements for the three endowment grants the Robina Foundation (the "Foundation") made to endow programs at the Law School:

- James H. Binger Center for New Americans Fund Agreement dated October 13, 2016
- James H. Binger Professorship in Clinical Law Fund Agreement dated October 13, 2016
- Law School Dean's Innovation Fund Agreement dated October 16, 2020

As provided in the "Reporting" sections of the three agreements, the Foundation designates The Minneapolis Foundation ("TMF") as the Foundation's designated representative to receive reports from January 1, 2021, through December 31, 2023. The following two years the designated representative will be the University of Minnesota Provost.

Contact information for The Minneapolis Foundation:

Jean Adams, Senior Vice President, Strategy and Chief Operating Officer;
jadams@mplsfoundation.org or her designee. (Phone: Office: 612-672-3821)

I worked with Dean Jenkins and others to establish the form and timing of grant reports, which will be reviewed for the first three years by Susan Berresford and Steve Lewis as consultants to The Minneapolis Foundation.

Please contact me if you have questions or concerns about Robina's designation of a successor representative to receive and review grant reports beginning in 2021.

Regards,

Penny Hunt

Penny Hunt
Executive Director

Cc: David Jensen

ROBINA FOUNDATION

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

November 27, 2020

James Bundy
Dean, Yale School of Drama
Yale University
P.O. Box 208244
New Haven, CT 06520-8244

Joan E. O'Neill
Vice President for Alumni Affairs & Development
Yale University
P.O. BOX 2018
New Haven, CT 06521-2038

RE: Robina Foundation

Dear Dean Bundy and Ms. O'Neill,

As planned, the Robina Foundation will be dissolved effective December 31, 2020. Since Robina will cease operations, I am writing to inform Yale School of Drama ("YSD") and Yale University of a change in the reporting procedures provided in grant agreements for the two endowment grants the Robina Foundation (the "Foundation") made to endow programs at YSD:

The Binger Center for New Theatre Endowment Fund Indenture dated April 2012, as amended by an Amendment dated April 15, 2015

As provided in the "Stewardship" section of the Indenture, the Foundation designates The Minneapolis Foundation as the Foundation's designated representative to receive reports from January 1, 2021, through December 31, 2023. The following two years the designated representative will be Yale University's Vice President for Alumni Affairs and Development.

Yale School of Drama Dean's Innovation Endowment Fund Grant and Endowment Agreement dated as of September 25, 2020

As provided in the "Reporting" section (Paragraph 4) of the agreement, the Foundation designates The Minneapolis Foundation as the Foundation's designated representative to receive reports from January 1, 2021, through December 31, 2023. The following two years the designated representative will be Yale University's Vice President for Alumni Affairs and Development.

Contact information for The Minneapolis Foundation:

Jean Adams, Senior Vice President, Strategy and Chief Operating Officer;
jadams@mplsfoundation.org or her designee. (Phone: Office: 612-672-3821)

I worked with Deborah Berman to establish the form and timing of grant reports, which will be reviewed for the first three years by Susan Berresford and Steve Lewis as consultants to The Minneapolis Foundation.

Please contact me if you have questions or concerns about Robina's designation of a successor representative to receive and review grant reports beginning in 2021.

Regards,

Penny Hunt

Penny Hunt
Executive Director

Cc: Deborah Berman

ROBINA FOUNDATION

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

November 28, 2020

Heather Gerken
Dean, Yale Law School
Yale University
P.O. Box 208215
New Haven, CT 06520

Joan E. O'Neill
Vice President for Alumni Affairs & Development
Yale University
P.O. Box 2038
New Haven, CT 06521-2038

RE: Robina Foundation

Dear Dean Gerken and Ms. O'Neill,

As planned, the Robina Foundation will be dissolved effective December 31, 2020. Since Robina will cease operations, I am writing to inform Yale Law School and Yale University of a change in the reporting procedures provided in grant agreements for the two endowment grants the Robina Foundation (the "Foundation") made to endow programs at Yale Law School:

Robina Human Rights Initiative Endowment Fund Grant and Endowment Agreement dated as of November 1, 2016

Binger Clinical Faculty Chair in Human Rights at Yale Law School Grant and Fund Agreement dated as of November 1, 2016

As provided in the "Reporting" section (Paragraph 4) of the two agreements, the Foundation designates The Minneapolis Foundation as the Foundation's designated representative to receive reports from January 1, 2021, through December 31, 2023. The following two years the designated representative will be Yale University's Vice President for Alumni Affairs and Development.

Contact information for The Minneapolis Foundation:

Jean Adams, Senior Vice President, Strategy and Chief Operating Officer;
jadams@mplsfoundation.org or her designee. (Phone: Office: 612-672-3821)

I worked with Tara Fitzpatrick to establish the form and timing of grant reports, which will be reviewed for the first three years by Susan Berresford and Steve Lewis as consultants to The Minneapolis Foundation.

Please contact me if you have questions or concerns about Robina's designation of a successor representative to receive and review grant reports beginning in 2021.

Regards,

Penny Hunt

Penny Hunt
Executive Director

Cc: Tara Fitzpatrick

ROBINA FOUNDATION

80 South 8th Street, Suite 4900, Minneapolis, MN

December 4, 2020

Joan E. O'Neill
Vice President for Alumni Affairs & Development
Yale University
P.O. Box 2018
New Haven, CT 06521-2038

Patty Pedersen
Associate Vice President, University Director of
Corporate & Foundation Relations
Yale University
P.O. Box 2038
New Haven, CT 06521-2038

RE: Thomas M. Crosby, Jr. Scholarship Fund

Dear Joan and Patty,

As you know, Robina Foundation is slated to end its operations on December 31, 2020. I am writing regarding reports required by the Indenture creating the "Thomas M. Crosby, Jr. Scholarship Fund" in 2014 with Robina Foundation's \$200,000 grant to Yale University. The Robina Foundation Board of Directors was very pleased to honor Tom with a fund that recognizes his lifelong affection for Yale and commemorates his deep commitment to community service and exceptional leadership abilities.

The Indenture for the Thomas M. Crosby, Jr. Scholarship Fund calls for annual written reports to Robina Foundation, as well as to members of the Crosby family. After January 1, 2021, Yale need not submit additional reports to Robina Foundation; however, Yale should continue to provide written reports to Crosby Family Members listed on the Appendix to the Indenture. I will notify Ellie Crosby of this change in reporting and confirm that she has information to inform Yale of any changes in the list of family members who should receive reports.

I will personally miss reading about the remarkable Yale students who have benefitted from the Crosby Scholarship Fund, but I know Crosby family members will continue to appreciate learning how Tom's legacy continues. My very best to both of you for happy, healthy, safe holidays and for the return of some sort of normalcy in 2021!

Warm regards,

Regards,
Penny Hunt

Executive Director

ROBINA FOUNDATION

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

December 8, 2020

Penny Wheeler, M.D.
Allina Health
P.O. Box 43
Minneapolis, MN 55407-3799

RE: Robina Foundation

Dear Penny,

Robina Foundation recently transferred \$50,000 to support Allina Health. At a board meeting on November 19, 2020, the Robina Foundation Board of Directors approved this "Closing Grant" of \$50,000 to provide general operating support for Allina as you determine.

As we closed out the Robina Board's last meeting, Board Members and staff reminisced about Robina's work and the enriching experiences we all had working with Robina Grantees. We remember well the many interesting times we met with you and others from Allina and Abbott Northwestern to discuss Care Guides and LifeCourse and learn more about how best to care for patients needing late in life care. We are proud of Robina's support of those important programs – and the Robina Board is very pleased to be able to support Allina with this final grant. We're confident you will put the funds to good use!

My best,

Penny Hunt

Penny Hunt
Executive Director

ROBINA FOUNDATION

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

December 8, 2020

Richard Haass
President
Council on Foreign Relations
58 East 68th Street
New York, NY 10065

Suzanne Helm
Vice President for Development
Council on Foreign Relations
58 East 68th Street
New York, NY 10065

=RE: Robina Foundation

Dear Richard and Suzanne,

Robina Foundation recently transferred \$50,000 to support the Council on Foreign Relations. At a board meeting on November 19, 2020, the Robina Foundation Board of Directors approved this "Closing Grant" of \$50,000 to provide general operating support for the Council.

The Robina Board is very pleased to be able to support the Council with this final grant. We're confident you will put the funds to good use, perhaps in connection with the Council's upcoming centennial!

My best,

Penny Hunt

Penny Hunt
Executive Director

ROBINA FOUNDATION

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

December 2, 2020

Richard Haass
President
Council on Foreign Relations
58 East 68th Street
New York, NY 10065

Suzanne Helm
Vice President for Development
Council on Foreign Relations
58 East 68th Street
New York, NY 10065

RE: Robina Foundation

Dear Richard and Suzanne,

As you know, Robina Foundation today transferred \$50,000 to support the Council on Foreign Relations. At a board meeting on November 19, 2020, the Robina Foundation Board of Directors approved this "Closing Grant" of \$50,000 to provide general operating support for the Council, as directed by Richard.

The Robina Board is very pleased to be able to support the Council with this final grant. We're confident that you will put the funds to good use, perhaps in connection with the Council's upcoming centennial!

My very best to both of you,

Penny Hunt

Penny Hunt
Executive Director

ROBINA FOUNDATION

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

December 8, 2020

Dean Garry Jenkins
University of Minnesota Law School
381 Walter F. Mondale Hall
229-19th Ave. So., Room 381
Minneapolis, MN 55435

Christine Searson
Vice President & CFO
University of Minnesota Foundation
200 SE Oak St #500
Minneapolis, MN 55455

RE: Robina Foundation

Dear Dean Jenkins and Ms. Searson,

As I hope you know, Robina Foundation recently transferred \$100,000 to the University of Minnesota Foundation to support the University of Minnesota Law School's *Dean's Innovation Fund* previously funded by Robina Foundation.

At a board meeting on November 19, 2020, the Robina Foundation Board of Directors approved this "Closing Grant" of \$100,000 to provide additional support for the Dean's Innovation Fund as described in the Fund Agreement dated October 16, 2020. The Board asks that these new funds be applied to the available balance of the Dean's Innovation Fund for current use as desired by Garry as Law School Dean and not be restricted as part of the endowment.

As in the past, the Robina Board is very pleased to be able to support the Law School with this final grant. We are confident that initiatives of the Dean's Innovation Fund will impact the Law School in new and different ways, ways we can't even imagine today!

Warm regards,

Regards,
Penny Hunt

Penny Hunt
Executive Director

Cc: David Jensen

ROBINA FOUNDATION

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

December 8, 2020

James Bundy
Dean, Yale School of Drama
Yale University
P.O. Box 208244
New Haven, CT 06520-8244

Joan E. O'Neill
Vice President for Alumni Affairs & Development
Yale University
P.O. Box 2018
New Haven, CT 06521-2038

RE: Robina Foundation

Dear James and Joan,

Robina Foundation recently transferred \$100,000 to Yale University to support Yale School of Drama's *Dean's Innovation Fund* previously funded by Robina Foundation.

At a board meeting on November 19, 2020, the Robina Foundation Board of Directors approved this "Closing Grant" of \$100,000 to provide additional support for the Dean's Innovation Fund. The Board asks that these new funds be applied to the available balance of the Dean's Innovation Fund for current use as desired by James as Yale School of Drama's Dean and not be restricted as part of the endowment.

As in the past, the Robina Board is very pleased to be able to support Yale School of Drama with this final grant. We are confident that initiatives of the Dean's Innovation Fund will impact Yale School of Drama in new and different ways, ways we can't even imagine today!

Warm regards,

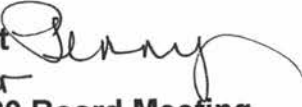
Regards,
Penny Hunt

Penny Hunt
Executive Director

Cc: Deborah Berman

ROBINA FOUNDATION

TO: Robina Foundation Board of Directors

FROM: Penny Hunt 

RE: ~~November~~
August 2020 Board Meeting

The last official meeting of the Board of Directors of the Robina Foundation! This Board Book marks the 56th Board Book Nancy has prepared for the Robina Board Meetings – and that's not counting books prepared for the Board's Listening Tour or other special meetings with Robina Grantees! This is only my 44th Board Book, so I'm still learning how best to put books together.

How I wish we could meet in person rather than by phone, but tradition and the pandemic call for your last actions of the Robina Foundation to be made by phone. This meeting will involve several interesting discussions and important decisions in anticipation of Robina's dissolution in December.

Comments about the meeting and the Board Book:

Tab 3: Draft – Available Funds Through 12/31/2020

If all goes well, I will email you more up-to-date information based on several transactions we plan to make between now and the Board Meeting.

Tab 4: Angela Fogt has provided a final update on the dissolution process, including the documents to be filed at the end of the process. Angela will be available by phone if we have questions during the meeting.

Tab 5: As you can see, the three grants approved at the August Board Meeting have been paid.

Tab 6: Once the Board has reached agreement on the amount to be provided to The Minneapolis Foundation for work pursuant to the Robina/The Minneapolis Foundation Memorandum of Understanding, the Board will consider use of remaining funds to make "Closing Grants" to Robina Grantees. This was discussed at the August Board Meeting, but further discussion may be appropriate since when we meet we will have more information on funds available for the grants.

Tab 7 & 8: Although Susan and Steve will review grant reports in 2021-2023 on these grants as part of Robina's "Post-Dissolution Reporting," this will be the last time the full Board considers Robina's endowment grants. You may want to highlight important aspects of the grants for Susan and Steve to monitor.

I think that's it! Don't hesitate to get in touch with me before the meeting if you have comments or questions.

Robina Foundation Board of Directors Meeting
Thursday, November 19, 2020 - Conference Call
1:00 p.m. to 3:00 p.m. (CST) 2:00 p.m. to 4:00 p.m. (EST)

Time	Agenda Item	Tab #
1:00 p.m.	Welcome and Call to Order – Blatz	
1:05 p.m.	Minutes of August 25, 2020 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 • 2020 Third Quarter Asset Statement Prepared by Jim Peter • Bond Dividend Income and Maturity Schedules • Estimated 2020 Expenses • Available Funds Through 12/31/20	3
1:45 p.m.	Dissolution Update • Memo from Angela Fogt, Faegre Drinker	4
1:55 p.m.	Grant Update – Hunt • Minnesota Historical Society • Yale School of Drama – <i>Dean's Innovation Fund</i> • U of M Law School – <i>Dean's Innovation Fund</i>	5
2:15 p.m.	Final Distributions before Dissolution – All - Action • Minneapolis Foundation Worksheet • Closing Grants	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 • Yale School of Drama ➤ <i>Binger Center for New Theatre</i>: Program and Endowment Reports	7 8
3:00 p.m.	Adjournment	

1	MINUTES August 25, 2020
2	EXECUTIVE DIRECTOR'S REPORT
3	FOUNDATION FINANCES
4	DISSOLUTION UPDATE
5	GRANT UPDATE
6	FINAL DISTRIBUTIONS BEFORE DISSOLUTION
7	GRANTEE REPORTS University of Minnesota
8	GRANTEE REPORTS Yale Law School Yale School of Drama

**Robina Foundation Annual Meeting
Meeting Minutes
August 25, 2020**

The Annual Meeting of the Board of Directors of the Robina Foundation, a Minnesota nonprofit corporation, was held on August 25, 2020, at the Minneapolis Club in Minneapolis, Minnesota and via Zoom.

Directors present: Susan Berresford (on Zoom), Kathleen Blatz, Steve Lewis and Marianne Short (in person).

Staff present: Penny Hunt, Executive Director (in person), and Nancy Gilberg, Administrative Consultant (on Zoom).

Mary Lou White (on Zoom) served as recorder.

Call to Order and Welcome

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

Minutes from May 21, 2020, Board Meeting

During the discussion of the Minutes, a Board Member proposed an amendment to the Minutes included in the Board Book to reference a motion regarding payment to Sullivan for accounting services. After discussion,

A motion made and seconded to approve the Minutes of the May 21, 2020 Board Meeting as amended was approved unanimously.

Executive Director's Report

Hunt called Board Members' attention to information in the Executive Director's Report outlining actions needed to shut down Robina's operations, as well as the impact of Robina's matching grant to support the Endowed Scholarship Match Program at the University of Minnesota Law School.

Foundation Finances

Board Members reviewed the Foundation's Q2 Asset Statement and accompanying schedules for the Foundation's Bond Dividends and Bond Principal Maturity. Board Members discussed the need to sell the Wells Fargo bond before its December 7 scheduled maturity to facilitate Robina's dissolution no later than December 31, 2020.

A motion made and seconded to sell Robina Foundation's Wells Fargo bond in November to facilitate the Foundation's dissolution was approved unanimously.

Hunt explained the estimate of Robina funds available through December 31, 2020 included in the Board Book, which was prepared to facilitate grant decisions during the months prior to dissolution.

New Grants

Deans' Innovation Funds

Yale School of Drama and University of Minnesota Law School

Board Members reviewed reports on programs supported through the Dean's Innovation Funds at Yale School of Drama and the University of Minnesota Law School during the past year before

considering endowment grants to sustain the two Innovation Funds. After discussing the amount and timing for endowment grants, Board Members approved grants to Yale School of Drama and the University of Minnesota Law School, as follows:

A motion made and seconded to provide an endowment grant to Yale University to support the Dean's Innovation Fund at Yale School of Drama was unanimously approved as follows:

- Implementation of the Dean's Innovation Fund as described in Yale School of Drama's 2018 grant proposal submitted to Robina Foundation;
- Endowment grant includes funds generated by the 2019 gift to Yale University of limited partnership interests in Aberdeen Venture Partners III and IV and a \$2 million grant, which will be paid no later than December 1, 2020.

A motion made and seconded to provide an endowment grant to the University of Minnesota Foundation to support the Dean's Innovation Fund at the University of Minnesota Law School was unanimously approved as follows:

- Implementation of the Dean's Innovation Fund as described in the Law School's 2018 grant proposal submitted to Robina Foundation;
- \$2.3 million grant to be paid no later than December 1, 2020.

Board Members instructed Hunt to work with Yale University and Yale School of Drama and with the University of Minnesota Foundation and the University of Minnesota Law School on agreements for the two Dean's Innovation Fund grants, which must be executed before payment of any grant funds.

Minnesota Historical Society

Prior to the Board's consideration of the Minnesota Historical Society's grant proposal, Hunt and Gilberg updated Board Members on the status of Robina files and plans to transfer appropriate documents to the Minnesota Historical Society for archiving.

Following discussion of two grant options presented by the Historical Society,

A motion made and seconded to provide a grant of \$10,000 to the Minnesota Historical Society to support preservation and access to Robina Foundation's papers and work on similar collections was unanimously approved.

Dissolution

Faegre Drinker attorney Angela Fogt joined the meeting via Zoom to update Board Members on the status of the legal dissolution process and discuss work with The Minneapolis Foundation. Fogt explained:

- The Attorney General's office will not intervene with Robina's sunseting;
- We will provide the Attorney General's office with one more notice that grants have been paid, including information on the exact amount of additional grants;
- The 90-day creditors claim period ends on September 30; no claims have been received;
- After September 30, Robina can move forward with additional final distributions including transfer of remaining assets to The Minneapolis Foundation;

- Following payment to The Minneapolis Foundation, final notice will go to the Attorney General's office to complete the statutory dissolution process.

Discussion of outstanding items in the Memorandum of Understanding with The Minneapolis Foundation

Designation of Binger family representative to receive information on grant reports:

A motion made and seconded to designate Noa Staryk, Jim Binger's granddaughter, as the Binger family representative to receive information on grant reports was unanimously approved.

Recommendation of consultants to monitor grant reports:

A motion made and seconded to recommend that Susan Berresford and Steve Lewis serve as consultants to The Minneapolis Foundation to monitor grant and endowment reports associated with Robina grants was approved with Berresford and Lewis abstaining.

Recommendation of an appropriate level of compensation for the consultants:

Following an executive session without Berresford and Lewis, Blatz and Short approved the following motion:

Based on a fair assessment of the time required to review nine annual program and endowment reports and accompanying documentation and certifications, discussion of the reports, follow-up conversations with Robina Grantees as needed, and communication with The Minneapolis Foundation, Robina Foundation recommends that The Minneapolis Foundation provide each consultant with \$12,000 per year for three years beginning in January 2021.

