

UC Law SF

## UC Law SF Scholarship Repository

---

2023 Board of Directors Agenda and Materials

Board of Directors Agenda and Materials

---

9-8-2023

### **Board of Directors Quarterly Meeting - Open Session Packet 09/ 08/2023**

UC Law SF

Follow this and additional works at: [https://repository.uclawsf.edu/board\\_materials\\_2023](https://repository.uclawsf.edu/board_materials_2023)

---

# Board of Directors Quarterly Meeting

University of California College of the Law, San Francisco  
333 Golden Gate Ave., San Francisco, CA 94102, Suite 501 Deb Colloquium  
Rm.  
Sep 8, 2023 9:00 AM - 1:00 PM PDT

## Table of Contents

1. Roll Call	
2. Public Comment Period	
3. Action Item: Approval of Minutes June 09, 2023.....	4
4. Report of the UCLAS President	
5. Report of the Board Chair:	
5.1. Report of the Chair of the Advancement and Communications Committee	
5.1.1. Report on Advancement:	
5.1.1.1. Comprehensive Campaign Update.....	20
5.1.1.2. Board Initiatives Update.....	24
5.1.1.3. FY23 Fundraising Results.....	39
5.1.1.4. Alumni Engagement Update	
5.1.1.5. Upcoming Events	
5.1.2. Report on Communications.....	46
5.2. Report of the Chair of the Educational Policy Committee:	
5.2.1. Strategic Plan Implementation; Academic Program Priorities in 2023-2024.....	56
5.2.2. Student Outcomes (Bar Passage and Employment).....	65
5.2.3. Centers.....	90
5.2.4. Staffing Changes in the Academic Program.....	93
5.2.5. Faculty Trainings and Inclusive Classrooms.....	97
5.2.6. Enrollment Management Snapshot	
6. Action Item: Finance Committee Consent Calendar	
6.1. Core Operations – State Budget for 2023-24.....	105
6.2. Non-State Budget for 2023-24.....	117
6.3. State Contracts and Grants in Excess of \$100,000.....	124
6.3.1. Wayfinding and Signage Collegewide – WeidnerCA	
6.3.2. HVAC Maintenance and Repairs – CA United Mechanical	
6.3.3. Geotechnical Engineering Services – 100 McAllister – Seismic Upgrade Project – Langan Engineering	

6.4. Nonstate Contracts and Grants in Excess of \$100,000.....	126
6.4.1. Training for CGRS – Acacia Center for Justice	
6.4.2. Training for CGRS – CARECEN	
6.4.3. Retail Lease – Academe at 198 – SPRO Coffee Lab	
6.5. General Enrollment Fee – Fee Increase for 2024-25 .....	128
6.6. Health Policy and Law – Fee Increase for 2024-25 .....	135
6.7. Update to Financial Policy and Procedure Manual .....	137
<b>7. Report of the Chief Financial Officer</b>	
7.1. UC Home Loan Programs – Authority to Participate in ZIP Loans.....	138
7.2. Long Range Campus Plan – Budget Approval for 2023-24.....	140
7.2.1. Budget Approval – Tower Project	
7.2.2. Budget Approval – Long Range Campus Plan for 2023-24	
7.3. Contracts and Grants in Excess of \$100,000.....	143
7.3.1. Materials Testing – Tower Project – Consolidated Engineering Laboratories	
7.3.2. Deputy Building Official – Tower Project – Claremont Engineering	
7.3.3. Inspector of Record – Tower Project – NorCal Inspection Services	
7.3.4. Legal Services – Tower Project – Lubin Olson	
7.3.5. Real Estate and Other Project Services – Tower Upgrade Project – Century Urban	
7.3.6. Art Fabrication – 198 McAllister – Straten Engineering	
7.3.7. Construction Services – Tower Project – Plant Construction (Ratification)	
7.4. Presentation: Hastings and the Tenderloin: A Journey Through Time.....	148
<b>8. Report Items: Finance Committee Reports:</b>	
8.1. Year-end Investment Report for 2022-23.....	167
8.2. State Budget Report -Preliminary 2022-23 Year-end.....	176
8.3. Core Operations – State Budget Planning for 2024-25.....	182
8.4. Non-State Budget Report – Preliminary 2022-23 Year-end .....	183
8.5. Preliminary 2022-23 Year-end Auxiliary Enterprises Budget Report .....	188
8.6. 198 McAllister – Campus Housing Project Update.....	192
8.7. 100 McAllister – McAllister Tower Project Overview .....	193
8.8. Annual Report on Insurance Coverage.....	201
8.9. Listing of Checks and Electronic Transfers over \$100,000 .....	203

**9. Report of the Chancellor and Dean**

**9.1. Report Item: General Updates on the State of the Campus, Academics, etc**

**9.2. Report Item: Status of College name – Almost all internal instances of the name have shifted to the new name, the website/email switch is complete, and exterior signage and further external marketing to follow.**

**9.2.1. Assistant Chancellor & Dean/Chief of Staff Jenny Kwon available for questions**

**9.3. Report Item: Status of AB 1936 Initiative**

**9.3.1. Assistant Chancellor & Dean/Chief of Staff Jenny Kwon available for questions**

**9.4. Report Item: DEI efforts**

**9.4.1. Report of Director of Diversity, Equity, & Inclusion Initiatives Mario Ernesto Lopez**

**10. Director Comments and Board Announcements**

**11. Adjournment**



# Board of Directors Quarterly Meeting Minutes

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

200 McAllister St., 2nd floor – ARC, San Francisco, CA 94102. Participants and members of the public were also able to join the open session 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 9:03 a.m., and the Secretary called the roll.

### Board Members Present

Director Simona Agnolucci, Chair  
Director Shashi Deb  
Director Andrew Houston  
Director Claes Lewenhaupt  
Director Mary Noel Pepys (joined at 9:09 a.m.)  
Director Courtney Greene Power  
Director Albert Zecher

### Board Members Absent

Director Chip Robertson, Vice Chair  
Director Andrew Giacomini

### Staff Participating

Chancellor & Dean David Faigman  
Chief Operating Officer Rhiannon Bailard  
Director of Institutional Research and Title IX & ADA/504 Coordinator Andrea Bing  
General Counsel & Secretary John DiPaolo  
Legal & Executive Assistant Yleana Escalante  
Director of Bar Passage Support Margaret Greer  
Assistant Dean of Career Development Office Amy Kimmel  
Assistant Chancellor & Dean/Chief of Staff to the Chancellor & Dean Jenny Kwon  
Director of Diveristy, Equity, & Inclusion Initiatives Mario Lopez  
Chief Communications Officer Elizabeth Moore  
Deputy Chief Financial Officer and Controller Sandra Plenski  
Provost & Academic Dean Morris Ratner  
Chief Human Resources Officer Andrew Scott  
Chief Financial Officer David Seward  
Associate Dean for Library & Technology Camilla Tubbs  
Deputy General Counsel Laura Wilson-Youngblood  
Director of Digital Media Lydia Xia

### Others Participating

President of the Alumni Association Board of Governors Barbra Diallo

#### 2. Public Comment Period

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

#### 3. Action Item: Approval of Minutes

##### **Motion:**

The Chair called for a motion to approve the minutes of the March 2, 2023 meeting and January 18, 2023 meeting.

Motion made and seconded. The motion carried.

#### 4. Approval of Proposed Changes to the By-Laws and Standing Orders

Chair Agnolucci invited questions on these changes. Director Zecher asked if there are other changes besides updating the College's name in these drafts. Ms. Wilson-Youngblood responded that there are a couple of other changes regarding the appointment of directors, issuing diplomas, and removal of an inapplicable code reference. For the most part these edits are related to the name change.

##### **Motion:**

The Chair called for a motion to approve the proposed changes to the By-Laws and Standing Orders.

Motion made and seconded. The motion carried

#### 5. Report of the UCLAS President

The UCLAS President was unable to attend the meeting. There was no report given.

#### 6. Report of the Board Chair

##### 6.1. Report Item: Report of the Chair of the Advancement and Communications Committee

###### 6.1.1. Report on Advancement

Chair Agnolucci introduced Director Deb, Chair of the Advancement & Communications Committee. Director Deb said that neither Eric Dumbleton nor Meredith Jaggard could attend this meeting, so Dean Faigman will present on their behalf. She added that Barbra Diallo, the President of the Alumni Association Board of Governors, will also present on initiatives and activities of the Alumni Board.

###### 6.1.1.1. Comprehensive Campaign Update

Dean Faigman thanked Director Deb. He said that the idea behind the comprehensive campaign was to have it aligned with his second term as Dean and to build on College resources. The College is currently in the quiet phase of the comprehensive campaign and will move into the principal leadership gift phase and then a public phase with the expectation and hope of raising the full goal amount by June 2027. He said that the College has done an extensive analysis of its alumni community, which indicates that raising \$100 million is within reach. His own goal is to raise \$150 million. He said that the College is working on a number of gifts at the moment. Chair Agnolucci asked whether donors are able to pledge gifts over the course of years, and Dean Faigman responded that the College allows donors to pledge a gift over five years. The College also accepts blended gifts between current and estate gifts. Director Zecher congratulated Dean Faigman on the gifts secured to date.

Dean Faigman presented the capital campaign timeline, noting the scheduled ending in June 2027. Over the next year, he will be doing a lot of travel and outreach. He thinks the College has a great story to tell and wants alumni to feel pride in it and to see that it is worth investment. He added that pledges count in their full amount, so if someone pledges a gift to be paid over five years, the College counts that entire amount toward the campaign. Dean Faigman credited Tracy Whitlock with expanding planned giving among donors, noting that the legacy society has been extraordinarily successful. He encouraged the Directors to participate, noting that he himself is a member of the legacy society. Dean Faigman also shared the current year to date numbers. Last year was a particularly banner year given the large gift that the College received from Mary Kay Kane's estate. He showed the numbers, which are down a bit this year, with the total dollars raised for the College close to \$9 million. Though not as strong as the last two years, it is an improvement on historical numbers which have been in the \$3 to 5 million range. The College is dedicated to increasing that number. This year the Centers brought in just over \$2 million and the College without the Centers raised about \$6 million. There are a number of gifts pending, so he anticipates that the next year will be a very positive year for fundraising.

Director Zecher asked whether the development department is sufficiently staffed, or if the College needs more gift officers. Dean Faigman responded that the College's consultants have recommended that the College add another major gift officer. He has considered that, but noted the challenge of supporting the additional FTE costs of about \$110,000 plus benefits, which is about \$150,000 to 260,000 total. If he had great confidence that adding a major gift officer would not only cover

that salary, but do much more, then he would move in that direction. What he has decided to do is propose a half FTE to do background research identifying new potential donors, which should allow others in development more time on the ground. He said that it is a hard decision to make because it is a big investment and there tends to be a runway before new hires really bring in the kind of money that the College must invest in them. Director Zecher asked if the College is setting goals and stretch goals for current gift officers, to which the Dean responded in the affirmative.

Dean Faigman presented the donor count, indicating that trends nationally are down slightly. He noted that the denominator increases with each graduating class, which affects the overall percentage. The College is working to create a culture of giving that begins the first year of law school. Dean Kwon added that the participation rate this year is up from last year. Dean Faigman said that the donor number for the Centers decreased slightly from last year. He emphasized that the most important figures are dollars raised, but that participation will eventually affect those amounts.

Director Lewenhaupt asked whether the College is targeting contributions from successful companies that got their start with support from the College in programs like the Startup Legal Garage. Dean Faigman responded that the College has discussed the possibility of taking an equity interest in companies that the College has supported from inception and that go on to be successful. The College is looking to hire a Director of LexLab to increase its prominence locally as well as nationally. The College now houses the new California Institute on Law, Neuroscience and Education. The College is also looking to engage with the AI revolution.

#### 6.1.1.2. Alumni Engagement Update

Dean Faigman presented. He said that enthusiasm for Spring Week was positive, and that there were a number of great events. He credited Meredith Jaggard for her tremendous work and expertise. Director Deb thanked Dean Faigman and transitioned to the report by Barbra Diallo, whom she thanked for making the time to present on the initiatives she is leading to increase alumni engagement.

#### 6.1.1.3. Board Initiatives Update

Ms. Diallo introduced herself and shared some work that the Alumni Association Board of Governors has been doing to support the College's advancement department. She said that the Alumni Association Board of Governors serve as ambassadors of the alumni and partners with the law



school. She highlighted some key initiatives like partnering with law school staff to strategically support students; hosting events and raising funds for student scholarships; supporting and organizing alumni chapter events and affinity group events; mentoring students and recent graduates; and encouraging alumni participation. This year the Alumni Association Board of Governors created an ad hoc committee to support fundraising efforts, and Ms. Diallo shared their two primary objectives. The first objective is to understand donor behavior and learn why there were some people who have consistently donated in the past, but recently stopped giving. The second goal is to refine communication and engagement with donors, learn about their behavior, and leverage that information in a way that increases donor participation. The Alumni Association Board of Governors sent an email and survey questions to around 1700 alumni last month to solicit data for development, and roughly 60 alumni have already completed the survey. The Alumni Association Board of Governors will present the information gathered to the development team so it can take action on the data and results collected.

Director Deb asked whether people filling out the survey are given an opportunity to provide additional information to support the responses, how the information is being collected, and whether it will be added to an existing database. Ms. Diallo replied that Ms. Jaggard and her team are helping with the survey data collection and will meet to go over the results, though she could not speak to the database. Director Deb and Director Houston thanked Ms. Diallo for all of her work on this.

#### 6.1.2. Report on Communications

##### 6.1.2.1. Communications Update on Social Media, Renaming, and National Excellence Initiatives

Director Deb invited Chief Communications Officer Liz Moore, to present. Ms. Moore shared rebranding items and some highlights from the spring semester. She said that they have been working hard on the rebranding since January and made some wonderful progress. Communications is also working on a national rollout of the new name starting this summer with its national marketing team. The College hired a new web and social media director, Lydia Xia, who has done a wonderful job so far. The College also has a professional graphic designer working on communications that will go out nationally this summer. The College is putting up new banners across the City on streets selected by Dean Faigman and Dean Kwon. Ms. Moore also presented on the progress and features for the fall alumni magazine. Ms. Moore highlighted a press release that went out this week from LexLab about a new partnership,

social media posts, and website updates. She added that Mr. Seward was interviewed in a San Francisco Chronicle article about the Academic Village, which the College's social media director posted and which was picked up by Channel Four News. She is hoping to publicize College events and activities in similar ways going forward. Communications offered leaders of student organizations the opportunity for the first time ever to be featured in College social media posts, which increases engagement from students. Communications is also showcasing content on the College's faculty. At the next meeting, Ms. Moore will be sharing a new faculty video series. She credited Dean Faigman and Dean Ratner with helping her find the right faculty and ask the right questions. Director Lewenhaupt asked about the timing for some renaming changes, and Dean Faigman responded that the College's website will be migrating to the new domain this month. Dean Kwon added that Associate Dean for Library & Technology Camilla Tubbs will join the meeting to discuss this in more detail. Director Houston suggested including a prompt for donations in some of the features that Communications shares that might really inspire alumni to give in the moment. Dean Faigman responded that the College does highlight those achievements in meetings with alumni, but where alumni support could really make a difference is in general fund, unrestricted gifts. Director Deb added that it is important to know who or what inspired donors to give the first gift in order to understand why donors give, why they stop giving, and what incentivizes them to keep giving. Director Houston noted that students' stories are very powerful and inspiring. Director Power asked Ms. Moore if there are faculty that she highlights consistently, whether faculty in general are seeking out services from Communications to help them publicize their work, and whether she has enough resources to work with faculty on those stories. Ms. Moore responded that the College has media monitoring software, which is how Communications locates some faculty stories. She has attended some of the faculty meetings this year to stay in touch with faculty members. She hopes to expand the number of professors who are speaking to the media, noting that the same pool of faculty currently tends to be both more available and more comfortable in media training.

## 6.2. Report of the Chair of the Educational Policy Committee

Director Pepys invited Dean Ratner to present. Dean Ratner thanked her and said he submitted four reports on the following topics: the status of implementation of the strategic plan in the academic program in academic year 2022-2023, rankings and student bar and employment outcomes, policy developments in the academic program, and programmatic updates. He rested on the written reports except with regards to rankings and outcomes. He introduced Dean Kimmel, Ms. Bing and Ms. Greer.

6.2.1. Strategic Plan Implementation in the 2022-2023 Academic Year (End of Year Reporting)

6.2.2. Rankings and Outcomes (Rankings, Bar Success, Employment)

Dean Ratner presented on rankings and outcomes with a focus on US News. The new formula highlights one element that aligns with the College's mission, which is to educate students so that they can pass the bar exam and get rewarding jobs. Dean Ratner added that the formula change does not necessarily account for such outcomes in ways that reflect educational program quality. Dean Ratner showed the year-over-year changes for all ABA-accredited law schools in California. For the College, the change in US News' ranking formula resulted in a nine point drop. For other schools like UC Davis there was a more dramatic change. Dean Ratner expects to see more variability year-over-year in the overall rank of law schools going forward unless US News changes the formula to increase stability. He said that the biggest changes from the prior US News formula are that outcomes are now the most heavily weighted factor, whereas quality assessment factors, like reputation and peer and lawyer judge assessment, were the most heavily weighted factors in the past. First time bar passage, ultimate bar passage, and employment at ten months from graduation now constitute 58 percent of the ranking. Bar passage for many law schools is quite variable year over year and employment is inherently cyclical, depending on the particular employment market, so large variations in rank are expected each year. He also noted that one of the College's strongest metrics, investment by the law school per student, was eliminated as a formula element. He said that entering metrics are also less heavily weighted in the overall formula. He added that US News has 13 subject areas for specialty rankings. Even though the College and many other law schools opted out of voting this year, the College moved up in the average of all these different specialty subject area rankings from 19 last year to 18 this year, clustered with Penn and Yale and above Cornell.

Dean Ratner invited questions. Director Houston said that he thinks these specialty rankings are important because it really shows that students can get a great education at this law school. Director Zecher said that he appreciates Dean Ratner's efforts to increase the College's ranking in US News since it is the one that people seem to focus on, and it feeds into alumni base sentiment, which in turn feeds into development. Dean Ratner responded that he thinks specialty rankings should be taken more seriously by consumers of US News information, but it is true that prospective students click through and look at the overall rank number. It remains to be seen how consumers will handle the expected annual variability in that rank. Director Lewenhaupt noted that the presentation

shows that, looking comparatively at California ABA-accredited law schools, first-time bar pass rates and entering metrics are closely aligned. Dean Ratner responded that the current presentation does show a very strong correlation between metrics and outcomes, but in the period from 2019-2021 when the College's bar pass rate was 80 percent, UC Law SF graduates over-performed relative to what their LSAT scores and undergraduate GPA would predict. In 2022, the pass rate for UC Law SF graduates decreased, in that it was more in line with what entering metrics would predict. Director Greer is working this summer to remedy that. Director Power discussed how the College measures and presents success within its marketing story, noting that presumably some of that will overlap with US News rankings. She suggested including some of that more prominently on the website and including it in some targeted social media like TikTok. Dean Ratner responded that the College just added a value proposition page to explain the College's value using statistics that it thinks prospective students perusing the website should consider. The College conducted a survey of peer websites, which often have visuals to draw people in. The College built on that with video content that highlights San Francisco and the different degree programs the College offers. Dean Kwon said that the College's Director of Electronic Media is in the same age group as most of the College's students and is very social media savvy. She calls this the "scroll generation" based on the way that they interact with information. The website needs to reach alumni and other groups as well, and the College is working on a design that will reach different audiences with different interactive styles. Director Power suggested a targeted approach in prime application season, and Dean Kwon responded that it was a good idea and that Dean Tubbs and Ms. Xia will present on the website in the Dean's report.

- 6.2.3. Policies (Academic Freedom, Community Principles, and Additional Compensation Policy)
- 6.2.4. Programmatic Updates (First Generation Program, Center Snapshots, and Faculty/Staff Transitions)

7. Action Item: Finance Committee Consent Calendar

**Motion:**

Chair Agnolucci called for a motion to approve the consent calendar.

Motion made and motion seconded. The motion carried.

- 7.1. Action Item: Approval of the 2023 Audit Plan
- 7.2. Action Item: Auxiliary Enterprises Proposed Budget 2023-24
- 7.3. Action Item: State Contracts and Grants in Excess of \$100,000

- 7.3.1. Amend Contract for Sidewalk Services – Safety – Mid-Market Business Association
  - 7.3.2. Security Services – Safety – UCSF PD
  - 7.3.3. AV Equipment for Courtrooms for 198 McAllister – IT – TBD
  - 7.3.4. Upgrade to New Firewall – IT – ePlus
  - 7.3.5. Internet Failover Circuit – IT – CENIC
  - 7.3.6. Hosted Software and Cloud Services – IT – Ellucian Company
  - 7.3.7. Renewal of Ellucian Managed Services – IT – Ellucian Company
  - 7.3.8. West LMA & Proview Digital Subscription – IT – West Publishing
  - 7.3.9. Ex Libris Amendment #1 to SAAS Subscription – IT – Ex Libris
  - 7.3.10. Emergency Water Damage Repairs to 333 GGA – Operations – Build Group
  - 7.3.11. Emergency Water Damage Repairs to 333 GGA – Operations – RMC
  - 7.4. Action Item: Nonstate Contracts and Grants in Excess of \$100,000
    - 7.4.1. AV Equipment & Installation Services – CFO – Avidex Ind
    - 7.4.2. General Operating Support Grant – WLL – Schmidt Foundation
    - 7.4.3. Dana Center Grant Subaward – Consortium – UCSF
    - 7.4.4. Support for Research – C4i – Arnold Ventures
    - 7.4.5. Support for Research – C4i – Commonwealth
  - 7.5. Action Item: UC Hastings Parking Garage – Rate Increase for 2023-24
  - 7.6. Action Item: UCSHIP Student Health Insurance Premiums for 2023-24
  - 7.7. Action Item: Updated Additional Compensation Policy – Faculty
  - 7.8. Action Item: Budget Approval – The Academe at 198
8. Report of the Chief Financial Officer
- Mr. Seward introduced and thanked Deputy CFO, Sandra Plenski and Chief Operating Officer Rhiannon Bailard, for their incredible work. Ms. Bailard noted that there was a contract for \$185,000 with Quadient that was approved at the September board meeting for package lockers at 198 McAllister. She said that Ms. Wilson-Youngblood has undertaken enormous efforts trying to reach agreement with counsel for Quadient on the contract terms. At this point, unless the deal transitions from a lease, which was originally approved by the Board, to a purchase of the lockers, the College will not have sufficient time to get the lockers delivered and operational before building opening. She said that the contract amount is not changing, but the College will purchase the equipment instead of leasing it. Mr. Seward added that the authority granted by the Board was for a contract of purchase or lease, so this report is an information item only.
- 8.1. Action Item: State Contracts and Grants in Excess of \$100,000
    - 8.1.1. Design Services – Tower Seismic Upgrade – Perkins Will Ratification

Mr. Seward said that at the Executive Committee meeting in May, the Executive Committee approved a design services contract with Perkins & Will and that the contract was awarded based on a comprehensive RFP process in which 16 firms competed. The Executive Committee approved authority to enter an agreement not to exceed \$17.1 million. Contract negotiations have been concluded and the final contract value is a total \$12.983 million. He seeks ratification from the Board.

**Motion:**

Director Zecher called for a motion to ratify the Executive Committee's approval of this contract with Perkins & Will as presented.

Motion made and motion seconded. The motion carried.

8.1.2. Software Renewal – Info Technology – Simpler

Mr. Seward said that this is a software renewal for \$232,000 over a 36-month contract term. Chair Agnolucci asked what the software does, and Mr. Seward responded that it is a law library database system that the College has used for many years.

**Motion:**

Director Zecher called for a motion to ratify the Executive Committee's approval of this contract.

Motion made and motion seconded. The motion carried.

8.2. Action Item: Nonstate Contracts and Grants in Excess of \$100,000

8.2.1. Grant - Low-Income Taxpayer Clinic - IRS

Mr. Seward introduced the grant, noting that the Internal Revenue Service has increased the grant award from \$100,000 to \$200,000 for the Low Income Taxpayer Clinic.

**Motion:**

Director Zecher called for a motion to approve the grant.

Motion made and motion seconded. The motion carried.

8.3. Action Item: Nonstate Budget Change for 2022-23 – Long Range Campus Plan

Mr. Seward said that he is seeking approval for a budget augmentation of \$436,000 to fund activities related to execution of the long range campus plan.

**Motion:**

Director Zecher called for a motion to approve the budget change funded from the non- state McAllister Tower building reserve account to fund 2022-23 costs supporting the academic village.

Motion made and motion seconded. The motion carried.

8.4. Action Item: Tower Seismic Upgrade Project – Status Update

There was no report or additional action taken on this item.

8.5. Action Item: State Budget Change – 333 Flood Expenses

Mr. Seward said that this is a state budget change requested due the water damage at the 333 Golden Gate building. The repairs have been completed. The cost of the repairs was approximately \$736,000. The College has completed the insurance work and been reimbursed but for the \$100,000 deductible.

**Motion:**

Director Zecher called for a motion to approve the presented revision to the state budget.

Motion made and motion seconded. The motion carried.

9. Report Items: Finance Committee Reports

Mr. Seward introduced this report item and invited questions. There were none.

9.1. Investment Report as of March 31, 2023

9.2. State Budget Report for 2022-23 as of March 31, 2023

9.3. Auxiliary Enterprises Budget Report as of March 31, 2023

9.4. Long-Range Campus Plan – Academe at 198

9.4.1. Construction Status Report

9.4.2. Leasing Update

9.5. Overview of California Environmental Quality Act (CEQA) Review of Unite Here/Local 2 Site at 210-247 Golden Gate Avenue

9.6. State Budget Update for 2023-24

9.7. AB 1936 Renaming and Restorative Justice Update

9.8. Listing of Checks and Electronic Transfers over \$100,000

10. Report of the Chancellor and Dean

10.1. Report Item: General Updates on the State of the Campus, Academics, etc.

Dean Faigman gave an update on admissions. Applications are down nationally by about eight or nine percent. He said that the College is doing a little better than average, with applications having decreased by about three to four percent. He noted that USC came up short of their intended class target and is pulling

from its waitlist, which in turn means that the College is pulling from its waitlist for the incoming class. There are currently about 352 depositors, and the College is aiming for an incoming class of 400, with melt to 390. The College expects that the LSAT and GPA averages will be strong, with current projections of an average LSAT score of 160. The GPA average will likely be similar to last year's at around 3.58-3.6.

10.2. Report Item: Status of College name

Dean Faigman reported that almost all internal instances of the name have moved to the new name, with the website and email shift happening over the summer. Transition of exterior signage will follow.

10.2.1. Assistant Chancellor & Dean/Chief of Staff Jenny Kwon, Associate Dean for the UC Law SF Library and Technology Camilla Tubbs, and Director of Digital Media and Web Lydia Xia available for questions

Ms. Xia introduced herself. Dean Kwon said that the meeting materials contain a workflow of everything the College has been doing to transition to the new name and invited questions. She credited Dean Tubbs and Ms. Xia with all of their work to migrate the website and emails this summer. Dean Tubbs said that starting on January 1st, her team did a slight cosmetic lift to the current UC Hastings website, which essentially included finding and replacing references to Hastings with UC Law SF. Concurrently, they launched a new intranet, Sharknet, as a replacement of myHastings. Dean Tubbs and her team also applied the name change to major college applications. In May, the College's legal scholarship transitioned to the new name and new domains. This took some additional time and effort in order to ensure that prior references to the scholarship, including by law journals and faculty, were linked going forward. The SSRN and repository are up to date. The College is now in the process of the email migration and Dean Tubbs and her team are in the very final stages of preparation. She noted that after the College makes the switch in July, emails sent to the old UC Hastings email addresses will automatically be routed to the new corresponding UC Law SF email account. She added that shortly after converting the email accounts UCPATH will need to be updated to recognize the new email addresses. She said that the url @uchastings.edu will be switched to @uclawsf.edu. She invited questions. There were none.

10.3. Report Item: Status of AB 1936 Initiatives

10.3.1. Assistant Chancellor & Dean/Chief of Staff Jenny Kwon available for questions

Dean Faigman said that AB 1936 included a number of restorative justice initiatives that the College continues to engage in and that Dean Kwon has done a phenomenal job tracking and working on progress with these initiatives. Dean Kwon said that the meeting materials contain a



spreadsheet of the status of each of the initiatives that were outlined in AB1936. She noted that Round Valley is going through some leadership changes and that the College is waiting for that to stabilize before reengaging. She invited questions. She thanked her colleagues who helped put the report together, noting that the College has an obligation to report annually to Sacramento on the status of these initiatives. The College will be submitting its annual report shortly after this meeting.

Director Agnolucci invited discussion as to whether it would be helpful to have a Board working group or subcommittee for involvement in the restorative justice measures coming out of AB 1936. Dean Faigman noted that Director Pepys is a member of the Restorative Justice Advisory Board (RJAB). He said that the Board is welcome to be more involved on this, subject to the parameters of open meetings laws. One additional representative from the Board can join RJAB. Chair Agnolucci asked whether RJAB has been involved in progress on AB1936 initiatives since the name change, and Dean Kwon responded in the affirmative. She said that RJAB meets several times a year and gives advice on a number of matters.

Chair Agnolucci responded that if Director Pepys continues to be engaged in RJAB that seems sufficient for purposes of Board involvement from her perspective, but she invited other Directors who want to engage on this to speak with Mr. DiPaolo. Mr. DiPaolo advised that it would be possible under open meetings laws for one additional Board member to serve on RJAB. Chair Agnolucci said she thinks it would be good to have the Board engaged as much as possible in those measures. Director Pepys commented that RJAB is an excellent advisory group and noted that former Board member Tom Gede also serves on RJAB. Director Lewenhaupt expressed interest in joining RJAB, which he will discuss at greater length with Dean Faigman.

#### 10.4. DEI Efforts: Report of Director of Diversity, Equity, & Inclusion Initiatives Mario Ernesto Lopez

Dean Faigman introduced Mr. Lopez to present on recent developments in the College's DEI efforts. Mr. Lopez gave an update on three key initiatives completed this quarter. First is the hiring of the College ombuds in response to a recommendation from the Campus Climate Advisory Committee. Mr. Lopez worked closely with Dean Kwon to examine different ombuds models and received advice from Mr. DiPaolo on how to structure the position. He also thanked Dean Faigman for creating the position. The ombuds will play a key role in addressing complex issues across faculty, staff and student interactions in an informal manner. The new Ombuds will spend the next few months getting to

know the key departments, faculty, staff and students, and the office will officially launch in early fall.

Next, Mr. Lopez presented on the Departmental DEI strategic plan refresher workshop. In August of 2020, Dean Kwon and Ms. McGriff led an initiative where staff departments examined DEI issues and created departmental strategic plans to address DEI matters. Earlier this year, the College hosted a refresher workshop to gather feedback on the process, which was well attended by different departments.

Mr. Lopez also spoke about the timeline for the Community Principles, another recommendation of the Campus Climate Advisory Committee. Dean Faigman tasked the Diversity, Equity and Inclusion Working Group (DEIWG) with drafting the Community Principles. Mr. Lopez added that Dean Ratner, Dean Kwon, and Ms. Wilson-Youngblood were part of that effort. DEIWG spent the entire year working on a set of Community Principles, submitted them to Dean Faigman, and Dean Faigman approved them. Mr. Lopez will work with Director of Student Services Emily Haan to implement those principles within student orientation this year, and he is working with Dean Ratner on rolling out the principles to faculty. He invited questions.

Director Houston asked whether the ombuds is a full-time or part-time position, and Mr. Lopez responded that it is a part-time position. The College looked at data on the utilization of ombuds offices across UC campuses, which indicates that about one to three percent of the campus actually uses the services of an ombuds. Because the College has a much smaller population of students, faculty, and staff, it decided to hire a part-time role. Director Houston asked that the ombuds be invited to attend the Board meeting in September in person, and Dean Faigman responded that he will invite her and try to arrange for her to be present in September, but noted that she is based in Southern California. Director Houston also asked about the article that came out in KQED about some of the DEI efforts and things going on at the College, noting that it was a bit discouraging, especially for alumni of color. He said he appreciated the Dean's response highlighting the College's work in those areas. He indicated that he has spoken with a number of students and alumni of color and it seems some of those issues are ongoing despite the College's work to make the climate more inclusive for everyone. He asked about any additional initiatives that might be employed for further improvement. He also noted that though disparaging comments towards minority communities include protected speech, that speech can still be crass, uncivil, and disrespectful. To that end, he also asked whether the College requires DEI training for faculty, staff and students. He said that he thought the Board could benefit from DEI training as well. He concluded by saying that he hopes the person hired to be the new Dean of Students has experience in dealing with DEI issues.

Mr. Lopez responded that there is DEI training for students as part of orientation. HR has an annual DEI training for staff, and Dean Ratner includes DEI matters as part of his ongoing work with faculty at the faculty retreat at the beginning of each year. Mr. Lopez also said that he hopes to use the newly adopted Community Principles to improve the campus environment. Dean Ratner added that faculty and staff have mandatory DEI training led by the Senior Diversity Officer at UCSF, in addition to retreats, workshops, and pedagogy colloquia on how to use trauma informed teaching methods. He said that with regards to faculty and staff, training is ongoing and includes both mandatory and voluntary aspects. He noted that building trust with the student population is a complicated matter. He added that the ABA recently amended its standards to require that all law schools provide significant educational experiences pertaining to racism, cross-cultural competency, and bias. With respect to the Dean of Students search, Dean Ratner said that expertise with regards to DEI matters is part of the vetting process. Mr. DiPaolo reminded everyone that the Dean of Students matter will be part of the closed session discussion on personnel matters. Director Zecher said that he would like a presentation on the DEI training that faculty and staff receive. Dean Faigman invited additional feedback from the Board and said that he is incredibly proud of the team of professionals that he has as his colleagues at the College.

11. Director Comments and Board Announcements

None.

12. Election of Officers: Chair and Vice Chair

Mr. DiPaolo said the Board must elect a Chair and Vice Chair as they do each year at the June meeting. He will first take nominations for each office and then there will be a vote. Whichever candidate receives a majority of the votes will be elected. He began by inviting nominations for the Chair position.

Director Zecher, on behalf of Director Robertson, who was not able to attend the meeting, nominated Chair Agnolucci to serve as Chair for a second term. Mr. DiPaolo invited other nominations or commentary. There were none.

Mr. DiPaolo called for a vote, and Director Agnolucci was unanimously elected.

Mr. DiPaolo asked if there were any nominations for Vice Chair. Chair Agnolucci nominated Director Zecher. Mr. DiPaolo invited any other nominations or commentary. There were none.

Mr. DiPaolo called for a vote, and Director Zecher was unanimously elected.

The Board adjourned to closed session at 11:14 a.m. pursuant to Education Code Section 92032(b)(3),(5),(6)&(7). The Board reconvened open session at 12:23 p.m. Mr. DiPaolo reported that in closed session the Board voted to approve tenure for Professor Emily Murphy and to establish three new funds and naming opportunities.

13. Adjournment

The Chair adjourned the meeting at 12:24 p.m.

Respectfully submitted,

---

Laura M. Wilson-Youngblood, Deputy General Counsel

# Office of Advancement

## Comprehensive Campaign Update

September 8, 2023



UC Law San Francisco

# 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> )	
FY25 ( <i>Quiet Phase</i> )	
FY26 ( <i>Public Phase</i> )	
FY27 ( <i>Public Phase</i> )	
<b>Total Current Gifts</b>	\$28,344,386
<b>Total Planned Gifts</b>	\$11,919,700
<b>Total</b>	\$40,264,086
<b>Working Goal</b>	\$100,000,000
<b>% Current</b>	70%
<b>% Planned*</b>	30%
<b>% to Goal</b>	40%

\*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	5
\$250,000	30	12
\$100,000	50	32
\$50,000	100	30
\$25,000	125	65
Under \$25,000	Many	5,663

- 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 \$40M.



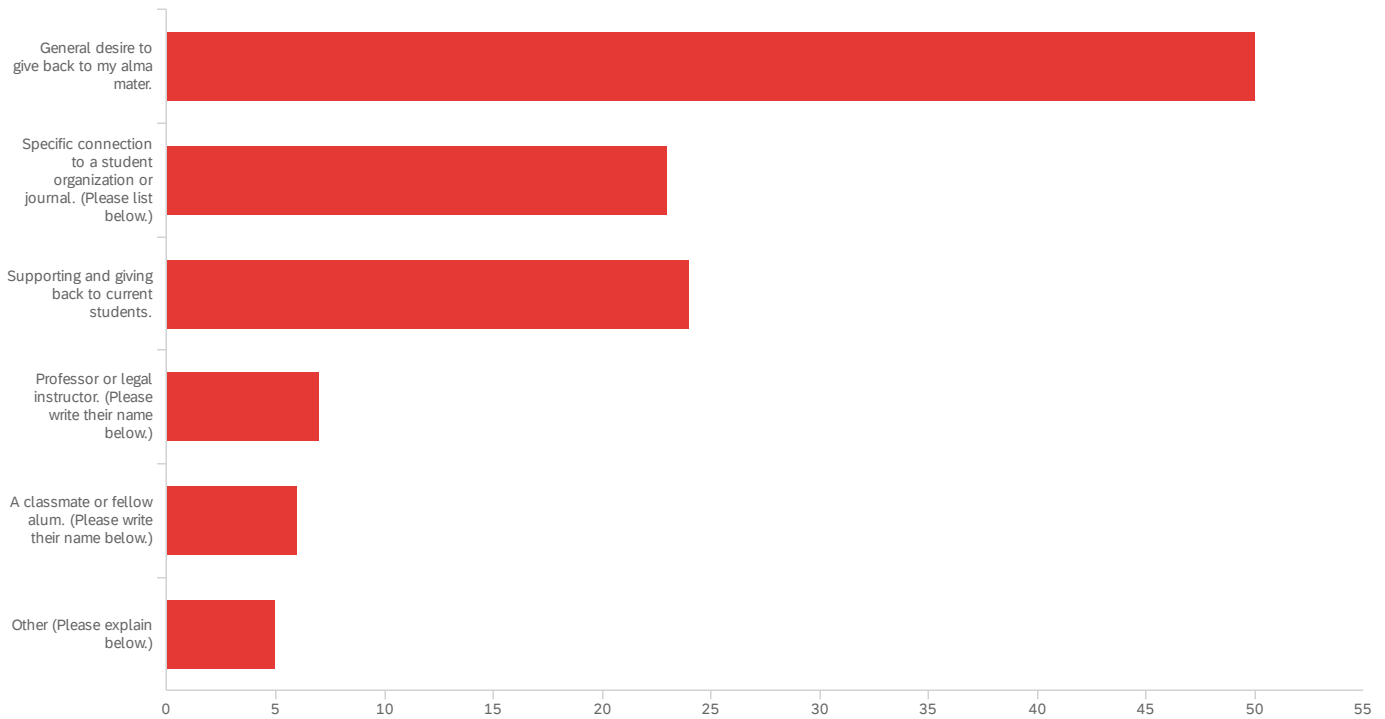
# Default Report

Board of Governors Ad Hoc Committee-Lapsed Donors

August 4, 2023 10:18 AM MDT

## Q1 - What or who inspired you to philanthropically support UC Law SF in the past?

Please check all that apply.



