

UC Law SF

## UC Law SF Scholarship Repository

---

2024 Board of Directors Agenda and Materials

Board of Directors Agenda and Materials

---

2-22-2024

### **Advancement & Communications Committee Meeting - Open Session Book 02/22/2024**

UC Law SF

Follow this and additional works at: [https://repository.uclawsf.edu/board\\_materials\\_2024](https://repository.uclawsf.edu/board_materials_2024)

---

**Advancement & Communications Committee Meeting**

University of California College of the Law, San Francisco  
200 McAllister St., 2nd floor – Alumni Reception Center San Francisco, CA 94102  
Feb 22, 2024 9:00 AM - 10:15 AM PST

**Table of Contents**

1. Roll Call

2. Public Comment

3. Action Item: Approval of Prior Meeting Minutes.....2

4. Report of Chief Communications Officer

5. Report of Chief Development Officer Eric Dumbleton

    5.1. Endowment Overview.....7

    5.2. Campaign Update.....22

    5.3. Naming Opportunities .....33

    5.4. Foundation Board Initiatives Update

    5.5. Alumni Engagement Update

6. Adjournment



## Advancement & Communications Committee Meeting Minutes

University of California College of the Law, San Francisco  
November 9, 2023

UC College of the Law, San Francisco, Deb Colloquium Room, 333 Golden Gate Avenue, San Francisco, CA 94102. Participants and members of the public were also able to join via the web link or dial-in numbers listed in the public notice of this meeting linked here:

<https://www.uchastings.edu/our-story/board-of-directors/board-meeting-notice-agendas-and-materials/>.

### 1. Roll Call

The Chair called the meeting to order at 9:04 a.m., and the Secretary called the roll.

#### Committee Members Present

Director Shashi Deb, Chair  
Director Andrew Giacomini  
Director Andrew Houston  
Director Mary Noel Pepys

#### Committee Members Absent

Director Courtney Greene Power  
Director Chip Robertson

#### Staff Participating

Chancellor & Dean David Faigman  
General Counsel & Secretary John DiPaolo  
Chief Development Officer Eric Dumbleton  
Legal & Executive Assistant Yleana Escalante  
Assistant Chancellor & Dean/Chief of Staff to the Chancellor & Dean Jenny Kwon  
Provost & Academic Dean Morris Ratner  
Executive Director, UC Law San Francisco Alumni Association Meredith Jaggard  
Chief Financial Officer David Seward  
Deputy General Counsel Laura Wilson-Youngblood

### 2. Public Comment

The Chair invited for public comment. No member of the public offered comment.

### 3. Approval of Prior Meeting Minutes

#### **Motion:**

The Chair called for a motion to approve the minutes of the Committee's August 24, 2023 meeting.

Motion made and motion seconded. The motion carried.

4. Report of Communications Office

Director Deb remarked on how UC Law has been on the move with media from the opening of the Academe at 198 and the relaunching of the alumni magazine. She thanked Dean Kwon for her ongoing efforts in managing the communications team during the vacancy of the communications director position. She also thanked the entire communications team for their additional work and effort.

Dean Kwon said the administration is vigilantly searching for the next head of communications. It has been posted as an executive director title, which she hopes will expand the candidate pool over a chief officer title. She added that she continues supervising the Communications team, and Dean Ratner and Associate Dean for Library and Technology Camilla Tubbs are also supervising some key projects.

Dean Kwon said the College has hired a firm called Underground to do external marketing for the College on the name change. For phase one the target audience is key law firms in California where UC Law SF students tend to have an interest in working, public agencies like public defenders, district attorneys, and US attorneys, and the broader academic realm. The outreach is going to include a variety of modalities such as social media, email campaigns, print ads and direct mailers. She said that the fall magazine has arrived at mailboxes of alumni and judges across the country. It will reach government officials at the end of October. She thanked Mr. Dumbleton, Ms. Jaggard and Director Robertson for their contributions. She added that they have only gotten positive feedback on the magazine.

Dean Kwon showed the final proofs of the city banners. She said that each of the navy banners will be paired with a gold banner. She hopes that installation around the city will start before the end of the calendar year.