Board Members discussed the disposition of any funds remaining in the Robina Foundation Fund at The Minneapolis Foundation on December 31, 2023, the end of the term of the Memorandum of Understanding. As provided in the Memorandum of Understanding, the consultants will be asked to recommend a plan to distribute funds to Robina Grantees. Board Members agreed that the consultants will be well-positioned to determine an appropriate distribution after their work reviewing grant reports.

Grant Report

Board Members welcomed Garry Jenkins, Dean of the University of Minnesota Law School, and Assistant Director of Annual Giving Lizzy Beghelli, who manages the Class Agent Fundraising Pilot Program. Jenkins and Beghelli joined the meeting via Zoom.

Jenkins described the Class Agent program as the "lynchpin" of the Law School's fundraising with graduates and the reason for a substantial increase in fundraising. Jenkins and Beghelli highlighted the main features of the program, which include

- Launch through reunion year program;
- Expansion through combined reunions and addition of one-year reunions;
- Engagement beyond reunions;
- International outreach;
- Development of a culture of philanthropy with current students;
- Linked to planned giving opportunities

Board Members commended the Law School on its implementation of the program and plans for the future.

Final Distributions before Dissolution

After review of estimated funds available after payment of endowment grants for Deans Innovation Funds at Yale School of Drama and the University of Minnesota Law School and funds provided to The Minneapolis Foundation, Board Members discussed options for additional grants before Robina's dissolution, assuming \$300,000 is available for grants.

A motion made and seconded to provide grants totaling \$300,000 to Robina Foundation's designated grantees in recognition of the importance of these four institutions to Robina's founder James Binger was unanimously approved as follows:

- \$100,000 to the University of Minnesota Law School to support the Dean's Innovation Fund;
- \$100,000 to Yale School of Drama to support the Dean's Innovation Fund;
- \$50,000 to the Council on Foreign Relations as general support;
- \$50,000 to Abbott Northwestern/Allina Health for general support.

Since payment of the grants will not take place until after the November Board Meeting, the terms of the grants will be confirmed at the November meeting.

Post Dissolution Reporting

Board Members provided suggestions for changes to the draft material to be provided to Robina Grantees. Hunt agreed to make appropriate changes for review by Board Members.

Board Governance

Directors and Officers Liability Insurance Extension

Following Board Members' discussion of extension of the Foundation's current Directors and Officers Liability Insurance after the Foundation's dissolution,

A motion moved and seconded to continue coverage for three years beginning in January 2021 was unanimously approved.

Gilberg and Hunt agreed to follow the required process to extend coverage for three years.

Meeting Dates

Board Members confirmed November 19, 2020, as the date for the last Robina Foundation Board Meeting.

Adjournment

There being no other business, the meeting was adjourned.

Respectfully Submitted,

Marianne Short, Secretary

Date

**ROBINA FOUNDATION
BOARD OF DIRECTORS MEETING
November 19, 2020
EXECUTIVE DIRECTOR'S REPORT**

The period since the August 2020 Board Meeting has been interesting as we continue to understand and address issues related to Robina's sunset in December 2020 - only 1-1/2 months away!

Nancy and I continued our almost daily conversations and frequent meetings in Nancy's car outside my condo to arrange payment of expenses and exchange documents. Our system is a bit convoluted, but it works!

Meeting Follow-up

Grants

Minnesota Historical Society: Nancy and I worked with Jennifer Pogatchnik and Kate Hujda at the Minnesota Historical Society to finalize the \$10,000 grant approved at the August Board Meeting. We also discussed transmission of Robina's documents to the Historical Society after the Board Meeting.

Dean's Innovation Fund grant at Yale School of Drama: Needless to say, Dean Bundy was thrilled to learn about Robina's endowment grant. With help from Tara Fitzpatrick and Deborah Berman an agreement for the grant was finalized and signed. Please note that Robina's gift of the two Aberdeen private equity funds is part of the endowment of the Dean's Innovation Fund.

Dean's Innovation Fund grant at the University of Minnesota Law School: I worked with David Jensen and the University of Minnesota Foundation on the preparation of the agreement for the grant.

Material for these three grants is found at Tab 5 in the Board Book.

Work with The Minneapolis Foundation

Nancy and I had two Zoom meetings with staff at The Minneapolis Foundation:

- A meeting with Jean Adams, Greg Wenz, The Minneapolis Foundation's Chief Financial Officer, and Jeana Aubinger, Accounting Supervisor, to discuss the management and operation of the Robina Foundation Fund at TMF.
- A meeting with Jean, Greg and Jennifer Tingley and Stan Ponkin of CliftonLarsonAllen to discuss preparation of Robina's 2020 tax return.

Jean and I discussed decisions made by the Robina Board of Directors at the August meeting, including designation of Noa Staryk as the Binger family representative, compensation for consultants, and payment of The Minneapolis Foundation fee.

Post-Dissolution Reporting

Work with CFR, University of Minnesota Law School, Yale Law School and Yale School of Drama involved agreement on the reporting process following dissolution, required documentation and notification that The Minneapolis Foundation is Robina's designated successor to receive reports after Robina's dissolution.

To facilitate the post-dissolution reporting, I prepared a notebook for Steve, Susan and The Minneapolis Foundation. The four of us met on Zoom to discuss the reporting.

Shutting Down Robina Operations

Attachment 1 details the various actions Nancy and I have taken or will take in connection with Robina's dissolution. At the Board Meeting I should be able to report additional actions that we have completed.

SHUTTING DOWN ROBINA OPERATIONS

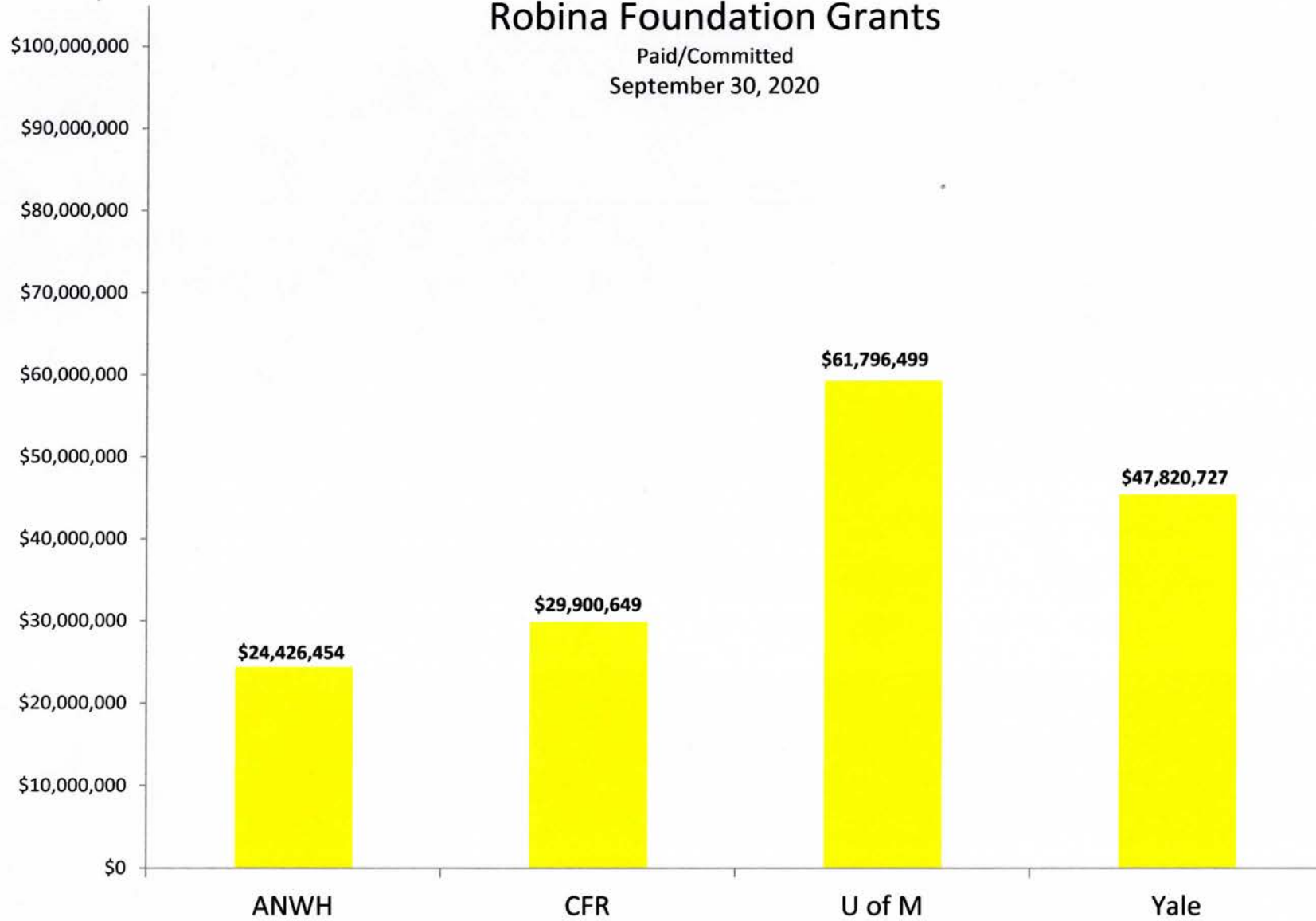
- | | |
|-----------|--|
| September | Meet with The Minneapolis Foundation team to discuss operation of Robina Foundation Fund - DONE |
| September | Meet with TMF team and CLA to discuss preparation of Robina's 2020 tax return and other financial issues – DONE |
| September | Finalize grant to the Minnesota Historical Society - DONE |
| October | Pay existing multi-year grant commitments to U of M Law School - DONE |
| October | Negotiate and execute endowment grant agreements with U of M Foundation and Yale School of Drama for Dean's Innovation Funds - DONE |
| Oct-Nov | Send Robina Post-Dissolution Reporting Material to: <ul style="list-style-type: none"> • Robina Grantees - DONE • Grant Report review consultants and TMF – DONE |
| Oct | Finalize two consulting agreements with Minneapolis Foundation -DONE |
| Oct-Nov | Prepare Robina website landing page for Minneapolis Foundation website |
| November | Provide Robina Grantees with formal notice that TMF is Robina's designated successor to receive grant reports |
| November | Sell Wells Fargo Bond |
| Nov-Dec | Cancel phone and internet |
| November | Terminate D&O insurance effective December 31, 2020, and file and pay for extension. Notify D&O insurance carrier that future information and notices should go to TMF. |
| November | Transfer funds held by Vanguard to USBank; close Vanguard account |
| November | Notify Binger family member of Robina closing date |
| November | Send notes and appreciation gifts to contacts at Robina Grantees |
| Nov-Dec | Prepare Robina documents jump drives and provide to Robina Board Members and TMF |
| Nov-Dec | Transmit Robina records to MN Historical Society <i>after Bd mtg</i> |
| Nov-Dec | Prepare 2020 tax information for 1099s and 990-PF; send to CLA and TMF |

- By Dec Pay final expenses (e.g. directors fees), including pre-payments
- By Dec Pay Dean's Innovation Fund grants to U of M and YSD and Closing Grants to Robina Grantees. (Letter from Kathleen to Robina Grantees to accompany Closing Grants.)
- Dec File Articles of Dissolution with the Minnesota Secretary of State, effective December 31, 2020 – Angela Fogt
- Dec Pay remaining assets to Robina Foundation Fund at TMF
- After Transfer of Assets, Angela Fogt will file statement with the Minnesota Attorney General, indicating that dissolution will be effective as of December 31, 2020
- Dec Close accounts at US Bank; cancel Visa; work with Dan Cummings to shut down online accounts and presence (email),
- Dec Email Board Members to confirm completion of Robina's dissolution

	ROBINA FOUNDATION GRANTS PAID/COMMITTED										For November 19, 2020 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						HIA	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	2,300,000		2,500,000
														U of M Total	61,796,499
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	2,000,000		2,200,000
Aberdeen Funds III and IV (valued by Yale at \$234,101)												171,018			171,018
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	47,820,727
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	3,729,347	5,400,688		163,944,329
Not Included Above: Planning Grants from 2005-2008: Abbott - \$125,000; CFR - \$50,000; U of M Law School - \$375,000; Yale University - \$50,000															
Misc Grants: ArtPlace-\$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; MN Historical Society-\$10,000															
															\$600,000
															\$717,725
															\$1,317,725
														TOTAL	\$165,262,054

Robina Foundation Grants

Paid/Committed
September 30, 2020



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
09/30/19	6,573,919	159,680,048	1,100,988
12/31/19	6,299,842	159,851,066	1,100,988
03/31/20	6,106,921	159,851,066	1,100,988
06/30/20	\$6,017,344	\$159,901,366	\$1,050,688
09/30/20	\$5,890,861	\$159,911,366	5,350,688

(1) Includes the following commitments:

University of Minnesota Law School: *Public Interest Scholars* - \$809,188; *Bridge Fellowship Program* - \$150,000;
Class Agent Fundraising Pilot Program - \$91,500; Dean's Innovation Fund - \$2,300,000
Yale School of Drama Dean's Innovation Fund - \$2,000,000

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	
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
Assets	12/31/19	03/31/20	06/20/20
USbank Checking	46,859	39,058	96,904
USbank Investment	4,180,343	3,988,145	3,439,044
Vanguard	2,072,640	2,079,718	2,481,396
Total	\$6,299,842	\$6,106,921	\$6,017,344
Assets	09/30/20		
USbank Checking	\$89,952		
USbank Investment	3,318,972		
Vanguard	2,481,937		
Total	\$5,890,861		

ROBINA FOUNDATION**ASSET STATEMENT**

	12/31/19	3/31/20	6/30/20	9/30/20
CASH:				
US BANK MM	\$252,731	\$290,816	\$246,564	\$913,808
VANGUARD MM	2,072,640	2,079,718	2,481,396	2,481,937
US BANK CHECKING	<u>39,359</u>	<u>27,058</u>	<u>77,404</u>	<u>82,452</u>
CASH TOTAL	<u>2,364,730</u>	<u>2,397,592</u>	<u>2,805,364</u>	<u>3,478,197</u>
BONDS:				
TAXABLE US	2,434,577	2,302,237	1,782,160	1,002,135
TAXABLE FOREIGN	<u>1,406,781</u>	<u>1,393,110</u>	<u>1,410,320</u>	<u>1,403,029</u>
BONDS TOTAL	<u>3,841,358</u>	<u>3,695,347</u>	<u>3,192,480</u>	<u>2,405,164</u>
EQUITIES				
PFINGSTEN PARTNERS	<u>86,254</u>	<u>1,982</u>	<u>-0-</u>	<u>-0-</u>
TOTAL ASSETS	<u>\$6,292,342</u>	<u>\$6,094,921</u>	<u>\$5,997,844</u>	<u>\$5,883,361</u>

ASSET RECONCILIATION:

BEGINNING BALANCE	\$6,292,342	\$6,094,921	\$5,997,844
US BANK INTEREST/DIV	19,097	34,507	9,342
VANGUARD INTEREST	7,078	1,678	541
US BANK FEES	(6,007)	(5,764)	(5,096)
GRANTS PAID		(50,300)	(10,000)
OPERATING EXPENSES	(112,306)	(99,359)	(94,954)
MARKET VALUE CHANGE	<u>(105,283)</u>	<u>22,161</u>	<u>(14,316)</u>
ENDING BALANCE	\$6,094,921	\$5,997,844	\$5,883,361

ROBINA FOUNDATION MGMT AGY

Period Ending: 09/30/2020

Selected Period Performance

	Market Value	Year to Date (9 Months)	1 Year	3 Years	5 Years
Total Portfolio Gross of Fees	3,341,629	-.76	-.21	1.24	1.95
Total Managed Portfolio	3,341,629	1.30	1.88	2.15	2.60
Robina Custom Benchmark				2.74	2.92
FTSE 3 Month Treasury Bill Index		.56	1.02		
Domestic Fixed	1,011,141	1.29	1.89	2.20	1.93
BBARC 1-3 Year US Government/Credit Index		3.12	3.73	2.84	2.09
Foreign Fixed Income	1,416,676	1.55	2.13	2.33	2.89
Total Cash Equivalents	913,813	.25	.59	1.17	.80
FTSE 3 Month Treasury Bill Index		.56	1.02	1.65	1.16
Pending Cash	0	.00	.00	.00	.00

For performance and rate of return methodologies, as well as other important information, please refer to the Appendix/Disclosures provided.

Investment products and services are:
NOT A DEPOSIT • NOT FDIC INSURED • MAY LOSE VALUE • NOT BANK GUARANTEED • NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY



Bond Dividend Income Schedule - 2020

	Date	Dividend	Description
1st Qtr	2/19/20	\$3,549	Bank NY Melon
	2/20/20	3,188	State Street Corp
	2/24/20	1,344	Bank of NY Mellon
	3/5/20	7,200	Burlington N Santa Fe
	3/5/20	3,188	Gilead Sciences Inc.
2nd Qtr	4/8/20	4,700	Bank of Nova Scotia
	5/3/20	6,750	Aust NZ Banking
	5/9/20	6,125	PNC Bank NA
	5/10/20	5,625	Shell International
	5/11/20	1,156	Intel Corp
	6/1/20	3,600	Burlington N Santa Fe
	6/8/20	6,375	Wells Fargo
3rd Qtr	7/17/20	2,958	Bank of NY Mellon
	8/18/20	3,188	State Street Corp
	9/1/20	3,188	Gilead Sciences Inc
4th Qtr	10/6/20	5,138	PNC Bank NA
	10/21/20	4,700	Bank of Nova Scotia
	11/1/20	6,750	Aust NZ Banking
	11/10/20	5,625	Shell International
	12/7/20	6,375	Wells Fargo

Total 2020

1Q	\$18,469
2Q	34,331
3Q	9,334
4Q	28,588
Total	\$90,722

Bond Principal Maturity Schedule – 2020

	Date	Amount	Description
1st Qtr	2/24/20	\$125,000	Bank of NY Mellon MTN
2nd Qtr	5/11/20	125,000	Intel Corp
	6/1/20	400,000	Burlington N Santa Fe
3rd Qtr	7/17/20	273,000	Bank of NY Mellon MTN*
	8/18/20	250,000	State Street Corp
	9/1/20	250,000	Gilead Sciences Inc
4th Qtr	10/6/20	500,000	PNC Bank NA MTN*
	10/21/20	400,000	Bank of Nova Scotia
	11/1/20	500,000	Aust NZ Banking MTN
	11/10/20	500,000	Shell International
	12/7/20	500,000	Wells Fargo MTN
	TOTAL	3,823,000	

Principal Received through 3rd Quarter 2020 - \$1,423,000

*Bank of NY Mellon MTN maturity date changed from 8/17/20 to 7/17/20

*PNC Bank NA MTN maturing date changed from 11/5/20 to 10/6/20

Estimated 2020 Expenses

OPERATING EXPENSES		2020 Budget	30-Sep	Oct-Dec
Administration: Contract Services				
	Penny Hunt	124,000	92,997	31,003
	Baker Management (Nancy Gilberg)	50,160	37,620	12,540
	Outside Consultants	5,000		
	Gilberg Overtime	1,500	2,165	5,000
Accounting-Audit Fees		11,000	8,855	6,000
Directors' Fees		138,000	103,500	34,500
Insurance				
	D&O	4,500	2,250	2,250
	Property	506	505	0
Investment Management Fees		48,000	32,491	13,000 (USbank fees-\$8K; Jim Peter-\$5K)
Legal-Prof Fees		15,000	24,397	4,803
Meeting Expense		6,000	3,768	200
Membership Dues		750	765	0
Misc Expense		1,000	0	3,000
Office				
	Equipment and Furnishings	100	0	0
	Misc	1,000	522	250
	Supplies	800	104	200
Parking and Mileage		3,000	947	150
Postage and Delivery		700	628	200
Printing, Web Design and Maintenance		2,000	1,718	1,000
Rent		7,136	7,137	0
Taxes				
	Excise, State, Federal	2,316	0	0
Telephone/Internet		3,504	3,017	1,000
TOTAL OPERATING EXPENSES		425,972	323,386	115,096
GRANTS		1,100,988	60,300	5,350,688
TOTAL EXPENDITURES		1,526,960	383,686	5,465,784

DRAFT
11/19/20

AVAILABLE FUNDS THROUGH 12/31/20

Estimated Total Assets **\$ 5,906,882**

Less:

- **Estimated Operating Expenses 9/30–12/31**
(\$115,096)
- **Grants:**
 - **Dean's Innovation Fund Grants (\$4.3 M)**
 - **Final payments to U of M for Public Interest**
Scholars, Bridge Fellowship Program
Class Agent Program (\$1,050,688) **\$ 5,463,284**

Projected Balance **\$ 443,598**

AVAILABLE FUNDS for Robina Foundation Fund at The Minneapolis
Foundation & Closing Grants to Robina Grantees (see Tab 6)

11/19/2020

DRAFT

AVAILABLE FUNDS THROUGH 12/31/20

Total Assets per 9/30/20 Asset Statement +
Estimated Q4 bond dividends (\$27,525.50) \$ 5,910,886

Less:

- Estimated Operating Expenses 9/30–12/31
- Grants
 - Dean's Innovation Fund Grants (\$4.3M)
 - Final payments to U of M for Public Interest Scholars, Bridge Fellowship Program, and Class Agent Program (\$1,050,688) \$ 5,465,784

Projected Balance \$ 446,352

AVAILABLE FUNDS for Robina Foundation Fund at The Minneapolis Foundation & Closing Grants to Robina Grantees (see Tab 6)

11/19/2020

Faegre Drinker Biddle & Reath LLP
2200 Wells Fargo Center
90 South Seventh Street
Minneapolis, Minnesota 55402
+1 612 766 7000 main
+1 612 766 1600 fax

October 21, 2020

Robina Foundation
Attn: Kathleen Blatz, Chair
4900 IDS Center
80 S. 8th Street
Minneapolis, MN 55402

Dear Kathleen:

We wanted to thank you and the entire board for the opportunity to serve as legal counsel for Robina Foundation. You have implemented Jim Binger's philanthropic vision with care and fidelity. It's a shame Tom Crosby is not here to see the end result as we know he would be proud. Robina Foundation's focus on innovation, forward thinking projects and major initiatives will leave a lasting legacy for the beneficiary organizations and the broader community. We are grateful for the chance to support the Foundation's work.