#	Field	Choice Count
1	General desire to give back to my alma mater.	43.48% 50
2	Specific connection to a student organization or journal. (Please list below.)	20.00% 23
3	Supporting and giving back to current students.	20.87% 24
4	Professor or legal instructor. (Please write their name below.)	6.09% 7
5	A classmate or fellow alum. (Please write their name below.)	5.22% 6
6	Other (Please explain below.)	4.35% 5

115

Showing rows 1 - 7 of 7

Q1\_2\_TEXT - Specific connection to a student organization or journal. (Please list below...)

Specific connection to a student organization or journal. (Please list below...)

LEOP Program

NALSA

BALSA

asian pacific law students

I served as the APALSA president during 2L, and I understand how difficult it is to raise money for student organizations.

LEOP

Moot Court

CGRS

LEOP

Trial team

HELA, HELJ

Moot Court

ILSA

APALSA

HLJ

HICLR

HLJ

LEOP

Pilipinx American Law Society

Q1\_4\_TEXT - Professor or legal instructor. (Please write their name below.)

Professor or legal instructor. (Please write their name below.)

Lathrope, Maier

Mary Kay Kane. Brian Gray

Professor or legal instructor. (Please write their name below.)

Richard R.B.Powell

Prof Diamond

Keith Wingate

Professor Schwartz

Alina Ball

Q1\_5\_TEXT - A classmate or fellow alum. (Please write their name below.)

A classmate or fellow alum. (Please write their name below.)

Calvin Moorad

James Hoey

Buck Delventhal

Jennah Feeley

the late Tom Scotto

Rachel Erlich

Q1\_6\_TEXT - Other (Please explain below.)

Other (Please explain below.)

you gave me a scholarship--and now that I have money I want to repay it.

The State subsidized the cost in the early 80's.

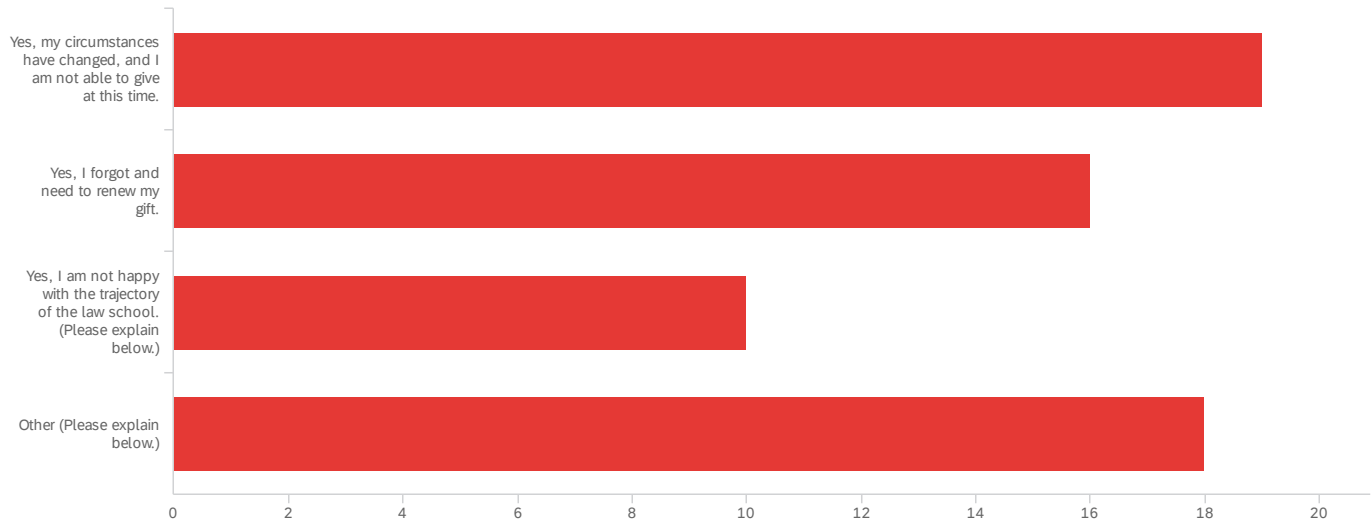
I think it was the memorial fund for a student who died, but I'm not sure

My expression of gratitude

I am Past President of the Hastings Alumni Association

## Q2 - Is there any particular reason why you have not renewed your support? Please

check all that apply.



#	Field	Choice Count
1	Yes, my circumstances have changed, and I am not able to give at this time.	30.16% 19
2	Yes, I forgot and need to renew my gift.	25.40% 16
3	Yes, I am not happy with the trajectory of the law school. (Please explain below.)	15.87% 10
4	Other (Please explain below.)	28.57% 18

63

Showing rows 1 - 5 of 5

### Q2\_3\_TEXT - Yes, I am not happy with the trajectory of the law school. (Please explain...

Yes, I am not happy with the trajectory of the law school. (Please explain...

Seems like no efforts to recruit stronger students to help boost rankings

Name change of institution will hurt the institution. Should be called UCSF.

too much wokeness and leftism

Not happy with the name change.

I am concerned about the change of name of the school, and I am very concerned about the failure to address falling ranking of the law school. This latter point must be addressed immediately.

Yes, I am not happy with the trajectory of the law school. (Please explain...

The decline in the rankings undermines the value of our law degrees. I find this disappointing, and difficult to want to continue to support the school philanthropically as a result.

92% of the staff at Hastings identify themselves as Democrat, That is a problem, the school is not diverse, I am sure that I would not be welcomed at Hastings, even though I was partner at a major international law firm, named Super Lawyer for twenty five years, but I am a conservative lawyer. I would never recommend a conservative person who is a person of faith to go to Hastings, first San Francisco is a dangerous city, and it is only going to get worse,

The name change of the school

Dean Faigman needs to go and institutional racism/ current systemic hostile environment of racism needs to be addressed, under the leadership of a person with lived experience of oppression.

Name change was a very negative experience for me. There could have been other methods of restorative justice for the descendants of the native americans involved that would not have involved cancelling S. Hastings and the name of the law school.

#### Q2\_4\_TEXT - Other (Please explain below.)

Other (Please explain below.)

Broader reconsideration. I would say that I reached out to a professor to see if I could support the tax program and never heard back. SO that makes a gift less interesting, more transactional

I renew every year in December, which is when we do all of our donations each year.

Giving from time to time

Prioritizing gifts, there are so many worthy organizations, so many requests. I am favorably impressed with Chancellor/Dean Faigman's communications and decisions.

Change of school name

I donate my time to the school

technically difficult to donate from a foreign country

I don't have the finances to give on a regular basis

Usually I donate annually at the end of the year.

Unpredictable interferences

I was busy preparing the bar and didn't have much money to allocate for philanthropic activity

I don't have a strong connection to the community.

I graduated from Hastings College of the Law. Since it no longer exists I see no reason to provide support.

Other (Please explain below.)

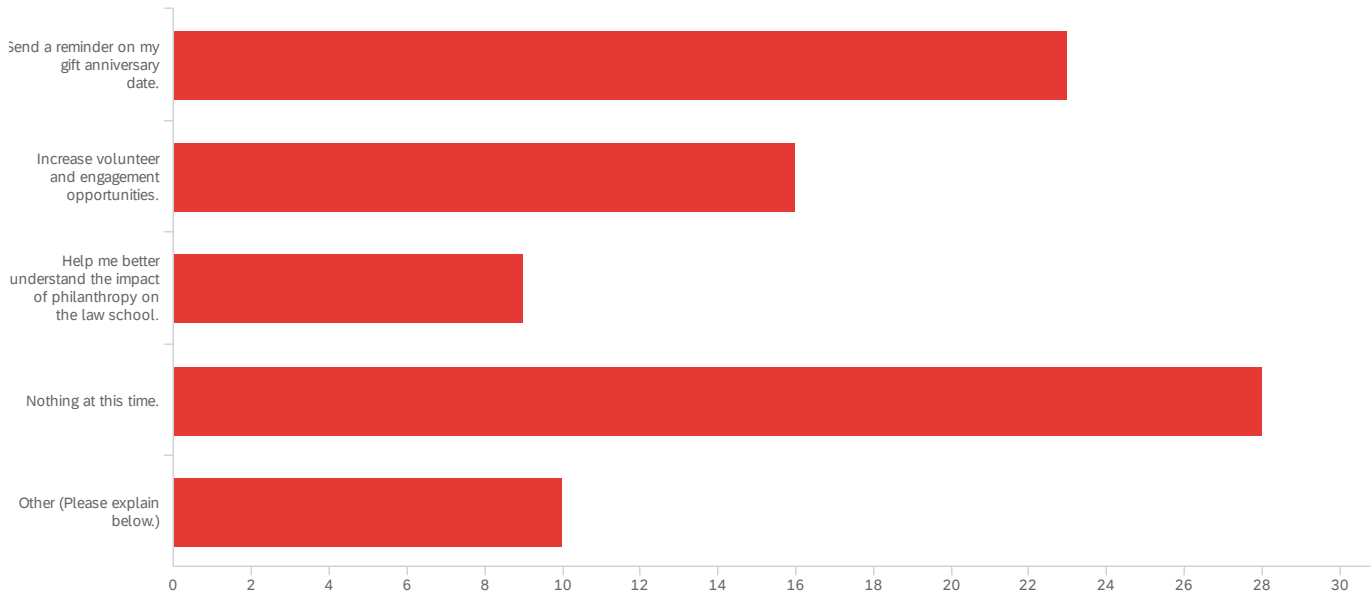
I gave throughout my career, but now I'm retired and cutting back on spending

Annoyed by the way the renaming issue was handled, especially with respect to the Yurok tribe members.

I have two kids in very expensive colleges

### Q3 - What can the law school do to ensure you give philanthropically in the future?

Please check all that apply.



#	Field	Choice Count
1	Send a reminder on my gift anniversary date.	26.74% 23
2	Increase volunteer and engagement opportunities.	18.60% 16
3	Help me better understand the impact of philanthropy on the law school.	10.47% 9
4	Nothing at this time.	32.56% 28
5	Other (Please explain below.)	11.63% 10
		86

Showing rows 1 - 6 of 6

#### Q3\_5\_TEXT - Other (Please explain below.)

Other (Please explain below.)

#### Boost ranking

avoid getting too political and focus on providing the best legal education and scholarship

Change the school name back to University of California, Hastings College of the Law

Take immediate action to address the ranking of the law school and restore the school's previous prestige.

Other (Please explain below.)

---

Try harder.

See above

More in person events in other cities, like DC (where I am)

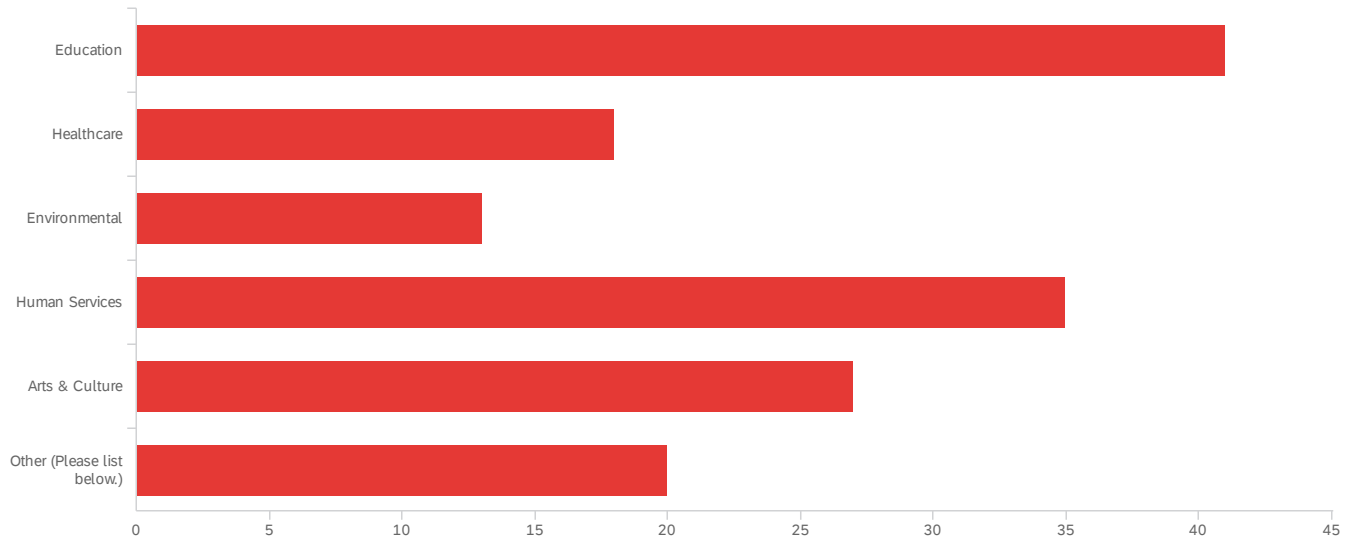
Create more opportunities to connect with fellow alumni.

A single drive at the same time every year.

Other ways besides financial giving - mentoring, etc.?



Q6 - What types of organizations do you support philanthropically? Please select your top three.



#	Field	Choice Count
1	Education	26.62% 41
2	Healthcare	11.69% 18
3	Environmental	8.44% 13
4	Human Services	22.73% 35
5	Arts & Culture	17.53% 27
6	Other (Please list below.)	12.99% 20

154

Showing rows 1 - 7 of 7

Q6\_6\_TEXT - Other (Please list below.)

Other (Please list below.)

Policy

Historical preservation

Immigration

legal, civil liberties

Other (Please list below.)

---

International Human Rights

Animal rescue

Religious

None

Synagogue.

Workers Rights/civil rights

Housing and homelessness

Planned Parenthood

Poverty alleviation

Faith based

Affinity bar association foundation

Religious

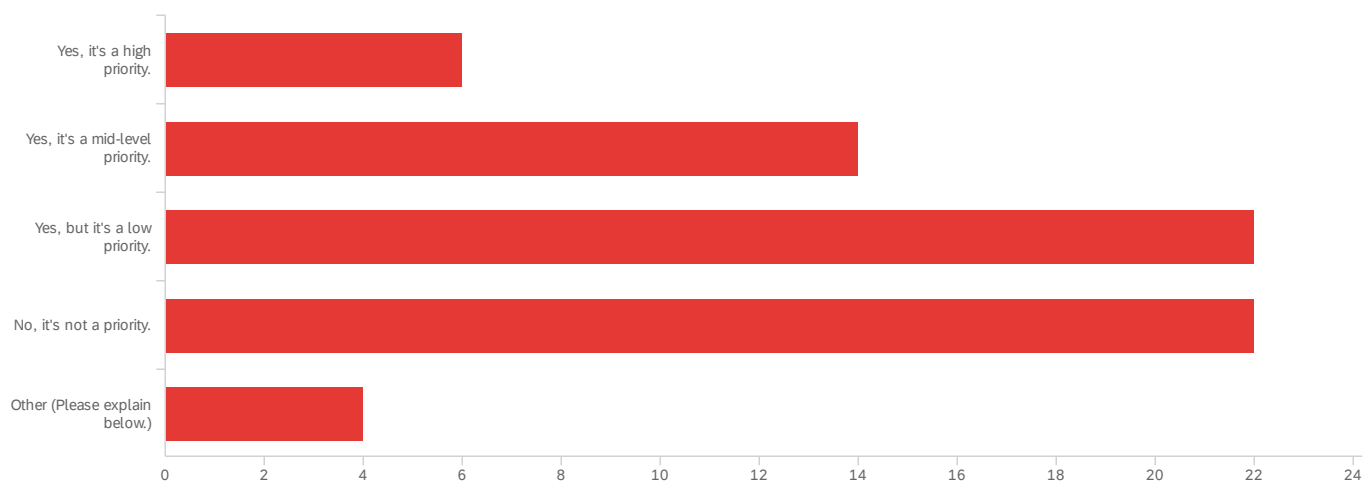
Religious

Animal welfare

Animals

animal rights

# Q7 - Is your involvement with UC Law SF a priority relative to the other organizations you support?



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Is your involvement with UC Law SF a priority relative to the other organizations you support? - Selected Choice	1.00	5.00	3.06	1.06	1.11	68

#	Field	Choice Count
1	Yes, it's a high priority.	8.82% 6
2	Yes, it's a mid-level priority.	20.59% 14
3	Yes, but it's a low priority.	32.35% 22
4	No, it's not a priority.	32.35% 22
5	Other (Please explain below.)	5.88% 4
		68

Showing rows 1 - 6 of 6

## Q7\_5\_TEXT - Other (Please explain below.)

Other (Please explain below.)

I would love to support Hastings as a show of appreciation of my alma mater, on par with the way I donate to all my almae matres and other organizations, but it is too political and leftwing

Other (Please explain below.)

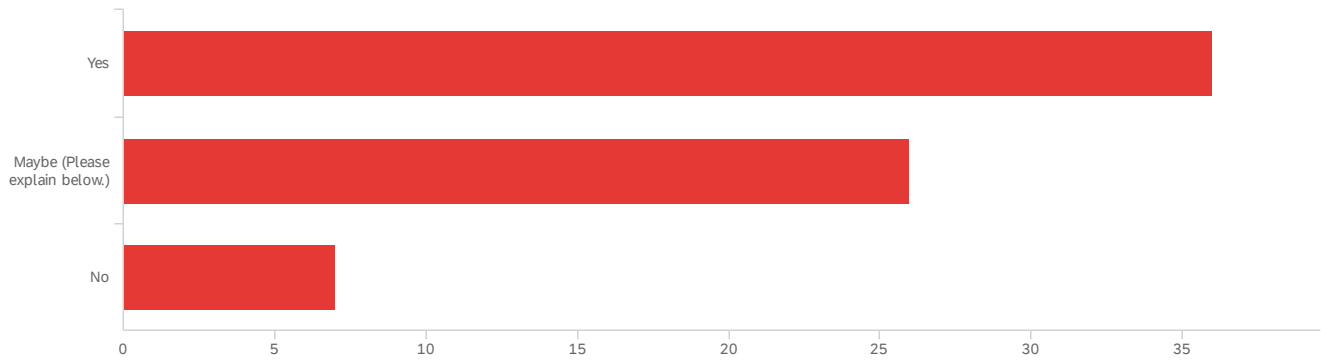
--	--

It was more so in the past.

--	--

It used to be, but is no longer.

## Q4 - I plan to donate to the law school in the future.



#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	I plan to donate to the law school in the future. - Selected Choice	1.00	3.00	1.58	0.67	0.45	69

#	Field	Choice Count
1	Yes	52.17% 36
2	Maybe (Please explain below.)	37.68% 26
3	No	10.14% 7
		69

Showing rows 1 - 4 of 4

### Q4\_2\_TEXT - Maybe (Please explain below.)

Maybe (Please explain below.)

See above

would like to, but unlikely given its foreseeable political leanings

from time to time

If I have extra to give

MAYBE

Maybe (Please explain below.)

The school must taken immediate action to address its ranking relative to other CA and national law schools. When I attended, it was a TOP 20 law school. How could the school allow the ranking to fall as it has?? This does not inspire confidence. I am very concerned.

Depending upon circumstances

Smaller amounts.

If the name is restored

When aforementioned concerns are addressed.

Depending on my monthly income and student loan reimbursement

I can see myself giving again but it seems lower priority than giving to my daughter's school or my synagogue.

if my finances permit

Not sure.

Q5 - We would love to hear from you. All feedback is welcome and appreciated. As an institution that rests on the shoulders of its alumni, we want to learn from you and hear your stories. Please feel free to contact us at [alumni@uchastings.edu](mailto:alumni@uchastings.edu) or leave us a message below. Thank you!

We would love to hear from you. All feedback is welcome and appreciated....

---

I really don't like the name change. It felt responsive to the pressure in the media and not from the actual tribes that were affected by Hastings. It was my understanding that they wanted to keep the name as a reminder of the bad history, so ignoring their wishes seems pretty ironic to me.

I support the name change but don't love the new name. Is it too late to consider alternatives?

**End of Report**

# Office of Advancement

FY23 Fundraising Results

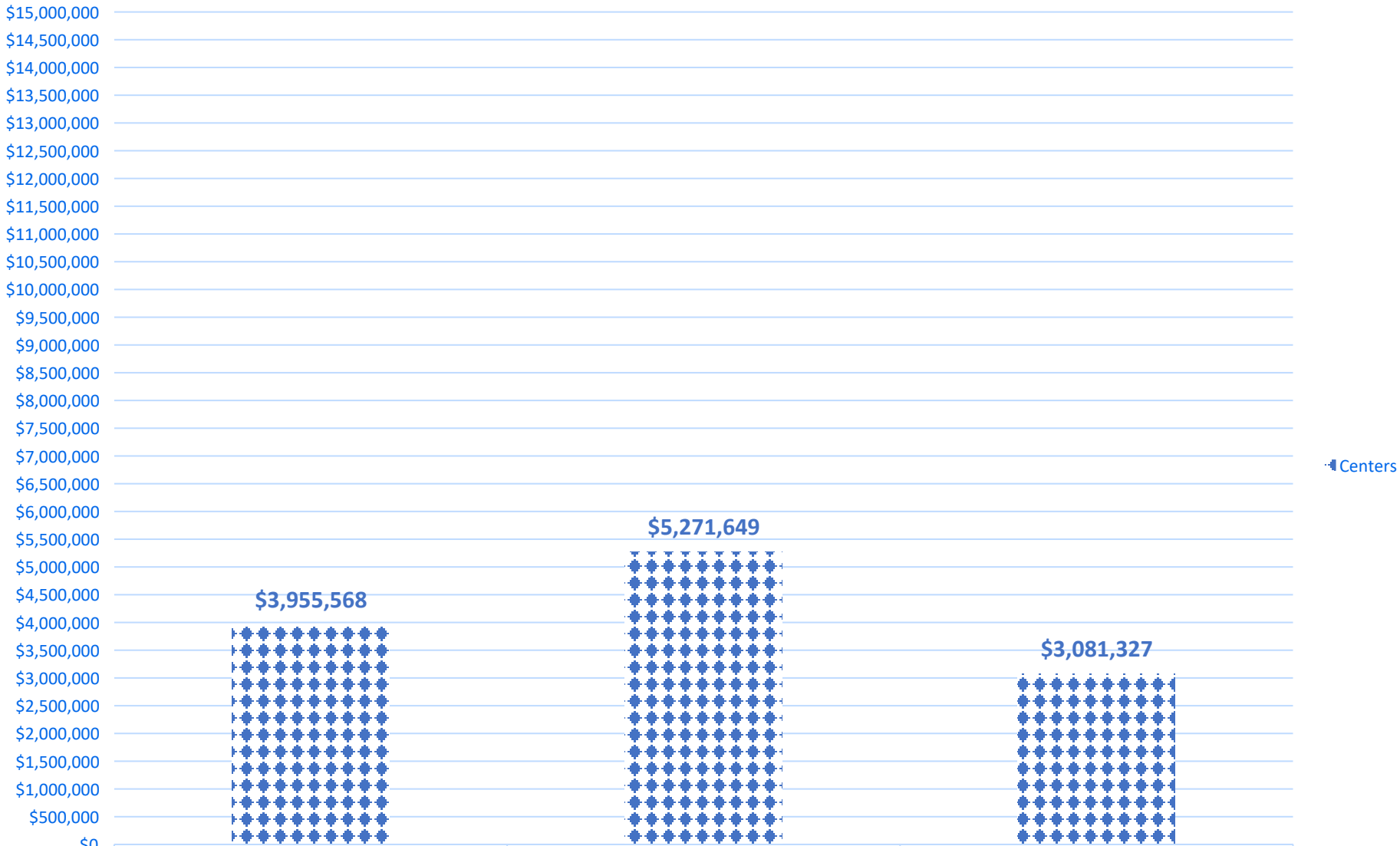
September 8, 2023



UC Law San Francisco

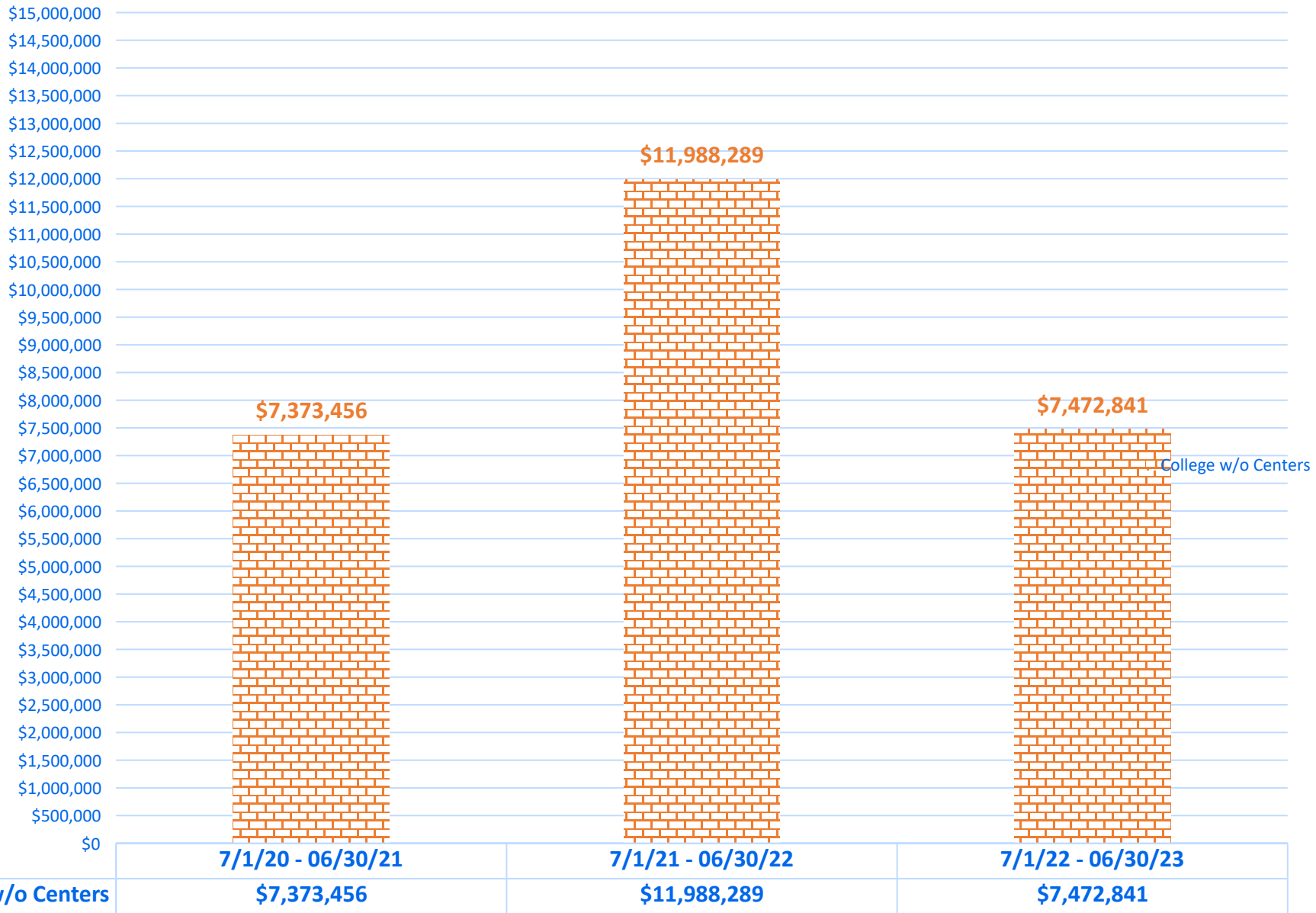


# Centers \$

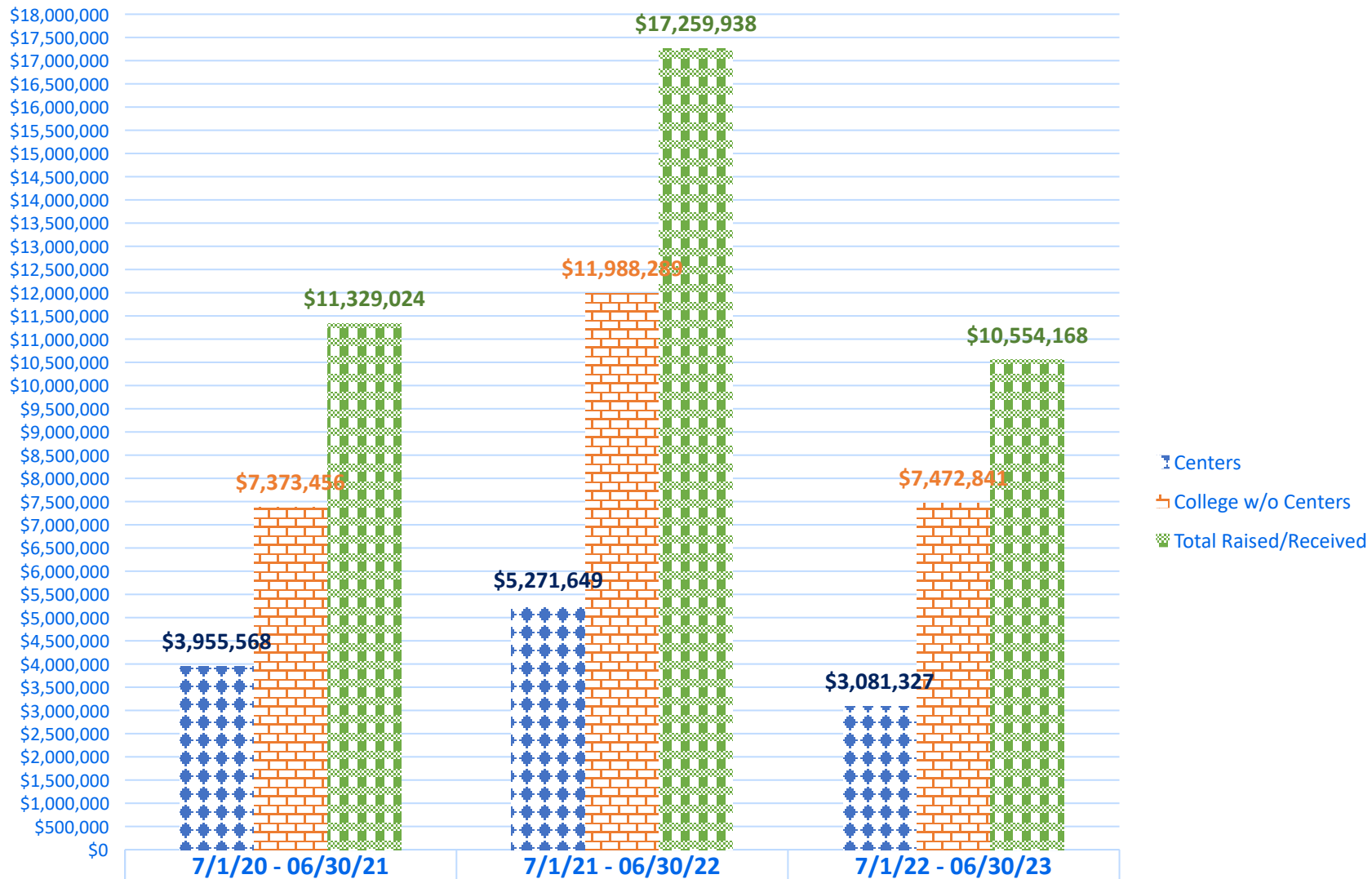


<b>Centers</b>	<b>\$3,955,568</b>	<b>\$5,271,649</b>	<b>\$3,081,327</b>
----------------	--------------------	--------------------	--------------------

# College \$

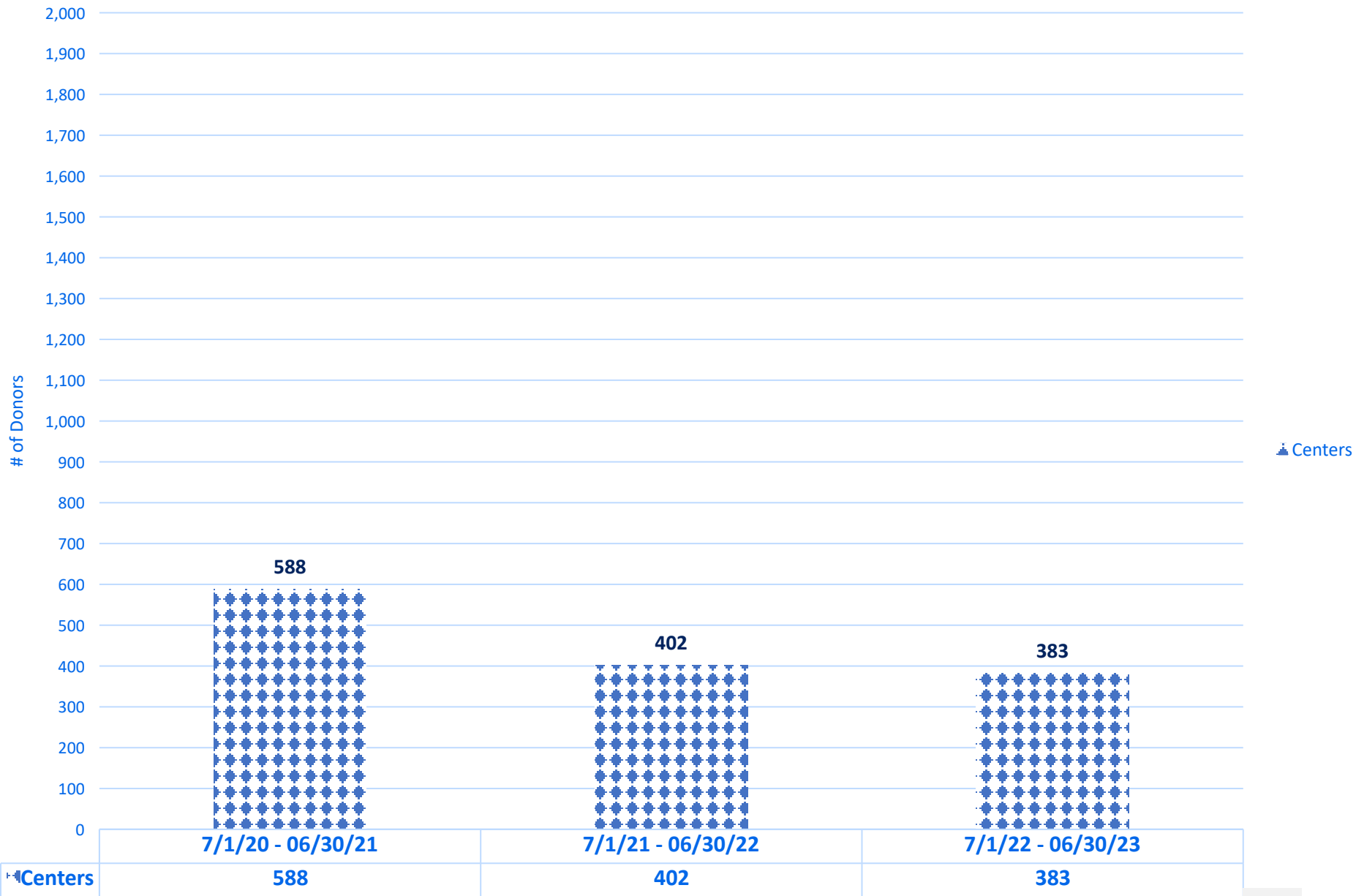


# College + Centers \$

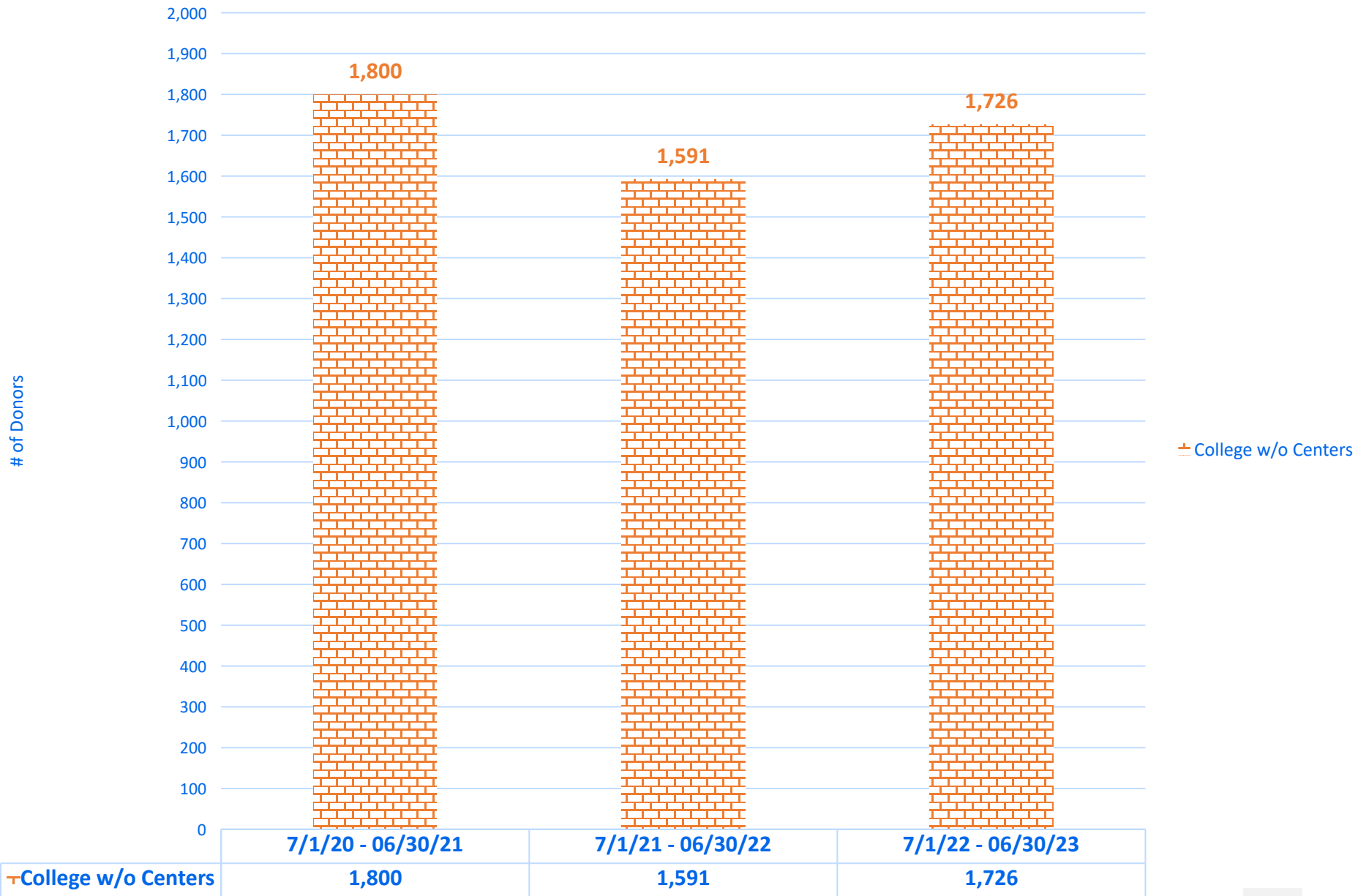


Centers	\$3,955,568	\$5,271,649	\$3,081,327
College w/o Centers	\$7,373,456	\$11,988,289	\$7,472,841
Total Raised/Received	\$11,329,024	\$17,259,938	\$10,554,168