Dean Kwon discussed the national reputation campaign, led by Dean Ratner and Professor Dave Owen. It has expanded into a year-round reputational campaign. She added that communications team members Lydia Xiao and Nick Iovino continue to work hard on the social media push.

Director Deb asked how they are measuring the impact of the national reputation campaign besides anecdotal evidence. Dean Kwon said they are able to track email open rates. Dean Ratner said that it is a great question because the measures are difficult. He said that one of the measures they can use is the impact on US News overall peer assessment and lawyer-judge assessment scores and on specialty rankings, which have improved. He said that another objective of the campaign is to

attract new faculty and students, but those are hard to measure because they are hard to link. He added that they have gone from sending one excellence email to sending out multiple emails over the course of the year to various audiences. He said that the strategic plan initiative to build centers of excellence aligns nicely with the national reputation effort because centers are natural nodes for people to learn about what the College is doing.

Director Giacomini suggested interviewing incoming students about how all of the communications effort was received by them.

Dean Faigman said he loves the idea of surveying and talking to incoming students, but a lot of them decide where to apply based on general reputation. He added that there are other constituencies to pay attention to, law firms in particular, because they are going to be the destination for graduates, as well as alumni, granting foundations, and peer faculty. The College wants to be seen as prestigious and competitive.

Director Deb thanked the Dean and Director Giacomini.

Mr. DiPaolo commented that Dean Kwon's work taking on communications leadership into her already huge portfolio, all of which she executes with excellence has been amazing to see. He said he deeply appreciates her and admires her as a colleague.

Director Pepys echoed those comments and said the presentation was superb.

Dean Faigman said Dean Kwon is phenomenal in anything she does.

## 5. Report of Chief Development Officer

### 5.1. FY09-23 Fundraising Results

Mr. Dumbleton showed the fundraising trajectory back to FY09 to show how far the College has come. He started in September 2015, and FY19 was the first year that they broke through the \$10 million mark. He credited Dean Faigman's vision and leadership. He said that they have now eclipsed \$10 million each of the past five fiscal years. He said that the spikes in funds raised represent the closing or receiving of large commitments, whether they be pledges or large one-time gifts. He said that they want to keep the bar moving upward, and they need those spikes because they mean the team is closing large gifts.

### 5.2. Comprehensive Campaign Update

Mr. Dumbleton said there was a very productive campaign cabinet meeting on September 18. There was a deep dive on endowments and how to pitch endowment to potential donors. Mr. Seward was present to help drive the conversation. They are working on collateral materials for members of the cabinet. He said that the idea is that there is so much to sell about the College, but sometimes it is a bit of a challenge to harness all of that in digestible ways, so

the materials will assist in that. He added that the number one priority is gifts from the campaign cabinet. They have spoken with and solicited every individual on the campaign cabinet with the exception of one. Additional priority conversations and solicitations are taking place with members of the Foundation board and the Board of Directors. He concluded by saying that he anticipates presenting a numerical update on the campaign next March.

Director Deb asked if there is a timeline on the collateral materials. Mr. Dumbleton said he expects to have that done by the end of the calendar year.

### 5.3. Events Recap

Mr. Dumbleton showed pictures of the ribbon cutting.

Ms. Jaggard said there was a pop-up shop on campus, for the second time. They sold about \$10,000 worth of merch in about an hour and a half. They are working with class leaders to figure out what the students want and have more of it on campus. In response to a question from Director Houston, Ms. Jaggard said 120 students donated \$5 or more to the school for the 20 percent discount.

Ms. Jaggard showed pictures of the Martinis by the Dean event, which she said was well-attended and well-received.

### 5.4. Foundation Board Initiatives Update

Mr. Dumbleton said that the class agent initiative soft launched with 10 classes. He said that he and his team are continuing to recruit class agents. The first message went out last week and they had positive responses so far. He said that they are going to continue to collect feedback but reported that the initiative is off the ground. He expressed particular thanks to Briana Meadows, who is a part-time employee with the Advancement team and does a lot of work behind the scenes, and to the IT department.

### 5.5. Alumni Engagement Update

Ms. Jaggard said that Giving Tuesday is November 28<sup>th</sup>, and they are hoping to raise over \$250,000. It is a community effort by alumni, faculty, staff, and students. She said that a lot of the chapters and affinity groups are getting together. The West LA, LA, Austin, Denver, and San Francisco chapters will have holiday gatherings during the first two weeks of December.