On a personal level, we also have enjoyed working with you, Penny and Nancy over the years. You have made us feel appreciated with your thoughtful and gracious approach. Thank you for everything and take care.

Very truly yours,



Gina M. Kastel



Angela T. Fogt

MEMORANDUM

TO: Robina Foundation

FROM: Angela T. Fogt; Faegre Drinker Biddle & Reath, LLP

DATE: October 21, 2020

RE: Dissolution Update

Robina Foundation (the "Foundation") is nearing the end of the statutory dissolution process. The winding up of the Foundation has gone smoothly, and we are on track for a corporate dissolution that will be effective on December 31, 2020. The Foundation has already completed the following steps in the dissolution process:

- Notice of Intent to Dissolve. The Foundation filed its Notice of Intent to Dissolve with the Minnesota Secretary of State on June 10, 2020. This filing formally initiated the statutory dissolution process for the Foundation as a Minnesota nonprofit corporation.
- Creditors' Claims. The Foundation provided notice of its dissolution to all known creditors by mailed letter and all unknown creditors by publication. Creditors were directed to submit any claims to our office no later than September 30, 2020. No such claims were received. Any claims that were not submitted are barred in accordance with Minnesota Statutes section 317A.781.
- Notice to Attorney General. The Foundation submitted its Notice of Intent to Dissolve to the Minnesota Attorney General on June 24, 2020. In a letter dated July 15, 2020, the Attorney General's Office confirmed that it does not intend to intervene with respect to the Foundation's plan for dissolution. After its final grants are made, the Foundation must file with the Minnesota Attorney General's Office a Notice After Transfer of Assets (see further discussion below).

In order to complete its formal dissolution, the Foundation must wind up its activities and pay all remaining grants and expenses. This includes terminating contracts, discontinuing services, and providing for the transition of records. We anticipate that this will be done by early December. Once this has occurred, the Foundation will complete the following filings to finalize its dissolution:

- Articles of Dissolution. The Foundation will file with the Minnesota Secretary of State's Office its Articles of Dissolution (attached), with an effective date of December 31, 2020. The Articles of Dissolution must be signed by Kathleen Blatz as Chair (an electronic signature is acceptable). The Articles of Dissolution may be filed up to 30 days in advance of the effective date. Once the filing is effective, the Minnesota Secretary of State's office will issue a Certificate of Dissolution, and the Foundation will cease to exist as a corporate entity.

- Notice After Transfer of Assets. The Foundation must also file a Notice After Transfer of Assets with the Minnesota Attorney General. This Notice will provide additional details on the final grants made from the Foundation. Our office will work with Penny Hunt and Nancy Gilberg to summarize all charitable payments made in contemplation of dissolution. This Notice must be signed by Kathleen Blatz as Chair (an electronic signature is acceptable).

In addition to the above-described Minnesota statutory requirements, the Foundation will be working with Clifton Larson Allen to file its final Form 990-PF with the Internal Revenue Service and its final annual report with the Minnesota Attorney General's Office (which primarily consists of its final Form 990-PF).

Please let me know if you have any questions regarding this information or the dissolution of the Foundation. I can be reached at angela.fogt@faegredrinker.com or 612.766.7945.

ROBINA FOUNDATION

Articles of Dissolution

The undersigned, Kathleen Blatz, Chair of Robina Foundation, a Minnesota nonprofit corporation (the "corporation"), hereby certifies as follows:

1. Notice has been given to the creditors and claimants of the corporation in the manner provided in Minnesota Statutes, section 317A.727; and (i) payment of creditors and claimants filing within the 90-day period set forth in Minnesota Statutes, section 317A.727, subd. 2(5), has been made or provided for, or (ii) the date on which the longer of the periods described in Minnesota Statutes, section 317A.729, clause (2), has expired.
2. The remaining assets of the corporation have been distributed under Minnesota Statutes, section 317A.735, or adequate provision has been made for such distribution.
3. There are no pending legal, administrative, or arbitration proceedings by or against the corporation.
4. Notice to the Attorney General of the State of Minnesota required by Minnesota Statutes, section 317A.811, has been given and the waiting period has expired or has been waived by the Attorney General.
5. The effective date of these Articles of Dissolution is December 31, 2020.

Dated: December __, 2020

Kathleen Blatz, Chair
Robina Foundation

ROBINA FOUNDATION
Notice After Transfer of Assets

TO THE ATTORNEY GENERAL OF THE STATE OF MINNESOTA:

In accordance with Minnesota Statutes, section 317A.811, subdivision 4, the undersigned, Chair of Robina Foundation, a dissolving Minnesota nonprofit corporation organized for charitable purposes, hereby gives notice after the transfer of all the remaining assets of Robina Foundation as follows:

Persons to whom assets were transferred:

Abbott Northwestern Hospital, a division of Allina Health System

Address: 800 E 28th Street, Minneapolis, MN 55407

EIN: 36-3261413

Assets:

Council on Foreign Relations

Address: 58 East 68th Street, New York, NY 10065

EIN: 13-1628168

Assets:

University of Minnesota Law School

Address: Walter F. Mondale Hall, 229 19th Avenue South, Minneapolis, MN 55455

EIN: 41-6007513

Assets:

Yale University

Address: PO Box 208239, New Haven, CT 06529

EIN: 06-0646973

Assets:

The Minneapolis Foundation

Address: 800 IDS Center; 80 South 8th Street, Minneapolis, MN 55402

EIN: 41-6029402

Assets:

Minnesota Historical Society

Address: 345 Kellogg Boulevard East, Saint Paul, MN 55102

EIN: 41-0713907

Assets: \$10,000; certain records, governance documents, and materials of historic significance

IN WITNESS WHEREOF, the undersigned has hereunto set her hand this

_____ day of December, 2020.

Kathleen Blatz, Chair

ROBINA FOUNDATION

TO: Jennifer Pogatchnik, Director of Development, MNHS

FROM: Penny Hunt, Executive Director, Robina Foundation

RE: Robina Foundation Gift to MNHS

DATE: August 31, 2020

Gift Amount: \$10,000

Statement of Purpose:

To fund immediate needs associated with the accession of Robina Foundation's papers, as curated by Kathryn Hujda. This gift will be used to support preservation and access to Robina Foundation's papers with any remaining funds used to work on similar collections.

Private support (including endowed or outright) to the Minnesota Historical Society in support of Robina Foundation's collection will support the following efforts as they pertain to the collection: accessioning, processing, cataloging, digitizing and ongoing storage and access.

1. Accessioning: Materials are formally acquired by the MNHS and a preliminary inventory is created by MNHS staff.
2. Processing: Materials are rehoused in preservation-quality enclosures and further arranged and described for research use.
3. Cataloging: Descriptive information is intellectually arranged in an online finding aid. The finding aid indexed in multiple search platforms to aid in accessibility.
4. Digitizing: Materials are scanned and image files are embedded into the finding aids. This process makes access possible even when the Gale Family Library is closed and physical folders cannot be researched.
5. Ongoing storage and access: Should a patron wish to see the Robina Collection, they may make an appointment to view the materials and the box of physical papers will be provided to them for research purposes upon request. The Gale Family Library is open free of charge to anyone. Physical and digital materials are maintained in secured, preservation-quality environments whenever not in use.

ROBINA FOUNDATION

September 2, 2020

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

James Bundy, Dean/Artistic Director
Yale School of Drama
P. O. Box 208244
New Haven, CT 06520-8244

Dear Dean Bundy,

I was delighted to be able to talk with you shortly after last week's Robina Foundation Board of Directors Meeting to personally give you the good news about the Board's decision to endow the Dean's Innovation Fund at Yale School of Drama. Great news is always fun to deliver! I am writing to communicate the news more formally.

At a board meeting on August 25, 2020, the Robina Foundation Board of Directors approved a grant of \$2,000,000 to support endowment of the Dean's Innovation Fund at Yale School of Drama as described in YSD's proposal submitted to Robina in 2018. The Robina Board is very pleased to be able to endow the Fund, which YSD has implemented during the last several years with annual support from Robina. Early implementation of the Fund confirmed our belief that sustaining the Fund through an endowment grant would enable YSD to support creative, impactful programs in the future, programs that might not otherwise be possible.

The endowment fund will include not only this cash grant, but also Robina's gift to YSD last year of two Aberdeen private equity funds. This new grant may be paid in two installments, but the entire amount will be paid by December 1. Endowment of YSD's Dean's Innovation Fund is one of two final large grants Robina is making in anticipation of Robina's dissolution in December. Like Robina's endowment grant to YSD to support *The Binger Center for New Theatre*, reports on this grant will be required for three years following Robina's dissolution. I will provide details on this reporting in the near future.

Before any payment can be made we need to execute an endowment agreement with YSD. We hope that we can use grant agreements prepared in connection with Robina's two endowment grants to Yale Law School as models for the new agreement.

Once again, we are very pleased to support the work of YSD in this new way, knowing that Jim Binger would agree that the Dean's Innovation Fund is a stellar example of an initiative that can help transform YSD in unique ways.

Warm regards,

Penny Hunt

Penny A. Hunt
Executive Director
Phone: 612-381-7790

Yale SCHOOL OF DRAMA

September 29, 2020

Ms. Kathleen Blatz, Chair
The Robina Foundation
Robina Foundation
80 South 8th Street, Suite 4900
Minneapolis, MN 55402

Dear Kathleen,

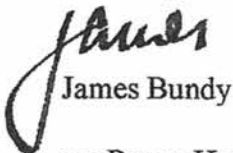
It is with the deepest gratitude that I write to thank you and the Board of the Robina Foundation for your recent gift of \$2,000,000 to establish an endowment for the Dean's Innovation Fund at Yale School of Drama. This very kind donation is yet another example of the Foundation's visionary philanthropy.

Your extraordinary commitment has been transformational: The Binger Center for New Theater is now one of the nation's most robust and innovative theater programs, and sets a singular standard for artist-driven commissioning, development and production of new plays and musicals. Your investment in the Deans' Innovation Fund ensures that the School will have the resources and flexibility to undertake inventive and collaborative projects that will both enrich our training and benefit the field.

On a personal note, it has been a pleasure to have had such a meaningful relationship with the Robina board over the last thirteen years. Penny has been a dedicated and thoughtful partner, and I cherish the opportunities I have had to work with all of you. I have been inspired by your interest and engagement in our work, and therefore the thought that the Foundation is sunsetting is bittersweet.

Thank you, again, for all you have done for Yale Repertory Theatre and Yale School of Drama. Your generosity will enhance our art form for generations to come.

Sincerely,



James Bundy

cc: Penny Hunt

JAMES BUNDY

Dean

Artistic Director of Yale Repertory Theatre

Professor of Drama

PO Box 208244

New Haven CT 06520-8244

T 203 432-1505

F 203 432-8337

james.bundy@yale.edu

drama.yale.edu

courier

222 York Street

New Haven CT 06511

ROBINA FOUNDATION
GRANT AND ENDOWMENT AGREEMENT

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

1. **Description of Grant.** The Foundation shall make a grant of \$2 million (the "Grant") to the Grantee to establish the *Yale School of Drama Dean's Innovation Endowment Fund*, which will be administered according to the terms of this Agreement. The Grant shall be paid on or before December 1, 2020. In addition, the limited partnership interests in Aberdeen Venture Partners III & IV transferred by the Foundation to Grantee as of September 30, 2019, will be added to and incorporated as part of the Fund.
2. **Use of the Fund.** Income generated from the endowment shall be used to sustain the Dean's Innovation Fund at Yale School of Drama. The annual income shall be distributed to 1) provide support for projects proposed by Yale School of Drama faculty and students in all disciplines as well as by national and international field leaders; 2) underwrite projects and initiatives with the potential to create new knowledge, accelerate interdisciplinary learning and collaboration and raise the standard of global professional theater practice and cultural policy.

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

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

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

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

7. **Counterparts.** The parties may sign this Agreement in counterparts which, taken together, will constitute a fully executed original.
8. **Effective Date:** This Agreement is effective as of the 25 day of September, 2020.

ROBINA FOUNDATION

Kathleen A. Blatz

Kathleen Blatz
Chair, Board of Directors, Robina Foundation

YALE UNIVERSITY

James Bundy

James Bundy
Dean
Yale School of Drama

Joan E. O'Neill

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

ROBINA FOUNDATION

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

September 2, 2020

Garry W. Jenkins, Dean
University of Minnesota Law School
229 19th Avenue South, Room 381
Minneapolis, MN 55455

Dear Dean Jenkins,

I was delighted to be able to talk with you shortly after last week's Robina Foundation Board of Directors Meeting to personally give you the good news about the Board's decision to endow the Dean's Innovation Fund at the University of Minnesota Law School. Great news is always fun to deliver! I am writing to communicate the news more formally.

At a board meeting on August 25, 2020, the Robina Foundation Board of Directors approved a grant of \$2,300,000 to support endowment of the Dean's Innovation Fund at the University of Minnesota Law School as described in the Law School's proposal submitted to Robina in 2018. The Robina Board is very pleased to be able to endow the Fund, which the Law School has implemented during the last several years with annual support from Robina. Early implementation of the Fund confirmed our belief that sustaining the Fund through an endowment grant would enable the Law School Dean to support creative, impactful programs in the future, programs that might not otherwise be possible.

This new grant may be paid in two installments, but the entire amount will be paid by December 1, 2020. Endowment of the Law School's Dean's Innovation Fund is one of two final large grants Robina is making in anticipation of Robina's dissolution in December. Like Robina's other endowment grants to the Law School, reports on this grant will be required for three years following Robina's dissolution. I will provide details on this reporting in the near future.

Before any payment can be made, Robina must execute a Fund Agreement with the Regents of the University of Minnesota and the University of Minnesota Foundation regarding the administration of the Fund, as we did in connection with Robina's grants to endow the *James H. Binger Center for New Americans Fund* and the *James H. Binger Professorship in Clinical Law Fund*. We hope those two earlier agreements can guide the preparation of the new agreement. I understand that David Jensen will work with the University of Minnesota Foundation to prepare a draft agreement for our review.

Once again, we are very pleased to support the work of the Law School in this new way, knowing that Jim Binger would agree that the Dean's Innovation Fund is a stellar example of an initiative that can help transform the Law School in unique ways.

Warm regards,

Penny Hunt

Penny A. Hunt
Executive Director
Phone: 612-381-7790

From: UMF Donor Relations <donorrel@umn.edu>

Subject: A note of thanks for your generous commitment

Date: September 8, 2020 at 4:00:53 PM CDT

To: pennhunt@gmail.com, ngilberg@robinafoundation.org, Kathleen Schmidlkofer <kms@umn.edu>



UNIVERSITY OF MINNESOTA FOUNDATION

Dear Penny:

Having been in touch this summer to acknowledge the fulfillment of the Robina Foundation's visionary pledge to the University of Minnesota Law School, it's a great pleasure to thank you for the Robina Foundation's wonderful new \$2.3 million commitment!

This gift, which will endow the Law School Dean's Innovation Fund, offers support that is especially valuable, as it will enable the dean to address critical needs and take advantage of opportunities that enable the school to raise its profile and fulfill its mission.

It's hard to think of a more enduring—or fitting—final contribution from your foundation. Through your inspiring philanthropy, you have elevated the Law School and positioned it to effectively address some of our society's greatest challenges. For this, we will always be immensely grateful.

Thank you once again for this very generous new pledge—and the legacy that the Robina Foundation has established at the Law School and the University of Minnesota. Best wishes to you.

Sincerely,

A handwritten signature in black ink, appearing to read 'K. Schmidlkofer', with a stylized, flowing script.

Kathleen M. Schmidlkofer
President and CEO

KMS:mdb

UNIVERSITY OF MINNESOTA FOUNDATION
McNamara Alumni Center
200 Oak Street SE | Suite 500
Minneapolis, MN 55455-2010
612-624-3333 | driven.umn.edu



UNIVERSITY OF MINNESOTA FOUNDATION

Fund Agreement

Robina Foundation (the "Donor"), Regents of the University of Minnesota (the "University"), and the University of Minnesota Foundation (the "Foundation") enter into this Fund Agreement (the "Agreement") regarding the establishment and administration of a fund to which certain gifts from the Donor to the Foundation have been and/or will be directed.

Name:

The fund shall be named the *Law School Dean's Innovation Fund* (the "Fund").

Recognition:

James H. Binger was a philanthropist who utilized his time, money, and incredible intellect to improve the quality of life in the Twin Cities. In 2004, he demonstrated his commitment to philanthropy by forming the Robina Foundation. The Robina Foundation's expressed purpose was to invest significantly in projects and organizations in pursuit of innovation in critical social issues. The University of Minnesota Law School is a trusted recipient of this incredible generosity and expressed purpose.

Fund Purpose:

The purpose of the Fund is to support the Law School's ability to fully-fund short-term projects, to provide the seed funding for new initiatives through the proof of concept phase while the Law School seeks long-term sustainable funding, or to be leveraged as matching funds to endowments established by others or to create new endowments to amplify support of institutional priorities. The Law School will use the Fund to serve one or more of the following intents of the Donor: 1) promoting faculty research and engagement, 2) enhancing student experiences, and 3) advancing institutional goals.

Each year, the Dean will determine the project(s) or initiative(s) that will be supported and allocate available funding. The Dean can aggregate funding over multiple years for a single large-scale project/initiative that might have the potential for transformative impact; however, absent unusual circumstances the Donor's goal is not to support the same project/initiative for more than three consecutive years. Also, instead of directly expending the Fund's available balance, such Fund distributions may be contributed to other newly created or existing endowment funds held by the Foundation for the benefit of the Law School that either (i) provide matching funds to encourage further private philanthropic funding for the benefit of the Law School or (ii) provide long-term, ongoing financial support for projects or initiatives seeded by the Fund.

Funding Details:

The Fund was established in September of 2018 with gifts from the Donor in the total amount of \$200,000. The Donor is contributing \$2,300,000 to create a legacy of support through an endowed fund as documented in the Donor letter dated September 2, 2020. The Donor and others may make additional gifts to the Fund at any time. Additional gifts to the Fund will be reflected in the records of the Foundation.