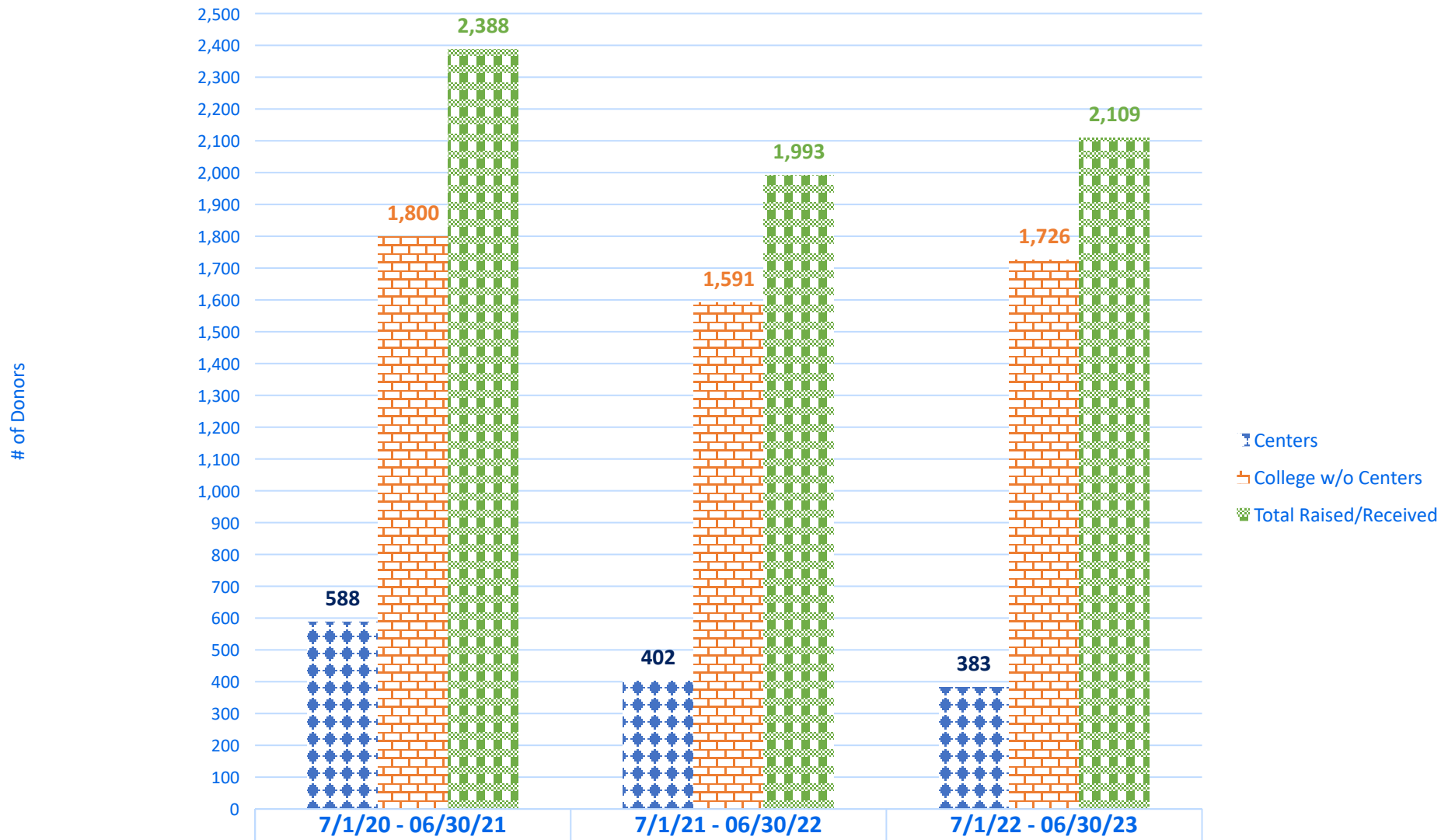
# Centers Donors



# College Donors



# College + Centers Donors



Centers	588	402	383
College w/o Centers	1,800	1,591	1,726
Total Raised/Received	2,388	1,993	2,109

# Communications

## Quarterly Board Report

September 8, 2023

UC SAN FRANCISCO Law

# Chief Communications Officer Transition

---

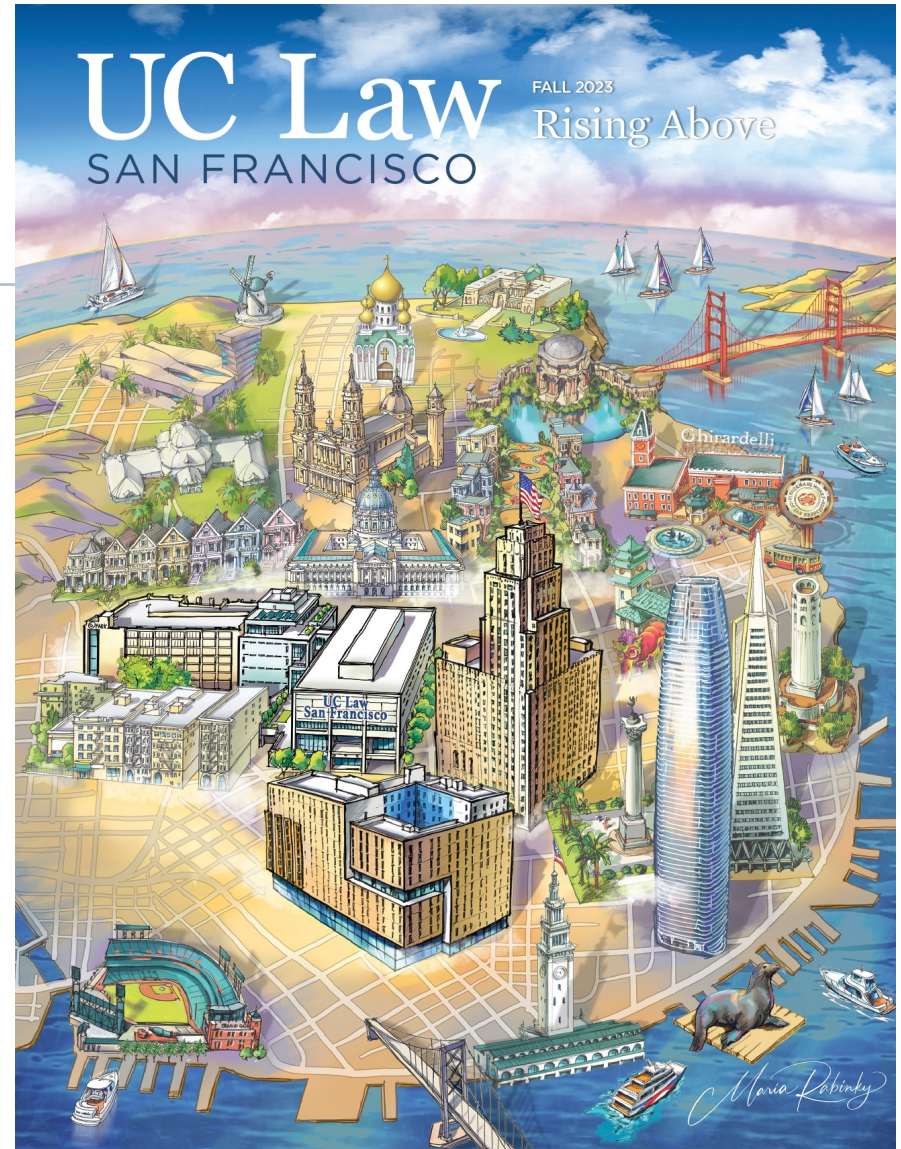
- Chief Communications Officer position is posted
  - Chief Human Resources Officer Andrew Scott has convened and is chairing the search committee
  - Initial application review in progress
- Interim Protocols and Procedures
  - Asst. Chancellor & Dean/Chief of Staff Jenny Kwon is supervising the team in the interim, with the added support of Provost & Academic Dean Morris Ratner and Associate Dean for Library & Technology Camilla Tubbs
  - Communications Team is running smoothly via interim protocols to monitor media mentions, address media inquiries, publish news stories and social media posts, complete ongoing projects, etc.



# Key Communications Projects

# Fall Magazine

- Completion of this project led by Asst. Chancellor & Dean/Chief of Staff Jenny Kwon
- Special thanks to Chief Development Officer Eric Dumbleton and Executive Director of the Alumni Association Meredith Jaggard for helping to get the magazine completed and out on time
- Audiences:
  - Alumni
  - Judges
  - ABA Deans
  - Government Officials
- Arriving in mailboxes early October



# New City Banners

- Freshly designed banners with our new name are in production
- Timeline for completion is September/October



# New Website

- Led by Director of Digital Media and Web Lydia Xia, under the supervision of Associate Dean for Library & Technology Camilla Tubbs
- Fully rebranded design and fresh content successfully launched in July 2022
- All historic pages redirect to new pages



# National Reputation Campaign

---

- Led by Provost & Academic Dean Morris Ratner and Associate Dean for Research Dave Owen
- Communications staff offering support on the campaign
- Regular (year-round) website articles and social media posts about (a) general UC Law SF excellence and (b) scholarly achievement
- Regular (year-round and U.S. News voting season) communications via email to law school deans and faculty, nationally, about centers, scholars, and general excellence
- Coordination with Alumni Office to inform UC Law SF graduates - who are dispersed across legal practice settings and the federal and state benches - of our scholarly, programmatic, and public service accomplishments
- Facilitation of media engagement by UC Law SF faculty and other experts on issues of national or local importance

# News Stories

- News stories led by Senior Writer & Editor Nick Iovino.
  - 2-3 stories per week

## Our Community

[More News >](#)



at UC Law SF

Four UC Law Professors Win Prestigious Faculty Chair Titles

August 28, 2023

at UC Law SF

Judge Robert Rigsby '86 Urges Incoming JD Students to 'Change the World'

August 24, 2023

at UC Law SF

Chancellor & Dean David Faigman Welcomes UC Law SF Community Back to Campus

August 22, 2023

at UC Law SF

UC Law SF Starts Fall Semester with New Faces, Classes, and Building

August 21, 2023

at UC Law SF

Valeria Vera '25 Advocated for Immigrants at SF Public Defender's Office

August 16, 2023

# Social Media Posts

- Social Media posts led by Director of Digital Media and Web Lydia Xia
  - About a dozen posts per week
  - Gained ~450-750 followers in the last year depending on platform (nearly doubling the growth of the previous year)
  - 1.4 million impressions on Instagram since the name change
  - 15 million impressions on Facebook since the name change
- Lydia is also currently taking the lead on daily monitoring of mentions in the media, sending weekly reports.



Questions?



## Report 5.2.1 – Strategic Plan Implementation in the Academic Program

By Provost & Academic Dean Morris Ratner

Strategic priorities in the academic program are determined in part by reference to the [Operational Strategic Plan](#) (attached) that the Board of Directors adopted in March 2020,<sup>1</sup> as well as by supplemental strategic planning documents created since March 2020. This report highlights strategic initiatives the College is emphasizing in the academic program in the 2023-2024 academic year and provides a summary of Plan implementation in the academic program.<sup>2</sup>

In academic year 2023-2024, major strategic priorities include:

- **Curricular and Program Design:** *continuing to adjust the academic program to account for existing and emerging generative AI platforms that are changing what it means to practice law.* This builds on work started last year, during which the Provost & Academic Dean organized a [faculty colloquium on ChatGPT](#), created and updated [resources for faculty on AI's impact](#) on teaching and assessment, added a [new class](#) on AI and the law, and updated the College's [plagiarism policies](#) to account for possible student use of AI. This year, the faculty will focus on two goals – (1) addressing assessment challenges on take-home assignments like papers and (2) identifying spaces in the curriculum to hone students' skills using generative AI. The two goals are in some tension but must be pursued simultaneously. This cluster of initiatives advances Goal 1.1 of the Strategic Plan, i.e., to provide an educational program that allows students to excel in a “continually changing legal environment.” (This topic will be addressed at a faculty retreat on October 6 and at the Board retreat on October 12.)
- **Bar Success:** *continuing to advance bar success goals, including closing performance gaps across law school GPA cohorts.* Prior reporting has exhaustively covered a wide range of bar success initiatives that the College has implemented since 2016 or is currently implementing. This year, our focus will expand to include consideration of concrete ways in which the College should adjust its academic program in light of [proposed changes to the California Bar Exam](#) that have not yet been approved or adopted. Questions on this subject

---

<sup>1</sup> The Plan was created pursuant to a multi-year, community-wide process led by Chancellor & Dean David Faigman's appointed Strategic Planning Working Group co-chairs, Chief Financial Officer David Seward and Provost & Academic Dean Morris Ratner. The Plan development process included substantial participation and input from members of the Board of Directors, alumni, and faculty, staff, and students.

<sup>2</sup> In a subsequent reporting cycle, strategic planning co-chairs Provost & Academic Dean Morris Ratner and Chief Financial Officer David Seward are planning to submit a joint report regarding implementation of the 2020 Operational Strategic Plan that ties together academic and non-academic Plan elements.

include: (1) where and how we should teach and test new lawyering skills that will likely be tested on the new bar exam (e.g., fact gathering, litigation strategy, negotiation, client management); and (2) depending on the answer to that first question, how we should change our teaching/pedagogy, assessment methods, and curriculum. There's one other obvious academic program design change if the current proposal is adopted, which is that classes we currently advise students to take in subjects that will no longer be tested on the California Bar Exam (e.g., Wills & Trusts, Community Property, Remedies, and Business Associations) will remain in our curriculum, but will have a lower profile and be the subject of different advising messages; conversely, if California adds Administrative Law, as the Blue Ribbon Commission has proposed, its inclusion could affect both advising and graduation requirements.<sup>3</sup> This advances Goal 1.2 of the Strategic Plan, i.e., to continuously improve the College's first-time bar pass rate. (See accompanying Report 5.2.2. This topic will also be addressed at the Board retreat on October 12.)

- **Employment:** *expanding student support; orienting students toward market conditions.* This year, the Career Development Office will continue to implement the Professional Development Program it launched last year and add staffing support for students seeking judicial externships or clerkships (with a new staff line shared with the Externship Program). A significant issue in recent years has been the mismatch between student employment preferences (which lean heavily toward corporate transactional work) and the types of jobs that are typically more widely available across sectors and settings (litigation); we will also reflect this year on how we can ensure that students are aware of market trends and how we can create more understanding of and excitement about career paths that align with these trends. This advances Goal 1.3 of the Strategic Plan, i.e., to continuously improve employment outcomes. (See accompanying Report 5.2.2.)
- **Scholarly Excellence:** *hiring new Ladder Faculty to make progress on the College's hiring plan and to account for recent attrition due to retirements and lateral moves and to maintain a robust scholarly community.* This year, the College is hiring up to [six Ladder Faculty](#), with an eye toward reaching an equilibrium number of at least approximately 43 Ladder Faculty, up from the current and historic low of 35 Ladder Faculty. This advances Plan Goal 2.1.1, which aims to create and maintain a vibrant scholarly community and environment to advance our research mission.
- **Community Cohesion:** *Implementing additional initiatives proposed by the Chancellor & Dean's Campus Climate Advisory Committee.* Cross-cutting initiatives include some matters being handled directly by the Chancellor & Dean's

---

<sup>3</sup> If California tests California administrative law, this change could have significant impacts on hiring, course-level design, and staffing, as well. Most faculty who teach Administrative Law teach federal law. It is possible that much of the subject could be covered in the 1L statutory courses, though the faculty needs to grapple with that question, too.

Office (e.g., providing ombuds services to informally facilitate intra-community conflicts) and others are being implemented by academic program units (e.g., providing a consolidated roadmap to students of all the available informal and formal mechanisms for addressing issues they may experience). This set of initiatives advances Plan Goal 4.2, i.e., to increase inclusion of all members of the UC Law SF community.

Though we have reported on new challenges that have emerged or been identified since the Board adopted the Operational Strategic Plan in 2020 (e.g., the pandemic, generative AI, proposed changes to the California Bar Exam, changing student characteristics), the College has made significant progress toward achieving many of the Strategic Plan's goals and has adopted the vast majority of Plan initiatives relating to, among other topics, bar pass rates and employment outcomes, the College's scholarly profile, the Academic Village and Long-Range Campus Plan, and community cohesion. Challenges to confront and opportunities to embrace remain, such that use of the term "significant progress" is not meant to suggest that the College has achieved all its goals. But most of the initiatives proposed in the Plan have either been adopted or are in progress.

The summary of Plan implementation, below, focuses on elements of the Plan that are squarely in the jurisdiction of the Educational Policy Committee, i.e., most directly relevant to the academic program. Other Plan elements have been the subject of regular reporting by the Chancellor & Dean in his regular Board reports and by Chief Financial Officer David Seward in Finance Committee and Board reporting (e.g., Plan elements pertaining to the Long-Range Campus Plan and to fiscal health).

- **Topic 1 – Student Development and Fulfillment**  
Teaching

- *Strategy 1.1.1 – Support teaching innovation that increases student engagement and results:* The College has adopted all of the strategies and initiatives listed in the Plan in this subsection, including hosting regular faculty teaching colloquia on pedagogy.
- *Strategy 1.1.2 – Promote and support excellent teaching through faculty awards and support programs:* The College has adopted all of the listed initiatives, including identifying the elements of teaching excellence, emphasizing mentorship, and supporting teachers whose course evaluations suggest they could benefit from extra teaching support.
- *Strategy 1.1.3 – Regularly update the curriculum to meet the evolving needs of the legal profession:* The College has made substantial progress on the initiatives in this section, including by analyzing additions to the curriculum by reference to the degree to which they fill gaps. While the last faculty-wide curricular audit was in 2018, the Provost & Academic Dean

regularly works with the faculty concentration advisors to evaluate new courses that might enhance our offerings. And, as a result of our outreach campaigns, practitioners regularly reach out to the College to propose new courses that match practicing lawyers' understanding of what students need to learn to be effective lawyers upon graduation. Recent additions to the curriculum that have resulted from this process include a course added this year at the suggestion of an in-house GC for a new course called Artificial Intelligence and the Law.

- *Strategy 1.1.4 – Use pedagogical techniques tailored to the diverse needs of all students; tailor instruction to changing student needs:* The College has invested heavily in this strategy, with colloquia on trauma-informed teaching and on developing students as self-directed learners, and with special emphasis on pervasive instruction regarding written legal analysis across the curriculum.
- *Strategy 1.1.5 – Provide both formative and summative individualized feedback to students:* The College has continued to expand curricular innovations such as the 1L Sack program (formative assessment with individualized feedback in large bar classes) by adding Sack upper division classes, shared guidance with faculty on providing individualized feedback in other courses, and explicitly asked faculty in annual reports used for compensation adjustments to describe their efforts to give feedback to students.
- *Strategy 1.1.6 – Continue to provide a robust array of clinical and experiential opportunities for students to develop lawyering skills:* The College has added a new in-house clinic (Low-Income Taxpayer Clinic), created the position of a Director of Pro Bono Programs, and, this year, approved the creation of a shared position in the externship program and Career Development Office to support and promote judicial externships and clerkships.

#### Bar Success

- *Strategy 1.2.1 – Identify and teach core skills necessary to achieve bar exam success:* As the Plan contemplated, the College has used data-driven analyses to assess bar interventions, added bar-skills classes (including one added this year to be taught by Director of Bar Passage Support Margaret Greer – a year-long writing skills class), continued to add Law & Process versions of bar classes (which are small-group classes in which formative assessment with individualized feedback are central features of the course) including Crim Pro and Evidence, and shared information with faculty about bar coverage and anticipated changes to the bar exam. A major supplement to the Plan involves planning for the next generation of bar exams.

- *Strategy 1.2.2 – Provide additional resources and support to for students to achieve bar exam success:* Director Greer has overseen an expansion (in terms of both services and programming) of the post-graduation College-run supplemental bar success program called BEST, with special emphasis on LEOP support, provided a full range of support to graduates preparing for the bar exam, and expanded the pool of funds available to provide support to students studying for the bar exam, with special emphasis on funds linked to performance targets.
- *Strategy 1.2.3 – Provide a strong advising program to help students make appropriate decisions about upper-division course selection and approaches to the bar exam:* The College has adopted all of the initiatives other than use of CRM, such as tracking student progress and risk factors through data we collect and implementing robust student advising programs (now including mandatory meetings with Student Services on academic advising) and an expansive individual tracking and coaching program in the post-graduation bar study period led by Director Greer.

#### Employment

- *Strategy 1.3.1 – Continuously improve full-time, long-term employment numbers both for jobs requiring/anticipating bar admission and JD-advantage jobs:* The College has used evidence based tools, including statistical analyses, to identify interventions to improve employment outcomes. Those analyses prompted the faculty to adopt Academic Regulation 708, which requires students to participate in a co-curricular Professional Development Program the Career Development Office rolled out last year. Pursuant to this section of the Plan, the College has also added programming to educate students about career paths in small and medium-sized firms, and increased data gathering by the Career Development Office, which has in turn led to more assessment.
- *Strategy 1.3.2 – Develop student competencies to navigate the professional world and the self-awareness to identify where they want to go:* The College has implemented the recommendations in the Plan, including expanded 1L programming (“1L Essentials”), and expanded 1-1 career advising (including mandatory meetings with CDO).
- *Strategy 1.3.3 –Encourage and support networking and collaboration with students and the external legal community:* The College has expanded networking programs including especially via the First Gen Program and has expanded pro bono opportunities, as indicated in the initiatives laid out in this section of the Plan.

#### Wellness

- *Strategy 1.4.1 – Increase understanding and support of students’ mental health and physical wellness while at [the College] and in their future*

*careers*: Spearheaded by Student Services, the College has created a wide array of wellness programming for students, including advising messages, co-curricular programs, yoga classes, meditation sessions, distribution of an app for their phones for inspiring calm, health and wellness coaching, and training on sexual harassment and substance abuse.

#### Student Attraction and Retention

- *Goal 1.5 – Attract students with demonstrated preparedness and capacity to succeed in law school and practice; retain top-performing students*: Dean of Enrollment Management June Sakamoto has regularly reported to the Board regarding efforts to attract and retain top students, and has implemented initiatives including engaging faculty in retention efforts, expanding digital outreach and marketing, and supporting the Honor Society.

### • **Topic 2 – Scholarly Production and Impact**

#### Quality and Quantity of Faculty Scholarship

- *Strategy 2.1.1 – Enhance and maintain an atmosphere of lively intellectual exchange among members of the [College] community*: The College has adopted initiatives listed in this section of the Plan, including regular reporting regarding faculty accomplishments, work-in-progress programs hosted by the Associate Dean for Research, regular faculty colloquia, systematic publication to the community of campus events, and expansion of centers of excellence (see Report 5.2.3 in this Committee reporting cycle).
- *Strategy 2.1.2 – Ensure sufficient opportunities and incentives for faculty members to produce high quality scholarship that addresses important topics relevant to the law with creativity and analytic rigor*: The Plan has been implemented with regard to this strategy. The College has standardized faculty annual reporting on scholarly accomplishments, baked regular compensation growth for faculty into its five-year budget (including merit pools), stabilized the funding source for faculty research accounts, increased summer research funding, and added a new set of awards (from an endowed fund from Emerita Chancellor & Dean Mary Kay Kane’s estate) to recognize faculty excellence, and added two new research chairs (Lind and Kane). Pursuant to the Plan, the College has also reviewed and updated its tenure standards by, among other things, increasing the number of substantial scholarly publications needed for tenure. The College has also established an Office of Sponsored Projects to support third party research funding. Ladder Faculty overall compensation remains below peer UC law schools, which has presented retention issues in recent years, especially with changes in the UC retirement plans over the past decade and so healthy faculty compensation growth remains a priority subject to available funding.

- *Strategy 2.1.3 – Support...scholarly production and renown by developing and attracting top scholars:* The College has added new chairs and the Chancellor & Dean continues to prioritize fundraising for new chairs, has built grants management capacity, and added centers of excellence as provided in the Plan.
- *Strategy 2.1.4 – Encourage development of “centers of excellence” to build upon and enhance [the College’s] subject-matter strengths:* As indicated in Report 5.2.3 submitted herewith, the College has implemented this section of the Strategic Plan.

#### Communicating Scholarly Excellence

- *Strategy 2.2.1 – Facilitate and encourage effective lines of communication among institutional actors:* The College has tracked scholarship and metrics and established clear lines of communication regarding scholarly achievements. The College has not yet identified a system to make it easier to sort data about achievements but is exploring technology to make it easier to go from reporting of achievements to publication of those achievements (e.g., a “ticker” on the website).
- *2.3.1 – Facilitate faculty self-promotion:* The College has provided information to faculty to train them on self-promotion, asked faculty to report annually about promotion of fellow faculty members’ work, methodically uploaded faculty publications to a centralized and public database, and regularly nominated faculty for awards and recognition.
- *2.3.2 – Institutionally promote scholarship and accolades:* The College has significantly expanded its communications program to share information about faculty achievements, including scholarship. It has added a directory of experts to the website to make it easier for reporters to identify faculty to interview and quote. And it regularly promotes faculty achievements via social media, website stories, and emails to the community, alumni, and peer law schools.

#### • **Topic 3 – Academic Village**

##### Multidisciplinary Teaching and Research

- *Strategy 3.3.1 – Scale up the “centers of excellence” model:* See accompanying Report 5.2.3. This has been accomplished.
- *Strategy 3.3.2 – Nurture and deepen foreign institutional partnerships through Global Programs that support LLM enrollment and intellectual exchange:* The College has prioritized development of new institutional partnerships. New Associate Dean for Global Programs Binyamin Blum has already strengthened and added partnerships in multiple countries, and this work has been supported by, among other College units, the International Development Law Center, which builds relationships with foreign partners through grant-funded exchanges. Based on expressions of

interest from foreign partners, the College has started adding MSL enrollment as an option in new partnership agreements, as well. This remains a high priority.

- **Topic 4 – Community Cohesion**

- Inclusion and Belonging

- *Strategy 4.2.1 – Enhance recruitment efforts to attract students who have overcome significant disadvantages:* The College continues to promote LEOP in person and on the website to attract qualified students, and it has further developed pipelines to the law school, including, most recently, joining the California Leadership Access Workforce (Cal LAW) Pathways program.<sup>4</sup> This set of initiatives has been implemented as indicated in prior reporting, and it remains a priority.
    - *Strategy 4.2.2 – Facilitate greater inclusion in community events:* The events described in prior reporting and in accompanying Report 5.2.3 demonstrate the diversity of topics and speakers invited to campus. The College recently updated its events publicity guidelines, and development of technology for advertising and promoting events is ongoing. Ensuring that the Events calendar is systematically used remains a strategic priority.
    - *Strategy 4.2.3 – Include a broad representation of community members, including staff members of all levels, on committees, including committees formed to implement Strategic Plan initiatives:* The College has implemented this Plan element, including most prominently with regard to implementation of the Plan element in the Community Cohesion topic to assess the campus climate and take action based on the evidence, which the College did through committees and working groups with broad campus and community representation. This Plan element is an ongoing project that isn't completed as a result of broad participation in any one committee or project.
    - *Strategy 4.2.4 – Build physical and human infrastructure to support and enhance diversity, equity, and inclusion at the College:* The College has studied best hiring practices (as reported with regard to faculty hiring in prior Board reporting), designated spaces that support diversity (including a cultural center, prayer/meditation rooms, etc.), ensured that art reflects the diversity of our community, and added new DEI roles, including the Director of DEI Initiatives and an Ombuds role.
    - *Strategy 4.2.5 – Foster communication, community, and awareness relating to DEI issues:* The College has implemented this section of the Plan

---

<sup>4</sup> See <https://uclawsf.edu/2023/02/27/uc-law-sf-joins-cal-law-pathways-program-to-help-diversify-legal-field/#:~:text=UC%20Law%20San%20Francisco%20signed,the%20Law%20School%20Admission%20Council.>



and has gone farther via supplemental strategic planning as to which there has been prior reporting. Implemented initiatives include regular communications from Student Services celebrating diverse communities, and the climate assessment survey (and follow-on planning and initiatives).<sup>5</sup> The Chancellor & Dean is also about to announce new Principles of Community adopted after a community-wide effort led by the Diversity, Equity & Inclusion Working Group at his request last year.

- *Strategy 4.2.6 – Recruit diverse faculty:* The College has recruited diverse faculty in recent hiring cycles for both full-time and part-time faculty in a manner consistent with Prop 209. (Hiring is the subject of regular Board reporting.) The College updated its Academic Freedom policy, a previously reported, implementing another key initiative in this section. And the College has engaged faculty and staff to emphasize the importance of viewpoint diversity and has added programming described in prior reports on that topic.

Reporting to this Board committee in the years since the adoption of the Plan in March 2020 has focused on the foregoing topics, with special emphasis on student development and on community cohesion, and that reporting includes much more detail regarding specific initiatives pursued since March 2020.

As a touchstone for identifying strategic priorities, the 2020 Strategic Plan remains highly relevant. That is partly because implementation is not yet complete and partly because the institution's priorities are relatively stable, even as the circumstances in which we strive to achieve them change. In defining goals, the 2020 Strategic Plan tracked the College's long-standing mission elements as a public center of higher learning (teaching, research, and public service). The College's commitment to continuous improvement as a core institutional value means that the same core goals that animated the 2020 Plan will remain core goals for the institution in the next several years.

---

<sup>5</sup> See <https://sites.uclawsf.edu/speakyourtruth/>.

## **Report 5.2.2 – Student Bar and Employment Outcomes**

By Provost & Academic Dean Morris Ratner, Assistant Dean for Career Development Amy Kimmel, Interim Associate Dean for Academic Skills Instruction and Support Stefano Moscato, and Director of Bar Passage Support Margaret Greer

### **I. Bar Passage**

Section I of this report includes quotes from prior Board reports, bar studies, and a faculty report in order to help frame recent discussions of bar success initiatives at the College.<sup>1</sup>

#### **A. History of Bar Success Initiatives**

The College regularly reports regarding its ongoing quantitative and qualitative assessment of the factors leading to improved first-time bar passage rates. Evidence-based assessment has grounded a wide range of initiatives adopted by the College since 2016. In December of 2022, the Provost & Academic Dean Morris Ratner, the College's statistician Dr. Stephen N. Goggin, Ph.D., Professor of Practice Stefano Moscato, Professor of Practice and Director of Bar Passage Support Margaret Greer, and Assistant Dean for the Legal Education Opportunity Program Elizabeth McGriff completed a statistical analysis of 13 years of graduate data, the largest single study the College has ever undertaken (and one of the largest data sets assembled by a law school), with the aim of evaluating which of the College's success initiatives accounted for the sustained 30+ percentage increase in first-time bar passage rates, and to evaluate, too, what accounted for the dip in pass rates for the Class of 2022. That report has been adapted as a draft scholarly article for publication, which was accepted a few weeks ago by the nation's leading academic and peer-reviewed journal focused on legal education, the AALS's Journal of Legal Education. A publication date must still be determined, at which point the study will be released publicly. Appendix A, below, is a summary of the study findings. Appendix B is a summary of the College's initiatives taken since 2016 to transform our program of legal education and improve outcomes, which is part of the same study. Appendix C is a chart copied from a prior Board report showing July 2022 bar pass rates for California ABA-accredited law school in relationship to entering metrics (LSAT); it is part of the support that explains that while in the period 2019-2021, the College outperformed peer schools with higher metrics, in 2022 it performed in line with entering metrics.

---

<sup>1</sup> Note that some of the prior reports and studies refer to UC Law SF as UC Hastings. When quoting reports submitted before the name change, we retained old name references.

The upshot is that the College has transformed its program of legal education to achieve historically high first-time and ultimate bar pass rates (accounting for student entering metrics) for all graduates and for LEOP graduates in particular, though, as described in the next section, the multi-year trend of historically high rates in excess of what students' entering metrics would predict ran up against the pandemic and other factors that negatively impacted the Class of 2022.

### B. July 2022 Outcomes and Analysis

The question has been posed regarding why UC Law SF graduates in 2022 might have been more negatively impacted by the pandemic than graduates of other schools. As previously reported, the dip in bar outcomes for the Class of 2022 was driven by a disproportionately large drop in bar pass rates for graduates admitted through the Legal Education Opportunity Program in the Class of 2022.<sup>2</sup> That is not surprising because LEOP students were most vulnerable to pandemic disruption. Their vulnerability is a result of LEOP admissions policy design: LEOP's mission is to create a bridge to practice for applicants who have overcome adversity via a process that emphasizes qualitative indicia of likelihood of success in law school.<sup>3</sup> As a result, the LEOP student cohort each year has lower entering metrics (e.g., LSAT scores), though in recent years, the gap between LEOP and non-LEOP entering metrics has narrowed. Lower-metric students are inherently more at-risk in the face of disruption such as a pandemic, but anecdotal evidence suggests that LEOP students also generally faced more challenging living circumstances during the pandemic, given that they appear to have disproportionately experienced family deaths or caregiving responsibilities, economic consequences of pandemic health measures, and the like. Though LEOP graduates had historically high first-time bar pass rates in the period 2019-2021, the first of the two most impacted LEOP graduating classes (2022, with 2023 being similarly situated) experienced a 20+ percentage point decline in first-time pass rates as a cohort, much larger than the decline experienced by the general student population.

In a December 2, 2022 Board report, the College summarized its findings with regard to the drop in first-time bar passage rates experienced by the Class of 2022:

In general, UC Hastings' non-LEOP bar passage rate for the Class of 2022 on the July 2022 administration of the California Bar Exam was approximately 77%, four

---

<sup>2</sup> The Class of 2023 was similarly impacted by the pandemic.

<sup>3</sup> See <https://uclawsf.edu/admissions/leop-admissions/> and <https://uclawsf.edu/academics/academic-success/legal-education-opportunity-program/> ("Our program offers special consideration in admission to applicants who have been subject to significant adversity that may have prevented them from attaining numeric criteria that fully reflect their motivation, talent, and academic and professional ability. While standard numeric criteria are considered in LEOP admissions, added emphasis is placed on non-numeric criteria.")

percentage points above the 73% average first-time pass rates of graduates of ABA-accredited law schools in California. However, the LEOP bar pass rate fell from historic highs maintained over the past three administrations before July 2022 (which were in the 70% range) to 49%, and the overall/blended first-time pass rate for all UC Hastings graduates (non-LEOP and LEOP) was 72%, a point below the average for graduates of ABA-accredited law schools. We don't yet have peer school data, and we are still in the middle of more comprehensive statistical analyses of the Class of 2022 data. The remainder of the text in this report shares our preliminary analysis and findings.