She said that Spring Week has won four awards in the past few months. It won a bronze medal internationally out of 4000 applicants, third for the Alumni Relations initiative, and first place in the College's district.

She said that this summer the alumni engagement team presented to over 50 universities worldwide about Spring Week and there was lots of interest.

Mr. Dumbleton thanked Ms. Jaggard and congratulated her on this accomplishment.

Director Houston asked for calendar invites for Spring Week. He asked Mr. Dumbleton if there will be an uptick in donations before the calendar year ends.

Mr. Dumbleton said yes, due to the tax calendar. He said that they will be sending a holiday card from the same illustrator as the magazine and a soft solicitation.

6. Adjournment

The Chair adjourned the meeting at 10:04 a.m.

Respectfully submitted,

---

John K. DiPaolo, Secretary

# Endowment Overview

## UC Law SF & Foundation

February 2024





# Gift Types: Endowed versus Current Use

---

- Endowed gifts are contributions that are invested by the organization, and only a portion of the investment earnings are used each year to support the designated purpose.
- The initial gift remains intact, while the organization benefits from the investment returns in perpetuity.
- Endowments often fund scholarships professorships, or specific programs.
- They provide long-term stability but may limit immediate spending flexibility.

# Gift Types: Endowed versus Current Use

---

- Current use gifts are donations that are used entirely or almost entirely within a short time frame, usually in the fiscal year they are received.
- The gifts provide immediate support for ongoing operations, projects, or initiatives.
- Current use gifts are typically spent directly and do not generate investment income for future use.
- They offer organizations more flexibility to allocate funds according to current needs.

# The Importance of Endowment Building

---

- **Long-term Sustainability:** An endowment provides a stable and reliable source of income, ensuring the organization's longevity and ability to fulfill its mission over time.
- **Financial Security:** Endowments act as a financial safety net during economic downturns or fluctuations in donations, allowing the organization to continue its work uninterrupted.
- **Program Enhancement:** A well-funded endowment enables the organization to enhance and expand its programs, invest in research, and innovate in pursuit of its goals.

# The Importance of Endowment Building

---

- **Attracting Talent:** With a strong endowment, the organization can offer competitive salaries and benefits, attracting top-tier talent to lead and operate the organization effectively.
- **Flexibility:** If unrestricted, endowment funds can be allocated to areas of greatest need or emerging opportunities, providing flexibility in resource allocation
- **Credibility:** A sizable endowment enhances the organization's reputation, making it more appealing to potential partners, supporters, and stakeholders.

# Comparative Law School Endowments

## ABA Data - 2019

---

<u>Law School</u>	<u>Total</u>	<u>USN&amp;WR Rank</u>
HARVARD	\$ 2,022,000,000	3
STANFORD	872,397,835	2
VIRGINIA	584,170,581	8
MICHIGAN	486,061,480	10
UC BERKELEY	348,205,104	9
UCLA	200,297,000	14
GEORGE WASHINGTON	124,389,074	27
FORDHAM	121,259,478	35
LOYOLA MARYMOUNT - LOS ANGELES	95,415,471	72
PEPPERDINE	90,220,105	46
UC HASTINGS *	58,006,522	50
UC IRVINE	21,511,990	35
UC DAVIS	13,622,758	35

\* Includes Blum Foundation apportionment.

# Comparative Law School Endowments 2023 Survey Data

---

The University of Texas at Austin Law School	393,000,000
Vanderbilt	269,000,000
University of Minnesota Law School	205,000,000
New York Law School	180,000,000
SMU (Dedman)	177,000,000
The University of Washington School of Law	147,000,000
Albany Law School	85,000,000
Emory University School of Law	80,000,000
Indiana University Maurer School of Law	60,000,000
Alabama	50,000,000
University of the Pacific, McGeorge School of Law	45,300,000
Rutgers Law School	44,700,000

# Convincing Donors to support Endowment Building

---

- **Impactful Legacy:** Emphasize that contributing to the endowment creates a lasting legacy, leaving a mark on the UC-Law SF's future in being a leader in legal education.
- **Perpetual Giving:** Highlight that an endowment gift keeps giving indefinitely, enabling the donor's support to have an enduring impact.
- **Financial Stewardship:** Position the endowment as a responsible way to manage funds, ensuring UC Law SF's financial health and sustainability.