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

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

Fund Administration:

The Fund will be administered and invested by the Foundation in accordance with the policies of the Foundation as currently in effect and as may be modified from time to time (the "Foundation Policy"). Oversight and management of the Fund shall be the responsibility of the Foundation in consultation with the Dean of the Law School or a designee(s). The assets of the Fund may be commingled with other assets of the Foundation for purposes of investment. Separate records and accounts will be kept for receipts and disbursements of the Fund.

As an endowment fund, the investment earnings attributable to the Fund, the annual administrative fees, and the annual amount appropriated by the Foundation to be made available for distribution from the Fund will be determined by Foundation Policy. Fund assets that the Foundation does not appropriate for distribution from the Fund in a given year shall continue to be held in the Fund and administered under this Agreement.

Reporting:

For a period to be designated by the Donor, the University will provide the Donor with an annual written report in a form and with information acceptable to the Donor that describes the activities and programs supported by the Fund.

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

Change in Circumstances:

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

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

Governing Law:

This Agreement shall be governed exclusively by the laws of the State of Minnesota, including the Uniform Prudent Management of Institutional Funds Act (the "UPMIFA"), without regard to conflict of law principles. For purposes of UPMIFA, the Fund shall constitute an institutional fund and no payment made by the Donor hereunder shall constitute a trust, and all such payments shall be held by the Foundation as the beneficial owner and not a trustee. All gifts to the Fund are for the exclusive benefit of the University through the provisions described in this Agreement.

Entire Agreement:

This Agreement constitutes the entire agreement of the parties related to the Fund, supersedes all prior oral and written agreements or communications related thereto. A signed document transmitted electronically shall be considered as binding as an original signature.

Effective Date:

This Agreement is effective as of October 16, 2020.

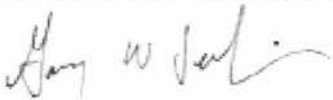
DONOR – Robina Foundation



By: Kathleen Blatz

Its: Chair, Board of Directors

REGENTS OF THE UNIVERSITY OF MINNESOTA



By: Garry W. Jenkins

Its: Dean, Law School

UNIVERSITY OF MINNESOTA FOUNDATION



By: Christine Searson

Its: Vice President and CFO

MINNEAPOLIS FOUNDATION WORKSHEET

Funds for Robina Foundation Fund

This worksheet is designed to help the Board estimate the allocation of available funds (See Tab 3) between funding for The Minneapolis Foundation's post-dissolution work and closing grants to Robina Grantees.

The Minneapolis Foundation Fee	\$ 20,000
Compensation for grant report consultants	\$ 72,000
Preparation of 2020 tax return and payment of taxes	\$ 7,000
Support for maintenance of Robina website "landing page"	\$ 1,000
Miscellaneous	<u>\$ 25,000</u>
TOTAL	\$125,000

11/19/2020



James H. Binger Center for New Americans ANNUAL REPORT – July 1, 2019 – June 30, 2020

PART 1 | SUMMARY

The James H. Binger Center for New Americans is the leading immigration clinical education program in the country and seeks to transform the country's immigration laws through collaborative litigation and advocacy. The Center offers 4 clinical courses, one externship course, and a host of education and outreach programs, including a nationally recognized Annual Immigration Law Forum held each fall at the University of Minnesota Law School.

In the past year, immigrant communities and the U.S. immigration system experienced rapid and significant changes as a result of the COVID-19 global pandemic. These changes include partial closure of the U.S. border, narrowing protections for asylum seekers, unsafe detention of immigrant detainees, and added economic and health challenges that have disproportionately fallen on poor people of color throughout the country.

The pandemic also caused changes in the clinical legal education space when the Law School transitioned to remote learning and work in March 2020. Since September 2020, the Center has operated both in-person and remote clinics and programs, along with the rest of the Law School's classes and clinics. Health protocols posed new challenges to an essential component of the Center's success—the synergy of its physical space—where law students, Center faculty, adjunct faculty, and community partners meet to discuss, brainstorm, and organize legal strategies at all levels of adjudication. The Center also faced serious challenges to reach vulnerable immigrant communities, specifically immigrants detained in county jails and immigrants living in rural Minnesota. Despite these challenges, the Center's staff, faculty, partners, and students have pivoted in inspiring and innovative ways and the Center has had another successful and hopeful year, with impressive growth and powerful victories that are further highlighted in the Center's Annual Report (enclosed).

The Center's team consists of 3 full-time clinical faculty professors, 1 full-time Executive Director and Education & Outreach Director, 1 full-time Program Coordinator, two Fellows, and 1 Administrative Coordinator. The Center's law-firm partners—Faegre Drinker Biddle & Reath (formerly Faegre Baker Daniels), Dorsey & Whitney, and Robins Kaplan—have now contributed **8,463 pro bono hours** to Center matters since our launch, a matching investment that now **exceeds \$3.35 million**.

PART 2 | PROGRAM DETAILS

FEDERAL IMMIGRATION LITIGATION CLINIC

During the reporting period, the Federal Immigration Litigation Clinic engaged in a series of challenging U.S. Circuit Court and District Court cases, including six cases led by 8 law students. This was a remarkable achievement for the Clinic, whose success is due to a unique collaboration where Center alumni continue to be actively engaged with the training of law students, thereby multiplying the Center's capacity to impact the immigration system. Center staff and faculty have been excited to watch the original goals and expectations of the Clinic's two-year student model come to fruition as alumni work with faculty and students in high-profile and novel federal cases.

Overall, the Center and its partners handled 50 matters before federal courts and 27 open cases at the U.S. Circuit Court level in 2019-20, including the Eighth Circuit asylum case *Uzodinma v. Barr* in November 2019. Law students Abyan Gurase '20 and Michelle Cardona Vinasco '20, led briefing and presented oral arguments for the case, which was co-counseled with Luis Cortes Romero, one of the lead attorneys in the landmark DACA case, *DHS v. Regents of the University of California*, heard by the U.S. Supreme Court. Luis is himself a DACA beneficiary, litigating to prevent his own removal, and was at the counsel table for the Supreme Court oral arguments on November 12, 2019. The next day, Luis flew to Minnesota to help prepare Abyan and Michelle for their own oral arguments, and to speak before an overflowing crowd at the Law School about his life and role in the DACA litigation. On November 14, 2020, Luis joined Abyan and Michelle at counsel table for their argument in St. Paul.

DETAINEE RIGHTS CLINIC

The Detainee Rights Clinic defends indigent noncitizens in immigration court after they are incarcerated by the Department of Homeland Security. Starting in early 2020, access to detainees in county jails became more restricted due to the pandemic and detainees faced unsafe environments as COVID outbreaks in county jails spread rapidly.

The Center's Habeas Litigation Project, which pre-dated the pandemic, worked to address these urgent cases. The Detainees Right Clinic and the Federal Immigration Litigation Clinic worked together to train students to provide representation to detainees in habeas corpus petitions in U.S. District Courts to challenge their unconstitutional civil incarceration. While the project was originally designed to help immigrants unjustly held for extended periods of time, it took on added urgency to help gain the release of immigrants as the pandemic spread.

The project is led by four Binger Center alumni who have returned to apply their own learning as adjunct clinical faculty. John Bruning '17 with The Advocates for Human Rights, Mary Georgevich '18 with the Immigrant Law Center of Minnesota, and Paul Dimick '19 with the American Civil Liberties Union of Minnesota all serve as adjunct clinical instructors and case supervisors and are assisted by Visiting Clinical Professor and Immigration Advocacy Fellow, Nadia Anguiano-Wehde '17. The Center's law firm partner, Robins Kaplan, serves as co-counsel in the habeas project, with Rajin Olson '17 and Mike Reif, providing invaluable pro bono assistance in many of our cases. **In the past year, the Center filed over ten habeas corpus petitions for detained noncitizens in the U.S. District Court in Minnesota and won orders requiring bond hearings that led to the release of all of the clients.**

Overall, the Detainee Rights Clinic and its partners expanded capacity by a total of 100 % since 2016-17 and provided merits representation to detained immigrants in Minnesota in a total of 116 matters. The Clinic and its partners also handled 49 bond hearings and won release for 34 immigrants (a nearly 70% success rate).

RURAL IMMIGRANT ACCESS CLINIC

The Rural Immigrant Access Clinic serves immigrant communities in rural Minnesota. These regions were severely impacted by the pandemic and rural counties witnessed disproportionate rises in COVID clusters due to challenging working environments. Immigrant families in this area often have a family member that works in the meatpacking or dairy industries and employees have reported widespread concerns about health safety and conditions.

While the pandemic spread in early 2020, the Clinic was in the middle of a series of outreach sessions in rural Minnesota and was forced to change its protocols. The Clinic worked closely with its partners (the ACLU-Minnesota, Fey y Justicia, and the Immigrant Law Center of Minnesota) to adjust to the new environment and public health concerns. By summer 2020, the Clinic provided 4 in-person sessions and one remote session by utilizing local partners on-site plus students and faculty connected virtually.

By using student clinicians and a student intern from the University of Minnesota School of Social Work, the Clinic conducted 60 individual intakes in 5 towns. Since the Clinic began in 2016, over 450 immigrants have been screened for relief. The clinic remains connected to rural communities and seeks to develop remote procedures again for spring 2021.

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. In the fall of 2019, the Center hosted two major events for the legal community and the general

public. The Center's Annual Immigration Law Forum titled, "Immigrants' Rights Under Siege and the Road Ahead" brought together activists, advocates, and lawyers to address intensifying efforts to dehumanize and deport immigrants and asylum seekers. The Center's event, "DACA at the U.S. Supreme Court: An Inside-the-Court Account," featured Luis Cortes Romero, one of the lead attorneys in the class-action litigation at the U.S. Supreme Court, to share an insider perspective about litigating during this time.

In the months that followed, the Center focused efforts on developing remote outreach programming. The initial event of this new model was titled "Supporting Detained Clients in the Time of COVID-19" in June 2020. The event received excellent reviews and had over 100 participants, which is one of the Center's highest-attended CLE sessions to date.

In May 2020, following the departure of Kjerstin Yager, the Center welcomed Marcaïl Distanté as the Center's new Education and Outreach Program Coordinator. Marcaïl brings a unique set of skills as an organizer and former housing advocate for immigrants.

PART 3 | THE YEAR AHEAD

The transition to remote teaching, litigation, and outreach has been challenging. It is hard to estimate the long-term implications if these conditions continue well into 2021. As many sectors are reporting, tasks take longer and zoom fatigue is growing. That said, the Center community is a closely-knit team of advocates who have been able to support each other and our students during this time. For the most part, the Center has been able to adapt well and find avenues for growth.

The Center will host its Annual Immigration Law Forum as a virtual event on November 12, 2020. This year's forum, "Critical Conversations: Racial Justice and the Immigrant Rights Movement," features Saint Paul Mayor Melvin Carter as the keynote speaker. The event will also address a host of immigrant and race-related issues that surround the recent police killing of George Floyd. While this annual event typically has around 200 attendees, we have over 600 registrants from across the country this year after making efforts to broaden our audience and speakers. The success of remote programming has been a positive outcome of the pandemic and has allowed the Center to expand its national presence.

Unfortunately, there is a growing sense of unease in the immigration advocacy community about the possibility of acceleration of current immigration policies and trends. While the Center has grown accustomed to unforeseen changes, there are concerns that an already hostile immigration environment will become significantly more draconian, dangerous, and violent depending on the outcome of the presidential election. This environment will require continued assessment and planning to ensure that the Center can pivot as needed to best serve client needs.

No matter the election outcome or the direction of the presidential administration in power, the Center will continue to provide impactful immigration advocacy and litigation using our innovative model. From serving our clients and making positive changes in immigration law, to building our capacity with pro bono and student attorneys, the Center is significantly impacting both the law and legal education. While we all navigate this uncertain time together, we are grateful to the Robina Foundation and the Binger Center endowment for supporting our efforts to make transformational change.

BINGER CENTER FOR NEW AMERICANS
Income and Expense Statement for 7/1/2019 - 6/30/2020

Income

Fiscal Year Spendable Endowment Earnings	<u>\$1,112,945</u>
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Expenses

Faculty	\$351,839
Executive Director	124,930
Teaching Fellows	156,380
Research Assistants	
Student Clinic Directors	30,983
Program Staff	94,886
Adjuncts	<u>27,880</u>
Total Compensation	786,897
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	78,524
Equipment & Space	24,194
TOTAL EXPENSES	<u>\$1,039,615</u>



UNIVERSITY OF MINNESOTA
FOUNDATION

McNamara Alumni Center
200 Oak Street SE, Suite 500
Minneapolis, MN 55455-2010
TEL 612-624-3333 800-775-2187
FAX 612-625-4305
driven.umn.edu

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

November 2020



Dear Penny,

With a heart full of gratitude, I write to say thank you.

The Robina Foundation's partnership and generosity are helping the University of Minnesota to thrive, even in difficult times like these. And *especially* in times like these, when so much feels uncertain, endowment gifts like yours provide strength and stability not just for the causes important to you, but for the entire University community.

Enclosed is the Robina Foundation's Report on Endowments (ROE) from the University of Minnesota Foundation.

It is particularly gratifying to report that despite worldwide economic volatility, the UMF endowment posted positive returns of 1.6% for the fiscal year. While the preliminary investment returns reflected in the ROE show a loss for most funds, updated June 30, 2020, quarter-end valuations increased the overall return by 4.2%. The increased earnings for your funds have now been allocated and will be part of the investment return reported in your 2021 ROE. I encourage you to review the enclosed glossary to learn more about how earnings are posted and reported.

Thank you so much for all that the Robina Foundation makes possible at the University of Minnesota today and for generations to come. Across all five campuses, philanthropy like yours is transforming lives, fueling the drive to discover, and helping to build a brighter tomorrow.

If you have questions about your report, please contact us at donorrelations@umn.edu or 612-626-9565.

With warmest wishes,

Kathleen M. Schmidtkofer
President and CEO

Driven The University of Minnesota Campaign

930306573



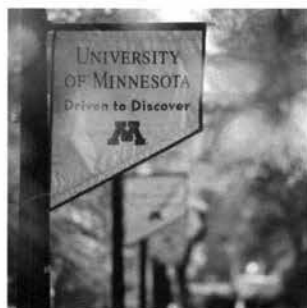
University of Minnesota FOUNDATION REPORT ON ENDOWMENTS

JAMES H. BINGER CENTER FOR NEW AMERICANS FUND

July 1, 2019–June 30, 2020

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, 2019	\$25,677,746
Gifts received	0
Investment return	(73,700)
Administrative fee	(293,142)
Endowment payout	(1,112,945)
Principal value as of June 30, 2020	<u>\$24,197,959</u>

Historical Market Values

Principal value as of June 30, 2018	\$24,692,980
Principal value as of June 30, 2017	\$24,052,630



University of Minnesota FOUNDATION REPORT ON ENDOWMENTS

JAMES H. BINGER PROFESSORSHIP IN CLINICAL LAW

July 1, 2019–June 30, 2020

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, 2019	\$1,062,142
Gifts received	0
Investment return	(11,772)
Administrative fee	(12,107)
Endowment payout	(46,963)
Principal value as of June 30, 2020	<u>\$991,300</u>

Historical Market Values

Principal value as of June 30, 2018	\$1,047,059
Principal value as of June 30, 2017	\$1,024,688

Impact of Permanent University Fund (PUF)

	Principal Value as of June 30, 2020	FY20 Payout
Foundation fund	\$991,300	\$46,963
University of Minnesota PUF fund	518,961	23,041
TOTAL	\$1,510,261	\$70,004

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 2020.

Investment return: Represents market gains or losses and interest and dividends earned during fiscal year 2020, net of external fees. Returns are posted to the fund monthly based on the most up-to-date asset valuations at the time. When June 30, 2020, returns were posted to the fund, approximately one-third of the portfolio was still carried at March 31, 2020, values. The updated June 30, 2020, values increased the overall return by 4.2%. The increased earnings were posted to the fund in July 2020 and will be part of the investment return reported in your 2021 ROE.

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 13 basis points annually).

Transfers: Dollars moved into or out of the fund during fiscal year 2020, 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.

Continued on reverse

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.

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 2020-21 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.

2020
**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 better tomorrow. Thank you for your inspiring partnership.



endowment update

for the periods ended
June 30, 2020

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 cover).

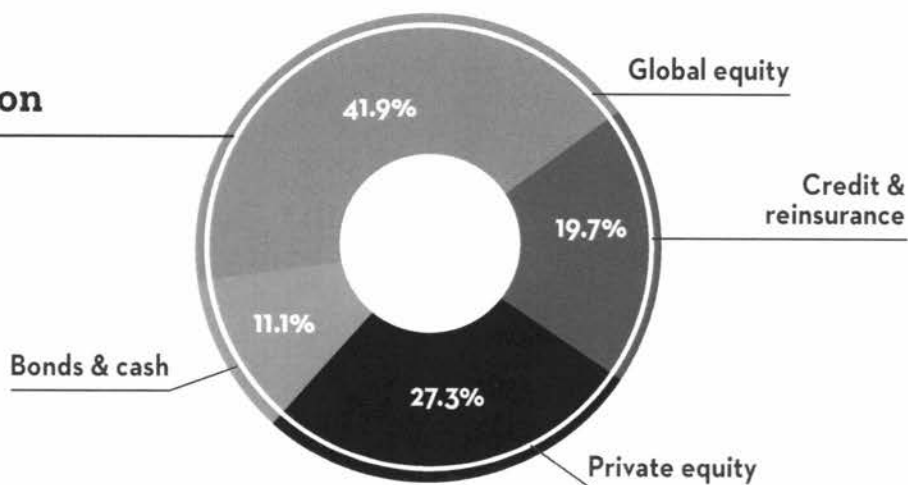
Investment strategy

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. It is positioned to perform **comparatively** well during volatile and declining markets, such as we are experiencing during the current COVID-19 pandemic, while capturing equity-like returns over the long term (see page 2). This means that, while on average, UMF's returns will not experience the highest highs, they will also avoid the lowest lows.

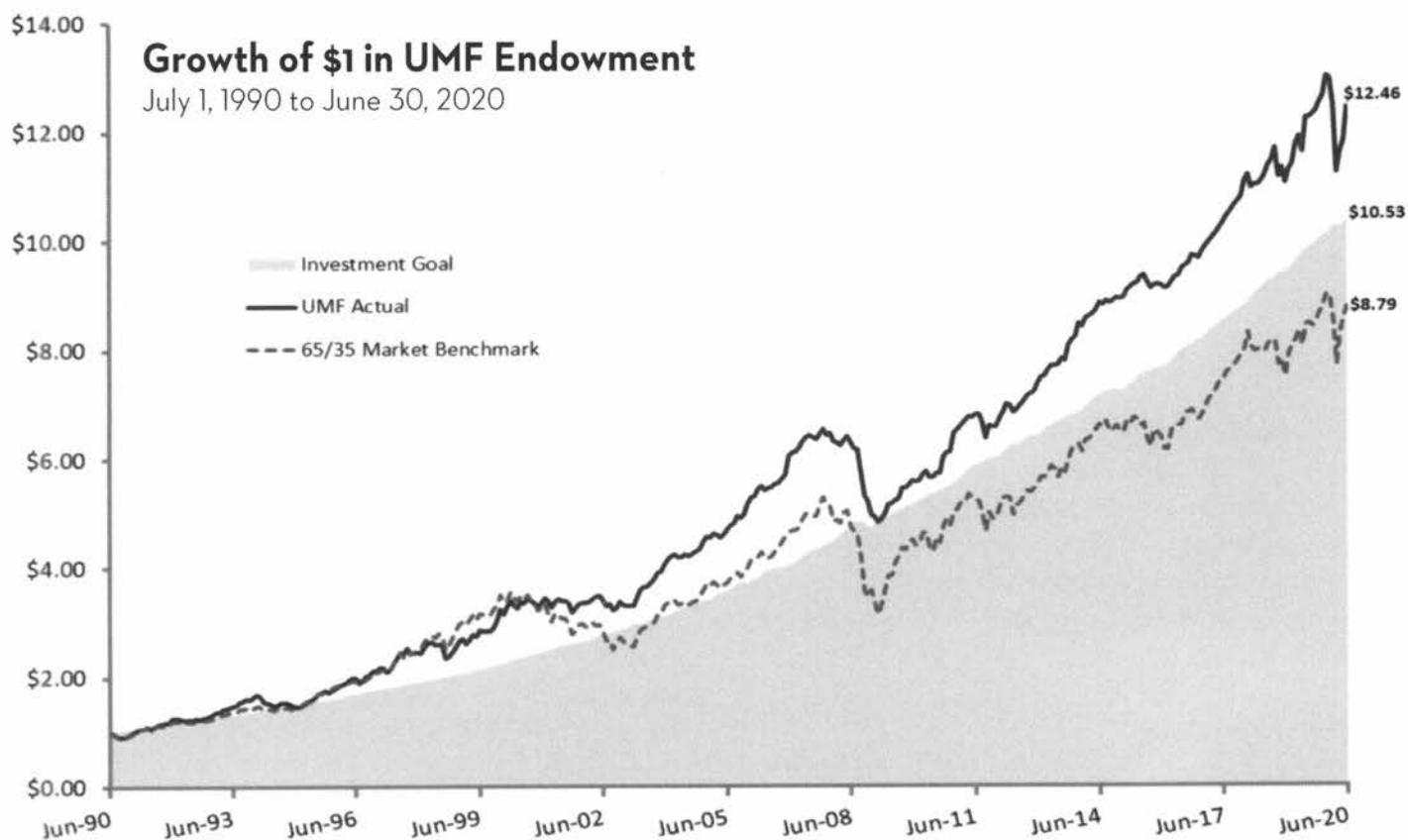
This strategy is designed to create predictable and stable funding over the long term; however, year-to-year short-term results will often look different from those of our peers and the standardized 65/35 market benchmark.