Before sharing more data, we want to acknowledge the efforts all our graduates made to adapt to a three-year JD program that was impacted by COVID, and we want to celebrate the success of the Class of 2022 graduates who did pass the July bar exam, despite many obstacles since they matriculated in 2019. We also want to acknowledge the dedication of our faculty and academic program staff who worked tirelessly during this period of disruption to maintain a high-quality academic program for our students. While we delve into some of the possible causes of this year's decline (in addition to COVID disruption), we want to clarify at the outset that we are not in any way criticizing graduates who failed, many of whom were simply unable to operationalize the success strategy advice we gave them this past summer.

In each of the three prior years (2019-2021), UC Hastings graduates were at or above an 80% first-time pass rate, above the state average first-time pass rate for graduates of ABA-accredited law schools, and above what our students' metrics predict. As a result, we experienced first-time pass rates that were in line with the pass rates of law schools with higher-metric students. Last year, for example, on the July 2021 administration of the California Bar Exam (CBE), the statewide average for grads of ABA-accredited law schools was 80% and the UC Hastings first-time pass rate was 83% overall and about 84% for the Class of 2021.

While the overall first-time pass rate for ABA-accredited schools fell by 7% year-over-year (YoY) from July 2021 to July 2022, the Hastings first-time pass rate YoY fell by 12% for the Class of 2022. Initial analyses suggest that the drop was driven by particular weakness in the third and fourth law school GPA quartiles and by difficulties of the LEOP graduates who comprised approximately 20% of the graduating class.

All that said, and as previously reported, the College is not assuming that this simple and straightforward explanation of 2022 outcomes is correct and is instead assuming that we

must remain vigilant and maximize the probability of success for all students and graduates.

### C. Summer 2023 Support

At the end of the last academic year, Director Greer reported regarding the College's plans to address challenges noted in the Class of 2023 graduating class, which, like the Class of 2022, was particularly hard-hit by pandemic disruption. Director Greer's plans included special support for LEOP graduates (e.g., enhanced advising/messaging and additional professionally trained 1-1 tutors) and special support for all graduates in the third GPA quartile. Director Greer successfully implemented that plan. Likely as a result of these interventions, the College narrowed the gap between LEOP and non-LEOP student bar preparedness, and third quartile students substantially increased course completion, accuracy of practice answers, and participation in the summer BEST program Director Greer manages. The College will have the opportunity to assess the efficacy of bar success initiatives aimed at Class of 2023 graduates when we receive first-time pass data in approximately November of this year.

At the same time, students in the bottom half of the Class of 2023 by law school GPA continued to struggle to complete the recommended percentage of post-graduation commercial bar courses. We suspect this is related to several converging factors: (1) Class of 2023 graduates had more open book exams during the pandemic, when it was not possible to effectively administer in-person, proctored exams; (2) they may not have retained as much information from their disrupted years as law students, meaning they had more information to absorb during post-graduation bar study; (3) students who spent formative years impacted by the pandemic have been presenting as law students as relatively passive learners, and significant numbers of them appear to struggle with time and project management; and (4) many of the students who would have most benefitted from an early start to bar study did not heed advice to start studying as soon as course materials were available in the spring and instead delayed bar study until after graduation and post-graduation celebrations. We are taking several steps to address these factors. For example, our 1L co-curricular programming now includes time and project management training. Also, we are dramatically scaling up in-person closed book exams. The College has selected a graduation date that precedes the official start of bar study. And we are crafting earlier and blunt advising messages regarding the importance of an early start to bar study.

### D. Disqualification

This section considers the question of whether the College should revisit its academic disqualification threshold at this time. One recent data point is relevant: while first-time

bar passage is obviously the best outcome for all graduates, ultimate bar passage is also relevant when considering both the quality of the educational program and the value of the law degree for graduates who have invested in it. (“Ultimate bar passage” is passage within two years of graduation.) The College reported an ultimate bar passage rate of 94 percent and 92 percent, respectively, for the two most recent graduating classes for which data are available (Classes of 2019 and 2020).<sup>4</sup> The percentage is even higher after two years, though we do not track that data for reporting purposes.

Against that backdrop, it’s helpful to consider the analysis of the faculty Academic Standards Committee that evaluated a proposal from the administration to increase the disqualification threshold in 2018 from a GPA of 2.2, which resulted in an average academic disqualification rate of less than 1% of the 1L class (similar to Stanford Law School’s disqualification rate), to a GPA of 2.7 (which would have resulted in disqualification rates more in line with metric peers). The Committee accepted that proposal only in part, raising the disqualification threshold that year to 2.5, which has resulted in an academic disqualification rate closer to 5 percent. In its report sharing its recommendations and findings with the full faculty, the Academic Standards Committee noted (with footnotes and exhibit references omitted):

### **1. Background**

The Academic Standards Committee has been asked to revisit the disqualification (DQ) threshold—the cumulative GPA below which a student may not continue or graduate. Under Academic Regulation (AR) 905, the cutoff is now 2.2.... In advocating for a substantial increase of the DQ standard, the administration asked us to consider four factors 1) historical DQ rates; 2) DQ numbers at metric-peer schools; 3) bar passage, and 4) best interests of our students. These factors were set forth and explained in Academic Dean Morris Ratner’s Feb. 2, 2018 report to the faculty, pages 5–8, and our Committee proposal will reference Dean Ratner’s report.... It will also reference a March 20, 2018 report by Dr. Stephen Goggin, entitled “Analysis of 1L GPA Mobility & Bar Outcomes, 2015–2016 Graduating Classes....”

In the Committee’s view, the purpose of raising the DQ threshold is to disqualify those students who are unlikely to be able to perform competently as lawyers, including those who will likely not pass the bar even with numerous attempts. We see this goal as being in the best interests of students and the institution. Disqualifying those students who are incurring substantial debt, with little likelihood of becoming lawyers, may be seen as being in their best interests....

---

<sup>4</sup> See <https://uclawsf.edu/wp-content/uploads/2023/01/2022ABABarPassage.pdf> and <https://uclawsf.edu/wp-content/uploads/2023/03/BarPassage2023.pdf>.

In the following section we summarize the four factors which the administration asked us to consider as being relevant to a determination of the DQ standard.

## **2. Factors Relevant to the DQ Threshold**

### **a. Historical Trends**

From 2002 to 2012, our DQ was 2.0, and an average of 2% (with a high of 2.89% and a low of 0.74%) of students were disqualified on that basis. In 2012, we raised our DQ to 2.2; since then, although our admission metrics have decreased, rather than more students being disqualified, the number has dropped, with an average of less than 1% being disqualified. We assume that loosening of the curve, as well as grade inflation explains why fewer students are being disqualified in a context where student metrics are going down and the DQ [GPA floor] has risen.

Assistant Dean...Stefano Moscato has studied the impact of various DQ levels on past classes. He found that a “2.4 DQ threshold would have, on average, amounted to a 2.88% DQ rate for the last five classes (which is basically the 2005 ‘historical high’ DQ rate), and a 2.3 DQ threshold would translate to a 1.85% average DQ rate (which is more or less the average DQ rate for 2003-2008). An argument for raising the DQ to roughly match historical rates, would be based on an assumption that, as Morris put it in his report, “our historical DQ rates are a meaningful benchmark.” The Committee is not persuaded that there is objective data conclusive on that point, and invite faculty input on the issue.

### **b. Peer Schools**

Our metric-peer schools...disqualify students at significantly higher rates than we do.... In deciding to recommend an increase in our DQ rate, we did not give a substantial amount of weight to the above comparison. We concluded that UCH is a different enough institution—in terms of curriculum, grading, and history—that we need not be driven by those schools’ non-transfer attrition rates and policies....

### **c & d. Bar Passage and Best Interests of Our**

The Committee has paired these two factors—bar passage and best interests—because it is our conclusion that it is not in the best interests of a student to invest heavily in a law school education when that student is very unlikely to be able to pass the bar and practice law.

We considered two sets of analyses prepared by Dr. Goggin. The first analysis, referenced in Morris’s report...looks at first-time bar passage rates—which is perhaps most relevant if one is considering school rankings. Dr. Goggin notes that “shifting the 1L GPA cutoff up slightly does little to affect the average first-attempt bar passage rates, as it excludes very few students.” It is only at far higher levels (2.7 or 2.8) that there are “noticeable changes” to the bar passage rates. A DQ standard of 2.8 would translate into disqualifying students who attained grades between B- and B in their first year courses. One should keep in mind that grade normalization requires that in classes with 30 or more students, 7–12% receive a grade of C+ or below. Thus, setting the DQ at 2.7 or 2.8 would result in disqualifying a minimum of 7% of the first year class – including those have received between B and B-. The Committee did not see this as in the best interests of our students.

In considering the best interests of our students, we wanted to consider any data that helped to correlate 1L GPA and bar passage, not just for first-time bar takers, but for ultimate passage. In other words, what is the likelihood that students at various 1L GPAs will ultimately pass the bar and be able to enter the profession? We asked Morris for data on that issue, and in response Dr. Goggin prepared a report addressing 1L GPA and bar passage; it is referred to above.... Dr. Goggin looked at various 1L GPAs from 2.3 to 3.0, and correlated passage on first attempt, and passage on “any attempt....”

[A]lthough students with a 1L GPA of less than 2.5 only pass at the rate of 10.5% on the first attempt, almost a third of them pass on subsequent (“any”) attempts. Students with a 1L GPA higher than 2.5 but less than 2.6 pass at the rate of 18.5% on the first time, and at 40.7% on subsequent attempts. We found these figures supportive of setting the DQ rate at 2.5, although we recognize that reasonable minds may disagree, and some might opt to set it at a higher rate.

### **3. Concerns**

This proposal is the product of much discussion and soul-searching among the Committee members. The faculty’s decision will have very real consequences for many of our students.... In the interest of contributing to a meaningful all-faculty discussion, we share the concerns raised and considered during our meetings. They include:

- a. Disproportionate impact on LEOP. Raising the DQ to 2.5 may have a disproportionate impact on LEOP students, who bring many benefits to our



- law-school community and the bar. The existing data is inconclusive on this point.
- b. Recent curricular changes. We have only very recently modified our curriculum and teaching methods with the goal of better preparing students for the bar. These measures have not yet run their course; it is too soon to tell whether those other changes will sufficiently improve our bar passage rate without resort to dramatically raising the DQ standard. [**Editor's note:** in fact, these measures did produce a sustained improvement in bar outcomes after 2018.]
  - c. Earlier interventions. In addition to recent efforts, the school could—and should—do more to prepare our students for the bar and practice. In particular, the Committee's student representatives emphasized that most 1L's receive no clear assessment of their performance until February, when they receive their Fall grades. Disqualifying students without earlier intervention seems unfair. In advocating such measures, the Committee recognizes that there are questions of resources. [**Editor's note:** the College has significantly increased the quantity and quality of formative assessment in the 1L year since 2016.]
  - d. Inconsistency between DQ threshold and grade definitions. Raising our DQ cutoff would require that we reconsider the definition of “unsatisfactory” set forth in AR 1004. AR 1004 states that students whose performance is “unsatisfactory” must be given a C- or lower. This suggests that a C or above is “satisfactory;” a C+ must be more than satisfactory. Accordingly, a 1L who receives a B- in two classes and C+'s in all others is considered to be performing acceptably. Yet with a DQ of 2.5 or above, that student would be disqualified. Though somewhat speculative, raising the DQ may lead to further grade inflation that would undermine the purpose of raising it to 2.5.
  - e. Student morale. We assume that raising the DQ threshold will have a negative impact on current student morale and—even though they are not subject to the new standard—it may well increase anxiety and self-doubt. It may also have an adverse effect on applications....

The faculty vote on the above-quoted report in 2018 occurred at a point in the College's history when its first-time bar pass rate was below 70% for a period of five years, including one year in which the July administration first-time pass rate had dropped to 51%. Since that time, the first-time bar pass rate improved to percentages not seen in over a decade, not since the College admitted students with much higher entering metrics. At the time of the vote in 2018, the faculty accepted the Committee's recommendation to increase the disqualification threshold to 2.5, but no higher.

Our ongoing analyses indicate that just as was the case in 2018, the College would need to disqualify a substantial percentage of the first-year class to significantly increase first-time bar pass rates. It is highly unlikely the faculty would agree to increase the

disqualification threshold at this time, given the fact that for three years (2019-2021) and as a result of significant effort, the College punched well above its entering metric weight on bar outcomes; the College's very high ultimate bar pass rate; the muddying of the assessment waters due to pandemic disruption; the likely role of LEOP student vulnerability in recent outcomes; the fact that, even in the 2022, when the bar pass rate dipped, most graduates performed roughly in line with what their entering metrics would have predicted (see Appendix C); and the need to raise the threshold to the point where we would need to more than double the number of disqualified students each year to materially impact bar outcomes.

#### E. Survey of Graduates Who Failed the Bar Exam

For the June 9, 2023 Board meeting, we reported regarding a recent survey of graduates who failed the bar exam (which supplements prior and regular surveys of graduates who passed the bar exam on the first try or a subsequent attempt). We characterized the reporting as preliminary because we thought we might receive additional responses. We did not. That reporting is thus complete. Here it is in relevant part, quoted from the June 9, 2023 Report 6.2.2 (the remainder of this subsection is copied from that report):

##### 1. Summary

Director of Bar Passage Support Margaret Greer recently surveyed students who did not pass prior administrations of the California Bar Exam and who are retaking the exam in July 2023. (We have surveyed students who passed the exam. This is our first qualitative survey of graduates who failed, though, as noted below, we regularly obtain qualitative information from graduates who failed via mechanisms other than surveys, and, in addition, rely heavily on quantitative data regarding all graduates, including those who passed and those who did not.) The upshot is that...we appreciate the suggestion that we survey recent graduates who failed and yielded useful information from the survey responses, including:

- Confirmation of prior quantitative and qualitative data.
- Confirmation of the impacts of pandemic disruption of closed book exams (an issue which will also impact Class of 2023 graduates).
- The benefits of continuing to advise Class of 2023 graduates to take practice tests this summer in closed book conditions.
- A useful nudge in support of enhancing guidance to faculty and students about best practices with regard to MBE practice (AdaptiBar) in MBE classes prior to graduation.

The remaining subsections of this report provide a more complete narrative description of what we learned, along with some hopefully useful context.

## 2. 1-1 Debriefs with Graduates Who Failed on Prior Attempts

We meet regularly and 1-1 with graduates who did not pass the exam and who are studying for the next administration of it (“repeaters”). In connection with the support we provide to repeaters, we engage in intensive conversations with them to inquire about the challenges they faced on prior administrations and to develop new study strategies with them. We have these conversations with an eye toward reflecting on academic program design because it’s clear that nearly all our graduates eventually pass the bar exam, raising the question of whether there are things we can do pre-graduation to better prepare students for the first attempt that we are not already doing. In fact, we have learned a lot from our graduates over the years, and, as described more fully below and in prior reporting, have made and continue to make many changes to our program, big and small, to respond to graduate feedback (and to our statistical analyses of large student data sets).

Routinely, the information we glean from these 1-1 deep conversations with repeaters is that graduates who failed generally did not or, for various reasons, could not<sup>5</sup> follow the advice we give to graduates on optimal bar study strategies – advice which is grounded in seven years of intensive quantitative and qualitative analyses, many of which have already been shared with the Board. For example, it’s clear from our individual student interactions (and prior reporting of aggregate data) that many of the Class of 2022 students who did not pass the exam completed less than the recommended percentage of their post-graduation commercial bar courses and did not know the underlying law well enough to pass the exam. Relatedly, many repeaters struggled with the project of memorizing after so many years without closed book exams due to pandemic disruption. Other graduates who did not pass rejected our advice regarding bar study success strategies because they genuinely believed that they would be the exceptions to our findings. Many repeaters were convinced on their first attempt that their unique study habits would work for them because they had passed law school coursework, even if many of them were in lower GPA quartiles. Even after failing on the first or second attempt, some graduates continue to apply our

---

<sup>5</sup> Reasons provided for not following the guidance on matters such as commercial bar course completion include, among others, that the students started bar study later than recommended, did not recall enough law from their law school studies to make summer bar study the refresher it is designed to be for many courses, did not have the energy to study a full work day each day, did not feel comfortable taking practice tests until they felt they knew more about the underlying law (contrary to advice that practice must start early and take place while learning underlying material), or did not devote space to reflection on how to adjust study practices in light of the scores they were seeing on practice tests. Some graduates also faced personal challenges, but the vast majority of students faced study practice challenges. Over the years, this feedback has led us to make changes to our program, including our advising.

recommendations only selectively. Most recently, we have learned that some graduates are following suggestions for bar study strategies they find on crowdsourcing platforms such as Reddit, the bases for and value of which are not clear. In short, our prior qualitative and quantitative analyses point in the same direction. To state it simply, graduates who follow our advice tend to pass, and those who do not are at greater risk of failure, a risk which increases if the students are already at risk as measured by law school GPA.

[W]e have enough responses to spot patterns in this new qualitative data set. Repeaters who completed the survey so far have confirmed much of what we have gleaned from 1-1 conversations with repeat test takers, especially with regard to student challenges memorizing large bodies of law. When asked what we could have done to better prepare them for the bar exams, students suggested: more closed book exams with bar-like essay questions (now required, again, in all bar classes, post-pandemic),<sup>6</sup> more feedback on writing on graded assignments, and more practice on MBE-style multiple choice questions.<sup>7</sup> When asked what they would do differently in terms of their own study, each student provided a different answer; some graduates intend to start bar study from scratch, approaching it entirely differently than they did the first time, while others identified smaller changes they would make to their study practices. On the whole, graduates' survey responses confirm what we already know, which is that our graduates are thoughtful and motivated and prefer to get advice that feels tailored, which we always aim to provide in our 1-1 interactions with them. This points, too, to the continuing tension we always face when advising graduates between wanting them to be aware of what our data reveal about best study practices and wanting them to feel understood as individuals who may need to adapt our advice to their unique circumstances as the bar prep period progresses (which Director Greer and others do when helping students adapt to challenges they experience during the course of bar study).

As noted at the outset, the information we have received so far from this repeater survey has proved to be useful. It's useful because it confirms some basic drivers of prior programmatic reforms; it underscores some helpful tweaks we are implementing as to Class of 2023 graduates and as to current students in the coming year; and it contributes to our ongoing reflection regarding advising in an era when students prefer tailored advice to advice based on analysis of large data sets or best practices.

---

<sup>6</sup> In response to this feedback, Director Greer is reinforcing her advice that Class of 2023 graduates to take practice tests in closed book settings.

<sup>7</sup> This last comment, seen in several responses, suggests that we can do more to explain to students why the College has incorporated AdaptiBar into a three-year course of study in the JD program. Dean Ratner and Director Greer will also highlight with greater urgency the benefits of faculty requiring students to complete AdaptiBar assignments in lieu of making them optional.

## F. New Initiatives

The College is constantly assessing and innovating to improve bar outcomes. This effort will intensify as we pivot to a new bar exam format. (The October 12, 2023 Board retreat is partly devoted to this topic.) Additional innovations under consideration include use of a substantial bar support fund to incentivize best bar study practices; evaluating the College's approach to academic supervision and counseling (applicable to students in the fourth law school GPA quartile); and continuing to expand the mentoring/tutoring support for at-risk students, given that the initiative showed promise this past summer.

## II. Employment<sup>8</sup>

### A. Class of 2023 Employment (Year Over Year Data)

The Career Development Office (CDO) has started capturing employment data for the graduation class at the start of every month on our graduate tracking sheet. Our graduate tracking sheet includes anyone who has not given us all the information required for reporting so it is possible that a graduate's status may change in the coming months. Additionally, the class size is not confirmed; May and August graduates are still being processed so the denominator (Class of 2023 class size) may change. The year-over-year comparisons will be more reliable later in the fall as graduation numbers are finalized and more information is confirmed/completed.

- August 16, 2023: 154/345 (44% are unemployed and/or we do not have complete data on their employment status).
- August 3, 2022: 134/309 (43% are unemployed and/or we do not have complete data on their employment status).
- August 2, 2021: 207/285 (72% are unemployed and/or we do not have complete data on their employment status).

### B. Considerations for Academic Year 2023-2024

- All 1Ls completed the first year co-curricular Professional Development Requirement components. Now as 2Ls (and into their 3L year), Class of 2025 students must attend three CDO sponsored events, have a graduation academic advising appointment with Student Services, and a 3L exit interview with the CDO.
- We continue to monitor market conditions, particularly the slowdown in the tech sector and related legal services. Big law firms have reduced their summer classes (closer to 2018 and 2019 levels) and some firms have delayed associate start dates.

---

<sup>8</sup> The text in this section of the report was drafted by Assistant Dean Kimmel.

We are in contact with recruiters and local law school colleagues and will continue to be attentive to changing market conditions when advising students.

- We are working with the administration to expand our clerkship services through a new position. This position would be shared with the Externship Program and would focus on educating, counseling, and preparing students for summer judicial internships, term-time judicial externships, and postgraduation clerkships. This position will be able to provide more resources and training to promote and help students obtain clerkships. Toward that end, the position will engage clerkship alumni to mentor and support our current students interested in judicial internships, for-credit externships, and clerkships.

## Appendix A: Summary of AccessLex-Funded Study

The following text is excerpted from an AccessLex-funded study of the determinants of bar success at UC Law SF:

For a period of approximately a decade, the first-time pass rate on the California Bar Exam (CBX) of graduates of UC Law SF followed national and state trends downward. But suddenly, in the space of three years (2014-2016), that trend accelerated to a much greater degree than changes in student metrics or statewide or national variations in pass rates could explain. This Article examines how UC Law SF broke out of that cycle, turning a July 2016 first-time bar passage rate of 51% into an opportunity to reflect deeply on how it taught academic and bar success skills and in the process, to produce an increase in its graduates' first-time bar pass rate of more than 30 percentage points in three years. Notably, the strategies adopted by UC Law SF appear to have lifted broad and diverse cohorts of students, though risk factors remain, as evidenced by the decline in bar outcomes for the Class of 2022. This study does not dictate the exact interventions that other schools should make, but the lessons learned in terms of how to approach educational program design may be useful to other schools hoping to ensure that all admitted students have the best chance of success on the bar exam and thus of entry into the profession.

As discussed more fully below, for this AccessLex<sup>9</sup> grant-funded study, UC Law SF assembled an anonymized data set including a broad array of information covering 13 years of graduates, with a total population of 4,382 students, including demographic information, entering metrics, curricular choices, and academic performance.<sup>10</sup> In addition to data normally maintained in the student information system, for later years the data set includes information about student participation in co-curricular interventions as well as post-graduation bar study choices and use of the bar study aid AdaptiBar.<sup>11</sup> This Article uses that data set to assess the efficacy of interventions adopted after 2016.

Our findings include the following:

- UC Law SF improved bar outcomes after it shifted from an academic skills development model focused on directing support to the most at-risk students based on entering metrics or law school GPA (LGPA) to a model of pervasive, integrated, and iterative skills instruction aimed at all students.
- We are able to measure the likely impact of only a subset of the other bar success interventions discussed below. UC Law SF adopted many reforms pervasively and all at once and tracked and analyzed data regarding only a subset of them. For example, we did not track the degree to which faculty

---

<sup>9</sup> See <https://www.accesslex.org>.

<sup>10</sup> Throughout this Article, the term “bar subject classes” refers to classes that cover subjects tested on the CBX. The term “bar skills classes” refers to classes offered for credit that are specifically designed to prepare students for the CBX, which at UC Law SF are called “Critical Studies” classes. The term “commercial bar preparation classes” refers to courses students take after graduation taught by third party bar preparation course providers such as Themis, BarBri, and Kaplan.

<sup>11</sup> See ADAPTI BAR, <https://www.AdaptiBar.com>.

changed the way they teach and test in bar subject classes or the degree to which individual students received formative assessments with individualized feedback in all their classes.

- Of the interventions we tracked and measured, no one intervention accounts for the improved outcomes at UC Law SF. The improvement in bar outcomes appears to be related to an array of initiatives adopted in roughly the same time period (2017-2022), though developments we are not measuring are likely impacting the pass rate as well.
- The improved outcomes were not the result of changing the profile of students who sat for the bar, e.g., by changing class size, or admissions criteria, or the disqualification threshold.
- Of the pre-graduation interventions we were able to study, the most impactful for some or all students included the following:
  - Requiring and encouraging students to take additional upper division bar subject classes, with each additional bar subject class taken associated with a 3% increase in bar pass rates in the post-2016 period.
  - Offering for-credit classes in the 3L year focused on improving MBE performance (Critical Studies 2) and on overall bar test taking (Critical Studies 3), which was particularly effective for students admitted through the Legal Education Opportunity Program (LEOP), defined below, and for all students in the third LGPA quartile.
  - 1L co-curricular interventions, including peer-led student discussion groups managed by UC Law SF Academic Support and made available to all students, as well as a 1L practice exam program administered to students identified as particularly at risk based on pre-admission criteria, namely, students who demonstrated that they had overcome adversity and were thus admitted through the Legal Education Opportunity Program (LEOP), described below.
- Of the post-graduation interventions we studied, the most impactful for all students included the following:
  - Advising and coaching individual students to complete a greater percentage of their post-graduation commercial bar preparation classes.
  - Offering supplemental law school-administered bar essay feedback during bar study.
  - Advising students to effectively practice MBE test taking.
- Pervasively adopted pedagogical changes can have a significant impact. For example, each additional upper division bar course taken after UC Law SF encouraged all bar-subject class faculty to teach and test with attentiveness to the way the bar exam tests their subjects is associated with a 3% increase in probability of bar passage (compared to a 1% increase associated with each additional bar subject class in the period prior to teaching and testing reforms).
- Though these are not bar success interventions per se, we see positive impacts on bar outcomes associated with participation by LEOP and other



students as teaching assistants (TAs), on journals, and in team competitions like Moot Court.

- The evidence of the impact of experiential work is mixed, with judicial externships being associated with declines in pass rates for LEOP students and only very marginal increases for non-LEOP students and with other fieldwork correlating with a roughly 1% increase in bar outcomes in the period since UC Law SF faculty changed how they teach and test in bar subject and other doctrinal classes.
- Especially in recent years, since faculty began teaching differently in bar classes, study abroad is associated with markedly worse bar outcomes. The study abroad penalty in the period 2017-2022 was 15% overall, 38% for those students who graduated in the third quartile by LGPA, and 34% for LEOP students....
- Some of the interventions we expected to show as correlating with bar success do not.
  - For example, individual specialist skills faculty report success working with individual students in 1-1 sessions, but the data suggest that students who frequently used that resource actually had worse outcomes.
  - Similarly, classes that combine written legal analysis skills and doctrinal instruction aimed primarily at 2Ls and bar skills classes in the 3L year focused on bar essay writing (Critical Studies 1) negatively correlate with bar success.

## Appendix B: Success Initiatives

Table 1, below, identifies major academic and bar success initiatives adopted by UC Law SF in the period following the steep decline in its bar pass rate by category of reform, and, for each intervention, identifies the year it was implemented and the graduating class whose bar pass rates would reflect the full impact. Light green interventions were pervasive,<sup>12</sup> and grey-colored interventions were targeted.

Category	Initiative	Date Implemented	Class Impacted
Academic skills infrastructure	Establish faculty department - Office of Academic Skills Instruction & Support (“OASIS”) - to integrate and coordinate skills instruction across the academic program (general academic support, bar success, LEOP academic skills development); appoint associate dean to lead effort (moving from a total of two specialist skills faculty to a cohort of seven	Academic year (“AY”) AY 2016-2017	Class of 2019

<sup>12</sup> Starting in 2016, and as noted, the College shifted from a targeted approach to bar preparedness, focusing primarily on the most at-risk students who landed in the bottom of the class based on law school GPA after the first semester or year, to a pervasive approach to teaching academic and bar success skills. Another way of characterizing the shift is to say that the College moved from a remedial conception of academic support to a pervasive model of academic skills instruction. The path was illuminated by others. Laura Dannebohm and Adam Lamparello succinctly mapped the cognitive and programmatic shift educators need to make from “remedial” to “comprehensive” skills development: “academic success programs should aim to enhance the skills level of all students, regardless of class rank or entering credentials.” Laura Dannebohm & Adam Lamparello, *The Death of Academic Support: Creating a Truly Experiential, Integrated, and Assessment-Driven Academic Success and Bar Preparation Program (Part I of II)*, 42 MITCHELL HAMLIN L. REV. 110, 116 (2016). Key features highlighted in this Table include the Sack Program for 1Ls, the development of Law & Process versions of upper division bar classes to combine doctrinal and intensive skills instruction for 2Ls, the Critical Studies suite of bar skills classes for 3Ls, and pervasive teaching and testing reforms described below. The vast majority of listed interventions UC Law SF adopted after 2016 (more than 80%) were pervasive insofar as they were aimed at all students, not just particularly at-risk students. This was partly due to the fact that the College had previously relied heavily on targeted interventions, which remained in place during this period of reform. Thus, the new interventions were mostly aimed at expanding academic and bar success skills development or improving the efficacy of existing targeted interventions such as specialized LEOP academic support.

Category	Initiative	Date Implemented	Class Impacted
	faculty, or about 11% of the full-time faculty) <sup>13</sup>		
Academic skills infrastructure	Professionalize and expand Legal Education Opportunity Program academic support (embedding OASIS academic skills specialist in LEOP)	AY 2017-2018	Class of 2020 <sup>14</sup>
Academic skills infrastructure	Establish Legal Writing Resource Center for 1-1 writing support	AY 2018-2019	Class of 2021
Advising	Intensify consistent and regular messaging about CBX preparedness; share data with students <sup>15</sup>	AY 2016-2017	Class of 2019

<sup>13</sup> Prior to 2016, UC Law SF had one full time academic support professional who was responsible for teaching Legal Analysis and handling 1-1 student academic skills advising and co-curricular programs. This academic skills staffing structure aligned with the then-prevailing understanding that CBX failure risk was concentrated in the bottom LGPA quartile and decile. In addition, LEOP had an academic skills component focused on orientation and the 1L year, but it was not managed by a dedicated academic skills specialist and instead was run by the program director, who had other duties as well (admissions, non-skills advising and support, etc.). Also, general and LEOP academic skills instruction were siloed from each other. In 2016, the College integrated all academic skills instruction, general and LEOP, in one department, OASIS, run by a faculty member associate dean and staffed with seven full-time faculty, including a director of Bar Passage Support, a dedicated LEOP academic skills specialist, three faculty who worked with Sack Professors and provided 1-1 academic skills support to all students, and a faculty member who was dedicated full-time to staffing Law & Process classes described below. This increase in faculty staffing created a level of capacity, in terms of skills instruction, that did not previously exist, and a community focused on teaching methods that could share its expertise with other faculty.

<sup>14</sup> Academic skills specialist oversight of the LEOP academic skills function increased starting academic year 2016-2017. A specialist started providing LEOP post-graduation bar support in the summer of 2018. A specialist was embedded in the program starting academic year 2018-2019. So, various dates could have been inserted here as the date by which impacts, if any, would be seen in the data.

<sup>15</sup> The College crafted clear and consistent messages to students about academic skills development and bar success. It delivered the message pervasively, so that doctrinal faculty meeting with students were aware of core information and advice to share with students in the informal advising that often takes place during office hours, and via the expanded and integrated academic skills department, OASIS. The messaging is much more nuanced and richer than what we summarize here, but it included three core elements: (1) that bar preparedness should be foremost in students' minds from matriculation through post-graduation bar study; (2) that students should acquire the skills necessary for success on the CBX, by taking bar subject classes, obtaining and acting on feedback on their written legal analysis, practicing on AdaptiBar, etc.; and

Category	Initiative	Date Implemented	Class Impacted
Co-curricular instruction (pre-graduation)	Expand academic skills component of orientation <sup>16</sup> and across JD program <sup>17</sup>	AY 2016-2017	Class of 2019
Co-curricular (pre-graduation)	Assess and engage in greater quality control with regard to LEOP TA program and LEOP practice exam program in 1L years <sup>18</sup>	AY2015-2016	Class of 2019
Co-curricular instruction (pre-graduation)	Establish first-generation student program <sup>19</sup>	AY 2021-2022	Class of 2024
Co-curricular instruction (post-graduation)	Expand summer bar support program (class, practice essays)	AY 2017-2018	Class of 2018 <sup>20</sup>

(3) that a key goal was to set students up to be able to complete substantial percentages of their post-graduation commercial bar courses, which, as noted in Section VI, highly correlates with first-time bar passage.

<sup>16</sup> Starting with the class entering in Fall 2016 (Class of 2019), the College expanded the academic skills components of orientation, providing pervasively for all students the kind of introduction to law school pedagogy and skills that were often reserved at higher-metric peer schools for admitted students with particular risk factors. Programming included an introduction to the case and Socratic methods, an overview of the U.S. legal system, instruction to reading court decisions, sample classes, and formative assessment in the form of a required short writing exercise on a simple legal question.

<sup>17</sup> OASIS co-curricular programming was scaled up to include, in addition to the academic skills components of orientation described above, for which OASIS faculty were responsible, 1L faculty-led, optional skills programs; the “Discussion Group Leader Program,” which existed prior to 2016 and involved attaching a skills-faculty supervised TA providing group and 1-1 instruction and support on the mechanics of legal analysis; and, importantly, the newest and most resource-intensive addition to the academic skills programming, the widespread availability to all students of 1-1 office hours with academic skills specialist faculty.

<sup>18</sup> As of 2016, LEOP’s academic skills components primarily included a substantive orientation, and in the 1L year, practice exams with individualized feedback and a peer-led TA program with TAs associated with most 1L classes. The primary changes after 2016 pertain to quality rather than format. The LEOP skills programming was integrated into OASIS, overseen by a professional academic skills specialist, and scaled for most of the period on the assumption that LEOP students would also utilize general academic skills support provided to all students.

<sup>19</sup> See *First Generation Program*, UC Law SF, <https://uclawsf.edu/diversity/firstgen/> (last visited July 21, 2023).

<sup>20</sup> The College’s program of providing free bar prep instruction to supplement commercial bar courses existing in 2017, but in the summer of 2018 it was scaled up to include the opportunity to get individualized feedback on a significant number of practice essay questions. The College has continued to grow this program – in terms of both staffing and graduate participation – in the years since 2018.

Category	Initiative	Date Implemented	Class Impacted
Co-curricular instruction (post-graduation)	Implement summer bar course advising, monitoring, and 1-1 coaching <sup>21</sup>	AY 2016-2017	Class of 2017
Curriculum	Adopt 1L Sack Program (systematic 1L study and skills instruction embedded in 1L doctrinal classes, for credit) <sup>22</sup>	AY 2017-2018	Class of 2021 <sup>23</sup>
Curriculum	Expand 1L legal writing program – extra unit, second semester converted from credit/no-credit to letter graded	AY 2019-2020	Class of 2022
Curriculum	Add Core Grammar for Lawyers to fall semester of 1L legal writing	AY 2019-2020	Class of 2022
Curriculum	Offer “Law & Process” versions of upper division bar subject classes (skills instruction)	Implemented in AY 2016-2017 and later (with range and number of	Class of 2018

<sup>21</sup> UC Law SF developed a post-graduation supplemental bar support program run by the Director of Bar Passage Support. Core elements included: (1) monitoring of graduate progress in their post-graduation commercial bar preparation courses, and coaching of graduates to help them stay on track or adapt to obstacles; (2) group substantive review sessions; and (3) individualized feedback on practice essays graded by persons familiar with CBX essay grading practices.

<sup>22</sup> The Sack Program involves the addition of a unit of classroom credit to one 1L class in each 1L section (about 80 students) in the fall and spring terms in the 1L year. Faculty teaching those classes are called “Sack Professors” (named in honor of a deceased faculty member who was especially appreciated by his students in a prior era because he explicitly taught legal analysis skills to his 1Ls). Sack Professors teach basic academic success skills, including case reading, rule identification, the form of legal analysis (use of facts, analogical reasoning), course outlining, and MBE success skills. In addition, each Sack class provides students with multiple formative assessments with individualized feedback provided by Sack TAs trained by Sack Professors or by the Sack Professor. In the fall term, each Sack Professor is paired with a professional faculty member who is an academic skills expert, and by rotating multiple faculty through the Sack Program and engaging them with skills experts, the Sack Program not only provides students with a baseline of instruction but also improves pedagogy across the curriculum.

<sup>23</sup> A less formal version of this program started in academic year 2015-2016 for half the 1L sections and scaled up to all 1L sections in academic year 2016-2017. The faculty formalized this into an extra unit of instruction in academic year 2016-2017 and began offering “Sack sections” of 1L doctrinal classes in academic year 2017-2018.

Category	Initiative	Date Implemented	Class Impacted
	embedded in bar subject classes) – offered to all students, but with limited seating allocated in priority basis to lower LGPA students <sup>24</sup>	offerings increasing each year since AY 2016-2017)	
Curriculum	Expand “Critical Studies” for-credit bar skills suite of classes <sup>25</sup>	AY 2016-2017	Class of 2019
Curriculum	Require upper division bar subject classes in addition to Legal Ethics/ Professional Responsibility <sup>26</sup>	AY 2017-2018	Class of 2020

<sup>24</sup> In recognition of the fact that students should hone core academic and bar success skills iteratively across a three-year program of instruction, the College created a new kind of class aimed primarily at 2Ls called “Law & Process” versions of upper division bar classes (e.g., Legal Ethics: Law & Process or Criminal Procedure: Law & Process). While certain students under academic supervision based on LGPA are required to take these classes in their 2L year, and while lower-performing students in other LGPA cohorts are strongly encouraged to take Law & Process classes, they are available to and taken by all students, albeit with limited seating because they are small sections. (Law & Process versions of bar classes are capped at 20 students, maximum, while regular upper division bar sections are typically capped at 80-100 students). Law & Process faculty reinforce written legal analysis skills emphasized in the Sack 1L classes and provide multiple opportunities for formative assessment and individualized feedback directly from the faculty members.