# Convincing Donors to support Endowment Building

---

- **Naming Opportunities:** Offer opportunities for donors to have their name associated with an endowment, acknowledging their significant gift.
- **Matching Gifts:** Be creative, and promote the idea of matching gifts, where UC Law SF could match a portion of the donor's contribution, effectively multiplying the impact.
- **Regular Updates:** Assure donors that they will receive regular updates on UC Law SF's use of the donated funds and the impact their gift is having.



## UC Law SF – Relationship with UC Investments

- UC Investments manages a portfolio of investments totaling approximately \$161 billion, which includes retirement, endowment, and cash assets.
- Since 2015, UC Investments has integrated material environmental, social and governance risk factors into the investment process to improve the ability to calculate risk-adjusted returns.
- UC Law SF elected to invest its funds with the University of California in the early 1990's.
- The College invests its funds in the General Endowment Pool (GEP). Performance has been favorable over a long-term time horizon:

### GEP STIP UNIT VALUE RETURN SUMMARY REPORT

	Account ID	EMV	1 Month	3 Month	6 Month	FYTD	CYTD	1 Year	3 Year	5 Year	10 Year
<b>TOTAL FUND</b>											
GEP Unit Value Audit Adjusted	EBKAG1UB	20,741,813,189	3.76	4.61	7.87	8.20	7.87	8.20	10.17	8.72	8.77
GEP TOTAL PORTFOLIO BM AUDIT ADJUSTED	REG44B		3.76	4.51	9.91	12.02	9.91	12.02	9.68	7.51	7.59

## UC Investments – Investment Pools

---

- The General Endowment Pool (GEP) is the Regents' primary investment vehicle for endowed gift funds. The GEP is a balanced portfolio of equities, fixed-income securities, and alternative investments that provides diversification and economies of scale in the investment process to participants.
- The Short-Term Investment Pool (STIP) is a cash investment pool. STIP allows fund participants to maximize the returns on their short-term cash balances by taking advantage of the economies of scale of investing in a larger pool. STIP consists primarily of current funds slated for payroll and operating expenses for all UC campuses and medical centers.
- The Total Return Investment Pool (TRIP), allows Campuses to maximize return on their long-term working capital, subject to an acceptable level of risk, by taking advantage of the economies of scale of investing in a larger pool and investing across a broad range of asset classes.

# Endowed Funds – UC Law & Foundation

## As of December 31, 2023

### College

	Restricted Net Position		Unrestricted Net Position	Total
	Nonexpendable	Expendable		
Endowments	\$ 20,181,512	\$ 18,164,681	\$ -	\$ 38,346,194
Funds functioning as endowments	-	-	14,653,534	14,653,534
Endowment assets held by others	6,947,549	-	-	6,947,549
College's endowments	<u>\$ 27,129,061</u>	<u>\$ 18,164,681</u>	<u>\$ 14,653,534</u>	<u>\$ 59,947,276</u>

### Foundation

	Restricted Net Position	
	Nonexpendable	Expendable
Foundation's endowments	<u>\$ 178,755</u>	<u>\$ 404,612</u>