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 +2.2% 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	1.6%	5.7%	-4.2%	3.7%
5-Year	6.0%	6.6%	4.2%	5.9%
10-Year	8.2%	6.8%	7.3%	7.4%
Since inception ³	7.4%	7.8%	6.2%	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, 2020, the endowment pool returned +1.6%. This performance lagged the one-year market benchmark return of +3.7%, due primarily to UMF's long-term investment strategy, which relies less on common stock exposure than the market benchmark (see page 1).

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.

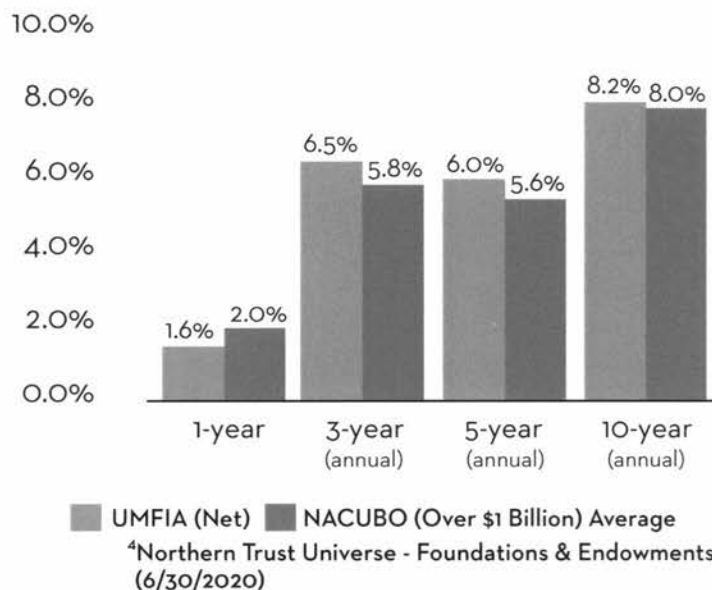
UMF performance compared to our peer group

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, 2020. Final results as of June 30, 2020, will become available early in 2021.



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 additional 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 \$202 million in funding to fuel greatness at the U of M in fiscal year 2020

University of Minnesota Foundation

Fiscal Year 2020 Operational Highlights

Fiscal year 2020 has been an unusual year. UMF entered the pandemic well prepared for remote work and in a position of financial strength, allowing us to continue to serve our donors and the University with minimal disruption. We remain dedicated to raising and managing gifts for the benefit of the University. As always, our work is guided by a commitment to efficiency and effectiveness.

The following information is provided to give you additional insights into how we're fulfilling our mission to support greatness across all five University of Minnesota campuses.

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.

Under UMFIA's 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.

In addition to being positioned to maximize long-term growth, the endowment portfolio is designed to minimize the effects of market volatility. This strategy is working to preserve the purchasing power of the individual endowment funds during the challenging and uncertain economic conditions created by the worldwide COVID-19 pandemic.

Investment performance: FY20 preliminary return of -2.6%; final return of +1.6%

Fiscal year 2020 investment returns of +1.6%, while lower than the goal of +5.7%, significantly exceeded expectations after a tumultuous market environment during the last four months of the fiscal year. The FY20 investment return allocated to the funds in your Report on Endowments was a preliminary -2.6%, which was calculated prior to receiving June 30, 2020,

quarter-end valuations for approximately 30 percent of the total portfolio. Updated quarter-end valuations increased the return to the reported +1.6%.

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.

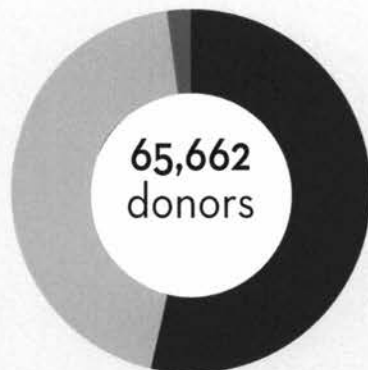
Administrative efficiency

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

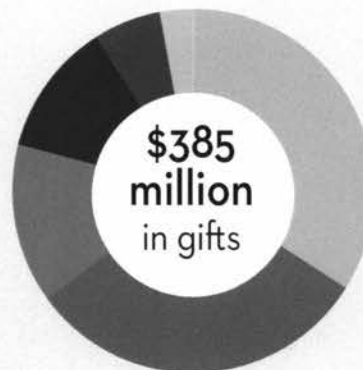
The University of Minnesota Foundation raises gifts from individuals and organizations for the sole purpose of building and sustaining excellence across all five U of M campuses. We collaborate with University leaders and development officers to ensure that fundraising activities are consistent with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

As the University continues to face unprecedented financial challenges from the COVID-19 pandemic, private gifts are more important than ever. We are enormously thankful to the University's community of donors and friends, who collectively provided \$385 million in new gifts and commitments in FY20.



This includes all FY20 donors to the U, with gifts to endowed and/or current use funds ranging from \$1 to \$25 million.

- Alumni
34,166 **52%**
- Other individuals
28,310 **43%**
- Organizations
3,186 **5%**



The \$385 million in gifts raised includes outright gifts, pledges, and future commitments.

- Program support
\$131 million **34%**
- Student support*
\$119 million **31%**
- Capital improvements
\$53 million **14%**
- Research
\$47 million **12%**
- Faculty and staff support
\$25 million **6%**
- Outreach and community engagement
\$10 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 22 years than would have been possible with a more traditional investment approach

FY20 investment returns of +1.6% **exceeded expectations, given the tumultuous and uncertain economic conditions**

Endowment fees have **not increased since 2008**

Endowment funds and cash gifts provided **\$202 million** in funding to benefit University people and programs this year. **Thank you!**

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Yale Law School

**THE ROBINA FOUNDATION
HUMAN RIGHTS FELLOWSHIP INITIATIVE**



Annual Report

November 2020

TABLE OF CONTENTS

Background.....	3
Kirby Simon Summer Human Rights Fellowships, funded by the Robina Foundation.....	4
Robina Post-Graduate Human Rights Fellowships.....	5
Robina Visiting Human Rights Fellowships.....	7
COAP Recipients Supported by the Robina Foundation.....	7
Human Rights Clinical Education Innovation and Travel.....	8
Outreach.....	9
Robina Human Rights Initiative Program Administration.....	9
Unanticipated Results and Potential Changes.....	10
Conclusion.....	10
Financial Report.....	11

BACKGROUND

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. Since its inception, the Robina Human Rights Fellowship Initiative has funded 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; 402 fellowships for individual law and undergraduate students' summer human rights experiences; and 44 year-long fellowships for recent graduates working in a wide range of human rights institutions. 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 2019-20, 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 2019-20.

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.

As a result of the COVID-19 pandemic, 2020 Kirby Simon Fellows were unable to travel to their planned host organizations. Nonetheless, Fellows conducted remote internships on a wide array of issues at a range of institutions. During the summer of 2020, 15 Yale Law School students and 12 Yale College students received the Kirby Simon Summer Human Rights Fellowships. Their internship placements were as follows:

Yale Law School

- **Camila Bustos '21 J.D.** – Earthrights International, USA
- **Evelin Caro Gutierrez '22 J.D.** – International Residual Mechanism for Criminal Tribunals, The Netherlands
- **Ify Chikezie '22 J.D.** – The Sentry, USA; Minority Rights Group, UK
- **Luke Connell '22 J.D.** – The European Court of Human Rights, France; Amnesty International, Mexico
- **Kayla Crowell '22 J.D.** – United Nations High Commissioner for Refugees, Switzerland
- **Benjamin Dearden '21 J.D.** – International Residual Mechanism for Criminal Tribunals, The Netherlands
- **Sofea Dil '21 J.D.** – World Food Programme, Italy; Asian Law Alliance, USA
- **Elsa Dodds '22 J.D.** – JUSTICE, UK
- **Christopher Ewell '22 J.D.** – Greenpeace Oceans Campaign, USA; Blue Ocean Law, USA

- **Randi Michel '22 J.D.** – Doughty Street Chambers, UK
- **Alex Miskho '22 J.D.** – International Law Commission, Switzerland
- **Emma Montoya '22 J.D.** – European Court of Human Rights, France
- **Andrew Ntim '22 J.D.** – South African Litigation Centre, South Africa
- **Jessica Tueller '21 J.D.** – Center for Reproductive Rights, USA

Yale College

- **Joelle Besch, B.A. '22** – Bet Tzedek, USA
- **Isabella Canava, B.A. '22** – IntegrateNYC, USA
- **Elaina Foley, B.A. '22** – Allard K. Lowenstein International Human Rights Clinic, YLS, USA
- **Shannon Guerra, B.A. '20** – Scalabrini Centre of Cape Town, South Africa
- **Danielle Harris, B.A. '21** – Allard K. Lowenstein International Human Rights Clinic, YLS, USA
- **Gabriel Klapholz, B.A. '22** – The Justice Collaborative, USA; Gay Men's Health Crisis, USA
- **Jever Mariwala, B.A. '21** – Zolberg Institute, USA
- **Larissa Martinez, B.A. '21** – Make the Road CT, USA
- **Nick Randos, B.A. '22** – Allard K. Lowenstein International Human Rights Clinic, YLS, USA
- **Isabelle Rhee, B.A. '22** – Hawaii Appleseed Center for Law & Economic Justice, USA
- **Eliana Swerdlow, B.A. '21** – Pennsylvanians for Alternatives to the Death Penalty, USA; Hope Recovery Center, USA
- **Teigist Taye, B.A. '22** – Allard K. Lowenstein International Human Rights Clinic, YLS, 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 2019-20, four graduates received Robina Post-Graduate Human Rights Fellowships, and one 2018-19 Robina Fellow extended her Fellowship.

2019-2020 Post-Graduate Robina Fellows

Sebastian Bates (LL.M. 2019) spent his Robina fellowship year at the European Court of Human Rights in Strasbourg, France. Sebastian assisted the Directorate of the Juriscouncil and Judge Helen Keller, the judge of the European Court of Human Rights in respect of Switzerland. His work focused on ensuring that the Court is aware of its member states' domestic law, international law, and European Union Law through analysis of discrete legal research questions. Sebastian also helped Judge Keller develop and write her judgments on cases.

Nikila Kaushik (LL.M. 2019) spent her fellowship year working at the International Criminal Court (ICC) and the Civil Party Lead Co-Lawyers' Section of the Extraordinary Chambers in the Courts of Cambodia (ECCC). After working for 6 months at the ICC, Nikila moved to the ECCC in the spring to complete her Fellowship after the COVID-19 pandemic precluded her from continuing to work at the International Criminal Court. At the ICC, Nikila worked on the prosecution team for the trial of Dominic Ongwen, the alleged former commander of the Lord's Resistance Army in Northern Uganda, who was charged with 70 counts of crimes against humanity and war crimes. At the ECCC, Nikila assisted the victims' representation team, with a particular focus on accountability for the crime of forced marriage.

Mara Redlich Revkin (J.D. 2016) spent her fellowship at the International Organization for Migration (IOM)'s Iraq Mission. As a Robina Fellow, Mara partnered with IOM and Yale Law School's Center for Global Legal Challenges to study the effects of a community policing program that IOM is implementing with the cooperation of Iraq's Interior Ministry. This multi-method study, which included field experiments in 13 Iraqi villages, door-to-door household surveys, and qualitative observations of policing activities during 18 months of fieldwork in Iraq, assessed whether community policing methods have positive effects on the protection of human rights and other outcomes associated with democratization and peacebuilding. She also served as the lead researcher on Iraq and Syria for two projects implemented by United Nations University, the research wing of the UN system, on (1) the recruitment of children by armed groups and (2) prospects for post-conflict transitional justice and accountability after the Islamic State's loss of territory in Iraq.

Mariana Olaizola Rosenblat (J.D. 2019) spent her fellowship year working at the U.N. High Commissioner for Refugees (UNHCR) Regional Office in Buenos Aires. As a Protection Associate, Mariana carried out field research in five countries of South America to assess local reception and integration conditions for arriving asylum seekers. Building on those

findings, she developed and promoted policies to improve refugees' access to welfare and employment schemes as a way to facilitate their local integration.

2019-2020 Post-Graduate Robina Fellow Extension

Elena Brodeala (LL.M. 2018) extended her 2018-19 Robina Post-Graduate Fellowship to work at the Council of Europe Information Society Department. The first year of Elena's Robina Fellowship was spent 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.

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 2019-20 academic year, funding from the Robina endowment supported Robina Visiting Human Rights Fellow Paul Linden-Retek.

Paul Linden-Retek '12 J.D. '18 Ph.D. was a 2019-20 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. Paul has taught courses at Yale 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 2019-20, Paul taught a seminar on the concept of the post-national constitution and post-Marxist critical theory in addition to the Human Rights Studies introductory and capstone courses. 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.

D. COAP Recipients Supported by the Robina Foundation

In 2019-20, 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, to enable them to follow a variety of career paths, particularly opportunities in public interest law, without suffering undue financial burden.

In 2019-20, the Robina Foundation supported four Yale Law School graduate COAP recipients working in human and civil rights:

- **Elizabeth Simpson '09 J.D.** – Carolina Justice Policy Center
- **Ryan Thoreson '14 J.D.** – Human Rights Watch/Yale Law School
- **Matthew Sipe '15 J.D.** – George Washington University Law School
- **Hyun-Soo Lim '18 J.D.** – European Court of Human Rights

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.

Lowenstein Clinic projects frequently involve travel, including internationally, to pursue investigative work that must be conducted on the ground or to engage in person with project partners. As a result of the COVID-19 pandemic, opportunities for travel during the spring of 2020 were limited, and some planned trips were cancelled for safety reasons. Nonetheless, while fewer Robina Initiative-funded Clinic trips were conducted than in a typical year, one of the Lowenstein Clinic's 2019-20 projects relied on funding from the Robina Initiative for key aspects of its work.

- The Clinic has been working with a Syrian human rights organization based in Turkey on a comprehensive report on human rights violations that have occurred during the armed conflict in Syria. The goal of the report is to support eventual justice efforts. The team in Istanbul has prepared a database of violations by all parties to the conflict and drafted the factual summary. The Clinic team has prepared the chapter analysing the factual account on the basis of international human rights, humanitarian, and criminal law. The Clinic and its partner organization will publish the report in Arabic and English. The Clinic is covering the cost of translating the factual chapter from Arabic to English and the legal chapter from English to Arabic. The Robina Initiative is supporting the cost of translation. [PLEASE NOTE: THIS WORK REMAINS CONFIDENTIAL.]

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 seventh year, MAPHR includes Human Rights Scholars from a wide array of majors, including environmental studies, psychology, history, mathematics, literature, and political science. 32 seniors and juniors are currently enrolled in the Program, and another cohort of approximately 15 sophomores will be admitted at the end of this fall semester. 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 from the Faculty Advisory Committee. In addition, the Schell Center offers Kirby Simon Summer Human Rights Fellowships to the Human Rights Scholars to pursue human rights-related internships during the summers. In 2019-20, 12 Human Rights Scholars' summer internships related to human rights were funded by Kirby Simon Fellowships.
- **Lowenstein Project.** The Lowenstein Project, founded in 1981, is a student-led extracurricular group in which students from Yale Law School and Yale College work together on research or writing projects to fulfill the needs of partner organizations in the human rights field. In 2019-20, over 100 students volunteered with the Lowenstein Project. During the Fall 2019 semester, the Schell Center supported a mid-semester community-building event for students to share knowledge and experience across project teams.

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 activities and assists with other administrative tasks for the undergraduate MAPHR.

UNANTICIPATED RESULTS AND POTENTIAL CHANGES

Aside from the disruptions posed by the Covid pandemic and the move to remote work, there have been no unanticipated results. Now that the Robina Human Rights Initiative is endowed and we have received a matching endowment from the Goldman family that will provide COAP funding for eligible alumni working in human rights, civil rights, and social justice fields, we are reducing the use of income from the Robina endowment to provide COAP funding.

CONCLUSION

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, 2019-JUNE 30, 2020

FISCAL REPORT

To: **Robina Foundation**

Report Period: **7/1/2019 6/30/2020**

FY20 Robina
Endowment
Actuals

3. Expenditures

Kirby Simon Summer Human Rights Fellows	90,933.04
Robina Post-Graduate Human Rights Fellows	240,314.83
Robina Human Rights JD Scholars	0.00
Robina Visiting Human Rights Fellows	73,303.27
Outreach, including Yale College human rights program	4,685.83
Administrative Support	35,131.92
Robina COAP Scholars	76,574.84

4 Total Expenditures		\$520,943.73
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Revenues	532,116.83
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Balance FY20	11,173.10
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BINGER CLINICAL PROFESSORSHIP OF HUMAN RIGHTS

ANNUAL REPORT 2019-2020

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.

During the 2019-20 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.

Professor Silk, in addition to teaching or co-teaching two sessions of the Lowenstein Clinic seminar each week, supervises a diverse set of projects. Professor Silk was on triennial leave for the spring 2020 semester and spent a month as a visiting scholar at the Victoria University of Wellington Faculty of Law in New Zealand, revising his Binger inaugural lecture as an essay for publication and working on a writing project. During the fall 2019 semester, Professor Silk supervised projects in which Clinic teams:

- finalized an account of the law applicable to violations of international human rights, humanitarian, and criminal law by all parties to the conflict in Syria for ultimate publication with a Syrian human rights organization, with a goal of supporting eventual post-conflict justice efforts;
- continued to edit a report, prepared in collaboration with a Palestinian women's organization and expected to be published this fall, on obstacles that Palestinian girls in

East Jerusalem face in securing access to education as a result of Israel's occupation of East Jerusalem;

- in cooperation with the European Human Rights Advocacy Centre (EHRAC), based in London, carried out research and prepared a third-party intervention, the equivalent of an *amicus* brief in U.S. courts, on a case before the European Court of Human Rights that concerns violations of the right to life and other rights resulting from the shelling of civilian areas by both Armenia and Azerbaijan in their conflict over the disputed territory of Nagorno-Karabakh;
- for EHRAC's work on a case from Russia before the European Court of Human Rights, carried out research on how states can be held accountable for failures to prevent domestic violence and to hold perpetrators responsible for it; and
- working with project partner Fortify Rights and relying on its survey of Rohingya refugees in camps in Bangladesh, analyzed the Rohingya's traumatic experiences in Myanmar and their effects on mental health to argue, in a report to be published this fall, that the infliction of mental harm met the Genocide Convention's definition of "acts causing serious . . . mental harm" to a protected group.