<sup>25</sup> Prior to 2016, UC Law SF experimented with different iterations of Critical Studies, a suite of for-credit bar skills classes. Critical Studies 1 classes are small-group (max 20 students), in-person, bar essay writing classes focused on written legal analysis. This version, taught by regular UC Law SF faculty (full-time and specially trained adjuncts) tends to attract students who believe they have deficits with regard to development of this skill. After 2016, UC Law SF invited bar companies to teach Critical Studies 2 and 3. Critical Studies 2 is an MBE-success skills class, which alternates between giving student commercial bar course-like overviews of areas of the law interspersed with special training regarding MBE strategies and practice. These classes, which tend to be larger and taught either in-person or online (synchronously or asynchronously), attract a broad cross-section of students in terms of LGPA. Critical Studies 3 is the version of Critical Studies that most closely approximates post-graduation commercial bar course study. It is taught asynchronously and covers all testing formats on the CBX.

<sup>26</sup> Seeing hints in early statistical analyses that taking six upper division bar classes correlated with higher bar pass rates, and in light of qualitative feedback on surveys from graduates indicating that they found it easier to study for the CBX after graduation if they had already taken particular bar course subjects, and noticing the decline in the average number of bar courses taken by students even as student entering metrics were declining, the UC Law SF faculty voted to change its graduation requirements. In 2016, the only required doctrinal course after 1L year was Legal Ethics/Professional Responsibility. The faculty voted to require all students to take all MBE-tested subjects not taught in the 1L year, including Evidence, Criminal Procedure, and Constitutional Law 2, but did not require students to take Business Associations, Wills & Trusts, or other subjects commonly tested on the essay section of the CBX but not doubly tested on the

<b>Category</b>	<b>Initiative</b>	<b>Date Implemented</b>	<b>Class Impacted</b>
Curriculum	Encourage faculty to design syllabi in bar-subject classes that account for CBX coverage in terms of issues <sup>27</sup>	AY 2017-2018	Class of 2020
Pedagogy	Encourage and train faculty to teach legal analysis pervasively <sup>28</sup>	AY 2016-2017	Class of 2019
Pedagogy	Encourage use of “active learning” techniques in which students engage with material instead of just passively listen to lectures	AY 2016-2017	Class of 2019
Pedagogy	Encourage formative assessment with individualized feedback	AY 2016-2017	Class of 2019
Pedagogy	Purchase AdaptiBar access for all three years of JD curriculum; normalize MBE practice; encourage assignment of AdaptiBar problem sets; encourage explicit instruction	AY2019-2020	Class of 2022

MBE. Later, as indicated in Table 1, the faculty voted to require that students not only pass these courses (earning at least a D) but also earn a higher minimum grade of C. (Students who did not earn the required minimum grade are now required to retake the course. UC Law SF has a mandatory curve which requires that 7-12% of grades in classes of more than 30 students be below a B-, but the College does not require any faculty member to award any grades below C.)

<sup>27</sup> Although the faculty did not require individual faculty members teaching bar-tested subjects to cover specific topics, the Director of Bar Passage Support shared information with faculty about frequently tested subjects and the practical importance of doing so generally permeated the faculty.

<sup>28</sup> After 2016, the College began a multi-pronged campaign to systematically train faculty to teach academic and bar success skills pervasively across the curriculum. The campaign’s core elements included formal pairings of doctrinal and skills specialist faculty in the Sack Program, discussed above. In addition, the College hosted, recorded, and disseminated faculty training videos on topics ranging from tutorials on how the bar tests on the essay and MBE sections to tutorials on formative assessment.

Category	Initiative	Date Implemented	Class Impacted
	in MBE success skills pervasively <sup>29</sup>		
Pedagogy	Intensively and systematically encourage faculty to adopt techniques designed to develop students as self-directed learners; use techniques in OASIS programming designed to achieve the same ends (e.g., requiring students to develop and follow study plans, requiring students to report on changes they have made between 1-1 meetings with academic support professionals)	AY2022-2023	Class of 2025 <sup>30</sup>
Pedagogy (Assessment)	Require closed book exams in bar subject classes with bar-like essay questions <sup>31</sup>	AY 2017-2018	Class of 2020
Pedagogy (Assessment)	Require MBE style questions on exams	AY 2017-2018	Class of 2020

<sup>29</sup> After initial assessment suggested a positive correlation between engagement with AdaptiBar, the College decided to fully integrate AdaptiBar into the JD curriculum. AdaptiBar is the largest database of released MBE questions presented in a format that allowed students to self-assess as they learn. AdaptiBar serves two functions: (1) it exposes students to MBE style questions early and often; and (2) it provides faculty with a ready-made tool for formative assessment. The study, below, focuses on AdaptiBar usage as a study tool after graduation. Published articles building on this Article will consider pre-graduation usage.

<sup>30</sup> Reforms are ongoing. This particular reform grows out of experience working with Class of 2022 graduates, an unusually high percentage of whom appeared to struggle to articulate or apply study strategies in the summer after graduation.

<sup>31</sup> While the data necessary to do quantitative analyses is limited, UC Law SF's qualitative data in the form of student self-reporting suggests that requiring law students to take closed book exams improves bar outcomes. Students need to learn how to memorize. Closed book exams also force a degree of synthesis that students might otherwise avoid. The study strategies necessary for students to succeed on closed book exams also prompt them to engage in the kind of study strategies that improve testing outcomes.



Category	Initiative	Date Implemented	Class Impacted
	in MBE-tested subjects <sup>32</sup>		
Pedagogy (Assessment)	Encourage faculty to provide individualized feedback on exams	AY 20016-2017	Class of 2019
Pedagogy (Assessment)	Phase out credit/no-credit option in bar subject courses <sup>33</sup>	AY 2018-2019	Class of 2021
Required grades in required upper division bar subject classes	Increase minimum grades necessary to pass required bar subject classes from D to C	AY 2018-2019 (applicable to students starting Fall 2018 or later)	Class of 2021
Staffing (faculty)	Hire academic skills specialists as faculty to co-design and co-teach 1L Sack classes and to staff Law & process and Critical Studies classes	AY 2016-2017	Class of 2019 <sup>34</sup>
Staffing (faculty)	Move more fully to a hybrid (full time and adjunct) staffing model for 1L legal writing	AY 2017-2018	Class of 2020

Table 1: Bar Success Initiatives at UC Law SF

<sup>32</sup> Starting after the 2016-2017 academic year, the faculty voted to require faculty teaching bar-tested subjects to have final exams that included bar-like essay questions. In MBE-tested subjects, faculty were also required to include MBE-style multiple-choice questions in their assessments. The COVID pandemic disrupted the implementation of this policy. Exams in Spring 2020 were take-home and open book, and faculty were not required to compromise the integrity of exam question banks by including MBE-style questions. In the 2020-2021 academic year during which all classes were online, exams were open book as well, and, again, testing with multiple choice questions was limited. Requirements regarding exam formats were scaled back into place starting in academic year 2021-2022. Anecdotal evidence obtained when supporting Class of 2022 graduates suggests that this class, which least benefitted from the positive effects of closed book exams, struggled to recall or memorize the substantive law when studying for the July administration of the CBX.

<sup>33</sup> Based on preliminary data suggesting that the benefits of upper division bar classes were apparent only when students took those classes for a letter grade, the faculty voted to eliminate credit/no-credit grading in bar classes.

<sup>34</sup> The impact of this intervention was not immediate, given the need to train new faculty, expand the programs with which they were associated, etc.

### Appendix C: Metrics and Outcomes in 2022<sup>35</sup>

School	July '22 Pass rate	F19 LSAT	F19 UGPA
Stanford	85%	174/171/169	3.96/3.91/3.79
Berkeley	92%	170/168/165	3.90/3.81/3.70
UCLA	92%	169/168/164	3.89/3.79/3.51
USC	88%	167/166/163	3.91/3.80/3.65
Irvine	88%	167/165/162	3.74/3.59/3.39
Davis	82%	164/162/159	3.75/3.61/3.41
Pepperdine	76%	163/161/157	3.79/3.66/3.29
Loyola	79%	162/160/157	3.73/3.57/3.30
USD	76%	161/159/155	3.68/3.57/3.29
Chapman	73%	160/158/155	3.64/3.49/3.28
<b>UC Law SF</b>	<b>71% (72% for Class of 2022; 77% for non-LEOP and 49% for LEOP)</b>	<b>160/158/154</b>	<b>3.62/3.45/3.20</b>
Santa Clara	64%	159/156/153	3.53/3.33/3.10
McGeorge	57%	156/153/150	3.54/3.35/3.03
Southwestern	60%	155/153/151	3.56/3.30/3.03
USF	61%	155/153/151	3.51/3.29/3.00
Cal Western	54%	153/151/149	3.44/3.26/2.99
Golden Gate	49%	152/150/147	3.38/3.14/2.79
Western State	48%	152/148/147	3.40/3.17/2.68

<sup>35</sup> From Report 8.2.2 for the March 2, 2023 Board of Directors meeting.

## Report 5.2.3 – Centers

By Provost & Academic Dean Morris Ratner

The Executive Summary to the March 2020 Operational Strategic Plan states at p. 6: “The Plan is also designed to support and accelerate innovative new centers of excellence that build on [the College’s] strengths, including our new law and technology program, LexLab, as well as our new Center of Business Law, Center on Tax Law, and Racial Justice Center.” Further, the Plan states at p. 14, under the section titled “Key Themes and Cross-Cutting Initiatives,” that “support for the centers of excellence will assist the College in building research and practice activities around and publicizing our core programmatic strengths.” And in Topic 2 of the Plan (“Scholarly Production and Impact”), the third listed goal is to “build centers of excellence.” The Plan states:

A core cross-cutting initiative of the Strategic Plan is that we will continue to build centers of excellence in subject matter areas of particular strength. One approach to creating centers of excellence is to tie together the strands of our law school, including our students and student organizations, our faculty members and their communities, our alumni and other practitioners, and our concentrations/curriculum. Centers host special projects and events, including colloquia and create alumni engagement opportunities.

Since the Board adopted the Plan, the College has added additional centers, including the Center for East Asian Legal Studies, the Indigenous Law Center, the International Development Law Center, the Center for Litigation and Courts, the Center for Race, Immigration, Citizenship & Equality, and the Center for Social Justice. The College now has 15 active centers that have transformed the intellectual life of the campus and achieved the goals set forth in the Plan.

Nearly all of our centers have completed annual reports for the academic year that just concluded, 2022-2023.<sup>1</sup> They are posted on the College’s public website on this page - <https://uclawsf.edu/academics/centers/> - and are available to the public. We have also started disseminating them more widely, including via community-wide emails, alumni appeals, and emails to deans and faculty at peer schools as part of our ongoing national reputation campaign. These annual reports vividly make the case for the Strategic Plan’s centers of excellence model.

Below please find links to each of the individual reports for the centers, showcasing a wide array of contributions to scholarship, teaching, policy analysis, student and alumni engagement, and public service. The reports reinforce reporting last year to the effect that

---

<sup>1</sup> Reports for the Center for Racial and Economic Justice and for the Center on Social Justice are still in production.

much of the DEI work that happens on campus is organic – the result of the focus of our faculty on matters of interest to diverse communities and populations.

- Center for Business Law (Faculty Director Abe Cable, Executive Director Evan Epstein):  
<https://player.flipsnack.com/?hash=OTlDRUJBRDlFOEMrMWpsb2ZxNXVuZg==>. [Contact: [cbl@uclawsf.edu](mailto:cbl@uclawsf.edu).]
- Center for East Asian Legal Studies (Faculty Co-Directors Setsuo Miyazawa and Keith Hand):  
<https://player.flipsnack.com/?hash=OTlDRUJBRDlFOEMrdWpsb2ZxNXVuZg==>. [Contact: [ceals@uclawsf.edu](mailto:ceals@uclawsf.edu).]
- Center for Gender and Refugee Studies (Faculty Director Karen Musalo):  
<https://player.flipsnack.com/?hash=OTlDRUJBRDlFOEMremS1NmlzbTFjaQ==>. [Mailing list form: <https://cgrs.uclawsf.edu>.]
- Center for Innovation (Faculty Director Robin Feldman, Faculty Assistant Director Paul Belonick):  
<https://player.flipsnack.com/?hash=OTlDRUJBRDlFOEMremNpNDNsOXh1Mw==>. [Contact: [feldmanr@uclawsf.edu](mailto:feldmanr@uclawsf.edu).]
- Center for Litigation and Courts (Faculty Director Scott Dodson):  
<https://player.flipsnack.com/?hash=OTlDRUJBRDlFOEMrY21hdnN5Zms5cw==>. [Contact: [clc@uclawsf.edu](mailto:clc@uclawsf.edu).]
- Center for Negotiation and Dispute Resolution (Faculty Director Hiro Aragaki, Deputy Director Mattie Robertson):  
<https://player.flipsnack.com/?hash=OTlDRUJBRDlFOEMrdGpsb2ZxNXVuZg==>. [Contact: [CNDR@uclawsf.edu](mailto:CNDR@uclawsf.edu).]
- Center for Race, Immigration, Citizenship & Equality (Faculty Director Ming Hsu Chen):  
<https://player.flipsnack.com/?hash=OTlDRUJBRDlFOEMrZGhtMjk4bjdoOQ==>. [Contact: [rice@uclawsf.edu](mailto:rice@uclawsf.edu).]
- Center for Racial and Economic Justice (Faculty Co-Directors Alina Ball, Thalia Gonzalez, and Shauna Marshall): annual report forthcoming, but see for now this page - <https://uclawsf.edu/academics/centers/center-racial-economic-justice/>. [Contact: see bottom of foregoing page with “Stay in Touch” form.]
- Center for Social Justice (Faculty Co-Directors Brittany Glidden and Gail Silverstein):  
<https://player.flipsnack.com/?hash=OTlDRUJBRDlFOEMrN2tmNm1udGd2dQ==>. [Contact: [silverst@uclawsf.edu](mailto:silverst@uclawsf.edu).]

- Center on Tax Law (Faculty Co-Directors Heather Field and Manoj Viswanathan):  
<https://player.flipsnack.com/?hash=OTIDRUJBRDlFOEMrYzMwZGEybHBtYQ==>. [Contact: [tax@uchastings.edu](mailto:tax@uchastings.edu).]
- Indigenous Law Center (Faculty Director Jo Carrillo):  
<https://player.flipsnack.com/?hash=OTIDRUJBRDlFOEMrdG5mYjgwaWhwOA==>. [Contact: [carrillo@uclawsf.edu](mailto:carrillo@uclawsf.edu).]
- International Development Law Center (Faculty Director Jessica Vapnek):  
<https://player.flipsnack.com/?hash=OTIDRUJBRDlFOEMrMWNzZzhtY3J6cA==>. [Contact: [vapnekjessica@uclawsf.edu](mailto:vapnekjessica@uclawsf.edu).]
- LexLab (Faculty Director Alice Armitage, Director Drew Amerson):  
<https://player.flipsnack.com/?hash=OTIDRUJBRDlFOEMrN25sZzU5dW83aw==>. [Mailing list signup: <https://lexlab.uchastings.edu/stay-in-touch/>.]
- UCSF-UC Law Consortium on Law, Science & Health Policy (Faculty Director Sarah Hooper):  
<https://player.flipsnack.com/?hash=OTIDRUJBRDlFOEMreG5mYjgwaWhwOA==>. [Contact: [blanchardrachel@uclawsf.edu](mailto:blanchardrachel@uclawsf.edu).]
- WorkLife Law (Faculty Director Joan Williams):  
<https://player.flipsnack.com/?hash=OTIDRUJBRDlFOEMrdnQ5eWo1cGQxag==>. [Subscription page: <https://worklifelaw.org/our-impact/>.]

## Report 5.2.4 – Academic Program Staffing Changes

By Provost & Academic Dean Morris Ratner

This report identifies new academic program personnel and describes changes in the titles and roles of existing personnel.

### I. New Full-Time Faculty

- Associate Professor of Law Christina [Koningisor](#): UC Law SF welcomed Professor Koningisor to the Ladder Faculty as of July 1. She is an expert in constitutional law, media law, and government secrecy, and is one of two new Ladder Faculty hires who started this academic year. You can read a profile of her [here](#).
- Associate Professor of Law Emily [Strauss](#): Professor Strauss also joined the UC Law SF Ladder Faculty as of July 1. She is an expert in corporate law and securities and financial regulation. You can read a profile of her [here](#).
- Associate Clinical Professor Amy [Spivey \('13\)](#): Formerly a Visiting Assistant Professor at UC Law SF, Professor Spivey joined our Long-Term Contract Faculty cohort as of July 1. She founded and directs the UC Law SF [Low-Income Taxpayer Clinic](#).
- Professor of Practice and Director of Legal Writing and Moot Court Joe [Creitz \('92\)](#): Having honed his teaching skills for approximately 30 years in our 1L writing program as an adjunct professor, Professor Creitz took on the role of director as of last month. You can read a profile of him [here](#).
- Professor of Practice Morgan [Wells](#): Given the expanding scope of her teaching responsibilities, Professor Wells, who also serves as Associate Director of the law school's non-lawyer MSL degree, has joined the regular faculty as a Professor of Practice (Lecturer).
- Professor of Practice and Director of Trial Advocacy Team Geoff [Hansen](#): Having long and ably served as an adjunct professor and manager of the Trial Team at UC Law SF, Professor Hansen joined the regular faculty as a Professor of Practice and Director of the Trial Team and Trial Advocacy as of July 1. You can learn more about our trial team [here](#).

### II. Academic Program Staff Changes

- New Dean of Students Tiffany [Gabrielson](#): After a national search, UC Law SF selected new Dean of Students Tiffany Gabrielson, who started a few weeks ago. Dean Gabrielson previously served in successively more expansive student affairs roles at Stanford University since 2014, most recently as Director of the university-wide Office of Community Standards and Associate Dean for Students. Dean Gabrielson earned her J.D. from Boston College Law School in 2010 and a master's degree in educational leadership with an emphasis in student affairs from University of the Pacific in 2013.
- Assistant Dean of Student Services Emily [Haan](#): Dean Haan's role with regard to administration of the Academic Regulations and student support has expanded,

and with that expansion she has been given a new title, Assistant Dean of Student Services. Among other things, Dean Haan will help process student course withdrawals and will take the lead in supporting and advising students readmitted after disqualification or on academic supervision or counseling.

- Assistant Dean of LEOP Elizabeth [McGriff](#): Having transformed LEOP over the past half-decade, and in recognition of the breadth of her responsibilities, Dean McGriff also has a new title as Assistant Dean of LEOP.
- New Associate Director of CARE Sarah [Lance](#): Director Lance succeeds prior Associate Director Annie Rosenthal. You can learn more about CARE on Sharknet [here](#).
- New CDO Associate Director of Professional Development Michelle [Hu](#): Associate Director Hu is committed to facilitating and supporting students' professional growth throughout their legal education and beyond. Prior to joining UC Law SF, she practiced corporate law in Hong Kong, New York, and the Bay Area.
- New Pro Bono Program Director Simone Leiban [Levine](#): Director Leiban Levine will build on the foundation of robust pro bono programs laid by Center on Social Justice Co-Director and Clinical Professor Brittany Glidden and prior pro bono partners. To learn more about UC Law SF pro bono programs, see [this page](#).

### III. New Adjunct and Visiting Professors

Several visiting professors are teaching at UC Law SF for the first time (or for the first time in many years) this fall term. They include:

- Zamir [Ben-Dan](#), Assistant Professor of Law at Temple Beasley School of Law, is teaching an online section of Criminal Procedure this fall term.
- Kathleen [Boozang](#), Professor of Law at Seton Hall Law School, is teaching Healthcare Providers & Law and the Health Law & Policy Seminar. She is a full-time in-residence visitor this fall.
- Charles (“Charlie”) [Craver](#), Freda Alverson Professor Emeritus at the George Washington University Law School, is teaching Labor Law and a section of Negotiation in the fall term.
- Mike [Flynn](#) (‘06), Associate Dean for Global Programs and Clinical Professor of Law at Santa Clara University School of Law, is teaching Constitutional Law 1 in the fall term.
- William (“Bill”) [Gallagher](#), Professor of Law and Director of the IP Law Center at Golden Gate University School of Law, is teaching a section of 1L Torts in the fall.
- Jens [Iverson](#) (‘07), Assistant Professor at the Grotius Centre for International Legal Studies, Faculty of Law, Leiden University, is teaching an online section of International Law in the fall term.
- Yvonne (“Yvette”) [Lindgren](#) (‘91), Associate Professor of Law at University of Missouri, Kansas City School of Law, is teaching a section of Constitutional Law 1 and 2 in the fall term. She is an in-residence and full-time visitor for the full academic year.

- Jenny [Liu](#), Associate Professor of Health Economics in the Institute of Health and Aging in the Department of Social and Behavioral Sciences at UCSF, is a Visiting Professor in the HPL program this fall term teaching Health Economics asynchronously and online.
- Wayne [Logan](#), Steven M. Goldstein Professor of Law at Florida State University College of the Law, is teaching an online section of Criminal Procedure this fall term.
- Jerry [López](#), Professor of Law Emeritus at UCLA Law, is serving this full year as the UC Law SF Center for Racial and Economic Justice Wiley Manuel Visiting Professor and Scholar.
- Brian [Love](#), Associate Professor of Law and Co-director of the High Tech Law Institute at Santa Clara University School of Law, will teach a section of IP Survey this fall term.
- Ben [Madley](#), Associate Professor at UCLA, is serving this year in a research/non-teaching role as the UC Law SF Indigenous Law Center Visiting Professor working on, among other projects, a book he is co-editing with UC Law SF Professor of Law and Director of the Indigenous Law Center Jo Carrillo. This project was generously funded by Joseph W. Cotchett.

New adjunct professors have also joined our faculty for the first time this fall term:

- Debra [Bogaards](#) ('81), founder of Bogaards Law, is co-teaching a section of Negotiation in the fall term.
- Asli [Karaveli](#), Student Services Law Librarian at UC Law SF, is teaching a section of Advanced Legal Research in the fall.
- Somnath [Chatterjee](#) ('94), Alameda County Superior Court Judge, is teaching Pretrial Practice in the fall.
- CJ [Connelly](#) ('21), staff attorney at East Bay Children's Law Offices, is teaching a section of Appellate Advocacy in the fall.
- Kelly [Cooke](#), Senior Privacy Counsel at Google, will co-teach U.S. Privacy Law in the fall term.
- Matt [Donahue](#), Associate Attorney at Shook Hardy & Bacon, LLP and former Assistant District Attorney at the San Francisco DA's Office, is co-teaching Trial Advocacy 1.
- Ian [Fein](#), Senior Counsel at Natural Resources Defense Council (NRDC), is teaching Environmental Law & Policy this fall term.
- Danile [Myers](#), is director of the real estate practice of Fennemore and is co-teaching a section of Contract Drafting & Analysis this fall term.
- Kelsey [Ryburn](#) ('14), Deputy Public Defender in the San Francisco PD's Office, is co-teaching Trial Advocacy 1 this fall.
- Koren [Stevenson](#), Senior Counsel at Delta Dental Insurance Company, is serving as an OASIS faculty member this fall term supporting students in Moscone Inn.

Also, we have a cohort of new LRW1 instructors, including:

- Zahra [Alamire](#) ('21), Appellate Fellow at Greines, Martin, Stein & Richard, LLP.



- Adam [Arce](#) ('19), Associate Attorney at Ferber Law, APC.
- Brady Baldwin, Deputy AG at the California Department of Justice.
- Aaron [Bleharski](#) ('05), Head of Legal at Honeybook, Inc.
- Madison Boucher ('21), Moot Court Academic Coordinator.
- Dannielle [Campbell](#), Of Counsel at Putterman Yu Wang, LLP.
- Merry Jean [Chan](#), Senior Litigation Counsel, Criminal Division, US Attorneys Office, N.D. Cal.
- Gillian [Garrett](#), founder of Gillian Garrett Law, PC.
- Raul [Gonzalez](#) ('18), Associate at Latham & Watkins.
- Emily [Griffith](#), Attorney Region 9, US Environmental Protection Agency.
- Caleb [Lin](#), Associate at Wilmer Cutler Pickering Hale & Dorr, LLP.
- Sophia [Mellein](#) ('18), Technology Associate at Goodwin, Procter & Hoar, LLP.
- Maddie [Thomas](#) ('22), Deputy AG in the California Department of Justice.

## Report 5.2.5 – DEI: Faculty Development; A Complicated Moment

By Provost & Academic Dean Morris Ratner

### I. Trainings and Resources for Faculty to Promote Inclusion and Belonging

At the last Board meeting, a request was made for information about faculty training and resources on DEI issues. This report responds to that request with concrete information about past and ongoing efforts and attempts to place those efforts in the context of larger cross-currents within the UC Law SF community and higher education more generally.

#### A. Mandatory Trainings and Programs

Since 2020, the College has held a number of mandatory trainings for faculty on DEI issues. Such trainings or programs have included, among others:

- A series of Diversity, Equity, Inclusion & Belonging “workshops” in academic year 2020-2021 for all employees, including faculty, provided by UCSF Vice Chair for Equity Inclusion & Structural Change LaMisha Hill and hosted by the College’s Human Resources Office.<sup>1</sup> The different sessions focused on the foundations of DEI (basic principles), allyship, and communication skills.
- A mandatory session for faculty hosted by the Provost & Academic Dean’s Office in the 2020-2021 academic year on mindfully approaching questions of race and racism facilitated by USF School of Law Professor Rhonda Magee, the offer of a popular book on the topic.<sup>2</sup>
- A mandatory retreat for faculty at the start of the 2021-2022 academic year in which faculty discussed strategies for creating inclusive classrooms.

This list does not include additional regular faculty and other employee trainings pertaining to such matters as sexual harassment.

#### B. Optional Teaching Colloquia

The Provost & Academic Dean’s Office also regularly sponsors optional trainings and colloquia and shares videos of them with all faculty. These have included multiple colloquia on “trauma-informed teaching methods,” led by the Director of the Disability Resource Program and the College’s full-time Associate Director of CARE. Trauma-informed teaching practices are designed to reduce the risk of retraumatization of individuals who may have experienced difficult situations (racism, sexual violence, police violence, etc.) by utilizing tools such as trigger warnings, allowing students to leave classrooms when they experience discussions as too painful, and other methods to minimize harm to previously traumatized students. Some faculty have found that just acknowledging the painful nature of particular subjects and their impact on certain participants in the classroom can have the effect of creating a caring and appropriately

---

<sup>1</sup> See <https://diversity.ucsf.edu/lamisha-hill-vice-chair-equity-inclusion-obgyn>.

<sup>2</sup> See <https://www.usfca.edu/law/faculty/rhonda-magee>.

mindful and serious tone when difficult subjects are explored. Faculty are not required to use trauma-informed teaching methods (which, as noted below, are contested), but we have explored the range of tools available to faculty to create environments of trust when sensitive topics are covered in classes.

Additional faculty trainings and colloquia have focused on cross-cultural competency with regard to non-binary students (two trainings in the past several years – in the 2020-2021 and 2017-2018 academic years), a faculty scholarly colloquium in the 2021-2022 academic year by a guest professor on “Teaching Slavery in Commercial Law,” a faculty teaching colloquium led by UC Law SF faculty regarding teaching about race in 1L doctrinal classes such as Property, and a number of other faculty-led events on similar topics. Recordings of these trainings and colloquia are housed on the Faculty Resources page on Sharknet along with other teaching resources for all faculty.

### C. Regular Messaging re College Priorities

The Provost & Academic Dean regularly highlights teaching priorities, including the desire to create inclusive classrooms. For example, the Provost shares a course design memorandum with faculty before the start of each semester. Below please find an excerpt of the July 2023 memorandum, under the heading “Creating Inclusive Classrooms” in a section of the document titled “Ongoing Teaching Initiatives”:

#### 1. *Campus Climate Survey*

*The College conducted a [campus climate survey](#) in 2021. The results are available [here](#). It was administered during the pandemic, when students were isolated and learning exclusively online. The survey results reveal areas for improvement, including, among many other things pertaining to our classrooms, creating spaces that feel inclusive to students with conservative, libertarian, or moderate viewpoints; being attentive to the needs of trans-spectrum students by, among other things, learning and using students’ chosen names and pronouns; and learning how to skillfully navigate intra-student conflicts in class.*

*Since that time, the College engaged in strategic planning to identify interventions to improve the climate. The Chancellor & Dean adopted this set of recommended [initiatives](#). One cross-cutting initiative is the appointment of a law school Ombuds, who starts this academic year and is available to facilitate difficult conversations among community members. Please be on the lookout for additional communications from the Chancellor & Dean’s office about this resource.*

## 2. Teaching about Bias, Racism, and Cross-Culture Competency

*The College is committed to addressing issues of bias, racism, and cross-cultural competency pervasively, both because that effort aligns with our recent strategic planning and because the ABA recently amended [Standard 303](#) applicable to law schools to require instruction on those topics. Please consider addressing those topics in your classes as you deem appropriate to help us achieve our goals. If you do, you may wish to consider identifying on your syllabus as a student learning outcome that students will demonstrate that they understand how the course subject intersects with bias, racism, and cross-cultural competency. For resources and information to help guide you, please visit the Faculty Resources page on Sharknet, including [this page](#) focused on teaching about race and racial justice. Also, if national or local events take place that are particularly traumatic to students (e.g., police violence, marches by white supremacists, etc.), please consider adopting trauma-informed teaching techniques that were the subject of [this teaching colloquium](#).*

## 3. Recently Expressed Student Concerns

*Students have remarked in recent years about some of the things that make them feel less connected in the classroom. The following are examples of matters on which students expressed concern in the past couple of years:*

- *When faculty call on students during discussions of race or gender/gender identity based on the students' race or perceived gender or gender identity.*
- *When faculty ask students in office hours if they are in LEOP (because some students see that as stereotyping).*
- *When faculty show images of violence without trigger warnings or in instances in which the images are not relevant to the subject being discussed.*
- *When faculty assign reading or use hypos containing racial slurs or repeat racial slurs during in-class discussion.*
- *When students in a class make jokes during discussions of police violence, sexual violence, or other traumatic matters.*

*It is not my intention in this section to suggest that faculty must use trauma informed teaching methods or teach in fear that they might offend some students in the classroom. On the contrary, we spent much of last year as a faculty strengthening and more fully elaborating a policy on academic freedom, [here](#). But at the start of the academic year, I did want to highlight some of the feedback received in the past couple of years from some students, so you are aware of and have the opportunity to reflect on it.*

*If you do have an uncomfortable moment during a class and would like advice, we have a lot of resources to support you. Please do not hesitate to reach out to*

*me if that happens and if you would like a sounding board on how to address any issues that may arise.*

This is just one example of a regular communication about the College's interest in creating inclusive classrooms.

#### D. Individual Faculty Counseling and Support

Consistent with principles of academic freedom, the Provost reaches out to and engages in reflection with individual faculty who may experience challenges in the classroom and connects them to resources. All faculty report each year in their annual reports regarding their efforts to address issues of race and racism in the law, part of an initiative to encourage faculty to do so pervasively. And the Provost gets student feedback when students leave comments in the comment box that is advertised to students as a place they can share information about any problems they experience in the classroom. The Provost also reviews all end-of-semester course evaluations for all classes. Using these data points, the Provost is able to identify faculty who may be struggling and to provide support, which could include the sharing of ideas, being connected with other faculty on campus who have successfully navigated challenging topics, or connection to external expert resources.

#### E. Funded Research on Inclusive Teaching Techniques

The Provost & Academic Dean's Office has funded faculty research into inclusive pedagogy and teaching tools, in partnership with the Center for Racial and Economic Justice. These teaching resources have been presented in a series of faculty colloquia over the past few years which were recorded and are now part of the inclusive classrooms video library for all faculty to view.

### II. The Persistence of Issues and Misunderstandings

Despite this consistent effort to train and provide resources to faculty and despite the ongoing focus on DEI and inclusive classrooms, issues still occasionally arise in our classrooms. Reasons include the following:

- There is a growing body of literature suggesting that trainings in general do not change behaviors.<sup>3</sup>
- The faculty is not as diverse as the student body, which engenders a degree of mistrust among some students. This has historically been especially true in the 1L curriculum. (This is a recognized problem that we are trying to solve, and many students understandably want or would benefit from a more diverse faculty regardless of whether or not that affects their levels of institutional trust.)

---

<sup>3</sup> See, e.g., Edward Chang, Katherin L. Milkman, Laura J. Zarrow, Kassandra Brabaw, Dena M. Gromet, Reb Rebele, Cade Massey, Angela L. Duckworth & Adam Grant, *Does Diversity Training Work the Way It's Supposed To?*, HARVARD BUSINESS REVIEW (July 9, 2019) (available at <https://hbr.org/2019/07/does-diversity-training-work-the-way-its-supposed-to>).

- Faculty do not always anticipate how comments or teaching choices will land until they have tried them and experienced student reactions, so every faculty member is in a constant, ongoing process of experimentation and self-reflection for which trainings cannot be a substitute.
- The College offers 200 classes per semester taught by hundreds of dedicated and accomplished faculty members each term. The vast majority of those classes proceed without incident. Many faculty routinely receive end-of-semester student evaluations in which students praise faculty for their expert handling of sensitive matters; but the few incidents that may arise in any given year often get discussed widely, while the many classes to which students respond favorably do not.
- Not all faculty members accept the efficacy of inclusion tools like trauma-informed teaching methods, and, in fact, there is a robust literature suggesting that a “trauma-informed” approach to teaching does a disservice to students;<sup>4</sup> at the classroom level, this can mean that some students will view legitimate and protected pedagogical choices as offensive.
- Relatedly, disagreements arise regarding what is acceptable. For example, a tenured faculty member who used the language of the statutes and cases the class was studying to discuss noncitizen foreign nationals as “aliens” was recently criticized by students who found the term offensive. But the faculty member intentionally chose to use the legal terminology as it exists in the U.S. Code, which he was entitled to do.

### III. Widening the Lens

Instances in which faculty engage in unacceptable conduct with regard to DEI matters are extremely rare. Instances in which faculty fail to connect with some students because they make teaching choices that prompt students to feel offended, misunderstood, or undervalued occur more regularly but far less frequently than instances in which faculty skillfully address even the most controversial topics in their classrooms. Instances in which even skillful and DEI-focused faculty have been criticized by students at UC Law SF and nationally for making legitimate teaching choices or in which (some) students have attempted to silence unpopular viewpoints (e.g., requesting that the Federalist Society not be allowed to exist as a student organization on campus or that their guest speakers not be allowed to present) have in part prompted a resurgence of interest among faculty in reinforcing principles of academic freedom.<sup>5</sup> This interest is not in necessarily

---

<sup>4</sup> See, e.g., Greg Lukianoff & Jonathan Haidt, *The Coddling of the American Mind*, THE ATLANTIC (September 2015), available at <https://www.theatlantic.com/magazine/archive/2015/09/the-coddling-of-the-american-mind/399356/>.

<sup>5</sup> For example, a faculty member who is one of the campus leaders on DEI initiatives was criticized by some students who believed the faculty member should have issued trigger warnings on the cover of a sample exam in the faculty member’s bank of prior exams in the Library that dealt with racial injustice. Another faculty member received critical feedback in end-of-course evaluations for not consistently applying a critical race theory lens in a doctrinal class. (Though many do, faculty are not required to issue trigger warnings and are not required to apply any one theoretical lens in their courses.) While we encourage students to be candid in their feedback and want them to let us and their faculty members know how we can best help them to learn, some faculty members have expressed concern that the DEI principles and teaching practices we encourage them to consider using may in some cases prompt them to experience

tension with the interest in continuous faculty development of cultural competency and inclusive teaching skills, an objective that, as noted, the College pursues vigorously. But a wider lens helps capture the complexity of the moment. The desire to promote inclusion by helping students feel “safe” and avoid “trauma” has at times been in conflict with our central mission as a teaching and research institution and as a public law school to explore, understand, and protect unpopular views or uncomfortable facts. This challenge is not unique to UC Law SF,<sup>6</sup> and it does not diminish the College’s ambition to continue to engage in deep and ongoing reflection about inclusion and belonging. But it explains why discussions of our aspirations regarding inclusive pedagogy exist side-by-side with discussions of academic freedom and the desire to create “brave” classrooms.

Two related sources provide additional helpful background and context – the report of the 2021 climate survey results and the report of the 2023 faculty Ad Hoc Committee on Academic freedom.

The campus climate survey conducted by Rankin & Associates<sup>7</sup> revealed that the cohort of students who most frequently felt excluded or chilled in our classrooms was, in fact, students with conservative or libertarian views. Of all students who reported experiencing “exclusion” on campus in the survey responses, the largest single group – 34.5% – was comprised of students who felt excluded based on political viewpoint, and the largest cohort in that group was comprised of students who identified as conservative or libertarian.<sup>8</sup> Faculty and student fears of saying the wrong thing or expressing unpopular views have prompted some faculty and students to avoid certain subjects altogether. (Since the survey was released, the College emphasized that diversity and inclusion include viewpoint diversity.)

After the year-long process of engaging with faculty to update the academic freedom policy in the 2022-2023 academic year, the Ad Hoc Committee on Academic Freedom found:

*The Committee members who have engaged in this process of research, reflection, and dialogue have been struck by the fragility of academic freedom, both historically and today. Prominent historical examples include efforts to sanction and dismiss faculty who raised dissenting views during World War I, who were suspected of sympathizing with socialism during the McCarthy Era, or who engaged in anti-war and civil rights activism during the 1960s and 1970s. Beyond the academic context, constraints on speech have been used to suppress ideas that the existing majority in power considered dangerous at the time, including women’s suffrage, contraception, and interracial marriage. Some observers have drawn parallels between these historical examples and*

---

negative consequences (such as low teaching evaluation scores) for what should be considered reasonable teaching choices they can make.