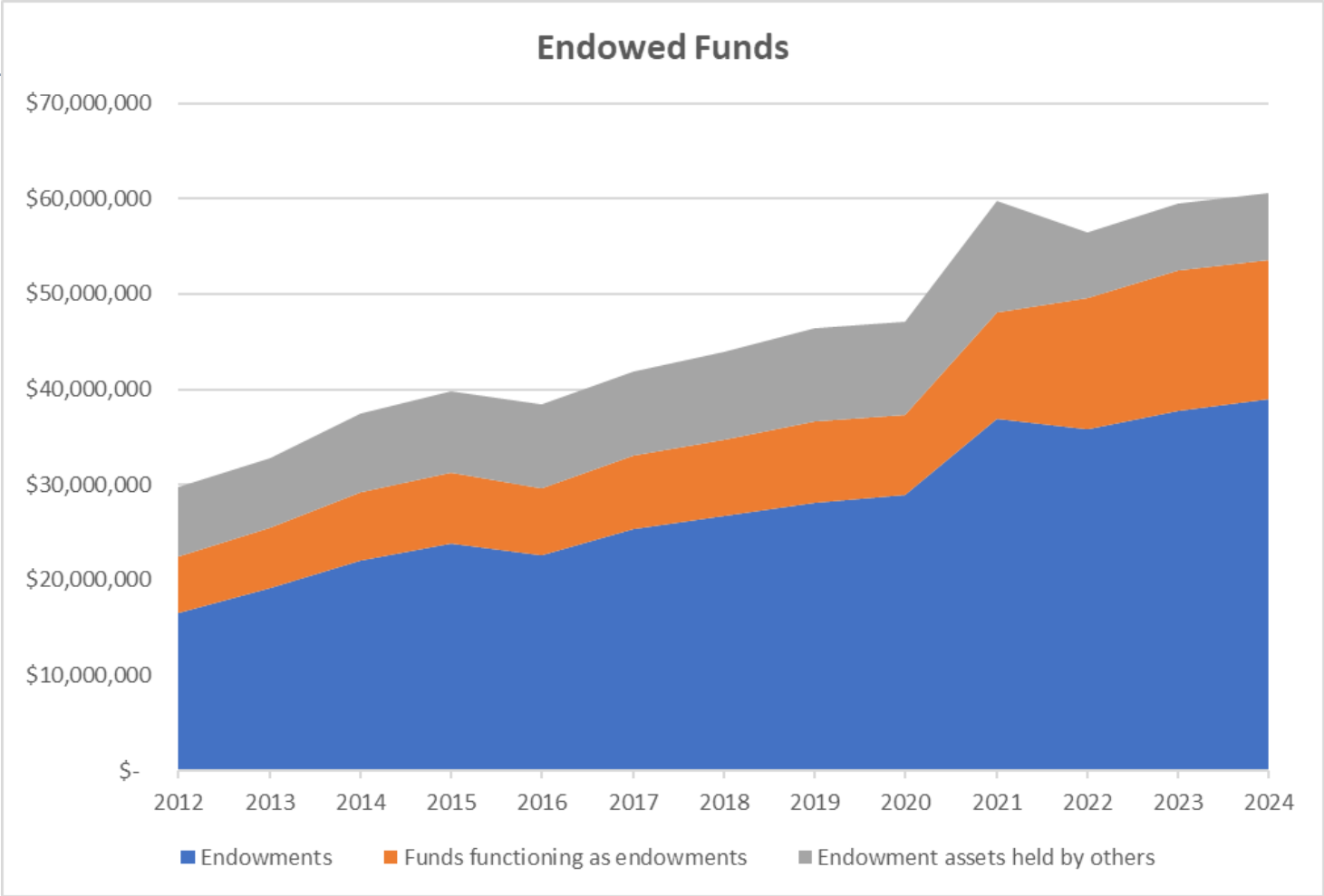
# Endowment by Function – UC Law & Foundation

- Endowments support a broad range of activities:
  - Financial Aid Awards - Scholarships and Grants (53.5%)
  - Instruction and Research - Professorships and Faculty Support (32.1%)
  - Institutional Support – General Operations and Decanal Support (14.4%)
  
- UC Hastings endowment is dedicated to the following functions:

Combined by Function	2023			
	Instruction and Research	Institutional Support	Financial Aid Awards	Total
Endowments	\$ 15,930,235	\$ 1,455,540	\$ 20,353,490	\$ 37,739,265
Foundation Endowments	-	587,302	-	587,302
				<b>\$ 38,326,566</b>
Quasi Endowments	3,363,429	6,575,733	4,812,895	14,752,056
Endowments assets held by others	-	-	6,947,549	6,947,549
<b>Total</b>	<b>\$ 19,293,663</b>	<b>\$ 8,618,575</b>	<b>\$ 32,113,933</b>	<b>\$ 60,026,171</b>

# Total Endowment - UC Hastings & Foundation

## 2012-2024



# Questions?

# *The Campaign for UC Law San Francisco*



# COMPREHENSIVE CAMPAIGN SUMMARY

- \$100 million goal
- Focus on building the school's endowment
- Currently in the quiet phase of fundraising (began July 1, 2021)
- \$46.8 million raised through February 15, 2024
- Target of minimum \$60 million raised by March 1, 2025
- Concentrate stakeholders on key priorities associated with expected outcomes
- Supporting the school and the neighborhood/SF (expanding prospective donor base)