Directing the undergraduate Multidisciplinary Academic Program in Human Rights Studies continues to be a major commitment of 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, take four electives during that semester and subsequent semesters, and complete capstone projects in a senior 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. Professors Silk and Linden-Retek supervise the students' individual projects. Linden-Retek has accepted an academic appointment at another law school but has continued co-teaching the seminar remotely this fall. Last fall's projects were emblematic of the multidisciplinary nature of the program and ranged in format from academic papers to plays, short stories, an experiment in performative protest, a digital archive, a series of podcasts, web-based advocacy resources, journalism, and oral history. They included:

Justice for the Wrongfully Convicted: Rethinking New Haven's Pardon Process

"Children of the Hated": The Lebensborn Generation and Inherited Guilt in Norway

The Individual and the Collective in Decarceration Advocacy: Observing the Human Rights of Individuals with Violent Offenses

"Le Murden la Mano a Quien Les Quitó el Bozal": Examining the Killings of Mexican Journalists Under the Current Presidency

Preservation and Elevation: Archiving the Interfaith Sanctuary Movement

The Revolution of Our Time: 2019 and Hong Kong's Last Line of Defense

Illuminate: A Short Story on Syrian Journalist Disappearances

From the Souls of the Ancestors: How Black Americans Inherit Memories, Trauma, and Strength through Ancestral Memory

The Ethics of Storytelling in Human Rights

Love from Linden Trees: A Creative Reflection on the Romanian Revolution

Seeking Paradise Within Settler Colonialism

The Automation of Agency: How Machines are Changing the Relationship Between Labor and Capital at Yale

Perplexities of Personhood: Living as Human Persons

Crimes Against Syrian Human Plurality: Critiquing Legitimacy in Post-War Syria Under the Assad Regime

Empowerment Under Occupation: Fair Trade and Organic Agriculture in the West Bank

Explorations of Transnational Identity

The students whose projects were not academic papers wrote papers to accompany their projects that reflected on the work they produced, 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, in a public Zoom symposium in June. Many of the presentations are available on the Human Rights Program's website at <https://law.yale.edu/schell/undergraduate-program/student-life/capstone-projects/2020-capstone-symposium>.

Financial Report, Binger Chair 2019-2020

Endowment Income:	\$153,630.96
Expenditures:	\$153,620.78
 Carry over from FY19:	 \$ 3.28
Balance forward:	\$ 13.46



ENDOWMENT REPORT
to the
ROBINA FOUNDATION

July 2019-June 2020
Yale Law School

1. Robina Human Rights Initiative Endowment Fund

Principal:	\$10,000,020
Market Value as of 6/30/2020:	\$11,473,701
Income Available, 2019-20:	\$ 412,700

2. Binger Clinical Faculty Chair in Human Rights Fund

Principal:	\$3,000,000
Market Value as of 6/30/2020:	\$3,442,807
Income Available, 2019-20:	\$ 153,631

Overall Endowment Performance for Fiscal Year 2020

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, 2020, net assets in the endowment totaled approximately \$31.2 billion, an increase of .9 billion since June 30, 2019.

Investment Performance

For the fiscal year ended June 30, 2020, the endowment earned a 6.8% investment return, net of fees. The university's longer-term results remain in the top tier of institutional investors. Yale's endowment returned 10.9% per annum over the 10 years ending June 30, 2020, trailing broad market results for domestic stocks, which returned 13.7% annually, and exceeding results for domestic bonds, which returned 3.8% annually. Relative to the estimated 7.4% average ten-year return of college and university endowments, Yale's investment performance added \$9.6 billion of value in the form of increased spending and enhanced endowment value. During the 10-year period, the endowment grew from \$16.7 billion to \$31.2 billion.

Endowment Spending

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 2021 fiscal year is projected to be \$1.5 billion, representing approximately 35% of the university's net revenues. Endowment distributions to the operating budget have increased at an annualized rate of 7.9% 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 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. 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.

Yale continues to maintain a well-diversified, equity-oriented portfolio, with the following asset allocation targets for fiscal year 2021:

ABSOLUTE RETURN	23.5%
VENTURE CAPITAL	23.5%
LEVERAGED BUYOUTS	17.5%
FOREIGN EQUITY	11.75%
REAL ESTATE	9.5%
BONDS AND CASH	7.5%
NATURAL RESOURCES	4.5%
DOMESTIC EQUITY	2.25%

Yale targets a minimum allocation of 30% of the endowment to market-insensitive assets (cash, bonds, and absolute return). The university further seeks to limit illiquid assets (venture capital, leveraged buyouts, real estate and natural resources) to 50% of the portfolio.



JAMES BUNDY, ARTISTIC DIRECTOR
FLORIE SEERY, MANAGING DIRECTOR

October 28, 2020

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 FY2020 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.

In the 2019-20 season, Yale Rep produced the world premieres of Branden Jacobs-Jenkins's *Girls* and Will Eno's *The Plot* and the east coast premiere of Mary Kathryn Nagle's *Manabhatta*. The COVID-19 pandemic forced us to suspend all production activities at Yale Rep and Yale School of Drama as of March 12, 2020, and as a result, our productions of Lorraine Hansberry's *A Raisin in the Sun* and Kate Attwell's *Testmatch* were canceled. In response to the pandemic, a university-wide spending freeze was implemented, which decreased the overall commissioning and new play development activities supported by the Binger Center in FY2020.

Commissions

- No new commissions were offered in FY2020 due to the university-mandated spending freeze. Negotiations for Branden Jacob-Jenkins's commission, which began in FY2019, extended into FY2020. The final commission contract reflects the most current understanding of the project. Initially, it was expected to be a collaboration between Branden, Lileana Blain-Cruz, and Raja Feather Kelly. The finalized commission agreement lists Branden as the sole author.
- The following commissioned projects are currently in development: Ann Marie Healy's *The Availables*; Mary Kathryn Nagle's *A Pipe for February*, an adaptation of Charles Red Corn's novel; Leah Nanako Winkler's *The Brightest Thing in the World*; Harrison David Rivers's *The Salvagers*, and new plays by Sheila Callaghan, Miranda Rose Hall, and Susan Soon He Stanton. Before the pandemic altered our production plans, we were in discussions with Julie Marie Myatt to produce her commission *Esther, Frog Queen* in the 2020-21 season; we remain in conversation with Ms. Myatt about next steps for her play.
- After developing Caroline McGraw's *1983*, we chose not to option the project for production, and we released the play back to the author.

Workshops, Readings, and Residencies

In the first half of FY2020, we produced three workshops and three writer's residencies. We had been planning on a busy spring and summer of new play development, both in New Haven and New York City. The financial impact of the pandemic halted activities that involved hiring actors or additional collaborators for online workshops or development. Instead, the Yale Rep artistic staff offered dramaturgical support to our commissioned writers—many of whom met with us on Zoom calls to discuss their plays and share drafts. We also used the final months of FY2020 to plan ahead for how we could support playwrights in FY2021, a year which would be fundamentally altered by COVID-19. If our work had not been halted, we would have expected to have the same level of—or more—developmental activity in FY2020 as we did in FY2019.

- Writer's Residency: Sheila Callaghan (New Haven, July 2019)
- Workshop of *Girls* by Branden Jacobs-Jenkins (New York, July/August 2019)
- Workshop of *The Plot* by Will Eno (New York, August 2019)

- Writer's Residency: Mary Kathryn Nagle (New Haven, September 2019)
- Writer's Residency: Mary Kathryn Nagle (New Haven, November 2019)
- Workshop of *A Pipe for February* by Mary Kathryn Nagle (New Haven, February 2020)

New Play Production

Our plans for 2019-20 included four Binger Center supported productions in Yale Rep's season: *Girls* by Branden Jacobs-Jenkins, *The Plot* by Will. Eno, *Manabhatta* by Mary Kathryn Nagle, and *Testmatch* by Kate Atwell.

- *Girls* by Branden Jacobs-Jenkins ran at Yale Rep from October 4 to 29, 2019, and was directed by Lileana Blain-Cruz and choreographed by Raja Feather Kelly. Ben Brantley of the *New York Times* described this world premiere as "a latter-day variation of one of the strangest and most disturbing Greek tragedies, Euripides' *The Bacchae*...[turned] into a silly but serious revenge fantasy for all women who ever squirmed under the crushing weight of a patriarchy." Christopher Arnott, in the *Hartford Courant*, not only gave this "Euripidean rave...a rave review," but he heralded the adaptation as a part of Yale Rep's "winning streak for years with radical modern updates of revered theater classics."
- Will Eno's *The Plot* had its world premiere, directed by Oliver Butler, at Yale Rep from November 29 to December 19, 2019. The "deftly witty" play (*New Haven Independent*) was praised as "Eno's latest energizing, sardonic, deadpan and hilarious examination of crass human behavior and shattered dramas" (*Hartford Courant*).
- *Manabhatta* by Mary Kathryn Nagle ran at Yale Rep from January 24 to February 15, 2020. The production reunited Ms. Nagle with Laurie Woolery, who directed the world premiere of *Manabhatta* in 2018 at Oregon Shakespeare Festival. *Manabhatta* was the first play produced at Yale Rep by a Native writer. Throughout the production process, Yale Rep meaningfully engaged with local Nations and tribes in New England, as well as with the Indigenous community of Yale University. In the *New Haven Review*, Donald Brown noted that "the play's nimble overlaps urge us to relive these pivotal moments in our nation's history," and Broadway World heralded the play and production as "impressive."
- *Testmatch* by Kate Atwell was scheduled for its second major production, after its world premiere at San Francisco's American Conservatory Theater in fall 2019. Because of COVID-19, Yale Rep had to cancel the production days before rehearsals were scheduled to begin. Our creative team, by that point, had already designed the show, and our technical staff has already budgeted, drafted, and started to build the physical production.

Production Enhancement Fund

In FY2020, we received Production Enhancement Fund requests to support the FY2021 world premieres of two Yale Rep commissions: christopher oscar peña's *How to Make an American Son* and Dorothy Fortenberry's *The Lotus Paradox*. The productions were postponed due to the COVID-19 pandemic. If they are rescheduled, we anticipate approving both funding requests.

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.

The COVID-19 pandemic significantly impacted the activities of the Binger Center in FY2020, and it will continue to do so throughout FY2021.

Neither the Yale School of Drama nor Yale Rep will produce a season of plays in 2020–21, due to the ongoing incompatibility of theatrical production with best public health practices in response to COVID-19. Practical production work is a central tenet of the School's conservatory training; the three-year MFA program is being extended temporarily to a fourth year to best meet and overcome the current and inevitable future disruptions of the pandemic. Similarly, the one-year Technical Internship program will be extended by one semester. The School's next student recruitment cycle will be for admission in the fall of 2022.

The coronavirus pandemic demands of us that we slow down as never before, to care for our community while bringing our best selves to theater training. At the same time, the state of our nation and field calls us more urgently than ever to continuous work toward anti-racist pedagogy and practice, in order to prepare our graduates to lead in a more just and joyful profession for which we must altogether take responsibility now.

The cost to students of this additional year/semester will be underwritten entirely by the School. We have identified approximately \$3 million of savings in the 2021 fiscal year budget, which will be put in reserve to underwrite this endeavor. These savings are realized by the absence of production, as well as sacrifices borne by the entire community in the coming year. Faculty and management employee salaries have been frozen, and visiting faculty will be reduced by approximately 20% in 2020–21.

Curriculum and production planning for the coming year has slowed the pace of work and created more space for reflection. These adjustments offer our community an opportunity to continue training at a high level, while centering responsible self-care as an antidote to the exhaustion that many people regard as a field-wide norm and manifestation of a culture of white supremacy. Prior to COVID-19, our plan for FY2021 called for spending only five days each week in production, up until technical rehearsals. Our adjusted plans call for similar restraint in pursuit of a new paradigm, and include deeper investment in the anti-racism work that must be at the heart of our training, here at Yale, within our profession, and across the country.

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.

While making plans to offer a school year in which virtually all classes have moved online to proactively limit the risk of COVID-19 transmission in our community, we remain keenly aware of ongoing global violence against Black people: police brutality, overt anti-Blackness on the part of political leaders and in the media, and racism harming Black, Indigenous, and People of Color in public health, housing, education, employment, and many other aspects of daily life.

In the summer of 2020, we received the dauntless demands of the We See You White American Theatre collective (<https://www.weseeyouwat.com>) which, we are proud to say, includes many alumni and current faculty members of the School of Drama as signatories. We regard these demands as a generous contribution to the future well-being of our field, and as a vital launching

pad to initiate our own analysis with regard to planning a return to both production and in person training when public health practices permit.

We know there is much for our community to learn and unlearn. We have formed a committee of faculty and staff who will imagine and propose plans for the inclusive, equitable, and safe return to production at Yale School of Drama and Yale Repertory Theatre, with an emphasis on developing modes of production that do not depend upon or promote oppressive values or discriminatory practices, while proceeding based on best scientific evidence with respect to the COVID-19 pandemic.

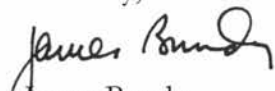
This committee's work will continue throughout the 20-21 academic year and will proceed in concert with our process to develop clear institution-wide, anti-racist policies and procedures enhancing recruitment, admissions, hiring, onboarding, and retention processes, largely based on the cultural assessment of the School and Yale Rep conducted by the consulting firm CookRoss in 2019-20.

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 FY2020 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

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.

Binger Center for New Theatre
Financial Report FY20

	FY2020 Binger Center Budget	FY2020 Other Sources Budget	FY2020 Center for New Theatre Budget Total	FY2020 Binger Center Actuals	FY2020 Other Sources Actuals	FY2020 Center for New Theatre Actuals Total
Income						
Binger Center Endowments	1,555,417		1,555,417	1,541,667		1,541,667
Robina Production Enhancement Funds	-		-	-		-
Other (Foundation, Individual, and University support) (1)		886,536	886,536		881,206	881,206
Grand Total Income	1,555,417	886,536	2,441,953	1,541,667	881,206	2,422,873
Expenses						
Artistic Office Salary and Benefits	338,644		338,644	465,525		465,525
Commissions (2)	71,250		71,250	63,750		63,750
Workshops, Residencies and Retreats (3)	105,050		105,050	34,190		34,190
Production Expenses	1,040,473	596,311	1,636,784	978,202	596,311	1,574,513
Enhancement Support (4)	-		-	-		-
YSD Playwriting Lecturers		144,226	144,226		138,896	138,896
YSD Key Staff Time (5)		145,999	145,999		145,999	145,999
Program Review			-			-
Grand Total Expenses	1,555,417	886,536	2,441,953	1,541,667	881,206	2,422,873

(1) Additional income for the project came from Beinecke Playwriting Residency endowment (\$57.7K), Carol Sirot Foundation for YRT3 (\$10K), NEA for YRT3 (\$30K) Center for New Theater endowment (\$34.8K)

(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. Fewer workshops than anticipated due to COVID-19.

(4) There were no expenditures from the Production Enhancement Fund in FY2020

(5) Key Staff Time reflects charging the following % of salary & fringe: 10% of Managing Director, 50% of Production Manager, 100% for YRT5 Actors and Nonpros

Binger Center for New Theatre
Yale Rep Commission History FY2006-FY2020

Year	Artist	Play	Result/Status	Subsequent Productions	Notes
FY2006	David Adjmi	<i>Marie Antoinette</i>	World Premiere 2012-13 at Yale Rep	more than 5	
FY2006	Hilary Bell	<i>Perfect Stranger</i>	Completed; Released to author		
FY2006	Marcus Gardley	untitled	In process		
FY2006	Naomi Iizuka	untitled	In process		Co-Commission with Huntington
FY2006	Anne Washburn	<i>The Octavia</i>	In process		
FY2007	Elizabeth Meriwether	untitled	In process		
FY2007	Octavio Solis	<i>Jonny Que-Onda</i>	Completed; Released to author		
FY2008	Adam Bock and Todd Almond	<i>We Have Always Lived in the Castle</i>	World Premiere 2010-11 at Yale Rep		
FY2008	Amy Herzog	<i>Belleville</i>	World Premiere 2011-12 at Yale Rep	more than 5	
FY2008	Kathryn Walat	<i>Creation</i>	World Premiere 2012-13 at Theatre @ Boston Court (LA)		
FY2008	Marisa Wegrzyn	untitled	In process		
FY2009	Will Eno	<i>The Realistic Joneses</i>	World Premiere 2011-12 at Yale Rep	more than 5	
FY2009	Marcus Gardley, Lear deBessonet, Todd Almond	<i>On the Levee</i>	World Premiere 2009-10 at LCT3		
FY2009	Ann Marie Healy	<i>The Availables</i>	In process		
FY2009	Dan LeFranc	<i>In the Labyrinth</i>	Completed; Released to author		
FY2009	Scott Murphy and Jay Reiss	<i>Meanwhile on the Other Side of Mt. Vesuvius</i>	Completed; Released to author		
FY2009	Robert Woodruff and Bill Camp	<i>Notes from Underground</i>	World Premiere 2008-09 at Yale Rep	2	
FY2010	Kirsten Greenidge	<i>Little Row Boat</i>	Completed; Released to author		
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>A Perfect Circle</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	<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>	Completed; Released to author		
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	

Year	Artist	Play	Result/Status	Subsequent Productions	Notes
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)	1	
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>	Completed; Released to author		
FY2014	Julie Marie Myatt	<i>Esther: 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>	Completed; Released to author		
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	Martín 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 Fasthose	untitled	In process		
FY2018	Miranda Rose Hall	untitled	In process		
FY2018	Basil Kreimendahl	untitled	In process		
FY2018	Harrison David Rivers	<i>The Salvagers</i>	In process		
FY2018	Leah Nanako Winkler	<i>The Brightest Thing in the World</i>	In process		
FY2019	Josh Wilder	untitled	In process		
FY2019	Marcus Gardley and Kimberly Hebert 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	untitled	In process		
Total Commissions:		71			
Pre-Robina (FY2006-FY2008):		11			
FY2009-FY2020:		60			
Produced:		24			
World Premiere at Yale Rep:		17			
World Premiere elsewhere:		7			
Completed, not yet produced:		19			
In process:		29			

**Binger Center for New Theatre Production History
FY2009-FY2020**

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 Hurac án</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>Manahatta</i> ++	2019-20	
TOTAL	4	
Yale Rep Commissions World Premiere Elsewhere & Funded by Binger Center		
<i>On the Levee</i> (LCT3)	2009-10	
TOTAL	1	
Yale Rep Commissioned Plays World Premiere Elsewhere		
<i>On the Levee</i>	LCT3 (New York City)	2009-10
<i>Creation</i>	Theatre @ Boston Court (Los Angeles)	2012-13
<i>Transfers</i> ++	MCC (New York City)	2017-18
<i>Lempicka</i>	Williamstown Theatre Festival (Williamstown, MA)	2018
<i>What Remains</i> ++	Fisher Center for the Performing Arts at Bard College	2016-17
<i>The Prisoner</i> ++	C.I.C.T. - Théâtre des Bouffes du Nord (Paris, France)	2017-18
TOTAL		6

**Binger Center For New Theatre
Production Enhancement Fund Expenditures FY2009-FY2020**

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 AWARDED			\$400,425

World Premiere Productions supported by the Binger Center at Yale Rep since 2008-09	28
New Plays (not World Premiere) supported by Binger Center at Yale Rep since 2008-09	4
World Premiere 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 had multiple productions	25

ENDOWMENT REPORT
to the
ROBINA FOUNDATION

July 2019-June 2020
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 6/30/2020:	\$22,175,020
Income Distribution/Expendable FY21	\$1,026,828

2. Binger Center for New Theatre Endowment Fund II

Original Investment:	\$2,194,203*
Principal:	\$718,522
Market Value as of 6/30/2020	\$953,385
Income Distribution/Expendable FY21	\$44,147**