<sup>6</sup> See Letter from Stanford Law School Dean Jenny Martinez to Community (March 22, 2023) (available at <https://law.stanford.edu/wp-content/uploads/2023/03/Next-Steps-on-Protests-and-Free-Speech.pdf>).

<sup>7</sup> See <https://bpb-us-e2.wpmucdn.com/sites.uclawsf.edu/dist/a/68/files/2021/10/UC-Hastings-Final-Report.corrected-2021-10-12.pdf>.

<sup>8</sup> *Id.*, at p. 84.

*contemporary efforts from both the Left and the Right to limit the teaching of concepts viewed as divisive and to restrict classroom and campus expression to shield community members from ideas and discourse they may find unsettling. In our view, these efforts to restrict expression are overbroad and should be resisted. Historically, legal protections for free speech have been critical in permitting the expression of unorthodox views, especially by those lacking power in a given community. These legal protections are based on the conviction that, if we want freedom to express particular ideas that we cherish, we need to protect and enforce this principle, even for ideas that we find objectionable.*

*Since 2011, UC Law SF has demonstrated its principled commitment to academic freedom and constructive discussion of controversial viewpoints on numerous occasions. The successful engagement of dissenting views during an event with former Israeli Supreme Court Justice Asher Grunis in September 2018, and the Chancellor and Dean's joint public statement in response to federal government criticism of critical race theory in September 2020, stand out as two notable examples. At the same time, UC Law SF is not immune from the pressures that have been surfacing at other institutions. In March 2022, events surrounding the disruption of a student event featuring Ilya Shapiro prompted ongoing reflection and discussion of core institutional values. Related tensions at the intersection of academic freedom and freedom of expression continue to arise on university campuses nationwide.*

*Anecdotally, and as evidenced by our 2021 Community Experience Survey and other similar surveys, students at UC Law SF and other institutions of higher education have reported fear of expressing views on matters of law or social policy that they perceive as unpopular or that would subject them to social stigma. Students have also raised concerns about the lack of a sense of belonging and reluctance to engage fully in class discussions, especially when they do not see their own identities and experiences reflected in the classroom. Some faculty have shared their reluctance to teach controversial subjects or cases due to concerns about potential employment repercussions or reputational harm. Other faculty have raised concerns that claims to academic freedom could be used improperly as a shield for prohibited discrimination or harassment. The current climate of political polarization, the explosive growth of social media, the disruption of in-person exchanges and relationship-building during the pandemic, and evolving student expectations about campus expression, have contributed to these trends.*

*In the Committee's view, UC Law SF can and must strive to equip all members of the academic community with tools and strategies to approach and have difficult conversations, engage substantively with opposing viewpoints, and express dissent without infringing on other community members' right to hear and to receive information. Doing so effectively requires starting from an initial presumption of mutual good faith. Any other presumption makes a vibrant intellectual environment impossible to maintain, and risks turning higher education campuses into echo chambers.*



The report excerpted above was shared with the full faculty at the final faculty meeting of the year in the 2022-2023 academic year, and the faculty voted to adopt the recommendation the excerpt was intended to support, which was an updated and enhanced Policy on Academic Freedom.

\*\*\*

In short, the College and the faculty as a whole have demonstrated a sustained interest in creating inclusive classrooms and an inclusive campus. Nevertheless, issues have arisen and will arise, even though the College has provided and continues to provide substantial messaging, training, and resources. When that happens, it helps to consider causes and solutions against what is, by any measure, a complicated backdrop.

## REPORT ITEM

1. **REPORT BY:** Chair of the Finance Committee Chip Robertson
2. **SUBJECT:** Core Operations – State Budget for 2023-24
3. **RECOMMENDATION:**

That the Board of Directors approves the attached state budget for 2023-24.

4. **BACKGROUND:**

Fiscal detail on major elements of both the revenue and expenditure budgets for 2023-24 are presented below. Classes were fully online in 2020-21, partially online 2021-22, and fully back in person without disruption in 2022-23. For the most part, expenditure planning returned to budgets conforming to base 2019-20 allocations following the COVID-19 global pandemic, notably in categories such as travel, training, and events. In year 2022-23, JD student tuition and fees increased by 3% and this year increase by 5%. The state budget for 2023-24 represents a new base for the core operations of the college.

### Revenues

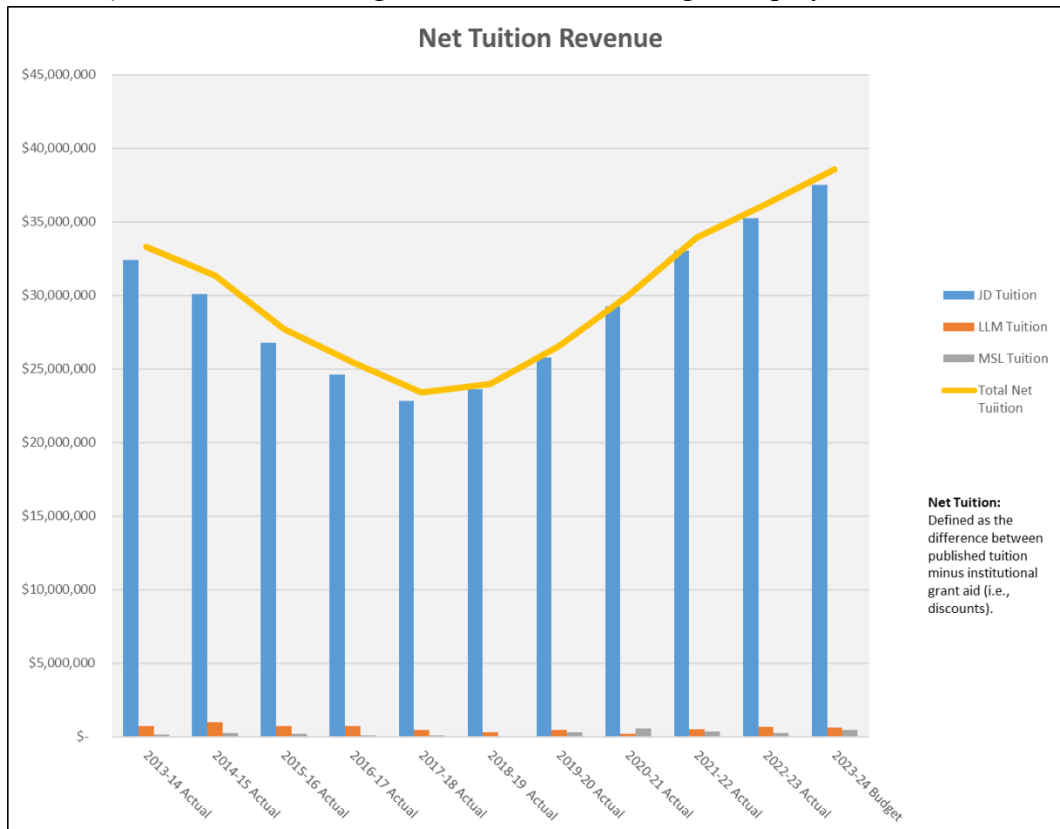
- **State Appropriations, General Fund** - General Fund support for operations in California's Budget Act of 2023 is \$23,956,000, which represents a net decrease of \$85.7 million or 78% over last year. The decrease is attributed to one-time funding of \$90 million for the Tower Renovation Projection, and \$885,000 for renaming costs, received from the state in 2022-23. Included in 2023-24 is \$20,956,000 for ongoing support, which increased \$2.17 million or 12% from last year. It also includes \$3 million to support an alternative campus public safety program, which shall be available for encumbrance or expenditure until June 30, 2026. The pass-through General Fund lease-revenue funding for 333 Golden Gate building rent payments continue at amounts adjusted for the current state debt service schedule with a 2023-24 appropriation of \$3,088,000.

### State of California Funding Appropriations

	2022-23	2023-24	\$ Change	% Change
Ongoing General Fund Support	18,789,000	20,956,000	2,167,000	12%
100 McAllister St. Building Renovation Project	90,000,000		(90,000,000)	-100%
Renaming Cost	885,000		(885,000)	-100%
Alternative Public Safety Program (BCP= 3 years)		3,000,000	3,000,000	-
California Institute on Law, Neuroscience & Education			-	-
<b>State General Fund Operations</b>	<b>\$ 109,674,000</b>	<b>\$ 23,956,000</b>	<b>\$ (85,718,000)</b>	<b>-78%</b>
333 Golden Gate Rent, General Fund Lease-revenue	3,089,000	3,088,000	(1,000)	0%
<b>Total State General Fund Appropriation</b>	<b>\$ 112,763,000</b>	<b>\$ 27,044,000</b>	<b>\$ (85,719,000)</b>	<b>-76%</b>

#### ■ Tuition and Related Fees

As approved by the Board of Directors at the September 2022 meeting, the 2023-24 annual per-student tuition and fees for the core JD program is \$47,031, increased by 5% from \$44,79. LL.M. tuition remains unchanged at \$47,500, and MSL is unchanged at \$39,000. Revenues are based on the following enrollment assumptions and net tuition reflects continuation of historical tuition discounting (30% for JD students). The effect of changes in tuition discounting is displayed below.



- **Non-resident Tuition** – At the September 2022 meeting of the Board of Directors, an increase of \$514 or 8% was approved for Non-resident Tuition in 2023-24. The budget

assumes 89 FTE (8%) are non-residents paying \$6,934 tuition in 2023-24. In 2022-23, 88 (8%) FTE JD students paid \$6,420 non-resident tuition.

- **Registration Fee** – The JD enrollment fee is budgeted for 1,082 FTE students, including 390 1Ls, for gross enrollment fee revenues of \$50,887,542. Budgeted tuition reductions from JD exchange programs reduces this by about \$28,179. In 2022-23, revenue of \$49,209,692 from 1,099 FTE paying JD students was received.
- **Veteran and Other Fee Waivers** – The 2023-24 budget estimates 39 FTE students are veterans eligible for waiver of the \$47,031 enrollment fee for total \$1,834,209 in foregone fee revenues resulting from this unfunded state mandate. In 2022-23 a total of 39 FTE students received waivers for foregone revenues of \$1,752,066.
- **LL.M. Tuition** – The budget reflects 30 FTE students paying \$47,500 for \$1,425,000 in 2023-24 revenue before financial aid. Actual revenue in 2022-23 was \$1,291,728 obtained from 27 FTE paying LL.M. students. The COVID-19 global pandemic impacted this one-year degree program intended for foreign students; in 2021-22 enrollment was 23 FTE and \$1,082,658 in tuition revenues.
- **MSL and CSL Tuition** – There are part-time students enrolled in the MSL and CSL programs for a projected enrollment of 13 FTE in 2023-24 paying \$39,000 generating \$507,000 in fee revenues. In 2022-23, 8 FTE students generated \$329,875 in revenues. In 2021-22, revenue was \$441,663 from 11 FTE students.
- **HPL Revenue** – The online Masters in Health Policy and Law (HPL) degree program was on hold after 2019-20 with resumption start-up costs in 2021-22. A new MOU with UCSF restarted program enrollment in 2022-23. The 2023-24 budget reflects 17 FTE students for total \$833,545 collected by UC Law SF before paying UCSF's revenue share of \$240,704, which result in net revenue projection of \$592,841. The HPL program will start to profit for the first time in 2023-24.
- **Realized Gain/Loss on Investments** – This category accounts for realized gains or losses attributable to the state fund's share in the UC General Endowment Pool (GEP) when investment shares are liquidated. In 2022-23 this was \$0, there is no basis for estimating activity in 2023-24.
- **Unrealized Gain/Loss on Investments** – This category accounts for the change in the market value of the state fund's share in the UC General Endowment Pool (GEP) and is not a budgeted item as there is no basis for a projection. In 2022-23, unrealized gain of \$3,225,167 were recognized and in 2021-22 unrealized loss of \$(3,602,507) were posted.
- **Overhead Allowances** – The beginning Nonstate Auxiliary Enterprises budget approved by the Board in June reflects contributions of \$211,731 as overhead to the state account. Indirect costs allowed on grants and contracts are budgeted to contribute \$598,617 to state funds. The total projected 2023-24 overhead allowance at \$810,348 decrease 49% from 2022-23 actual of \$1,603,604 mainly because the Auxiliary overhead allowance rate has dropped from 12% to 5% of the total revenue. The

Auxiliary enterprises revenue will also drop because we have removed Business Center out of auxiliary enterprises to the state, and the Tower will go offline for renovation.

- **Prior Year Reserve/Beginning Fund Balance** – The beginning operating reserve is projected at \$25.3 million based on preliminary 2022-23 year end actuals, representing total state net operating fund assets after backing out non-cash impacts of GASB pension and retiree health benefits liabilities, deferred inflows and deferred outflows of resources.

### **Expenditures**

The 2023-24 budget is transitional as major changes to the physical plant, coupled with the need to fund extraordinary expenses associated with campus safety, create both cost uncertainty and the need to reestablish baseline facility operations expenditures. With regards to the physical plant, McAllister Tower is being decommissioned but until such time as the building is turned over to the general contract, costs will continue to be incurred. The Academe at 198 is a mixed-use facility housing academic, state-support functions as well as residential, nonstate uses. While budget projections have been used as the basis for initial allocations, actual operating experience will be necessary for accurate budgets and allocations between cost centers in future years.

- **Salaries and Wages** – The 2023-24 budget reflects the full-year cost of 2022-23 with adjustments including general salary adjustment effective on October 1, 2023, and union compensation increases effective January 1, 2024. Here are significant details of the salary budget components:
  1. An adjusted Classroom beginning salary budget of \$12,553,061 that accounts for changes from retirements as well as changes to visiting professor, stipends, and adjunct appointments. This is an increase, before 2023-24 compensation adjustments of \$754,538 from 2022-23 actual Classroom salaries of \$11,798,523. The proposed faculty budget provides for the following in 2023-24:
    - a) Recruitment of ladder-rank faculty with two Associate Professor of Law hired at step 2. Also, one Lecturer positions have been filled as Professor of Practice.
    - b) A faculty compensation adjustment pool effective October 1, 2023, equivalent to 3% of regular base salaries to fund general salary adjustments at projected cost of \$223,357 in 2023-24. The full-year salary cost impact is projected at \$297,809 (\$362,285 inclusive of benefits).
    - c) An allocation of \$1,172,001 for Adjunct, Sullivan, and Emeriti Professor wages. Special funding request to increase Non-LRW Adjunct Compensation by 10% and LRW Adjunct Compensation by 4% with projected cost of \$48,044.

- d) A provisional allocation of \$250,000 available to fund faculty salary changes through June 2024.
  - e) One-time savings from partial buyouts of state salaries through nonstate grant and chair funding.
2. Staffing changes include:
- a) New staff positions:
    - Associate Director of Clerkships and Externships— Clinical Programs and the Career Development Office (CDO). The annual salary is \$80,000 and the contemplated start date is January 1, 2024. The new line is a transfer from an existing staff line from the Registrar’s Office (salary \$77,250) so there is no additional funding needed for 2023-24. For 2024-25 and going forward, the amount needed above the existing staff line is \$3,877.50 (\$2,750 salary + \$1,127.50 benefit).
    - Administrative Coordinator/Assistant– Disability Resource Program. Marginal staffing increase of 0.1 FTE over staffing just before 2020 with a reclassification of the current .9 FTE Administrative Assistant to a 1.0 FT exempt Administrative Coordinator position. \$77,250 annual salary, with 0.1 FTE increase.
    - Senior Financial Analyst, Capital Projects. Reallocating an existing staff position from the vacant Administrative Analyst position under the Chief Financial Officer, this 1.0 FTE position in Fiscal Services has a proposed annual salary of \$100,000.
  - b) General salary adjustments for represented staff – AFSCME and AFT-Librarians -- per collective bargaining agreements, providing 3% a wage increase effective January 1, 2024.
  - c) A compensation funding pool for non-represented career staff salary adjustments effective October 1, 2023, equivalent to 3% of base salaries and projected at \$181,531 in 2023-24.
  - d) Projected staff salary savings at 2% or \$(273,489) from turnover and temporary vacancies.
- **Student Wages-Reg. & Work-study** – The 2023-24 budget for student wages includes both student employee and CWSP on campus wages, which is projected at \$882,839 and mainly for Moot Court, Legal Writing and Research and Law Library. This year’s budget increased 73% or \$371,636 from year 2022-23, mainly because we are fully returned to in person classes and, with the well development of AI, we need more proctors to host in person exams instead of computerized exams.
  - **Staff Benefits** – Continuation of the multi-rate benefit structure facilitated by implementation of UCPath is budgeted in 2023-24. Calculated as a percentage of salaries by employee group, all benefits (health and welfare, UCRP, OPEB, workers’

compensation and unemployment insurance) are allocated to cost centers based on the combined benefit rates. Premium cost changes to health and welfare plans managed by UC will be effective January 1, 2024.

	Faculty and Other Academics, Full Benefits	Faculty and Staff, No Benefits	Faculty and Staff, Partial Benefits	Staff Exempt, Full Benefits	Staff Non-Exempt, Full Benefits	Students (Enrolled at Hastings)
<b>Allocation by Employee Group:</b>	32.0%	2.4%	7.6%	41.0%	48.5%	0.0%

- **Employee Development and Testing** – Employee professional development or training expense has been budgeted by HR and individual department heads, this line item representing the registration cost of conferences, seminars, and tuition reimbursement for classes. Activities were curtailed during pandemic and are projected to total almost \$177,055 or 32% more than what was spent in 2022-23.
- **Audit, Legal, and Case Costs** -The 2023-24 projection of audit, legal and case costs decreased dramatically of 78% or \$1,168,742, mainly because the legal cost associated with renaming our college has been decreased to \$50,000 from what we actually paid in 2022-23 at \$117,1425. Most of the renaming related legal cost has incurred in 2022-23, we do not expect large cost in 2023-24.
- **Travel** – Included here are allocations for faculty research and professional development from which other categories of expenditure are allowed. \$185,250 has been budgeted for faculty research accounts. Departments curtailed travel in 2022-23 and the 2023-24 budget reinstates significant allocations for student competition team travel, academic research, Admissions travel, and departmental staff travel for professional development activities (conferences and seminars).
- **Dues and Subscriptions** – The 2022-23 year-end actual is preliminary and expected to increase by \$116,000 when expenditures are final and year-end payments, including Adaptibar and the UCDC Program, are recognized. The 2023-24 budget would only increase \$76,766 from 2022-23 actuals, given the inflation causes all the membership price much higher.
- **Events and Entertainment** – With in-person events planned again in 2023-24 the budget increases by \$79,522 over 2022-23 actuals of \$570,523. Events managed by Student Services including commencement, orientation, Inns of Court and academic advising account for the largest allocations. Additional large allocations for student-focused events are budgeted in Moot Court, LEOP, Career Development Office, Global Programs and Graduate Division.
- **Computer Software** – The 2023-24 projection for computer software are mainly allocated for Information Technology, Fiscal Services, Office of the Registrar and Alumni Center, which occupy 86% of the total budget of \$1,066,143. Currently the projected expense in 2022-23 was exceeded by \$122,000; however, adjustments are pending that recognize prepayments for next year and eliminate the budget variance.

- **Building Maintenance** – The majority building maintenance projections allocated to janitorial services, engineering, and special repairs and maintenance. The 2023-24 budget of \$4,858,033 is \$1,797,604 or 59% more than the 2022-23 actual expenses. This is mainly because engineering services is being centralized started from 2023-24, costs incurred by nonstate auxiliary service functions will be charged back to those functions on an hourly basis so that campus housing, parking and retail uses only pay for the services received. The College also needs to provide additional engineering support to ensure maintenance of an additional 356,000 sf facility, the Academe at 198. With the Tower going offline for renovation and the new 198 building open, more janitorial services are also needed to support the custodial program at UC Law SF in light of bringing on a 356,000 sq. ft. facility with 47,000 sq. ft. of academic/programmable space including offices, court/classrooms, event spaces, and a lobby café.
- **Other Contract Services** – This budget category contains a variety of contracted services across all functions and departments of the College and the single largest expenditure is for security services with an allocation of \$4.54 million or 69% of the total budget. The total state budget is increasing by \$1,588,367 or 32% over 2022-23. The \$6.5 million 2023-24 budget includes \$450,000 in one-time costs associated with renaming the college, which decreased \$350,7480 from 2022-23, the security services contract budget increased \$1,607,411 because safety conditions in the area continue to be challenging and significant costs are being imposed upon the institution. In the past, these safety costs were allocated to state (e.g., academic spaces) and nonstate (e.g., parking and housing) cost centers. In 2023-24 and going forward, these costs will be centralized as state expenses as safety is one of the primary responsibilities of government and the cost recovery through rents and parking fees is infeasible. This budget also includes net contract services of \$117,000 to UCSF for business center providing reprographic and copier services on campus, which has been removed from Auxiliary Enterprises and added to state cost in 2023-24.
- **Equipment and Improvements** – Included in the budget is the base IT department allocation of \$70,599 for computers and technology equipment. A one-time allocation of \$15,000 scissor lift for 198 McAllister, to access the auditorium and 7th floor lounge ceilings, and a \$80,000 allocation for IT capital equipment replacement are also included.
- **Space & Equipment Rental** - The majority space and equipment rental projections is allocated to rental of space with 94% of the total budget. The 2023-24 budget of \$2,904,022 is \$2,367,572 or 441% more than the 2022-23 actual expenses, this is mainly due to the academic space rental of \$2,157,630 at 198 McAllister building. The offices currently located at Tower building will move out to 198 McAllister building in January 2024, which cause a \$91,176 office rental increase as well.



- **Financial Aid Grants** – The financial aid budget for 2023-24 state accounts totals \$14,406,930 which is a decrease of \$264,826 from 2022-23 actuals of \$14,671,756. This reflects a slightly smaller JD class continued at a discount rate of 26.32% and increased LLM enrollment with a 55.81% discount rate; additional student financial aid expense is included in nonstate budgets. State budget allocations include:
  - 1) \$13,393,770 grant budget for JD students.
  - 2) \$795,250 grant budget for LL.M.-International students.
  - 3) \$65,910 grant funding for Master of Studies in Law (MSL) students
  - 4) \$133,000 for the Loan Repayment Assistance Program (LRAP).
  - 5) \$19,000 for International Summer Internships, awards to rising 1L and 2L students to help defray travel and living expenses while working on international issues in an unpaid position.
- **Transfer to Other Funds** – Included in this budget is \$762,500 from Bench to School, \$500,000 to the nonstate CILNE account and to two proposed subawards to two faculty members. The subaward proposals are still in progress. It also includes \$640,000 transfer from state to Auxiliary Enterprise Business Center to fund the projected cash deficit to close this program. The \$90 million provided by state appropriation in 2022-23 for the McAllister Tower Campus Housing and Seismic Upgrade project has been received and transferred to a separate capital project account where, combined with nonstate College funding, the costs will be tracked across all categories of expense.

**Summary**

**2023-24 OPERATIONS BUDGET**

Based on the projected revenues identified and assuming approval of all proposed expenditures, an ending operating reserve with market valuation as of 6/30/23 is projected at \$22.7 million. Included in this amount is \$2 million in state funding carryover provided for alternative security services (\$3 million received in 2023-24 allocated over three years). Also included in the carryover is \$0.63 million of the \$3.5 million state funding received in 2021-22 for the California Institute of Law, Neuroscience and Education. The prior year reserve is preliminary and currently reported to end at \$25.3 million.

Operating Revenues (without reserve & gains)	\$78,362,735
Operating Expense (without financial aid)	(\$66,542,857)
<b>Net Operations</b>	<b>\$11,819,878</b>
Financial Aid	(\$14,406,930)
Net Change after Financial Aid	(\$2,587,052)
Realized/Unrealized Gain or Loss	\$0
<b>Current Year Surplus/Deficit</b>	<b>(\$2,587,052)</b>
Beginning Reserves (Preliminary)	\$25,311,559
<b>Projected Ending Operating Reserve</b>	<b>\$22,724,507</b>

### **PLANT FUND RESERVE**

The Plant Fund Reserve ended 2022-23 with a preliminary ending balance of \$5,249,794, increased by \$739,605 net investment activity and decreased by \$3,236,000 in long-range capital project funding. The 2023-24 Long-Range Campus Plan (LRCP) budget will seek expenditure authority from this funding source for capital project needs in a separate agenda item.

### **LEASE-REVENUE BOND RENTAL PAYMENTS**

Included in the State Budget Act of 2023 is \$3,088,000 under General Fund capital item 6600-003-0001 for support of Hastings. This fund scheduled rental payments for 333 Golden Gate, by lease-revenue bonds through the State of California -- a pass-through transaction with no net cash flow impact to the College, the State Public Works Board withdraws through the State Controller's Office.

### **CALIFORNIA SCHOLARS**

Total funding of \$9,000,000 from the State of California (\$4.5 million in 2018-19 and \$4.5 million in 2021-22) is being tracked in a separate restricted fund program for planned expenditure over several years. Funding provides full-fee scholarships and living expenses to qualifying students from historically Black college or university (HBCU) or the American University of Armenia for each of their three years at UC Hastings Law. The 2023-24 budget for student scholarships is \$650,000 for a projected ending fund balance of \$6,075,000.

### **PROPOSED RESOLUTION:**

Resolved that the Board of Directors approves the proposed state budget for 2023-24.

### **Attachments:**

- State Budget – 2023-24 Proposed

REVENUES	Proposed Budget 2023-24	Dollar Change FY24 Budget to FY23 Preliminary Actual	% Change from FY24 Budget to FY23 Preliminary Actual	Preliminary Year-end Actual 2022-23	Year-end Actual 2021-22
<b>State Appropriations</b>					
General Fund	23,956,000 *	(84,833,000)	-78%	108,789,000	23,289,000
Lottery Fund	<u>172,000</u>	<u>(94,580)</u>	<u>-35%</u>	266,580	206,770
<b>Subtotal</b>	<b>\$ 24,128,000</b>	<b>\$ (84,927,580)</b>	<b>-78%</b>	<b>\$ 109,055,580</b>	<b>\$ 23,495,770</b>
<b>Tuition and Related Fees</b>					
Non-resident Tuition	617,126 *	54,536	10%	562,590	574,659
Registration Fee	50,859,363 *	1,649,671	3%	49,209,692	46,258,401
Veteran Fee Waivers	(1,834,209) *	(82,143)	5%	(1,752,066)	(1,297,554)
LL.M. Tuition	1,425,000 *	133,272	10%	1,291,728	1,082,658
MSL and CSL Tuition	507,000 *	177,125	54%	329,875	441,663
MBE Support Fee	138,000	24,272	21%	113,728	134,280
HPL Revenue Share	592,841 *	9,419	2%	583,422	160,269
Summer Legal Institute	758,000	180,969	31%	577,031	743,858
Other Student Fees	<u>131,650</u>	<u>(35,773)</u>	<u>-21%</u>	<u>167,423</u>	<u>18,983</u>
<b>Subtotal</b>	<b>\$ 53,194,771</b>	<b>\$ 2,111,348</b>	<b>4%</b>	<b>\$ 51,083,423</b>	<b>\$ 48,117,217</b>
<b>Scholarly Publications</b>					
Subscription Revenues	<u>33,900</u>	<u>(2,935)</u>	<u>-8%</u>	<u>36,835</u>	<u>30,972</u>
<b>Subtotal</b>	<b>\$ 33,900</b>	<b>\$ (2,935)</b>	<b>-8%</b>	<b>\$ 36,835</b>	<b>\$ 30,972</b>
<b>Other Income</b>					
Investment Income	150,000	(361,103)	-71%	511,103	130,425
Realized Gain/Loss on Sale of Investments	0 *	-	-	-	-
Unrealized Gain/Loss on Investments	0 *	(3,225,167)	-100%	3,225,167	(3,602,507)
Overhead Allowances	810,348 *	(793,256)	-49%	1,603,604	1,272,845
Miscellaneous	<u>45,716</u>	<u>(652,818)</u>	<u>-93%</u>	<u>698,534</u>	<u>41,305</u>
<b>Subtotal</b>	<b>\$ 1,006,064</b>	<b>\$ (5,032,344)</b>	<b>-83%</b>	<b>\$ 6,038,408</b>	<b>\$ (2,157,932)</b>
<b>Transfer from Other Funds</b>	<b>\$ -</b>	<b>\$ (210,705)</b>	<b>--</b>	<b>\$ 210,705</b>	<b>\$ 248,058</b>
<b>Prior Year Reserve/Beginning Fund Balance</b>	<b>\$ 25,311,559 *</b>	<b>\$ 4,176,613</b>	<b>20%</b>	<b>\$ 21,134,946</b>	<b>\$ 15,883,869</b>
<b>TOTAL REVENUES &amp; RESERVES</b>	<b>\$ 103,674,294</b>	<b>\$ (83,885,603)</b>	<b>-45%</b>	<b>\$ 187,559,897</b>	<b>\$ 85,617,954</b>

\*See attached narrative.

UC LAW SAN FRANCISCO  
STATE BUDGET - 2023-24 Proposed

8/16/2023

EXPENDITURES	Proposed Budget 2023-24	Dollar Change FY24 Budget to FY23 Preliminary Actual	% Change from FY24 Budget to FY23 Preliminary Actual	Preliminary	Year-end Actual 2021-22
				Year-end Actual 2022-23	Year-end Actual 2021-22
Salaries & Wages	30,198,323 *	2,389,473	9%	27,808,850	26,220,509
Student Wages-Reg. & Work-study	882,839 *	371,636	73%	511,203	517,617
Staff Benefits	10,058,461 *	740,995	8%	9,317,466	8,625,759
Consultants	722,843	177,327	33%	545,516	377,230
Temporary Help (Contracted)	56,772	(188,982)	-77%	245,754	181,885
Employee Development & Testing	177,055 *	43,073	32%	133,982	158,835
Recruiting & Advertising	555,692	(9,183)	-2%	564,875	498,006
Audit, Legal, and Case Costs	335,000 *	(1,168,742)	-78%	1,503,742	259,026
Insurance	674,273	12,848	2%	661,425	585,933
Printing & Copier Service	410,420	90,227	28%	320,193	235,299
Supplies	236,211	(76,379)	-24%	312,590	327,602
Travel	876,224 *	240,933	38%	635,291	185,412
Dues & Subscriptions	389,901 *	192,766	98%	197,135	297,809
Events & Entertainment	650,045 *	79,522	14%	570,523	319,801
Computer Software	1,066,143 *	(180,262)	-14%	1,246,405	804,534
Data Processing	442,100	87,378	25%	354,722	324,410
Electronic Databases & Bibliography Svs	524,560	11,387	2%	513,173	463,390
Books & Bindings	651,862	(52,630)	-7%	704,492	805,895
Equipment Maintenance	331,979	(28,609)	-8%	360,588	116,817
Building Maintenance	4,858,033 *	1,797,604	59%	3,060,429	2,103,466
Other Contract Services	6,529,238 *	1,588,367	32%	4,940,871	3,946,944
Utilities	1,140,158	103,423	10%	1,036,735	953,988
Telephone	31,782	1,842	6%	29,940	19,850
Mail	34,622	22,688	190%	11,934	9,894
Misc. (Including Bank Fees)	176,535	(217,072)	-55%	393,607	350,304
Equipment & Improvements	208,264 *	(338,106)	-62%	546,370	385,652
Space & Equipment Rental	2,904,022 *	2,367,572	441%	536,450	635,327
Financial Aid Grants	14,406,930 *	(264,826)	-2%	14,671,756	13,878,987
Collection Costs	17,000	11,945	236%	5,055	26,776
Transfer to Other Funds	1,402,500 *	(89,099,372)	-98%	90,501,872	60,760
<b>TOTAL EXPENDITURES</b>	<b>\$ 80,949,787</b>	<b>\$ (81,293,159)</b>	<b>-50%</b>	<b>\$ 162,242,946</b>	<b>\$ 63,677,717</b>

\*See attached narrative.

<b>SUMMARY - OPERATIONS</b>	<b>Proposed Budget 2023-24</b>	<b>Dollar Change FY24 Budget to FY23 Preliminary Actual</b>	<b>% Change from FY24 Budget to FY23 Preliminary Actual</b>	<b>Preliminary Year-end Actual 2022-23</b>	<b>Year-end Actual 2021-22</b>
Operating Revenues (without reserve & gains)	78,362,735	(84,837,049)	-52%	163,199,784	
Operating Expense (without financial aid)	(66,542,857)	81,028,333	-55%	(147,571,190)	
<b>Net Operations</b>	<b>\$ 11,819,878</b>	<b>\$ (3,808,716)</b>	<b>-24%</b>	<b>\$ 15,628,594</b>	
Financial Aid	(14,406,930)	264,826	-2%	(14,671,756)	
<b>Net Change after Financial Aid</b>	<b>\$ (2,587,052)</b>	<b>\$ (3,543,890)</b>	<b>-370%</b>	<b>\$ 956,837</b>	
Realized/Unrealized Gain or Loss	0	(3,225,167)	-100%	3,225,167	
<b>Current Year Surplus/Deficit</b>	<b>\$ (2,587,052)</b>	<b>\$ (6,769,057)</b>	<b>-162%</b>	<b>\$ 4,182,005</b>	
Beginning Reserves	25,311,559	4,176,613	20%	21,134,946	
<b>Ending Reserves - Operating</b>	<b>\$ 22,724,507</b>	<b>\$ (2,592,444)</b>	<b>-10%</b>	<b>\$ 25,316,951</b>	

\*See attached narrative.

## REPORT ITEM

1. **REPORT BY:** Chair of the Finance Committee Chip Robertson
2. **SUBJECT:** Non-State Budget for 2023-24
3. **RECOMMENDATION**

That the Board of Directors approves the attached non-state budget for 2023-24.

## 4. BACKGROUND

This report is divided into the following categories of non-state funds:

- Restricted Funds
- Unrestricted Funds

### RESTRICTED FUNDS

This report includes all non-state funds having restrictions imposed upon them from external sources, such as donors or granting agencies.

#### Overall

On an overall basis, the net effect of planned activity is a (\$3,129,569) reduction in restricted fund net assets, a function of expending grant and gift funds received in the prior year or approved spending plans that use accumulated current-use fund balances. Last year's beginning budget planned a net (\$2,797,845) reduction and preliminary year-end actuals are \$468,146.

#### Revenues

- Grants and Contracts – The 2023-24 grants and contracts revenue budget of \$5.7 million reflects known funding sources at time of budget development and includes support for Research Center projects and general support (exchange and non-exchange grants):
  - \$673,135 federal grants
  - \$845,806 state grants and contracts
  - \$1,705,838 private non-exchange grants
  - \$2,282,796 private exchange grants and contracts
  - \$170,227 city and county grants
- Other Income – The 2023-24 revenue expected in this category includes a total \$1 million to the California Institute on Law, Neuroscience, and Education (CILNE); with \$500,000 each from partners 1) the Memory and Aging Center of UCSF and 2) the UC/CSU California Collaborative for Neurodiversity and Learning, the MOU

funding will be completed as these entities also transferred to UC Law \$500,000 each in 2022-23 (supplementing the College's allocation of \$500,000 from Bench to School appropriations to CILNE, see Transfers).

### **Expenses**

- Instruction and Research, Salaries and Benefits – A budget of \$5,688,615 in 2023-24 reflects an increase of \$213,218 over 2022-23 actuals and includes staff support for Research Centers and funding from endowed Professorship and Chair accounts; the increase is largely attributed to CILNE expected to be fully staffed with addition of new Chief of Staff. Salaries are projected at \$4,143,061 and benefits at \$1,545,554; the combined benefit rates for 2023-24 remain unchanged from 2022-23.
- Instruction and Research, Program Support – With the increase of \$1,513,457 compared to 2022-23 actuals funded by grants, contracts and gifts, a total of \$3,070,826 in program support is budgeted for research centers and instructional programs. The 2023-24 budget includes a total allocation of \$744,000 to CILNE, increased over 2022-23 actual \$161,409. The 2023-23 budget also projects \$533,119 expensed to grants and contracts for indirect costs, cash that is then credited and available in unrestricted College funds.
- Student Services, Program Support – The reduction in 2023-24 compared to 2022-23 is from the state-funded College Student Right to Access grant expensed at \$132,729 in 2022-23 with the remaining \$67,271 expense in 2023-24 finalizing the total award received of \$200,000.
- Student Organizations – The various student organizations carry cash balances with the college and are not required to submit budgets. In 2022-23, program support of \$110,227 was disbursed on behalf of student organizations.

### **Nonoperating Revenues (Expenses)**

- Donations – The 2023-24 budget for donations reflects projected gifts available for current-use from reliable or known sources and has been downwardly adjusted to account for one-time donations in 2022-23. Included in the 2023-24 budget is gift funding from the Blum Foundation for scholarships, and general support for the Center for Gender and Refugee Studies.
- Endowment Payout – This category includes both payouts from endowments held by the College as well as payouts from funds held by UC on our behalf.
- Net Transfers to/from Other Funds – A positive number in this category is an addition (transfer from/revenue) while a negative number is a deduction (transfer to/expense). The 2023-24 budget includes \$500,000 to be transferred from state Bench to School funds as the College's final contribution to CILNE under MOU with Cal Institute partner institutions.

### **Endowed Funds Spending Rate and Cost Recovery Surcharge**

- Endowment Spending Rate – The budget for endowed funds reflects a total return spending policy permitting the expenditure of both current income and a portion of

appreciation. As adopted by the Board of Directors in March 2023, the spending rate for 2023-24 is budgeted at 4.0 percent calculated on the 12-quarter rolling average market value of all endowed funds (January 2020–December 2022). In 2022-23, the approved payout rate was also 4.0 percent.