# CAMPAIGN PRIORITIES

- Student Scholarships – Attract and retain the best & the brightest students
  - Ease student indebtedness
  - Enhance competitive position for student recruitment
  - Retention of highest achieving students
  - More competitive recruitment/higher retention = higher bar passage
- Faculty Chairs & Professorships – Attract and retain renowned faculty
  - Enhance competitiveness of salaries to better attract and retain faculty
  - Funding for travel, research assistants, and release time for scholarly work
- Program Enhancements – Capitalize on our location & cutting-edge issues
  - Enhance the cutting-edge research and work being spearheaded by our Centers via increased funding of faculty and students
  - Attract and retain talented Center directors

# FUNDING THEME CATEGORIES FOR DONOR CULTIVATION

- Academic Enterprise
- Business & Industry
- Capital Enhancements
- DEI Initiatives
- Dean's Priorities Fund
- Public Interest & Public Service
- Physical Naming Opportunities
- San Francisco Stakeholders
- Student Support & Scholarships
- Technology & Innovation

# SAMPLE NAMING OPPORTUNITIES

<u>BUILDING</u>	<u>SPACE</u>	<u>AMOUNT</u>
198 MCALLISTER	198 MCALLISTER BUILDING	\$20,000,000
198 MCALLISTER	ATRIUM/ENTRANCE	\$10,000,000
198 MCALLISTER	7th FLOOR COMMONS & TERRACE	\$5,000,000
198 MCALLISTER	AUDITORIUM	\$3,000,000
COTCHETT LAW CENTER	SKY DECK	\$2,500,000
CAMPUS SPACE	ACADEMIC QUAD	\$2,500,000
COTCHETT LAW CENTER	SKY BRIDGE	\$1,000,000
<del>198 MCALLISTER</del>	<del>COURTYARD</del>	<del>\$500,000</del>
<del>198 MCALLISTER</del>	<del>AUDITORIUM PRE-EVENT LOBBY</del>	<del>\$250,000</del>
COTCHETT LAW CENTER	OUTDOOR TERRACE	\$250,000
COTCHETT LAW CENTER	SMALL CLASSROOMS	\$250,000/room
198 MCALLISTER	DOG RUN	\$250,000
198 MCALLISTER	JOURNAL SUITES	\$100,000/room
198 MCALLISTER	MEDIUM MEETING ROOMS	\$75,000/room
198 MCALLISTER	RESIDENTIAL STUDY ROOMS	\$50,000/room
198 MCALLISTER	LEXLAB STUDY PODS	\$25,000

# CAMPAIGN TIMELINE

Campaign Phase	FY22	FY23	FY24	FY25	FY26	FY27
Preparation Phase & Campaign Counting Begins	↔					
Principal & Leadership Gift Phase (Quiet Phase)		↔				
Public Phase					↔	

Public  
Announcement

# CAMPAIGN PROGRESS

<b>Gift Period (Campaign Phase)</b>	<b>Total \$</b>
FY21 ( <i>Reach Back - 2 gifts</i> )	\$1,250,000
FY22 ( <i>Prep Phase &amp; Counting Begins</i> )	\$16,925,660
FY23 ( <i>Quiet Phase</i> )	\$10,168,726
FY24 ( <i>Quiet Phase</i> )	\$5,493,562
FY25 ( <i>Quiet Phase</i> )	
FY26 ( <i>Public Phase</i> )	
FY27 ( <i>Public Phase</i> )	
<b>Total Current Gifts</b>	\$33,737,948
<b>Total Planned Gifts</b>	\$12,916,700
<b>Total</b>	\$46,654,648
<b>Working Goal</b>	\$100,000,000
<b>% Current</b>	72%
<b>% Planned*</b>	28%
<b>% to Goal</b>	47%

\*Target of Planned Gifts: 25%-35%

# CAMPAIGN GIFT TABLE

## Gift Commitments Required for \$100M Campaign

Target Gift Level	Number Required	Number Secured to-date
\$20,000,000	1	0
\$10,000,000	1	0
\$5,000,000	6	1
\$1,000,000	8	3
\$500,000	8	6
\$250,000	30	21
\$100,000	50	37
\$50,000	100	40
\$25,000	125	87
Under \$25,000	Many	7,166

# KEY OBSERVATIONS

- UC Law SF's \$100M campaign requires seven- and eight-figure gift commitments.
- The College will likely need 16 gift commitments of \$1M and higher for a \$100M campaign, including eight at \$5M and up.
- The campaign total currently stands at approximately \$46+M.