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

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

Overall Endowment Performance for Fiscal Year 2020

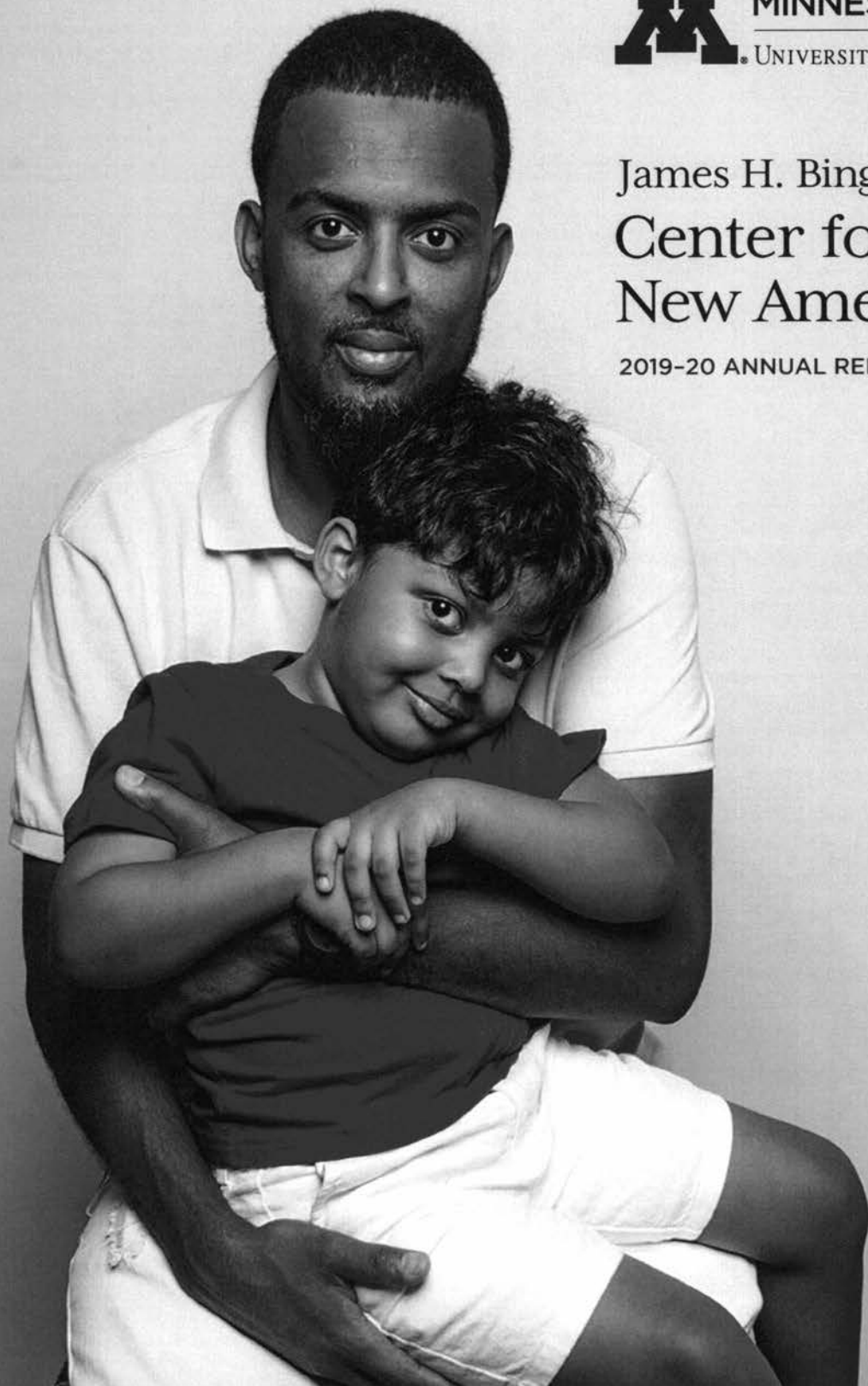
Yale's endowment earned a 6.8% investment return (net of fees) for the year ending June 30, 2020. The endowment value increased from \$30.3 billion on June 30, 2019, to \$31.2 billion on June 30, 2020.

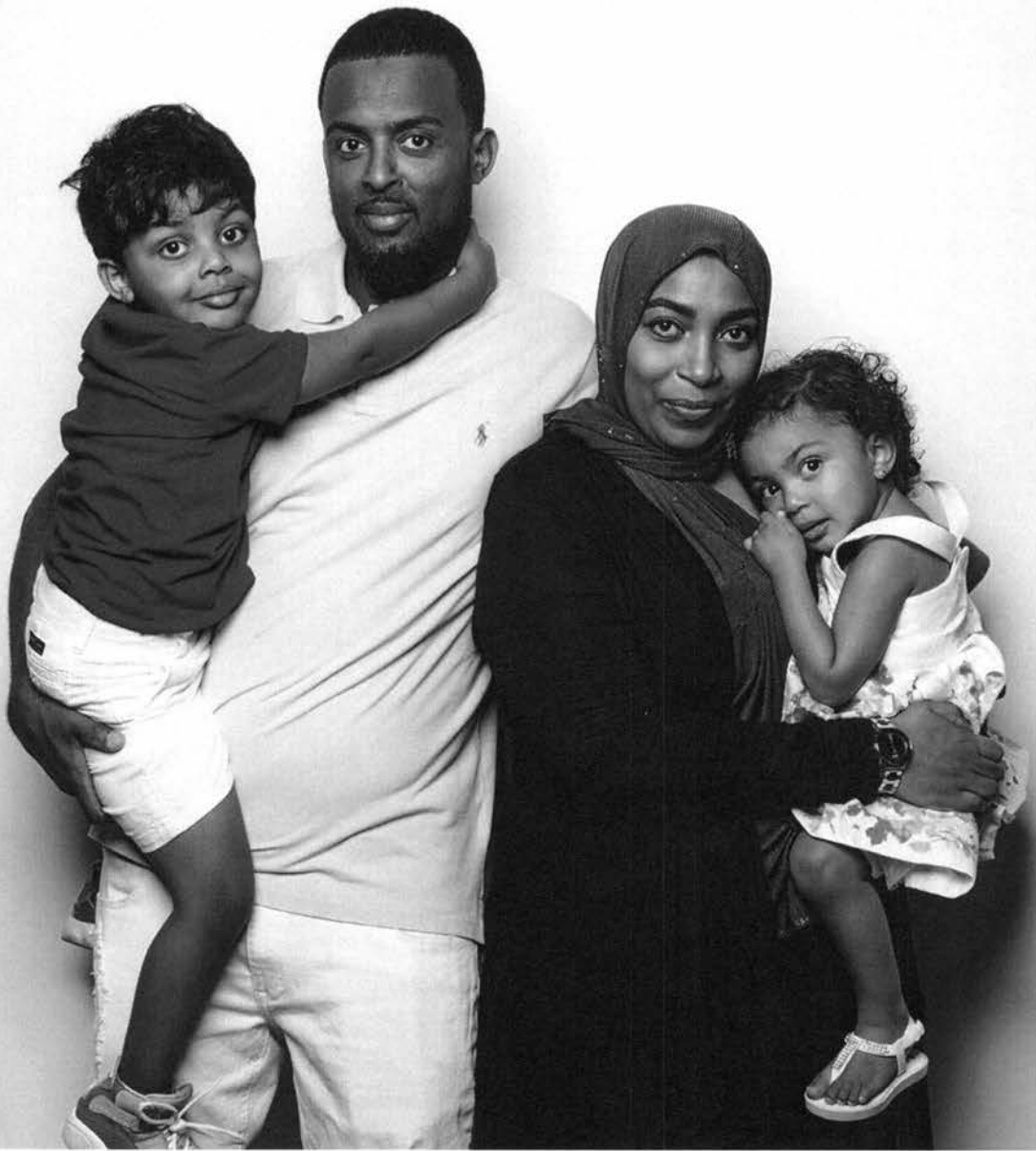
Spending from the endowment, which is the largest source of revenue for the university and supports faculty salaries, student scholarships, and other expenses, for Yale's 2021 fiscal year is projected to be \$1.5 billion, representing approximately 35% of the university's net revenues. Endowment distributions to the operating budget have increased at an annualized rate of 7.9% 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 10.9% per annum over the 10 years ending June 30, 2020, trailing broad market results for domestic stocks, which returned 13.7% annually, and exceeding results for domestic bonds, which returned 3.8% annually. Relative to the estimated 7.4% average ten-year return of college and university endowments, Yale's investment performance added \$9.6 billion of value in the form of increased spending and enhanced endowment value. During the 10-year period, the endowment grew from \$16.7 billion to \$31.2 billion.

James H. Binger
Center for
New Americans

2019-20 ANNUAL REPORT





In December 2017, **Rahim Mohamed** was put on a flight by the U.S. Immigration and Customs Enforcement (ICE) in Miami to be deported to Somalia. For the next 40 hours, Rahim and 91 other people were shackled to their seats, and several passengers endured excessive force and abuse at the hands of ICE before the flight aborted and returned to the U.S. The Center worked with partners in Florida to file a class-action lawsuit and won an order halting the deportation of the "Somali 92." From there, the Center coordinated efforts with local and national partners to reopen cases for class members. Rahim was represented by immigration attorney, Clinical Adjunct Professor Mirella Ceja-Orozco and the Binger Center, and released on bond after being detained for 15 months. Currently, he has several petitions filed with USCIS and the court.

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 Drinker Biddle & Reath, 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.

\$27.5M

In February 2017, the Law School announced a \$25 million gift from the Robina Foundation to permanently endow the Binger Center. The endowment is now at \$27.5M

BINGER CENTER AND PARTNERS



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.



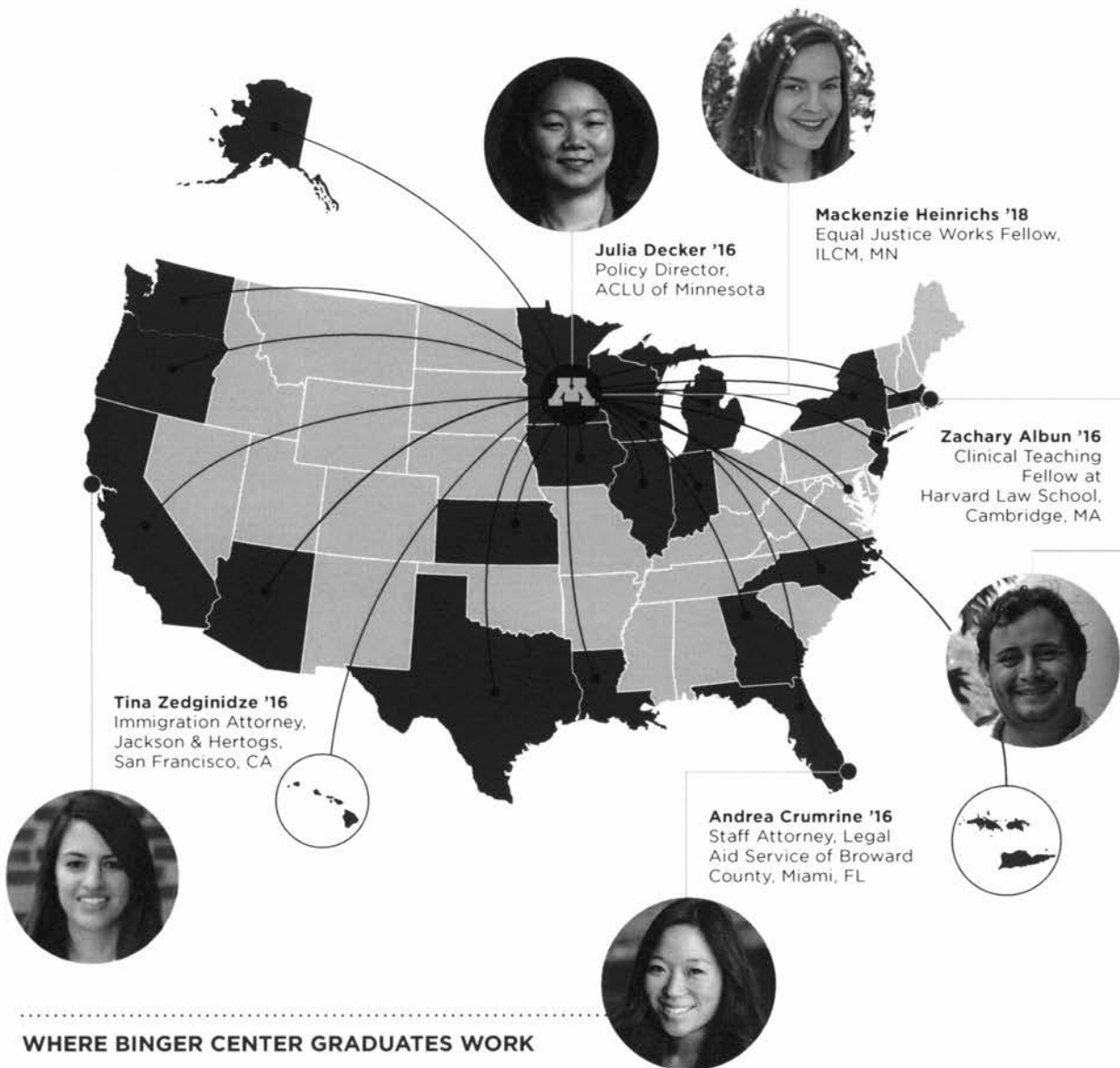
Racial Justice and Immigrant Rights in an Embattled America

This past year brought profound changes for many—the COVID-19 global pandemic transformed the way people work and live, and its devastating outcomes disproportionately fell on people of color, including immigrants in rural and urban Minnesota. Unfortunately, these disparities are not new. Ongoing racial inequalities plague many institutions in the United States, including the criminal justice, policing, health care, and addiction treatment systems. Increased xenophobia and deportation efforts add another layer to this inequitable environment.

When police officers killed Minneapolis resident George Floyd, another chapter in the national movement demanding justice and equity for Black men and women began. While this was a horrific and all too common tragedy, it ushered in a hopeful moment and garnered a great deal of momentum to influence individuals, political representatives, and institutions to take long-needed steps to understand and address their role in racially inequitable outcomes.

The Binger Center’s work is rooted in opposing systemic racism, particularly at the intersections of criminal, immigration and human rights law. The Binger Center’s faculty, staff, and students work alongside community members, nonprofit organizations, and grassroots movements to achieve reform of an immigration system with a long history of race-based exclusion influenced by white supremacy. This year, the Binger Center continued to successfully train law students to push forward in this hostile time to combat systemic racism. At the same time, the Center has regrouped its goals and challenged itself to do more, to go deeper and to connect across sectors in its effort to work for justice and dignity. The Center is inspired by this moment to push United States immigration law and policy to evolve so it fairly protects the rights of those it has left out.

BINGER CENTER GRADUATES MAKE AN IMPACT IN IMMIGRATION LOCALLY AND NATIONALLY



WHERE BINGER CENTER GRADUATES WORK

26 Immigration Law Firms

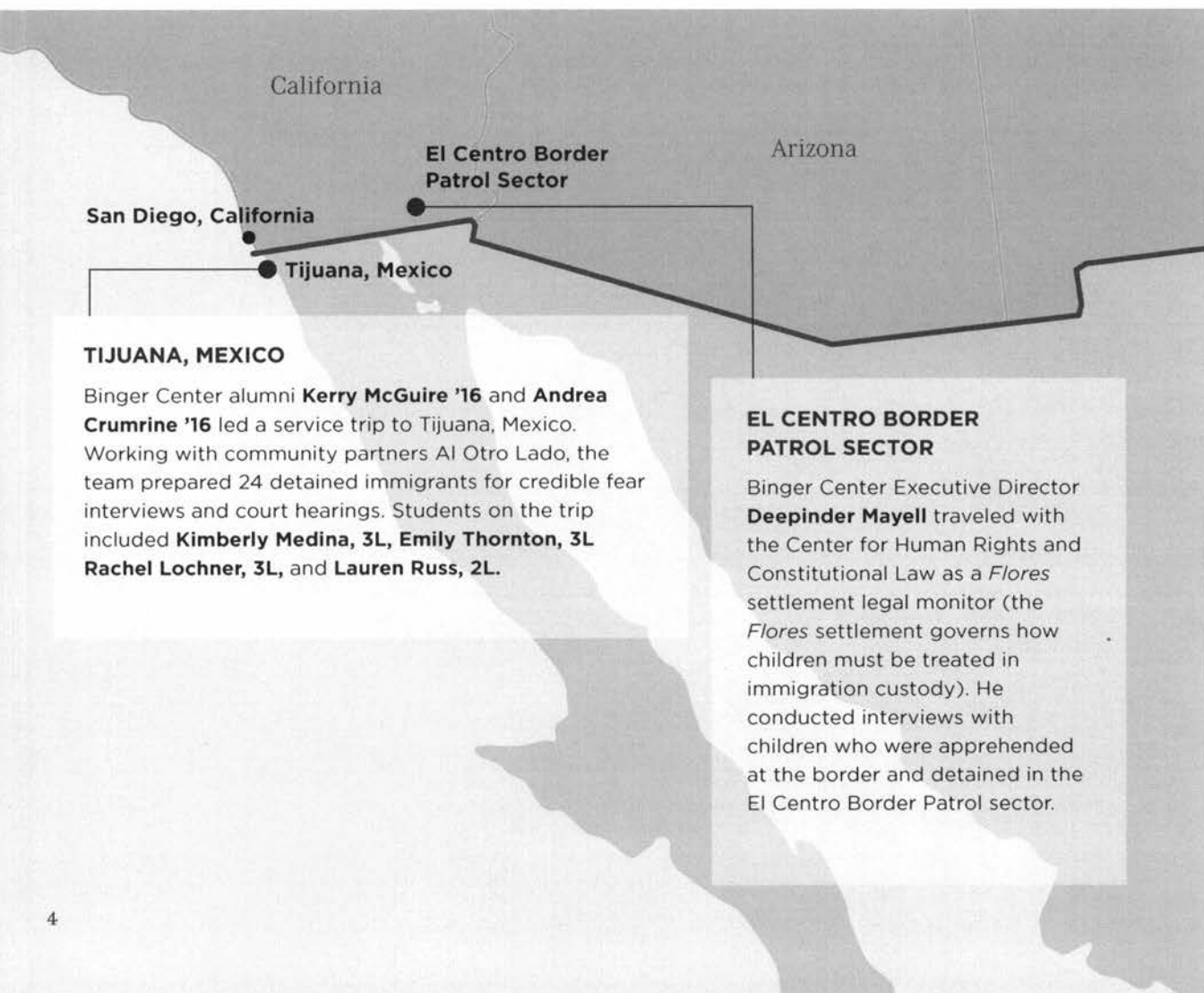
10 Government

33 Judicial Clerkships

29 Immigration Advocacy Organizations

Supporting Families in Crisis at the Southern Border

The Trump administration's "zero tolerance" policy was widely criticized as a gross violation of fundamental human rights. Families arriving at the southern border continue to be systematically turned away and denied the right to seek asylum. Those that are detained face abuse, lack of access to medical or legal services, and inhumane treatment in detention facilities. This year, Binger Center alumni, students, and faculty traveled to the southern border to provide legal representation to detained immigrants and mitigate the impacts of Trump's harmful policies.



TIJUANA, MEXICO

Binger Center alumni **Kerry McGuire '16** and **Andrea Crumrine '16** led a service trip to Tijuana, Mexico. Working with community partners *Al Otro Lado*, the team prepared 24 detained immigrants for credible fear interviews and court hearings. Students on the trip included **Kimberly Medina, 3L**, **Emily Thornton, 3L**, **Rachel Lochner, 3L**, and **Lauren Russ, 2L**.