- Endowment Management Cost Recovery Surcharge – A cost recovery fee is currently budgeted with a surcharge of 55 basis points (0.55 percent) applied to distributions from the General Endowment Pool for endowed funds. The funds recovered will be used to defray, in part, the cost of carrying out the terms of endowments and provide additional resources for the fundraising effort.

## UNRESTRICTED FUNDS

This report includes all non-state current-use funds that do not have restrictions imposed upon them from external sources. These funds include gifts given without restriction such as the UC Law SF Foundation support in the form of black grants for Institutional Advancement and Alumni Office operations. In addition, funds generated that support the budget of individual programs such as research centers, and conferences are recorded here. Miscellaneous revenue sources such as room rentals and forfeited deposits fund programs that may not have income of their own such as Student and College-wide events and administrative support funds. Designated Funds, those funds restricted as to use by the Board of Directors (e.g., Digardi Professorship, Hastings Chair, Shashi & Dipanjan Deb Fund) are also categorized as unrestricted current-use funds because it is within the Board’s power to remove such restrictions.

### Overall

On an overall basis, the net effect of planned activity is a (\$2,414,538) change in unrestricted fund net assets with operating revenues of \$829,482 and non-operating revenues/expenses of \$2,562,055 being reduced by \$5,806,075 in operating expenses.

### Revenues

- Other Income – In 2023-24, the increase is attributed to the Center for WorkLife Law projecting service revenues (e.g., speaking fees) at \$225,000; in 2022-23 the actual was \$110,000. Other unrestricted revenues accounted for here include forfeited deposits and income from events.

### Expenses

- Instruction and Research, Program Support – Included in the 2023-24 budget is \$308,895 in unrestricted fund support of the Center for WorkLife Law for 58 percent of the total \$531,763. The budget increases in 2023-24 by \$100,000 unrestricted funding provided to the Indigenous Law Center: \$95,000 allocated for contracted faculty and \$5,000 for travel. The other significant allocation in 2023-24 is \$49,246 for academic conferences.



- Student Services, Salaries and Benefits – A new part-time limited-term position is included in the 2023-24 budget, funded from unrestricted Wellness Activities fees at a total \$81,675 salaries and benefits.
- Institutional and Building Support, Salaries and Benefits – New in 2023-24 is \$31,739 allocated from the Mary Kay Kane Staff Merit Achievement Award endowment payout. The balance in this category are allocations in the Advancement Office; included in the 2023-24 budget is a new .5 FTE Prospect Research Coordinator position, and continuation of part-time Foundation Board of Trustees Liaison staff support.
- Institutional and Building Support, Program Support – Allocations from the Dean’s Priorities gift-funded account include \$750,000 for the digital display in the new Academe for 198 building; this is expected to be an advance, repaid through fundraising efforts. Program support for Alumni and Advancement is planned to increase in 2023-24 by \$111,320 over 2022-23 with total allocation of \$551,700 including \$226,000 for consulting services. Included in 2022-23 was \$403,471 one-time final project costs for the Kane Hall (200 McAllister) renovation project, this includes an estimated \$66,000 in final FF&E payments still due vendor One Work Place. Funded from unrestricted Hastings Digardi Hall is LRCP expense, reference separate agenda item for Long-Range Campus Planning budget details.
- Financial Aid, Scholarships and Fellowships – New in 2023-24 is \$63,478 funded by endowment payout from the Mary Kay Kane Chancellor’s Scholarship. Also included in the total is \$487,484 funded from the Dean’s Cotchett Fund and \$60,000 from the Dean's Priorities Fund for scholarships plus \$120,000 for summer public interest fellowships. The Hastings Scholarship fund allocates \$170,663 for student awards.

**Nonoperating Revenues (Expenses)**

- UCH Foundation Grants and Other Donations – The 2023-24 College budget reflects the Foundation’s plan to fund a block grant of \$875,000; the preliminary 2022-23 block grant is \$750,000 (budgeted target was \$1,100,000). Also budgeted is an estimated \$500,000 in donations to the Dean’s Priorities fund, intended to back-fill the advance funding for the digital display in the Academe at 198 building. In 2022-23, the remaining distributions from the estate of Mary Kay Kane were received. WorkLife Law’s “H Law” program is projected to receive \$105,000 in gifts. Gift processing fees (6% deducted from private donations) are projected to provide \$300,000 in funding, supporting the Advancement department.
- Endowment Payout – The 2023-24 fiscal year is the first to receive endowment payout from funds endowed by direction of the Board of Directors from the unrestricted monies of Emeritus Chancellor and Dean Mary Kay Kane’s estate, including allocations for professorships, staff merit achievement awards, and Chancellor’s scholarship at a total \$147,670.
- Net Transfers to/from Other Funds – A positive number in this category is an addition (transfer from/revenue) while a negative number is a deduction (transfer to/expense). The 2023-24 budget includes \$224,535 coming in to unrestricted nonstate funds by transfer from nonstate Special Events and Guest Services, an auxiliary enterprise

operation that provides funding for other nonstate college-wide expenses without their own revenue source. In 2022-23 the positive revenue transfers were offset by one-time use of the State Plant Fund Reserve at \$3.236 million.

**5. PROPOSED RESOLUTION**

Resolved that the Board of Directors approves the attached non-state budget for 2023-24.

**Attachment:** Non-State Beginning Budget 2023-24

UC LAW SAN FRANCISCO  
**Non-State Budget, Restricted Funds**  
**2023-24 Proposed Budget**

	Proposed Budget 2023-24	Preliminary Year-end Actual 2022-23	\$ Change from FY24 Budget to Preliminary FY23 Year-end Actual	% Change from FY24 Budget to Preliminary FY23 Year-end Actual	Year-end Actual 2021-22
<b>REVENUES</b>					
Grants and Contracts	5,677,802 *	6,126,382	(448,580)	-7%	6,727,375
Other Income	<u>1,005,781</u> *	<u>1,038,657</u>	<u>(32,876)</u>	<u>-3%</u>	<u>94,231</u>
<b>TOTAL OPERATING REVENUES</b>	<b>\$ 6,683,583</b>	<b>\$ 7,165,039</b>	<b>\$ (481,456)</b>	<b>-7%</b>	<b>\$ 6,821,605</b>
<b>EXPENSES</b>					
Instruction and Research					
Salaries and Benefits	5,688,615 *	5,475,397	213,218	4%	4,836,642
Program Support	3,070,826 *	1,557,369	1,513,457	97%	907,351
Public and Professional Services					
Salaries and Benefits	414,418	213,347	201,071	94%	226,165
Program Support	151,457	84,912	66,546	78%	94,121
Academic Support					
Salaries and Benefits	-	-	-	--	-
Program Support	-	-	-	--	-
Student Services					
Salaries and Benefits	13,017	6,697	6,320	94%	7,177
Program Support	99,957 *	147,334	(47,377)	-32%	15,101
Institutional and Building Support					
Salaries and Benefits	40,239	6,626	33,613	507%	6,418
Program Support	30,518	720	29,798	4139%	120,585
Financial Aid					
Salaries and Benefits	7,500	7,500	-	0%	5,000
Program Support	17,838	5,207	12,631	243%	7,227
Administrative Overhead	-	-	-	--	-
Scholarships and Fellowships	2,790,332	2,231,620	558,712	25%	2,620,486
Student Organizations					
Program Support	- *	110,227	(110,227)	-100%	100,820
<b>TOTAL OPERATINGEXPENSES</b>	<b>\$ 12,324,717</b>	<b>\$ 9,846,955</b>	<b>\$ 2,477,762</b>	<b>25%</b>	<b>\$ 8,947,092</b>
<b>NET OPERATIONS</b>	<b>\$ (5,641,134)</b>	<b>\$ (2,681,916)</b>	<b>\$ (2,959,217)</b>	<b>110%</b>	<b>\$ (2,125,487)</b>
<b>NONOPERATING REVENUES (EXPENSES)</b>					
Donations	422,065 *	1,375,646	(953,581)	-69%	2,387,432
Investment Income	-	21,102	(21,102)	-100%	4,592
Endowment Payout	1,564,500 *	1,560,675	3,825	0%	1,396,198
Realized Gain/Loss on Sale of Investments	-	202	(202)	-100%	(148)
Unrealized Gain/Loss on Investments	-	123,381	(123,381)	-100%	(137,792)
Net Transfers to/from Other Funds	<u>525,000</u> *	<u>69,057</u>	<u>455,943</u>	<u>660%</u>	<u>52,206</u>
<b>TOTAL NONOPERATING REVENUES (EXPENSES)</b>	<b>\$ 2,511,565</b>	<b>\$ 3,150,063</b>	<b>\$ (638,498)</b>	<b>-20%</b>	<b>\$ 3,702,489</b>
<b>TOTAL CHANGE IN NET ASSETS</b>	<b>\$ (3,129,569)</b>	<b>\$ 468,146</b>	<b>\$ (3,597,715)</b>	<b>-769%</b>	<b>\$ 1,577,002</b>

\*See attached narrative.

UC LAW SAN FRANCISCO  
**Non-State Budget, Unrestricted Funds**  
**2023-24 Proposed Budget**

	Proposed Budget 2023-24	Preliminary Year-end Actual 2022-23	\$ Change from FY24 Budget to Preliminary FY23 Year-end Actual	% Change from FY24 Budget to Preliminary FY23 Year-end Actual	Year-end Actual 2021-22
<b>REVENUES</b>					
Dues/Memberships	95,000	95,000	-	0%	125,000
Fees	376,984	382,172	(5,188)	-1%	395,130
Private Grants and Contracts	7,490	5,318	2,172	41%	24,268
Other Income	333,750 *	249,961	83,790	34%	423,107
Overhead Allowances	16,258	14,469	1,789	12%	26,696
<b>TOTAL OPERATING REVENUES</b>	<b>\$ 829,482</b>	<b>\$ 746,919</b>	<b>\$ 82,563</b>	<b>11%</b>	<b>\$ 994,201</b>
<b>EXPENSES</b>					
Instruction and Research					
Salaries and Benefits	931,007	955,012	(24,005)	-3%	651,758
Program Support	531,763 *	413,918	117,845	28%	282,337
Public and Professional Services					
Salaries and Benefits	43,221	34,185	9,036	26%	44,846
Program Support	38,500	7,428	31,072	418%	6,988
Academic Support					
Salaries and Benefits	0	-	-	--	-
Program Support	46,900	23,469	23,431	100%	22,955
Student Services					
Salaries and Benefits	90,299 *	8,298	82,001	988%	8,330
Program Support	490,337	420,542	69,795	17%	517,898
Institutional and Building Support					
Salaries and Benefits	932,257 *	841,949	90,308	11%	770,932
Program Support	1,717,413 *	1,177,217	540,196	46%	1,438,358
Financial Aid					
Scholarships and Fellowships	984,378 *	576,776	407,602	71%	614,652
Program Support	-	-	-	--	-
<b>TOTAL OPERATING EXPENSES</b>	<b>\$ 5,806,075</b>	<b>\$ 4,458,794</b>	<b>\$ 1,347,281</b>	<b>30%</b>	<b>\$ 4,359,053</b>
<b>NET OPERATIONS</b>	<b>\$ (4,976,593)</b>	<b>\$ (3,711,876)</b>	<b>\$ (1,264,718)</b>	<b>34%</b>	<b>\$ (3,364,853)</b>
<b>NONOPERATING REVENUES (EXPENSES)</b>					
UCH Foundation Grants and Other Donations	1,757,664 *	2,247,370	(489,706)	-22%	3,292,440
Investment Income	43,127	125,565	(82,438)	-66%	30,427
Endowment Payout	332,942 *	179,693	153,249	85%	156,402
Endowment Management Fee	203,787	198,778	5,009	3%	175,797
Realized Gain/Loss on Sale of Investments	-	-	-	--	-
Unrealized Gain/Loss on Investments	-	735,954	(735,954)	-100%	(821,915)
Net Transfers to/from Other Funds	224,535 *	(2,663,704)	2,888,239	-108%	(116,395)
<b>TOTAL NONOPERATING REVENUES (EXPENSES)</b>	<b>\$ 2,562,055</b>	<b>\$ 823,656</b>	<b>\$ 1,738,399</b>	<b>211%</b>	<b>\$ 2,716,756</b>
<b>TOTAL CHANGE IN NET ASSETS</b>	<b>\$ (2,414,538)</b>	<b>\$ (2,888,220)</b>	<b>\$ 473,682</b>	<b>-16%</b>	<b>\$ (648,097)</b>

\*See attached narrative.

**ACTION ITEM**

1. **REPORT BY:** Chair of the Finance Committee Chip Robertson
2. **SUBJECT:** State Contracts in Excess of \$100,000
3. **RECOMMENDATIONS:**

That the Board of Directors authorizes award of the state contracts in excess of \$100,000 as described in this report.

---

**Item:** \*6.3.1

**Title:** Wayfinding and Signage Collegewide  
**Vendor Name:** WeidnerCA (Clearstory as subcontractor)  
**Cost:** \$230,000 (previous approval of \$99,000)  
**Term of Contract:** March 17, 2023 to March 16, 2028 (Term)

**Description:**

Authority is requested to increase the scope of work and compensation for a professional services contract awarded by way of RFP to provide full design, manufacturing and installation services for wayfinding signage and site directional display maps.

---

**Item:** \*6.3.2

**Title:** HVAC Maintenance and Repairs  
**Vendor Name:** California United Mechanical Inc.  
**Cost:** \$244,000 (\$59,160 prior approval)  
**Term of Contract:** Two Year On-Call Trade Service Agreement

**Description:**

Authority is requested to increase compensation for current on-call service agreement to provide heating, ventilation, and air conditioning (HVAC) maintenance and repairs.

---

**Item:** \*6.3.3

**Title:** Geotechnical Engineering Services – 100 McAllister Seismic Upgrade  
**Vendor Name:** Langan Engineering

**Cost:** \$502,100 [\$467,100 (base contract) and \$35,000 (extra services)]

**Term of Contract:** July 24, 2023 to July 23, 2028

**Description:**

Authority is requested to enter into a contract with Langan Engineering for geotechnical services related to the renovation of 100 McAllister Tower. The scope of work for this engagement is being increased to include hazardous soil testing at the site. The base contract was approved at the July 17, 2023 meeting of the Executive Committee subject to ratification by the Board of Directors at its next meeting.

**4. PROPOSED RESOLUTION:**

That the Board of Directors authorizes the award of the state contracts listed below:

- \*6.3.1 Wayfinding & Signage Collegewide- Weidner CA \$230,000
- \*6.3.2 HVAC Maintenance- California United Mechanical Inc. \$244,000

Be it further resolved that the Board of Directors ratifies the action of the Executive Committee taken at its meeting of July 17, 2023:

- \*6.3.3 Geotechnical Engineering – Langan Engineering \$502,100

**ACTION ITEM**

1. **REPORT BY:** Chair of the Finance Committee Chip Robertson
2. **SUBJECT:** Nonstate Contracts and Grants in Excess of \$100,000
3. **RECOMMENDATIONS:**

That the Board of Directors authorizes the award of nonstate grants and contracts in excess of \$100,000 as described in this report.

---

**Item:** \*6.4.1

**Title:** Contract from the Acacia Center for Justice  
**Vendor Name:** Acacia Center for Justice  
**Cost:** \$483,770  
**Term of Contract:** September 2023 – August 2024

**Description:**

Authority to subcontract with the Acacia Center for Justice for the Center for Gender & Refugee Studies to provide training and technical assistance to a national network of post-release legal service providers representing unaccompanied children. The subcontract is funded from the Office of Refugee Resettlement (ORR), part of the federal Department of Health and Human Services (HHS).

---

**Item:** \*6.4.2

**Title:** Contract from the Central American Resource Center of Northern California  
**Vendor Name:** Central American Resource Center of Northern California  
**Cost:** \$373,342  
**Term of Contract:** July 1, 2023 to June 30, 2024 (Renewal)

**Description:**

Authority to subcontract with the Central American Resource Center (CARECEN) of Northern California for the provision of training and technical assistance to the San Francisco Immigrant Legal Defense Collaborative. The subcontract is funded from a grant from the Mayor's Office of Housing and Community Development (MOHCD).

---

**Item:** \*6.4.3

**Title:** Academe at 198 – Lobby Coffee Shop

**Vendor Name:** SPRO Coffee Lab

**Revenue:** \$504,000

**Term of Contract:** From Delivery of Premises to Tenant to Eight Years (96 months)

**Description:**

Authority is requested to enter into an agreement with SPRO Coffee Lab. SPRO will operate a café and coffee shop and will occupy the ground floor retail space in the Academe at 198. The term of the agreement is being extended from the 7 years approved by the Executive Committee to an 8-year period. The base contract was approved at the July 17, 2023 meeting of the Executive Committee subject to ratification by the Board of Directors at its next meeting.

**4. PROPOSED RESOLUTION:**

That the Board of Directors authorizes the acceptance of the nonstate grants and contracts in excess of \$100,000 listed below:

*6.4.1 Grant – CGRS - The Acacia Center for Justice	\$483,770
*6.4.2 Grant – CGRS - Central American Resource Center Northern California	\$373,342

Be it further resolved that the Board of Directors ratifies the action of the Executive Committee taken at its meeting of July 17, 2023:

*6.4.3 Retail Lease - SPRO Coffee Lab – 198 McAllister	\$504,000 (Revenue)
--	------------------------



## **ACTION ITEM**

- 1. REPORT BY:** Chair of the Finance Committee Chip Robertson
- 2. SUBJECT:** General Enrollment Fee - Resident and Nonresident Fee Increase for 2024-25
- 3. RECOMMENDATION:**

That the Board of Directors approves the following fees for the 2024-25 academic year:

1. General Enrollment Fee of \$49,383 representing, an increase of \$2,352 (5%); and
2. Nonresident Tuition of \$7,488, representing an increase of \$555 (8%).

## **4. BACKGROUND:**

The By-laws of the College provide that the Finance Committee considers and makes recommendations to the Board concerning the assessment of registration fees, educational fees, compulsory student activity fees, housing and parking charges and all other fees of the College.

Student fees are the primary revenue source supporting the College's educational mission. In 2022-23, 30 of the educational program was funded from student fee revenue. UC Law SF's General Enrollment Fee was flat from 2012-13 through 2021-22 when a 3% fee increase was approved 2022-23 after a ten-year period of fee stability followed by a 5% fee increase for the 2023-24 academic year.

### **Major Cost Factors for 2024-25**

UC Law SF faced several years of fiscal challenges after the great recession, comparable to law schools and state agencies around the country. The current multi-year plan is partly designed to make progress on some of the lingering financial issues that UC Law SF was unable to fully address during an earlier era of economic and budgetary uncertainty.

- Faculty compensation – Over the last decade, UC Law SF has been challenged in adequately investing in its faculty as evidenced by differentials between pay scales when compared to the UC system.
- Non-represented staff compensation – Similarly, investment in supporting the College's non-represented employees is an important institutional objective. The need to remain salary competitive is evidenced by difficulties in filling vacant positions and turnover.
- Represented staff – Bargaining for successor agreements between UC Law SF and unions representing staff and librarians will commence during the 2023-24 academic year. The

AFSCME agreement expires on June 30, 2024, and the AFT agreement expires on October 31, 2024.

- Inflation – As noted later in this analysis, inflation continues to place financial stress not just on the College, but also the personal finances of its employees.
- Academic space lease payments – The College is obligated beginning in 2023-24 to begin annual lease payments for the academic space located in the 198 McAllister mixed-use facility at a cost of \$2.1 million for 2023-24.
- Operating Budget Cost Items – Various factors are contributing to the need to increase student fees for the upcoming year. The amount of net revenue (\$1,786,054) derived solely from the proposed fee increase will partially fund these costs, additional state General Fund support in 2024-25 will also be needed.
  - Employee Compensation – Continuation of a 3% compensation pool is estimated to cost \$879,000 in 2024-25.
  - Information Technology – Cost containment efforts have limited necessary investments in IT infrastructure. Needs include \$240,000 to upgrade the current internet circuit from 1GE to a diverse 10GE and add a second circuit for redundancy. Further, funds are needed to upgrade the firewall (which is end-of-life) and add a second firewall for redundancy as well as other critical IT infrastructure support needs.
  - Insurance Premiums – Premium costs are increasing at a rate more than normal growth. Contributing factors include inflation hikes up to 8.3%, increases in construction costs impacting property coverages, and \$116 billion paid out to California insureds due to natural disasters. In the current year, premiums increased by \$366,000 (24.2%).
  - Safety and Security – The state has funded sidewalk safety services in the amount of \$1 million annually, the College absorbs an additional \$1.3 million from institutional funds. These cost pressures will continue as safety continues to be a priority.
  - Renaming Costs - Costs associated with the implementation of AB 1936, the bill that renamed the school, will extend into 2024-25. Preliminary 2022-23 expenditure totals \$2.8 million (inclusive of \$1.7 million in legal fees). The budget for 2023-24 is \$500,000; this amount will fund exterior signage. Further expenses will roll into 2024-25 for continued outreach efforts to communicate the new name to employers and judges, for interior signage, and other costs.

## **Academic Year 2023-24: Current-year Fee Structure**

The current-year (2023-24) fee structure at UC Law SF consists of the following charges and assessments.

- **General Enrollment Fee** – The General Enrollment Fee represents the primary fee at UC Law SF and is its main revenue source. This fee is analogous to the Tuition Fee, Student Services Fee, and Professional Degree Supplemental Tuition Fee (i.e., mandatory system-wide fees) charged by the University of California. The General Enrollment Fee is currently \$47,031.
- **Nonresident Tuition** – The establishment of nonresident tuition is based on state policy guidelines developed by the California Postsecondary Education Commission (CPEC). Students typically achieve residency status after their first year of attendance. Nonresident tuition is currently \$6,934.
- **Health Services Fee** – UC Law SF operated a health clinic up until 2020. For the current year, student primary care services will be provided by Carbon Health and consistent with the policy adopted by the Board, health care services are required to be self-supporting. This fee provides the revenue necessary to fund all direct costs including support staff and a student care advocate. The Health Services Fee is \$965.
- **Activity Fee and MBE Support Fee** – Mandatory fees are charged to support student-related functions. These fees include the Student Activity Fee at \$157, and the Multi-State Bar Exam preparation fee at \$120, used to provide each student with bar preparation software.
- **UCSHIP Accident and Sickness Insurance Plan** – UC Law SF participates in the UC Graduate SHIP managed by the University of California. This allows students and their spouses and/or children to purchase health coverage at competitive rates by achieving economies of scale by virtue of the program’s system-wide character. For 2023-24, the premium and program fee is \$5,867. This fee is waivable upon presentation of proof of alternative equivalent coverage.

For 2023-24, total mandatory resident fees (inclusive of campus fees) are \$48,273. Nonresidents pay an additional \$6,934 for total fees of \$55,207. These figures exclude UCSHIP health insurance, as these premiums are waivable.

### **Law School Fees assessed at other comparable law schools**

For 2023-2024, UC Law SF fees are lower than the average charged by other University of California law schools; the average fee UC law schools is \$56,163, UC Law SF’s fee is -16% lower. Similarly, UC Law SF nonresident tuition is lower than the average nonresident fee charged by the University of California, a -22% differential.

UC Law Schools - JD Student Fees for 2023-24

	UCLA 2023-24		UC-Davis 2023-24		Berkeley 2023-24		Irvine 2023-24		UC Law SF 2023-24		UC Law SF 2024-25	
	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident	Resident	Nonresident
<b>FEES</b>												
General Enrollment Fee	-	-	-	-	-	-	-	-	47,031	47,031	49,383	49,383
Prof. Degree Supplemental	41,672	41,672	40,390	40,390	47,040	47,222	41,670	41,670	-	-	-	-
Student Services Fee (Reg. Fee)	1,206	1,206	1,206	1,206	1,206	1,206	1,206	1,206	-	-	-	-
Tuition (Educational Fee)	12,264	12,264	12,264	12,264	12,264	12,264	12,264	12,264	-	-	-	-
Nonresident Tuition	-	12,245	-	15,102	-	12,245	-	12,245	-	6,934	-	7,488
<b>Total</b>	<b>\$ 55,142</b>	<b>\$ 67,387</b>	<b>\$ 53,860</b>	<b>\$ 68,962</b>	<b>\$ 60,510</b>	<b>\$ 72,937</b>	<b>\$ 55,140</b>	<b>\$ 67,385</b>	<b>\$ 47,031</b>	<b>\$ 53,965</b>	<b>\$ 49,383</b>	<b>\$ 56,871</b>
<b>CAMPUS FEES</b>	1,313	1,313	1,089	1,089	1,821	1,821	805	805	1,242	1,242	1,242	1,242
<b>HEALTH INSURANCE</b>	5,571	5,571	6,186	6,186	6,156	6,156	5,519	5,519	5,867	5,867	5,867	5,867
<b>TOTAL FEES</b>	<b>\$ 62,026</b>	<b>\$ 74,271</b>	<b>\$ 61,135</b>	<b>\$ 76,237</b>	<b>\$ 68,487</b>	<b>\$ 80,914</b>	<b>\$ 61,464</b>	<b>\$ 73,709</b>	<b>\$ 54,140</b>	<b>\$ 61,074</b>	<b>\$ 56,492</b>	<b>\$ 63,980</b>

(1) For other UC campuses, Resident Fees are referred to as Mandatory System-wide fees consisting of the Student Services Fee (formerly Registration Fee), Tuition (formerly Educational Fee), and Professional Degree Supplemental Tuition.

(2) Health Insurance premiums is waivable upon presentation of proof of alternative, comparable coverage.

**Summary – Proposed UC Law SF 2024-25 to Current 2023-2024 UC Fees**

Comparing the proposed 2024-25 UC Law SF fee structure to comparable current levels at other UC law schools (2023-24) demonstrates that UC Law SF will remain the lowest fee law school in the UC system with tuition levels set at the lowest level possible to assure that the College can continue to provide a legal education of the highest quality.

2023-24 Law School Fees	2023-24 Mandatory System-wide Resident Fees	2023-24 Total Nonresident Fees
UC Davis	\$53,860	\$68,962
UC Berkeley	\$60,510	\$72,937
UC Irvine	\$55,140	\$67,385
UCLA	\$55,142	\$67,387
<i>Average</i>	<i>\$56,163</i>	<i>\$69,168</i>

The fee structure proposed for 2024-25 for UC Law SF remains below the amounts charged by other UC law schools currently.

Law School	2024-25 General Enrollment Fee (Proposed)	2024-25 Nonresident Fees (Proposed)
UC Law SF	\$49,383	\$56,871

With the 5% increase proposed for 2024-25, UC Law SF resident General Enrollment Fee will be \$6,780 below (-12.1%) the average of UC’s current resident fees. Similarly, the proposed 8% increase for nonresident fees will be -17.8% below the average of UC’s current nonresident fee.

**Other Benchmark Law Schools**

The following table summarizes the total fees charged in 2023-24 by national public and private law schools.

<b>Law School</b>	<b>Tuition &amp; Fees</b>	<b>Nonresident</b>
USC	\$76,438	N/A
Stanford University	\$71,610	N/A
Boston College	\$66,600	N/A
George Washington	\$69,740	N/A
University of Texas	\$31,728	\$47,114
University of Minnesota	\$48,964	\$58,396
University of Michigan	\$43,966	\$46,966
University of Virginia	\$67,676	\$69,994

California private institutions are summarized below:

<b>Law School</b>	<b><u>Tuition &amp; Fees</u></b>
University of San Diego	\$62,500
Pepperdine	\$67,450
Loyola Marymount	\$64,890
University of San Francisco	\$54,100

**Information with regard to the inflation or deflation reflected in CPI**

Inflationary pressures in the general economy are significant and projected to continue. The Department of Finance regularly publishes data measuring price changes. The Consumer Price Index for Urban Consumers (CPI-U) for California for the period ending on June 30, 2022, was 5.9% and for the period ending June 30, 2023, an additional 3.5% increase was recorded. The Department of Finance projects that costs measured by this index will increase by an additional 2.9% for 2024-25.

**Nonresident Tuition**

UC Law SF, like other public universities, charges nonresident students more than resident students. UC Law SF nonresidents pay Nonresident Tuition in addition to the charges paid by resident students. The additional charge means that California’s investment in its system of public higher education is directly supporting California students.

The establishment of nonresident tuition is based on state policy guidelines developed some time ago by the California Postsecondary Education Commission (CPEC): As California's public

postsecondary education segments annually adjust the level of nonresident tuition they charge out-of-state students, the nonresident tuition methodologies they develop and use are to take into consideration, at a minimum, the following two factors: (1) the total nonresident charges imposed by each of their public comparison institutions and (2) the full average cost of instruction. In addition, each segment should endeavor to maintain that increases in the level of nonresident tuition are gradual, moderate, and predictable, by providing nonresident students with a minimum of a 10-month notice of tuition increases. Each governing board is directed to develop its own methodology for adjusting the level of nonresident tuition, but those methodologies should be consistent with this recommendation and existing statutes.

The proposed Nonresident Tuition for 2024-25 conforms to the provision that nonresident fees be adjusted based on two considerations: fees charged at benchmark institutions and cost recovery.

**SUMMARY**

Based on these considerations, the following fee structure is proposed for 2024-25:

	<b>Authorized</b>	<b>Proposed</b>		
	<b>2023-24</b>	<b>2024-25</b>	<b>Change</b>	<b>Percent</b>
General Enrollment Fee	47,031	49,383	2,352	5%
Nonresident Tuition	6,934	7,488	554	8%
Activity Fee*	157	157	-	0%
MBE Support Fee	120	120	-	0%
Health Services Fee*	965	965	-	0%
Health Insurance Premium*	5,240	5,240	-	0%
<b>Total Resident</b>	<b>\$53,513</b>	<b>\$55,865</b>	<b>\$2,352</b>	<b>4.40%</b>
<b>Total Nonresident</b>	<b>\$60,447</b>	<b>\$63,353</b>	<b>\$2,906</b>	<b>4.81%</b>

\* Preliminary. These fees will be established at the June 2024 meeting of the Board of Directors.

The General Enrollment Fee increase will result in \$2,587,200 in gross revenue assuming 1,100 JD students. The added surcharge for nonresident students will generate \$52,630 assuming 95 students. Of the revenue derived from the General Enrollment Fee increase, one-third (\$853,776) is earmarked for need and merit based financial aid to mitigate any adverse impact on accessibility. After this set-aside, net revenue of \$1,786,054 will be available to fund the College’s priorities.

**5. PROPOSED RESOLUTION\*:**

RESOLVED, that the Board of Directors approves the fees outlined below for the 2024-25 academic year:

1. General Enrollment Fee of \$49,383; and
2. Nonresident Tuition of \$7,488.

*\*Nothing in this document constitutes a contract, an offer of a contract, or a promise that any tuition or fees ultimately authorized by the Board of Directors will be limited by any term or provision of this policy. The Board of Directors expressly reserve the right and option, in its absolute discretion, to establish tuition or fees at any level it deems appropriate based on a full consideration of the circumstances, and nothing herein shall be a basis for any party to rely on tuition or fees of a specified level or based on a specified formula.*

## **ACTION ITEM**

- 1. REPORT BY:** Chair of the Finance Committee Chip Robertson
- 2. SUBJECT:** UCSF-UC Law SF Master of Science in Health Policy & Law – Fee Increase for 2024-25 and 2025-26

### **3. RECOMMENDATION**

That the Board of Directors approves bringing the per unit cost of the program to \$1,942, or \$46,766 for full-time students and \$46,924 for part-time students (inclusive of \$157 annual activity fee) for 2024-25 (an increase of 3%).

It is further recommended that a 3% tuition increase be approved for the 2025-26 academic year for the Master of Health Policy & Law degree.

### **4. BACKGROUND**

The By-laws and Standing Orders of the College provide that the Finance Committee considers and makes recommendations to the Board concerning the assessment of registration fees, educational fees, compulsory student activity fees, housing and parking charges, and all other fees of the College.

The UCSF-UC Law SF Master of Science in Health Policy & Law degree (“HPL”) is a jointly conferred and jointly governed program of UCSF and UC Law SF, with primary administrative responsibilities housed at UC Law SF. Students attend the program full time for one year or part time for two years, primarily in an asynchronous online format. The program admits between 15-25 new students per year and is a fully self-sustaining program.

The program was originally launched in 2015. At that time, HPL was a three-way partnership of UCSF, UC Law SF (then UC Hastings), and the UC Berkeley Center for Online Education (BRCOE). The HPL program was administratively housed at UCSF, with BRCOE providing total financial backing and some administrative support. Tuition was set for the first entering class at \$41,400 (excluding campus and other fees) in 2016-17, increasing by 3% annually thereafter. In 2019, BRCOE withdrew from the partnership and the program was put on pause until 2021, when UC Law SF and UCSF established a revised Memorandum of Understanding (MOU) in which the two institutions assumed joint financial responsibility for the program and UC Law SF assumed primary responsibility for its administration.

Under the terms of the new MOU, the parties agreed to a five-year projected budget that anticipated the program would operate at a loss in the first two years of the new partnership (2021-22 and 2022-23) before becoming self-sustaining in 2023-24. These projections assumed a tuition rate of \$1885.50 per unit, or \$45,409 annually for full-time students, and \$45,566



annually for part time students.<sup>1</sup> The projections also assumed an annual 3% tuition increase beginning Fall 2023 to account for inflation related to personnel and operating costs.

In April 2023, UCSF and UC Law SF elected not to increase tuition as originally planned but to defer a request for tuition increase another year. This decision was made to ensure that current and prospective students had sufficient notice and time to prepare for the increase, modest as the impact may have been. The program was operating at a loss as anticipated, but previously unforeseen budget savings permitted the campuses sufficient leeway to forgo this additional tuition revenue another year. These budget savings were one-time, unique events and are unlikely to recur.

Given post-pandemic inflation in operating and personnel costs, program management, Prof. Sarah Hooper, anticipates the need to continue increasing tuition modestly each year to keep pace with cost and ensure sustainability of the program.

Proposed is a two-year plan that would increase annual tuition by 3% beginning in Fall 2024, bringing the per unit cost of the program to \$1,942, or \$46,766 for full-time students and \$46,924 for part-time students (inclusive of \$157 annual activity fee). In the second year, 2025-26 tuition would also be increased by 3%. This action does not require parallel approval by UCSF.

## **5. PROPOSED RESOLUTION:**

Resolved that the Board of Directors approves increasing the per unit cost of the Master of Health Policy & Law degree to \$1,942, or \$46,766 for full-time students and \$46,924 for part-time students (inclusive of \$157 annual activity fee) for 2024-25 (an increase of 3%).

Be it further resolved that for 2025-26, tuition would be increased by an additional 3%.

---

<sup>1</sup> These totals include annually charged activity fees of \$157. Full time students pay this fee once and part time students pay this fee twice, resulting in the slightly higher total tuition.

## **ACTION ITEM**

**1. REPORT BY:** Chair of the Finance Committee Chip Robertson

**2. SUBJECT:** Financial Operations Policy Manual – Update

### **3. RECOMMENDATION:**

That the Board of Directors approves the revision to the Financial Operations Policy Manual described below.

### **4. BACKGROUND**

The Financial Operations Policy Manual provides the framework for the financial management of the College. It is regularly updated and revised to maintain its efficacy and to reflect modifications and improvements to business practices.

#### Section 10.0 - Travel

Current travel policy regarding airfare indicates that staff traveling on College-related business must purchase the lowest airfare available and that seat upgrades are not reimbursable.

It will remain the policy to purchase the lowest airfare available. However, it is proposed that for staff traveling on College-related business that includes a segment of flight that is ten (10) hours or more, such traveler is given the option to purchase a seat in the next-higher economy class, if available. This includes seating such as Economy Plus from United Airlines or Premium Economy from American Airlines.

A single flight of 10 hours or more is the proposed criterion. Premium seating for two five-hour flights or similar flights adding up to 10 or more hours is not reimbursable.

At no point are business class or first-class seats reimbursed, in accordance with the current policy, unless the traveler submits a doctor's note requiring this seating upgrade.

### **5. PROPOSED RESOLUTION:**

Resolved, that the Board of Directors approves the modification proposed to Section 10.0 of the Financial Policy and Procedure Manual.

## ACTION ITEM

1. **REPORT BY:** Executive Director of Human Resources Andrew Scott  
Chief Financial Officer David Seward
2. **SUBJECT:** UC Home Loan Programs – Authority to Participate in ZIP Loans

### 3. RECOMMENDATION:

That the Board of Directors approves UC Law SF’s participation in the ZIP loan program managed by the University of California’s Office of Home Loan Programs.

### 4. BACKGROUND

In 2015, the [UC Board of Regents expanded the UC Mortgage Orientation Program \(MOP\) and Supplemental Home Loan Program to include UC Hastings College of the Law Faculty](#). MOP Loans for the College are funded centrally through the UCOP allocation. Since implementation, the College has regularly included eligibility for MOP loans as a critical component of faculty offers. The MOP offers a fully-amortizing first deed of trust loan with a one-year adjustable interest rate based upon an internal index. The annual rate adjustment is capped at 1%, subject to minimum and maximum interest rates. There is an overall interest rate cap of 10% over the initial interest rate, and a minimum rate of 3.25%. [Historical MOP interest rates can be viewed here](#).

To supplement the primary MOP Loan offerings, the UC Board of Regents recently authorized a new type of supplemental loan, called a Zero Interest Supplemental Home Loan (ZIP Loan). ZIP Loans provide secured subordinate financing with no monthly payments and zero percent interest with a forgivable feature. At the end of the loan term, the outstanding principle balance would be fully due and payable. Unlike the primary loan program, the ZIP Loan is not centrally funded – funding must be provided by each campus/location.