# HOW YOU CAN HELP

- Help make connections to potential supporters
- Host and/or attend donor cultivation events
- Make a campaign commitment
  - Current-use gift or pledge
  - Planned gift
  - Blended gift



# Thank you!

Questions?



UC Law San Francisco

## UC LAW ACADEMIC VILLAGE: NAMING OPPORTUNITIES

### Cotchett Law Center - 333 Golden Gate Avenue

SPACE	COMMITMENT LEVEL	# OF SPACES	NAMED	REMAINING
333 GOLDEN GATE AVE		1	1	0
SKY DECK	\$2,500,000	1	0	1
ACADEMIC QUAD	\$2,500,000	1	0	1
CONFERENCE CENTER	\$2,000,000	1	0	1
ALUMNI COLLOQUIUM ROOM		1	1	0
MAIN LECTURE HALL		1	1	0
SKY BRIDGE	\$1,000,000	1	0	1
CLINICS HUBS		1	1	0
LARGE CLASSROOM		2	2	0
GREEN WALL		1	1	0
OUTDOOR TERRACE	\$250,000	2	1	1
SMALL CLASSROOM	\$250,000	7	1	6
LARGE MEETING (CONFERERNC) ROOM	\$100,000	3	1	2
STUDENT LOUNGE		1	1	0
ALUMNI CENTER OFFICE		1	1	0
ASUCH OFFICE	\$100,000	1	0	1
FACULTY OFFICE	\$50,000	26	12	14
SMALL MEETING ROOM	\$50,000	10	3	7
BREAKOUT SPACES		3	3	0
PHONE ROOMS		2	2	0

### To be Named - 198 McAllister Street

SPACE	COMMITMENT LEVEL	# OF SPACES	NAMED	REMAINING
198 MCALLISTER	\$20,000,000	1	0	1
ATRIUM	\$10,000,000	1	0	1
LEXLAB (SPACE & CENTER)	\$5,000,000	1	0	1
7TH FLOOR COMMONS & TERRACE	\$5,000,000	1	0	1
SCHOLARLY PUBLICATIONS		1	1	0

ADVOCACY CENTER		1	1	0
APPELLATE COURTROOM		1	1	0
TRIAL COURTROOM		1	1	0
AUDITORIUM	\$3,000,000	1	0	1
CAFÉ LOUNGE	\$1,000,000	1	0	1
COURTYARD	\$500,000	1	0	1
AUDITORIUM PRE-EVENT SPACE		1	1	0
DOG RUN	\$250,000	1	0	1
TOUCHDOWN ROOM		1	1	0
FITNESS ROOM		1	1	0
7TH FLOOR MEDIA ROOM	\$250,000	1	0	1
JOURNAL SUITES	\$100,000	10	1	9
7TH FLOOR PANTRY	\$100,000	1	0	1
LARGE MEETING ROOM	\$100,000	4	0	4
LEXLAB CONFERENCE ROOM		1	1	0
LEXLAB WORKROOM	\$75,000	3	0	3
MEDIUM MEETING ROOM	\$75,000	2	0	2
RESIDENTIAL STUDY ROOM	\$50,000	4	0	4
WELLNESS ROOM	\$25,000	1	0	1
LEXLAB PHONEBOOTHs	\$15,000	3	0	3
<b>Mary Kay Kane Hall - 200 McAllister Street</b>				
<b>SPACE</b>	<b>COMMITMENT LEVEL</b>	<b># OF SPACES</b>	<b>NAMED</b>	<b>REMAINING</b>
CHANCELLOR & DEAN'S SUITE		1	1	0
ACADEMIC DEAN'S SUITE		1	1	0
CHANCELLOR & DEAN'S OFFICE	\$100,000	1	0	1