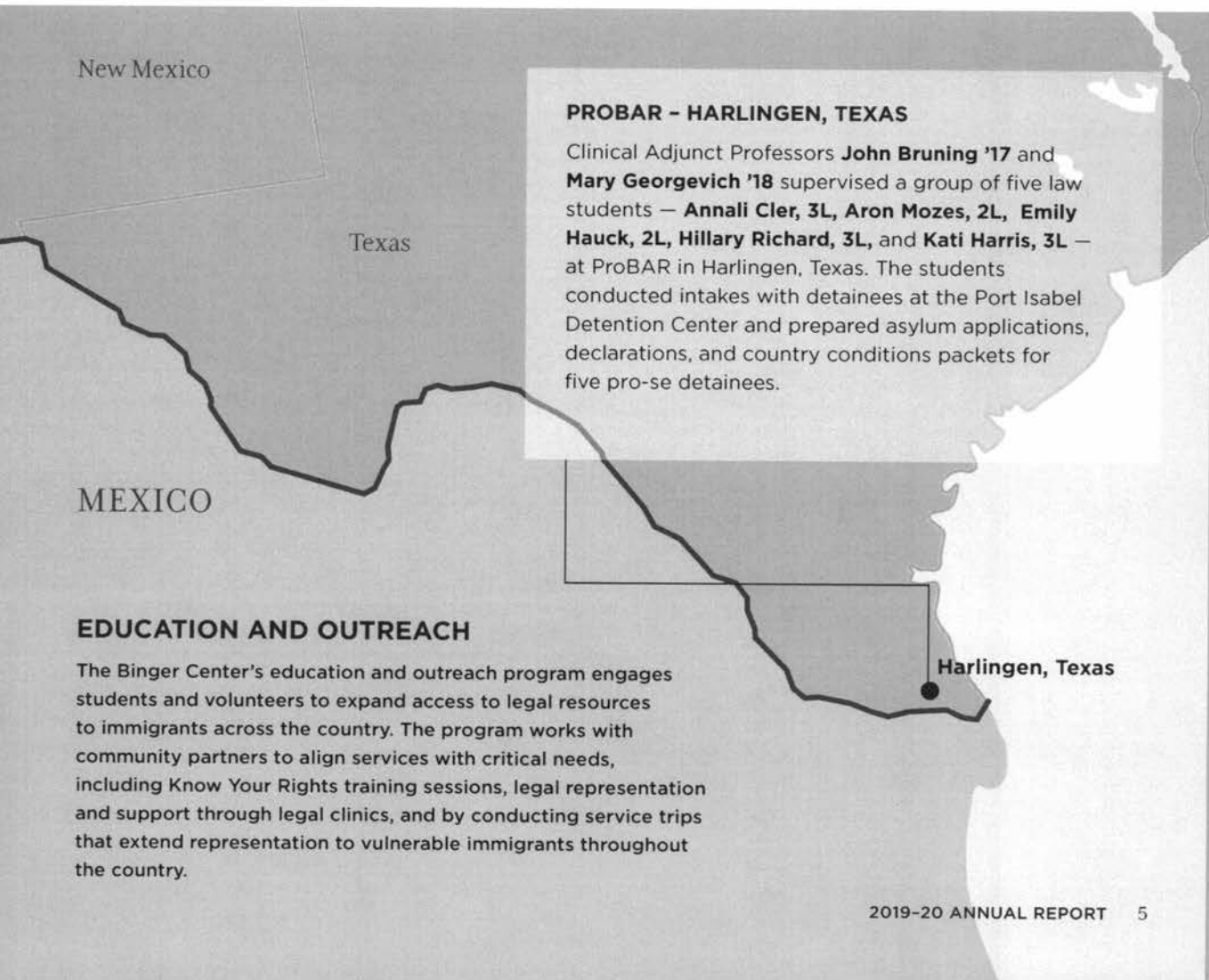
EL CENTRO BORDER PATROL SECTOR

Binger Center Executive Director **Deepinder Mayell** traveled with the Center for Human Rights and Constitutional Law as a *Flores* settlement legal monitor (the *Flores* settlement governs how children must be treated in immigration custody). He conducted interviews with children who were apprehended at the border and detained in the El Centro Border Patrol sector.



“What is happening at the southern border is nothing less than an American tragedy and one of the most inhumane policies in modern American history. It cannot be ignored, no matter how much we are told to look away.”

—DEEPINDER MAYELL, executive director, James H. Binger Center for New Americans, and director of the Rural Immigrant Access Clinic



PROBAR - HARLINGEN, TEXAS

Clinical Adjunct Professors **John Bruning '17** and **Mary Georgevich '18** supervised a group of five law students — **Annali Cler, 3L, Aron Mozes, 2L, Emily Hauck, 2L, Hillary Richard, 3L, and Kati Harris, 3L** — at ProBAR in Harlingen, Texas. The students conducted intakes with detainees at the Port Isabel Detention Center and prepared asylum applications, declarations, and country conditions packets for five pro-se detainees.

Harlingen, Texas

EDUCATION AND OUTREACH

The Binger Center's education and outreach program engages students and volunteers to expand access to legal resources to immigrants across the country. The program works with community partners to align services with critical needs, including Know Your Rights training sessions, legal representation and support through legal clinics, and by conducting service trips that extend representation to vulnerable immigrants throughout the country.



Above: **Allie Jo Mitchell, 3L**, **Kayla Hoel '19**, **Alicia Granse '19**, and **Yvie Yao, 3L** after arguing several cases at the U.S. Court of Appeals for the 8th Circuit in October 2019. In the past year, eight current students and recent graduates led oral arguments for six cases in federal court that they had briefed while enrolled in the Federal Litigation Immigration Clinic.

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 and Professor **Benjamin Casper Sanchez '97** and Visiting Assistant Clinical Professor **Kathy Moccio**, the clinic gives law students immersive training in collaborative and complex litigation at all levels of appeals.

Habeas Litigation Creates a New Pathway

The Binger Center's Habeas Litigation Project is led by Binger Center faculty, along with Visiting Clinical Professor and Immigration Advocacy Fellow **Nadia Anguiano-Wehde '17**, and clinical adjunct professors **John Bruning '17**, **Mary Georgevich '18**, and **Paul Dimick '19**. It is a groundbreaking collaboration that uses constitutional law in U.S. District Courts to demand the release of immigrant detainees held by ICE unlawfully. The project trains and supervises Federal Immigration Litigation Clinic and Detainee Rights Clinic students to lead complex habeas corpus petitions for clients who have been held jailed unconstitutionally, often without basic due process protections, and in many cases for prolonged periods measured in years.

In collaboration with the Binger Center's law firm partner Robins Kaplan, the project filed more than ten habeas corpus petitions for detained noncitizens in the U.S. District Court and won orders that eventually led to the release of virtually all of the clients in the past year. Without the help of the Binger Center, most of these clients would have remained in immigration custody to this day.



Professor **Benjamin Casper Sanchez '97** speaking with students and alumni at the Binger Center.

IMPACT LITIGATION BY THE NUMBERS

8

Binger Center students and graduates argued and led oral arguments for

6

cases in federal court.

27

new matters were handled in U.S. Circuit Courts in 2019-20.

The Binger Center and its partners handled

51

federal matters in 2019-20.



“My time with the clinic truly helped develop my passion for asylum work, empathy in advocacy, and perseverance.”

—BRITTANY TURANY, 3L, student director, Immigration and Human Rights Clinic, at the Fort Snelling Immigration Court, where she won asylum cases for two clients.

IMMIGRATION AND HUMAN RIGHTS CLINIC

The Immigration and Human Rights Clinic, led by Professor **Stephen Meili**, connects students with opportunities to represent asylum seekers in the United States, human trafficking victims, and immigrant detainees. Students in this clinic work with Professor Meili and Clinical Adjunct Professor **Emily Good '03**, of Legal Services State Support, to support clients from the stage of conducting an intake to representing their clients at hearings in immigration court. Students also gain experience in courtroom advocacy, community engagement, and legal writing.

Intensifying Attacks on Asylum Seekers in the U.S.

The Trump administration policies related to asylum seekers have been described by Amnesty International as “the most dramatic attempts yet to redefine who qualifies for this vital protection.” The administration’s Migrant Protection Protocols policy forced thousands of asylum seekers to wait in dangerous areas of Mexico while their claims were adjudicated in U.S. immigration court. Restricting access to entry into the U.S. exposes immigrants to physical violence, sexual assault, food shortage, and medical emergencies in overcrowded shelters.

Immigration and Human Rights Clinic students Brittany Turany, 3L, Kristina Tester, 3L, and Max Tsai, 2L, won a case in immigration court for a Nigerian man who faced persecution in Nigeria from Boko Haram, which targeted them because of their Christian faith. The victory set an important precedent for the urgency of granting asylum in an era when new legislation, such as expedited removal, has continually revoked protections for migrants fleeing violence in their home countries.

Students in the Immigration and Human Rights Clinic, along with Professor Stephen Meili, worked with the U.N. to release a report on how prolonged detention violates the Universal Declaration of Human Rights and the International Covenant on Civil and Political Rights. Students also worked with the Organization for Refugee, Asylum & Migration to release a report on persecution of the LGBT community in Honduras.



Students **Brittany Turany, 3L, Natacha Garcia '19** and **Emily Ortlieb '19**, and Professor **Stephen Meili** after arguing an asylum case at the Fort Snelling Immigration Court.

The Immigration and Human Rights Clinic represented

13

individuals in asylum cases in 2019–20 from

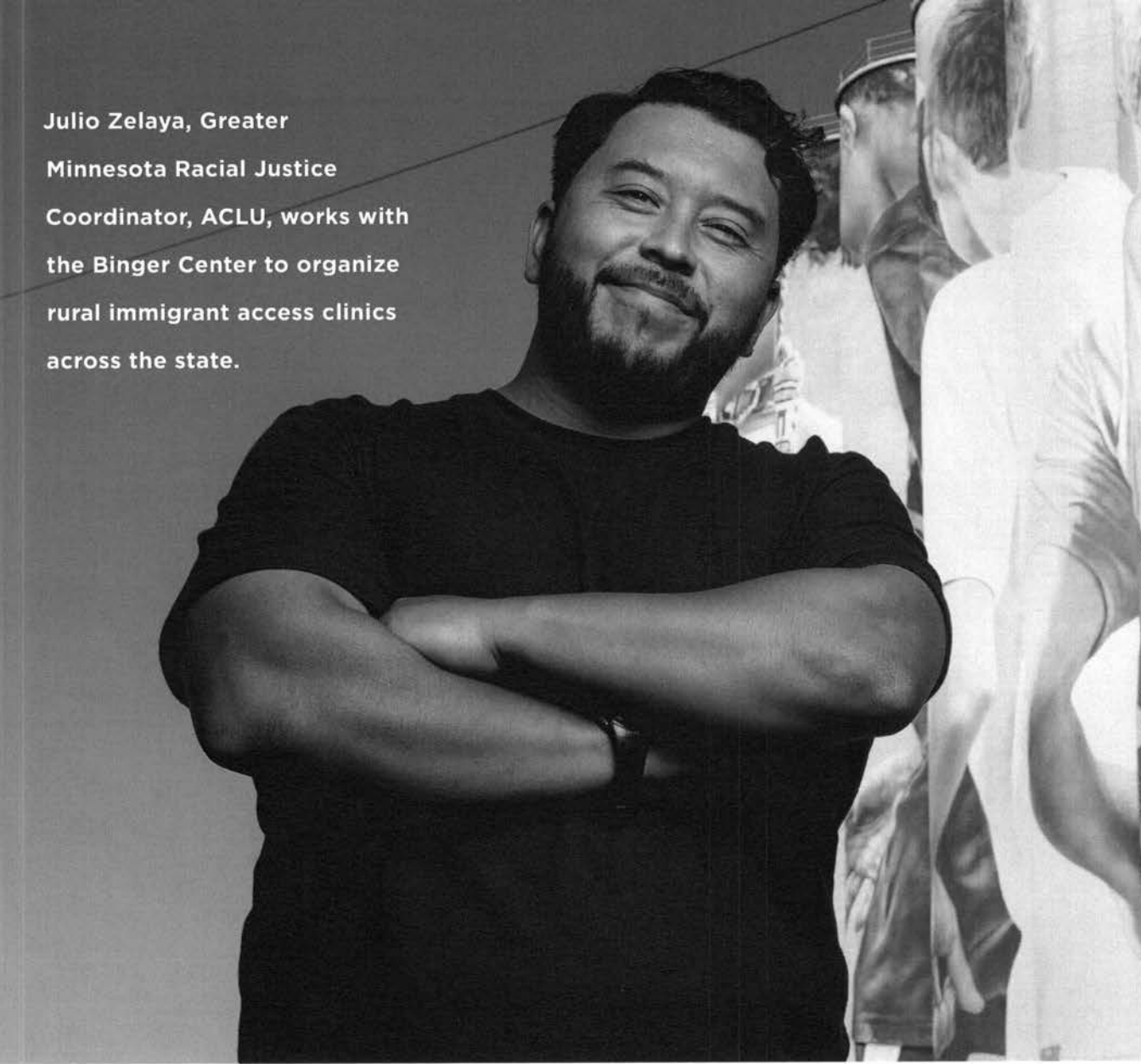
8

different countries:

El Salvador
Honduras
Mexico
Nigeria
Cameroon
The Gambia
Ethiopia
Kenya.

13

students participated in the Immigration and Human Rights Clinic in 2019–20.



Julio Zelaya, Greater Minnesota Racial Justice Coordinator, ACLU, works with the Binger Center to organize rural immigrant access clinics across the state.

RURAL IMMIGRANT ACCESS 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. Led by Binger Center executive director Professor **Deepinder Mayell**, 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 to identify potential avenues for immigration relief.

Reaching Immigrants in Rural Minnesota

There are an estimated 83,000 undocumented immigrants living in Minnesota, with increasing numbers of communities in rural parts of the state, where manufacturing and agriculture jobs make up the majority of the economy. This population is particularly vulnerable, with 62% of immigrant workers at meatpacking plants in Long Prairie, for example, being infected with COVID-19.

The Rural Immigrant Access Clinic expanded legal services in rural Minnesota and screened 60 immigrants in pop-up clinics in five towns, including Worthington, Perham, St. Peter, Little Falls, and Long Prairie. The team consisted of four law students enrolled in the Rural Immigrant Access Clinic, one social work intern, six student volunteers and four volunteer attorneys.

The team adapted to the pandemic and worked closely with the ACLU's Greater Minnesota Racial Justice Program, Asamblea de Derechos Civiles, and Fe y Justicia to utilize a mix of in-person and remote screening methods to provide much-needed services.

RURAL IMMIGRANT ACCESS CLINIC BY THE NUMBERS SINCE 2016

16

Towns in Minnesota and South Dakota

150

Referrals to Legal Partners

34

Volunteer Interpreters

24

Volunteer Attorneys

452

Individual Intakes

2K+

Miles Traveled

RURAL IMMIGRANT ACCESS CLINIC IMPACT

450+

screenings have taken place in rural areas across Minnesota and South Dakota since 2016.



MINNESOTA

Austin
Faribault
Jordan
Le Center
Little Falls
Le Sueur
Long Prairie
Madelia
Perham
Shakopee
St. James
St. Peter
Worthington
Windom

SOUTH DAKOTA

Brookings
Sioux Falls



The most important learning experience was the chance to sit one-on-one with clients, who were predominantly from Central America, for eligibility screenings.”

—EDUARDO CASTRO, 3L
Student Director, Detainee Rights Clinic

DETAINEE RIGHTS CLINIC

In 2013, given the desperate needs of detained immigrants in the region, the Binger 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 116 merits cases, increasing from 103 cases last year and 77 cases in 2018, with an overall increase of over 100%.** With the support and leadership of Professor **Linus Chan**, Visiting Assistant Clinical Professor **Kathy Moccio**, and Clinical Adjunct Professor **ThaoMee Xiong**, the Detainee Rights Clinic addresses one of the most significant unmet needs in our community.

Supporting Detained Noncitizens Amid a Public Health Crisis

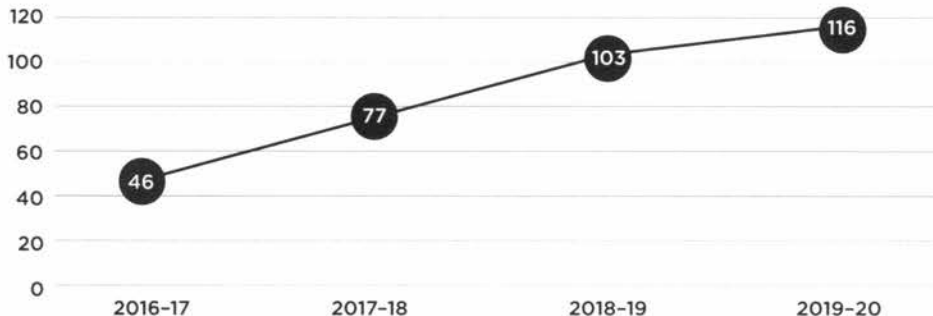
Detainees in county jails and detention centers face unsafe and hazardous conditions and the COVID-19 crisis exacerbated health concerns across the country. The Detainee Rights Clinic worked to support detained noncitizens in this challenging environment.

Detainee Rights Clinic students argued cases in immigration court and won bond for two clients. One client feared returning to Mexico based on gender identity, and another was a survivor of domestic violence who was separated from her toddler for months. Being released on bond is a critical step in deportation defense, as it facilitates access to legal counsel and allows immigrants to argue the injustice of their sentence in court.

The Clinic also partnered to build the Medical Legal Collaborative, which connects students, professors, health professionals, and community members to integrative health clinics that focus on wraparound support of immigrants. During the last year, the one-of-a-kind collaborative joined the cities of Minneapolis and St. Paul to host roundtables that, for the first time, brought together individuals and organizations from across sectors to address obstacles to wellness faced by immigrant communities. Students also volunteered at La Clinica to provide immigration information to clinic patients.

REPRESENTING THE MOST VULNERABLE

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



11
legal orientation
presentations
reached
more than
200
detainees
in 2019-20.

The Detainee
Rights Clinic
and its partners
represented
116
detained
immigrants
for full
representation, a

100%
increase
since 2017.



Luis Cortes Romero, one of the lead attorneys in the historic legal battle over the Trump administration's effort to terminate the Deferred Action for Childhood Arrivals (DACA) program, spoke to the University of Minnesota Law School community in November 2019 and provided a firsthand account of the November 12 oral arguments before the U.S. Supreme Court. **Abyan Gurase, 3L**, and **Michelle Cardona Vinasco, 3L**, also led briefing and presented oral argument last November in the 8th Circuit asylum case *Uzodinma v. Barr*, which was co-counseled with Luis Cortes Romero.

700K

DACA RECIPIENTS IN THE U.S.

200K

DACA RECIPIENTS ARE ESSENTIAL WORKERS



Karen Musalo, professor and director for the Center for Gender & Refugee Studies at Hastings College of Law, giving the keynote address at the Binger Center's 2019 annual forum.

Bringing the Community Together and Moving Forward

2019 Immigration Law Forum: Immigrants' Rights Under Siege and the Road Ahead

The 2019 annual forum brought together activists, advocates, and lawyers to address intensifying efforts to dehumanize and deport immigrants and asylum seekers.

DACA at the U.S. Supreme Court: An Inside-the-Court Account

Luis Cortes Romero, one of the lead attorneys in the class-action litigation at the U.S. Supreme Court that blocked the administration from ending DACA, joined the Binger Center to share an insider perspective about litigating during this time.

Supporting Detained Clients in the Time of COVID-19

In response to the growing challenges facing detained immigrants during the COVID-19 pandemic, the Center and its partners conducted a virtual panel on communicating with and representing clients during this time.

More than
860
participants in
Binger Center
events in 2019-20.

15
students were
student directors
in four clinics
in 2019-20.

9
students took
experiential
service trips
in 2019-20.

“Participating in the Federal Immigration Litigation Clinic made me realize the powerful change that is possible through strategic and coordinated impact litigation and solidified my intent to dedicate my career to immigration law.

**—SEIKO SHASTRI, 2L, student director,
Federal Immigration Litigation 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 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
Federal Litigation Immigration Clinic



Kjerstin Yager
Former Education and Outreach
Program Coordinator



Marcaill Distant
Community Outreach and
Program Coordinator



Lorena Anderson
Executive Office and
Administrative Specialist

Awards and Recognition

Deepinder Mayell
was appointed member of
the Legal Services Advisory
Committee

Linus Chan
was named the National
Immigration Project 2020
Member Honoree of the Year

Benjamin Casper-Sanchez
was honored to receive the
Minnesota Hispanic Bar
Association's Access to
Justice Award

Stephen Meili
was named the Inaugural James H.
Binger Professor in Clinical Law

Selected Publications

Linus Chan
"How Crime-Based Deportations
Undermine State Sovereignty
and Community Rehabilitation,"
1 *AILA Law Review* 2 (2019)

Stephen Meili
"Constitutionalized Human Rights
Law in Mexico: Hope for Central
American Refugees?," 32 *Harvard
Human Rights Journal* 103 (2019)



MINNESOTA LAW

UNIVERSITY OF MINNESOTA

LAW.UMN.EDU/JAMES-H-BINGER-CENTER-NEW-AMERICANS

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