#### Overview of the ZIP Loan Features:

- Zero percent interest with no monthly payment
- Loan Term: Approximately 11 years
- Min Loan Amount: \$10,000
- Max Loan Amount: \$150,000
- Lien Position: 2<sup>nd</sup> or 3<sup>rd</sup>
  - o Can be subordinate to an outside loan, subject to the Program (+ standard fees) and primary lender’s guidelines.
- Repayment: Upon the due date, the outstanding principal balance is fully due and payable and is considered a “balloon payment”.

- Forgivable Feature: Ten percent of the original principal of the ZIP loan may be forgiven each year with the annual written endorsement of the Chancellor & Dean, provided that the participant:
  - o Continues to be employed as an eligible participant;
  - o Is in good standing; and
  - o Is not in default on any term or condition of the loan.
- Loan forgiveness is reported as taxable income in the year forgiven on a W-2 form and is subject to standard withholding requirements.
- Loan Acceleration: All program loans are condition of employment loans. The ZIP Loan can be declared due and payable before the due date for a number of reasons, including, for example, separation from UC, including retirement, voluntary or involuntary termination, or death; transfer to another UC campus; violation of the loan program guidelines; or if the property securing the loan is sold or transferred.

The College is engaging in several critical ladder faculty recruitments in 2023-24. To remain competitive and address increasing housing costs in the Bay Area, the College seeks to offer ZIP loans as part of recruitment offers. The amount of utilization for this program is unknown. Funding to support the cost of ZIP loans would be derived from nonstate discretionary funds managed by the Chancellor and Dean.

## **5. PROPOSED RESOLUTION:**

Resolved, that the Board of Directors approves UC Law SF's participation in the ZIP loan program managed by the University of California's Office of Home Loan Programs.

## CTION ITEM

1. **REPORT BY:** Chief Financial Officer David Seward
2. **SUBJECT:** Long Range Campus Plan Budget for 2023-24

### 3. **RECOMMENDATION**

That the Finance Committee recommend that the Board of Directors approve the budget allocations to support the Long-Range Campus Plan (LRCP).

### 4. **BACKGROUND:**

The centerpiece of UC Law’s strategic vision is the creation of an Academic Village. A key aspect of this plan is the renovation of McAllister Tower. As noted in the 2022-27 Five Year Infrastructure Plan:

The Board of Directors adopted a new strategic plan in September 2020. This new plan is a blueprint to ensure that UC Hastings Law becomes one of the nation’s premier public law schools by 2025. It marries an evolving Long-Range Campus Plan with an overarching vision for the law school and for the Academic Village for which its new buildings and academic partnerships create a platform for a reimagined community of learning.

This budget request for 2023-24 is divided into two parts: the state-funded seismic upgrade of 100 McAllister supported by an appropriation of \$90 million included in the Budget Act of 2022 and activities keyed toward further development of the Academic Village funded by the nonstate Hastings-Digardi-Hall account.

#### **McAllister Tower Seismic Upgrade Project** **\$90,000,000**

The project is being undertaken in two phases. Contracts and funding are in place for the first phase of the work, the seismic upgraded of the building to achieve the performance standards contained in the UC Hastings Seismic Safety policy (2017). Financing will be needed for the second phase which can occur upon stabilization (occupancy at 95% and a 1.2 debt service coverage ratio) at 198 McAllister.

At its March 2023 meeting, the Board of Directors approved an initial budget of \$1 million to allow for the commencement of project activities in 2022-23. This request is intended to supersede that approval so as to allow for the presentation of the entire budget now that public procurement activities have been largely completed.

The budget is presented below:

<u>GL Account</u>	<u>Description</u>	<u>2023-24 Budget</u>
48-17026-4400	INVESTMENT INCOME	\$2,400,000
48-17026-4999	NONMANDATORY TRANSFERS FROM OTHER FUNDS	(\$1,400,000)
<b>Total Revenue</b>		<b>\$1,000,000</b>
48-17026-5247	CONTRACT-OTHER	\$15,724,303
48-17026-5280	MCALLISTER TOWER RENOVATION : INSURANCE	\$1,000,000
48-17026-5394	FINES, PENALTIES, LATE FEES, TAXES, PERMITS	\$2,000,000
48-17026-5403	LEGAL SERVICES	\$100,000
48-17026-5408	MISCELLANEOUS (Contingency Reserve)	\$6,801,657
48-17026-5813	BUILDING IMPROVEMENTS	\$64,374,040
<b>Total Expense</b>		<b>\$90,000,000</b>

The nonmandatory transfer of \$1.4 million represents funding being shifted to the 2023-24 budget of the Academe at 198 to support the 10% rent subsidies for non-UCSF tenants. Greater detail on the planned uses of the \$90 million appropriation are included in the project summary presented to the Finance Committee at its August 2023 meeting (and included in the board materials as item #9.7 - 100 McAllister – McAllister Tower Project Overview).

**Long-Range Campus Plan and the Academic Village** **\$2,015,470**

The budget for 2023-24 is intended to fund ongoing activities associated with the Long-Range Campus Plan. Major items include:

- Base building and tenant improvements for Golden Gate and Hyde Street retail space.
- Completion of CEQA entitlement process for the Local 2/Unite Here sites at 201-247 Golden Gate Avenue.
- Space allocation audit and conceptual planning based on audit recommendations.
- Completion of implementation of UC Law’s Green Community Benefit Plan
- Continuation of campus art program

Funding for this purpose will be allocated from the nonstate Hastings Digardi Hall account. Assuming approval of these items, a balance of approximately \$4 million will be in place as of June 30, 2024, assuming no changes in market valuations.

**5. PROPOSED RESOLUTION:**

Resolved that the Board of Directors authorizes the 2023-24 budgets as presented, specifically:

#7.2.1	McAllister Tower Seismic Upgrade Project	\$90,000,000
	State Funding – Budget Act of 2022	
#7.2.2	Long Range Campus Plan – Academic Village	\$1,994,320
	Nonstate Funding – Hastings Digardi Hall Account	

GL Account	Description	Budget	Notes
09-35150-4400	INVESTMENT INCOME	26,500	
09-35150-4410	ENDOWMENT INCOME	-	
09-35150-4415	ENDOWMENT PAYOUT	178,853	
09-35150-4500	OTHER REVENUE	111,210	
09-35150-4999	NONMANDATORY TRANSFERS FROM OTHER FUNDS	1,698,907	
<b>Total Revenue</b>		<b>\$ 2,015,470</b>	
09-35150-5138	STAFF STIPENDS	15,000	15,000 CFO Project Stipend
09-35150-5150	BENEFITS PROVISION	6,150	6,150 CFO Project Stipend
09-35150-5231	CONSULTANTS	22,000	
	- Gamble Strategies		12,000 Financial advisory services
	- Unallocated		10,000 Contingency
09-35150-5247	CONTRACT-OTHER	1,713,200	
	- TBD - Retail Tenant Improvement - Lobby 198 Academe		75,000 198 McAllister - SPRO lease
	- TBP Architecture - Retail Tenant Design Services		15,000 198 McAllister - SPRO lease
	- TBD - Retail Tenant Improvement - Golden Gate/Hyde Space		990,000 198 McAllister - GG/Hyde Lease (4400 @ \$225psf)
	- TBP Architecture - Retail Tenant Design Services		100,000 Design service
	- TBD Construction Services		125,000 Miscellaneous Renewals (BG Office, 2nd floor 198,etc)
	- Page Southerland Page		50,000 Capital Planning Updates (IMP, 5-Year Infrastructure Plan)
	- TBD		100,000 Space Audit & Conceptual Planning
	- Century Urban		125,000 Real Estate Advisory & Other Services
	- Scion Group (On Call Services)		36,000 Student housing advisory & marketing services
	- Keen on Art (BaseServices)		66,000 Art curation
	- Tree Management Experts		31,200 Green Benefits Plan - Arborists & Planting
09-35150-5270	TRAVEL	7,500	7,500 Travel for Conferences & Events
09-35150-5370	SUPPLIES	10,000	
	- Art Purchases		10,000 Tall Tapestry 333 GG (\$5,000) & Other
09-35150-5403	LEGAL SERVICES	150,000	
	- Reuben Junius & Rose		125,000 Land Use & Local 2 CEQA
	- Gibson Dunn & Crutcher		25,000 Transactional
09-35150-5408	MISCELLANEOUS	25,000	25,000 Contingency
09-35150-5417	ENDOWMENT MANAGEMENT FEE	21,620	21,620
09-35150-5420	MEMBERSHIPS	-	
09-35150-5670	EVENTS, ENTERTAINMENT AND MEETINGS	10,000	10,000 Community building events
09-35150-5675	AWARDS/HONORARIUM/GIFTS	-	
09-35150-5685	PROMOTIONAL ACTIVITIES	35,000	
	- Perkins & Will		35,000 Academic Village - Marketing & Promotional
<b>Total Expense</b>		<b>\$ 2,015,470</b>	

## ACTION ITEM

1. **REPORT BY:** Chief Financial Officer David Seward
2. **SUBJECT:** Contracts and Grants in Excess of \$100,000
3. **RECOMMENDATIONS:**

That the Board of Directors authorizes award of the contracts and grants in excess of \$100,000 as described in this report.

---

**Item:** \*7.3.1

**Title:** Materials Testing – Tower Seismic Upgrade Project  
**Vendor Name:** Consolidated Engineering Laboratories  
**Cost:** \$450,000 (not to exceed)  
**Term of Contract:** July 1, 2023 to December 31, 2025

### Description:

Authority is requested to increase the scope of work and compensation for a professional services contract awarded by way of RFP to provide full design, manufacturing and installation services for wayfinding signage and site directional display maps.

---

**Item:** \*7.3.2

**Title:** Professional Services – Deputy Building Official – Tower Seismic Upgrade Project  
**Vendor Name:** Claremont Engineering  
**Cost:** \$126,000 (not to exceed)  
**Term of Contract:** July 1, 2023 to December 31, 2025

### Description:

Authority is requested to enter a contract with Claremont Engineering to function as the Deputy Building Official for the McAllister Tower project. The vendor would liaise with the College's Seismic Review Committee and provide assurance that plans and specifications developed by the design team conform to the UC Hastings Seismic Safety Policy and its structural engineering design standards. An RFP was issued and the vendor selected based on the quality of their past performance.



---

**Item:** \*7.3.3  
**Title:** Inspector of Record - Tower Seismic Upgrade Project  
**Vendor Name:** NorCal Inspection Services  
**Cost:** \$340,000 (not to exceed)  
**Term of Contract:** July 1, 2023 to December 31, 2025

**Description:**

Authority is requested to amend an existing contract with NorCal Inspection Services for inspector of record responsibilities related to the renovation of McAllister Tower. NorCal successfully competed in an RFP process for the 198 McAllister Campus Housing Project. Based on their prior performance, it is recommended that their scope of service be expanded to include the Tower Seismic Upgrade Project.

---

**Item:** \*7.3.4  
**Title:** Legal Services - Tower Seismic Upgrade Project  
**Vendor Name:** Lubin Olson  
**Cost:** \$100,000 (not to exceed)  
**Term of Contract:** July 1, 2023 to December 31, 2025

**Description:**

Authority is requested to retain legal services to support contracting and legal review for the renovation of McAllister Tower. The Lubin Olson firm was selected based on their experience with public contracting with the University of California system.

---

**Item:** \*7.3.5  
**Title:** Real Estate Advisory and Other Services - Tower Seismic Upgrade Project  
**Vendor Name:** Century Urban  
**Cost:** \$2,000,000 (including \$500,000 previously approved)  
**Term of Contract:** July 1, 2023 to December 31, 2025

**Description:**

At the March 2023 meeting of the Board of Directors, authority was approved to expand the existing scope of services with Century Urban for real estate advisory and other services (i.e., support UC Law’s internal project manager, etc.) for the McAllister Tower Seismic Upgrade project. Century Urban successfully competed in an RFP process when the firm was originally awarded a contract to support the Long Range Campus Plan. Prior approval was for services to be rendered through March 31, 2024; authority is now sought for services through the completion of Phase I. Hourly compensation ranges from \$175 to \$400/hour.

---

**Item:** \*7.3.6

**Title:** Art Fabrication – 198 McAllister Lobby Art

**Vendor Name:** Stratin Engineering

**Cost:** \$662,361 (including an optional first review at \$21,369)

**Term of Contract:** August 21, 2023 to November 30, 2023

**Description:**

Authority is requested to contract with Stratin Engineering to design, fabricate, render, delivery and install the Tidal Wave of Justice art piece in the lobby of 198 McAllister. Additionally, the vendor will fabricate the digital display and donor recognition elements of the Tidal Wave of Justice art piece, but only upon receipt of a notice to proceed with such work anticipated not to exceed \$15,000. The budget for this project was approved at the March 2023 meeting of the Board of Directors where approved was an allocation of \$750,000 for design and fabrication of the digital display. This outlay is initially being funded from nonstate funds allocated to two of the Dean’s discretionary accounts which would be reimbursed from donor solicitations currently underway.

---

**Item:** \*7.3.7 (Ratification)

**Title:** Construction Management/General Contractor Services  
- Tower Seismic Upgrade Project

**Vendor Name:** Plant Construction

**Cost:** \$774,000 for Preconstruction Services  
2.25% for Construction Manager & General Contractor Fee as a % of Cost  
of Work

**Term of Contract:** June 30, 2023 through Completion

**Description:**

Authority is requested to enter into an agreement for Construction Management/General Contractor services for the McAllister Tower Seismic Upgrade Project. This two-phase project is being partially funded by \$90 million appropriated in the Budget Act of 2022.

A Request for Proposal was issued. Ten bids were received; all were deemed responsive. From this initial pool, four firms were shortlisted and interviewed. Plant Construction was selected based on their extensive experience modernizing historic buildings, most particularly high-rise buildings. Ten years ago, Plant Construction restored the iconic Timothy Pflueger-designed San Francisco landmark, 140 New Montgomery, with a full seismic retrofit and complete restoration of the historic building. 100 McAllister was also designed by Pflueger and would undergo a similar preservation and transformation strategy.

Compensation is based on two phases of the work. For Preconstruction Services, \$774,000 as a not to exceed based on an estimated 24 months duration. The preconstruction services amount can be adjusted if the duration is shorter or longer using a unit rate of \$9,713 per week. If the College elects to retain Plant Construction going into the actual upgrades, the cost is 2.25% multiplied by the cost of the work. The 2.25% fee includes profit on the project but excludes General Conditions, bonds, insurance, and San Francisco’s gross receipts tax. The contract’s total estimated value based on the most recent construction cost estimate is \$64,374,040.

This item is being presented for ratification. Approval for contract approval was secured pursuant to the provisions of the Financial Operations Policy Manual concerning out-of-cycle Board approval for contracts over \$100,000. Specifically, Section 8.1.3 provides that, “In the event that prior approval by the full Board of Directors for leases and contracts over \$100,000 is impractical or unfeasible, the Chancellor and Dean may approve said leases or contracts after consultation with and approval by the Chair of the Board and the Chair of the Finance Committee and subject to notification of the full Board of Directors.” This approval was granted on June 24, 2023.

---

**4. PROPOSED RESOLUTION:**

That the Board of Directors authorizes award of the contracts listed below:

*7.3.1 Materials Testing – Tower Seismic Upgrade Project – Consolidated Engineering Laboratories (Not to exceed)	\$450,000
*7.3.2 Professional Services – Deputy Building Official – Tower Seismic Upgrade Project - Claremont Engineering (Not to exceed)	\$126,000
*7.3.3 Inspector of Record - Tower Seismic Upgrade Project - Nor Inspection Services (Not to exceed)	\$340,000
*7.3.4 Legal Services - Tower Upgrade Project - Lubin Olson (Not to exceed)	\$100,000
*7.3.5 Real Estate & Other Project Services – - Tower Upgrade Project - Century Urban (Includes prior approval for \$500,000; not to exceed)	\$2,000,000
*7.3.6 Art Fabrication – 198 McAllister Lobby Art - Stratin Engineering	\$662,361

Be it further resolved that the Board of Directors ratifies the award of the contract described below awarded under the provisions of Section 8.1.3 of the Financial Operations Policy Manual (Out-of-cycle Contract Approval):

*7.3.7 Construction Management/General Contractor Services - Plant Construction	
- Preconstruction Services	\$774,000
- General Contractor Fee (2.25% of the cost of construction)	\$64,374,040

**REPORT ITEM**

- 1. REPORT BY:** Chief Financial Officer David Seward
- 2. SUBJECT:** Hastings College of the Law and the Tenderloin -  
A Journey through Time
- 3. REPORT:**

A presentation at the September meeting of the Board of Directors will be made concerning the College's history of engagement with the Tenderloin and its impact on campus development.

# Hastings College of the Law

(aka UC Law, SF)

&

# the Tenderloin

A Journey through Time

Board of Directors

September 2023

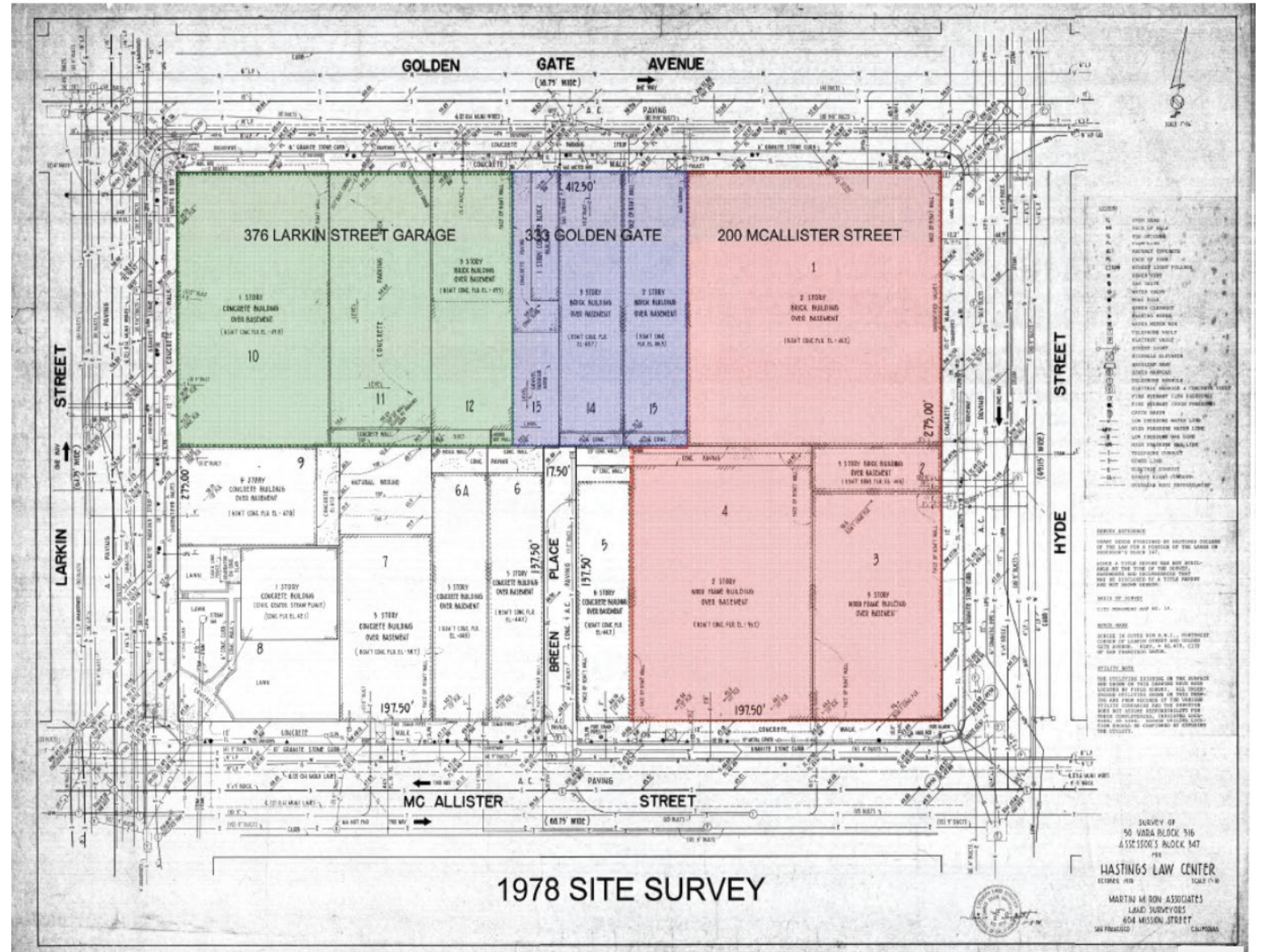


UC <sup>San Francisco</sup> Law



# West Block Properties: 1978 and Now

Hastings buys everything it can. Abigail Hotel resists. Steam Plant not for sale.





# Hastings purchases McAllister Tower

1979



- Acquired under leadership of Dean Marvin Anderson as surplus federal property for \$1.2 million.
- Favorable financing terms from a \$6 million HUD loan for purchase and upgrade costs.
- Funding was sufficient to renovate only to the 19<sup>th</sup> floor.
- Building's structural condition was subject of intensive pre-purchase analysis.
- Partial residency was achieved in 1980-81.

Where did the  
money come  
from?

## Part I

# Auditor General Investigation - 1986

- The “acquisition and retention of the West Block properties with funds restricted for other uses constitutes a breach of trust.”
- Report triggers legislative actions to exert greater state oversight:
  - Annual audit reporting to the Regents and Legislature
  - Legislation requiring conformance with endowment investment and management policies of the Regents is enacted
  - Board of Directors loses the power of self perpetuation; legislation gives governor appointment authority except for seat filled by Hastings’ heir.

Where did the  
money come  
from?

## Part II

Department of  
Justice  
Charitable Trust  
Inquiry –  
1986

- Management authority over remaining endowments and restricted funds is removed from the Board of Directors and ceded to the newly established Hastings Law School Trust.
- Restitution payments are mandated providing “scholarships” post-facto to alumni that would otherwise have been eligible if not for...
- Residential properties in negative cash flow.
- Commercial bank loan is secured to fund restitution payments and cover operating shortfalls.

Where did the money come from?

Part III

One thing leads to another, Board of Directors launches its own investigations - 1987

HAROLD ROPERS  
(1904-1966)  
LAW OFFICE OF  
RICH W. FIELDS  
655 MONTGOMERY STREET, SUITE 1600  
SAN FRANCISCO, CALIFORNIA 94111  
OF COUNSEL  
HAROLD CLINTON BROWN

LAW OFFICES  
ROPERS, MAJESKI, KOHN, BENTLEY,  
WAGNER & KANE  
A PROFESSIONAL CORPORATION  
1125 MARSHALL STREET  
REDWOOD CITY, CALIFORNIA 94063  
(415) 364-8200  
TWX 9103785211  
ROPERS RDCY

SAN FRANCISCO OFFICE  
655 MONTGOMERY STREET, SUITE 1600  
SAN FRANCISCO, CALIFORNIA 94111  
TELEPHONE (415) 788-2600  
SAN JOSE OFFICE  
80 NORTH FIRST STREET, SUITE 300  
SAN JOSE, CALIFORNIA 95113  
TELEPHONE (408) 287-6162

CONFIDENTIAL & PRIVILEGED/ATTORNEY-CLIENT COMMUNICATION

March 19, 1987

Board of Directors  
Hastings College of the Law  
c/o Mr. Harold Dobbs, Chairman  
Dobbs, Berger, Molinari,  
Casalnuovo, Vanelli & Nadel  
One Maritime Plaza  
Suite 2500  
San Francisco, CA 94111

SPECIAL REPORTS TO HASTINGS BOARD OF DIRECTORS  
REGARDING MISUSE OF ITS RESTRICTED AND NON-STATE PUBLIC FUNDS

PREFACE

On May 13, 1986, the Auditor General initiated an investigation of the manner in which Hastings has managed its real property. In late October, 1986 the Auditor General issued a report detailing its investigation and conclusions. (Report No. P-624.) The report was sharply critical of Hastings' use of restricted endowment and scholarship monies to help purchase four pieces of real property, otherwise referred to as "The West Block Properties."<sup>1</sup>

<sup>1</sup> The report of the Auditor General also criticized the alleged failure by Hastings to conduct regular health and safety inspections of its real properties and to maintain those properties within the requirements of the Health and Safety Code. The scope of investigation by this office did not include the Health and Safety issues and consequently they are not addressed in this report.

# Loma Prieta Earthquake – 1989

Never let a good crisis go to waste.

- Hastings demolishes four buildings – including two vacant SRO's.
- Litigation ensues...

SAN FRANCISCO EXAMINER

## City goes to court to halt plan for school parking lot

### Hastings College wants to demolish 4 old buildings

By Steven A. Chin  
OF THE EXAMINER STAFF

The City is seeking a court order to block Hastings College of the Law from leveling four Tenderloin District buildings containing more than 80 low-income units to make way for a school parking lot.

The legal action initiated by The City Wednesday is the first blow in what could become another long battle pitting Mayor Agnos and Tenderloin housing activists against the century-old law school over a new plan to develop its "West Block" property.

Hastings' plan to construct a parking lot — and possibly a new courthouse — could affect as many as 300 low-income units and numerous small businesses on the block bounded by Hyde, McAllister and Larkin streets and Golden Gate Avenue.

"This would be the largest demolition of housing The City has seen in years at a time when the earthquake has made low-cost housing more scarce than ever before," said Randy Shaw, executive director of the Tenderloin Housing Clinic.

The Oct. 17 earthquake has left several hundred low-income units uninhabitable in the Tenderloin



EXAMINER/KURT ROEBERS

**Hastings College hopes to demolish this building in the 300 block of Golden Gate Ave. and then construct a parking lot on the vacant land.**



EXAMINER GRAPHICS

stroyed by a proposed commercial project. Paul said Agnos intends to hold the college to local laws. "Our position is that they are responsible for replacing the housing," said Paul.

Hastings' critics are also suspicious that once the buildings are demolished, the school will try use the land to raise revenue, a strategy it has pursued for more than a decade.

"The parking lot is just an excuse to demolish the buildings," said Shaw, who in 1986, along with then-Assemblyman Agnos fought the college's earlier plans to demol-

So “there’s no such thing as bad publicity?”

Hastings tests the limits

1991

RANDOLPH A. HEARST  
*President*

# San Francisco Examiner



**WILLIAM R. HEARST III**  
*Editor and Publisher*

**LARRY KRAMER**  
*Executive Editor*

**LEE DEMBART**  
*Editor of the Editorial Pages*

**JAMES E. SEVRENS**  
*General Manager*

**PAMELA BRUNGER SCOTT** *Deputy Managing Editor*

**STEPHEN COOK** *Foreign/National Editor*

**BARBARA FRENCH** *Business Editor*

**JAY JOHNSON** *Executive News Editor*

**JOHN A. KIRKPATRICK III** *Assistant Managing Editor, News*

**TIM PORTER** *Metropolitan Editor*

**GLENN SCHWARTZ** *Sports Editor*

**PAUL WILNER** *Assistant Managing Editor, Features*

**WARREN HINCKLE** *Associate Editor*

**JIM WOOD** *Associate Editor*

## LETTERS

### Mideast war

A chorus of editorial writers has recently been bemoaning the fact that the vast majority of the American public favors censorship by the military during time of war.

The old saw about “killing the messenger” is often hauled out. Many of us would feel less hostile toward the messenger if we thought we were getting a reasonably unbiased story from it.

In fact, the media have presented a remarkably one-sided view of the war. We see sanitized, prepackaged pictures of events inside Iraq, carefully prepared by Saddam Hussein. At the same time, the press has not run pictures of the atrocities that have been committed in Kuwait, apparently believing these are too horrible to expose to the public.

The rule for dictators thus becomes to feed the media cleaned-up pictures ready for prime time while simultaneously making sure any pictures available from the site of the aggression are so disgusting the media will not run them.

TONY LIMA  
*San Carlos*

Now Saddam Hussein is asking for peace to save his hide, so that in several years this snake can come back with more lethal weapons. The

from the P  
Reports of  
been grossly  
peace march  
have been  
pro-war acti  
page covera  
real cost o  
death conti  
the public.  
Barbara Eh  
Barbara B  
the many of

It appear  
concentrat  
mize their  
they have  
Thousands  
perished as  
bombardme  
confirm the  
into the are  
ground war

One tacti  
trying to pu  
out into the  
easy targets  
the Iraqis ar  
don't the all  
chuting thou  
er-----  
si 157 rat  
RU

## Hastings' bad neighbor policy

Any development by the law school ought to obey city policy and provide replacement housing

**H**ASTINGS COLLEGE of the Law envisions a bright future for itself. The law school wants to redevelop two blocks it owns in

San Francisco's Tenderloin. The proposal is ambitious, though vague. Hastings—part of the University of California—says it would like to build new facilities for itself, including legal-aid clinics, a law video center, a judicial college and new offices. Maybe even a little housing. For all its eagerness

Hastings says that as a state-run college, it isn't subject to local planning and zoning laws. This is a matter of debate, but whatever the legalities (and Hastings is very good at those), the school's idea of a civic conscience stinks.

The same attitude is reflected in Hastings' “need to know” approach in formulating development plans. Before the school announced its plans earlier this month, it hadn't seen fit to share its intentions with The City or neighborhood groups. Marcia Rosen, an attorney for the North of Market Planning Coalition, notes

Not the greatest  
landlord

Hastings does its  
best to manage  
legacy tenants

1992

SAN FRANCISCO EXAMINER

# Law school tenants outraged

Hastings, police  
lambasted for lack  
of action to stop  
vicious burglar

By Tanya Schevitz Wills  
OF THE EXAMINER STAFF

Tenants at a Tenderloin apartment building owned by Hastings College of Law are outraged that their complaints about a vicious burglar are getting little attention from the law school and the San Francisco Police Department.

"We are demanding that both Hastings and the S.F. Police Department stop viewing the Tenderloin as just a place where crime can occur . . . and do something to solve the problem," Attorney Stephen L. Collier from the Tenderloin Housing Clinic said at a news conference Tuesday.

Residents said the Larkin Street apartment building had been burglarized at least 10 times by a short, slightly built woman with shoul-



Making the Best of a Bad Situation, or at Least Trying To

1994

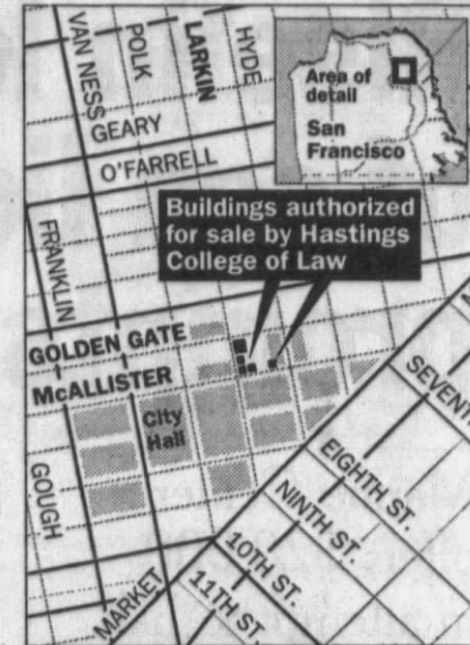
# Hastings property report alarms activists

## Developers favored to buy buildings

By Gerald D. Adams  
EXAMINER URBAN PLANNING WRITER

Arousing activists' fears of gentrification in the Tenderloin-Civic Center area, a report to be presented Friday to Hastings College trustees gives the edge to commercial developers over a nonprofit housing group in bidding for four residential buildings adjacent to the law school.

"We're concerned that the private sector is interested in gentrifying this kind of housing, further depleting affordable housing stock



1/2 mile

- ▶ **270 McAllister St.**  
An 80-room residential hotel  
Value: \$790,000
- ▶ **260 McAllister St.**  
A 29-unit apartment house  
Value: \$960,000
- ▶ **250 McAllister St.**  
A 34-unit apartment house  
Value: \$1,140,000
- ▶ **324 Larkin St.**  
A 24-unit apartment house  
Value: \$925,000
- ▶ **277 Golden Gate Ave.**  
Five-story office building  
Former KGO television studio

EXAMINER GRAPHICS

ing bidder" for apartment houses at 250 and 260 McAllister St.



# Hastings withdraws from the field of battle

1994

Board of Directors elect to terminate ownership by selling:

- 250 McAllister to TNDC
- 260 McAllister to TNDC
- 324 Larkin Street to Private Owner
- 270 McAllister to Private Owner
- 277 Golden Gate (1996) to Private Owner

Proceeds used to reduce outstanding debt issued for Restitution Payments.

## Law school to sell buildings for housing

**SAN FRANCISCO** Hastings College of Law has agreed to sell two McAllister Street apartment buildings to the non-profit Tenderloin Neighborhood Development Corp. for use as affordable housing.

Monday's announcement ends tense jockeying for the last of four surplus properties from a block purchased in 1976 for Hastings' expansion. Housing activists were outbid by private developers for the first two properties.

The two buildings Hastings has agreed to sell to the nonprofit agency are at 250 and 260 McAllister and contain 63 apartments.

Part of the purchase money will come from The City. Tenderloin Neighborhood Development has until Oct. 31 to round up the rest. If it succeeds, the sale would be completed by Dec. 31, Hastings attorney Angele Khachaour said.

*Compiled from Examiner staff and wire reports*

# Hastings Garage - The Seven Year War

## Round I: 2000 – 2002

- CEQA approval hearing is a riot
- Sen. John Burton defunds school
- Project “paused” by board
- Blue Ribbon Committee formed

## Round II: 2007 - 2009

- Garage reduced in size
- Partnership formed with YMCA
- Community engagement occurs
- Project completed in 2009



Supervisor clashes with S.F. police / Chris Daly arrested during 2002 protest at a Board of Directors meeting over Hastings Law School garage. Ten others arrested.

# Rapprochement

## Hastings engages with the Tenderloin

- 2007 to Present

Hastings institutionally engages with Tenderloin to promote positive change:

- Forms partnership with the Tenderloin YMCA
- Civil Justice Clinic expands legal services under Prof. Aaronson
- Legal Assistance Resource Clinic established under Prof. Stuart
- Social Enterprise Clinic created under Prof. Ball
- Tenderloin Community Benefit District is formed with Hastings leadership
- McAllister Street streetscape improvement project funded by City; receives Most Greenified Block award from Friends of Urban Forest

# The Academic Village –

# Tenderloin Support!

2017

## CEQA Process undertaken for entitlement of Academic Village

- 333 Golden Gate Avenue – Academic
- 198 McAllister – Mixed Use – Academic and Housing
- 100 McAllister – Academic and Housing
- Process completed in nine months
- No opposition; five comments tendered throughout public process

# The Pandemic

## A bad moon rising... The Tenderloin & Hastings

2020 - 2023

### UC Hastings agrees to settlement in lawsuit against SF over homeless tents in the Tenderloin

By Joshua Sabatini  
Jun 12, 2020



Tents in the Tenderloin sheltering homeless people were the subject of a lawsuit filed by UC Hastings. (Kevin N. Hume/S.F....

San Francisco announced a settlement Friday of a lawsuit filed by University of California, Hastings College of the Law over Tenderloin homeless encampments that will require The City to remove 300 tents within weeks.

Well, here we  
are

UC Law, SF and  
the Academic  
Village

—2023



What's next?

McAllister Tower  
Seismic Upgrade  
Project

&

Unite Here / Local 2  
201-247 GG Avenue



Academic Village – The East Block

## REPORT ITEM

1. **REPORT BY:** Chair of the Finance Committee Chip Robertson
2. **SUBJECT:** Investment Report as of June 30, 2023
3. **REPORT:**

UC Law SF follows the investment philosophy of the University of California and invests excess cash and long-term investments – endowments and operating reserves – in the General Endowment Pool ("GEP") managed by the Office of the Treasurer.

In 2023, an account in the Total Return Investment Pool (TRIP) was established for the purpose of investing funds received to support the implementation of the College's Long Range Campus Plan, specifically, 50% of the \$90 million appropriated for the McAllister Tower Seismic Upgrade Project. And lastly, cash needed for near term liquidity needs is allocated to the Short Term Investment Pool (STIP).

Investment fund balances held by the University of California as of June 30, 2023 are displayed below:

	As of 6-30-2022	As of 12-31-2022	As of 6/30/2023	FYTD %
Hastings Endowment Fund (GEP)	\$49,760,768	\$48,072,209	\$51,855,613	4.2%
Hastings Operating Fund (GEP)	64,797,831	64,993,344	70,108,481	8.2%
Endowed Funds Held by Regents (GEP-7)	9,757,634	9,751,825	10,450,415	7.1%
Hastings Operations – STIP	661,881	2,815,010	16,454	-97.5%
100 McAllister Project Fund – STIP	0	90,461,630	46,931,656	NA
100 McAllister Project Fund – TRIP	0	0	45,000,000	NA
<b>Total</b>	<b>\$124,978,114</b>	<b>\$216,094,018</b>	<b>\$224,362,619</b>	<b>79.5%</b>

Other highlights:

- The General Endowment Pool (GEP) experienced total returns of 8.2% as of June 30, 2023. On a calendar year basis, GEP had a total return of 3.96%.
- The Short Term Investment Pool (STIP) experienced total returns of 2.49% as of June 30, 2023. On a calendar year basis, STIP had a total return of 1.36%

The Office the Chief Investment Officer of the University of California has communicated its interest in making a presentation. A date for this presentation is being formalized.

### Attachments:

- State Street Bank, GEP, STIP Unit Value Return Summary Report – Period Ending May 31, 2023
- Press Release – Office of the President - Real Estate and Equities Lead UC's Investment Assets to \$164 billion at the close of the fiscal year, August 4, 2023



# Chief Investment Officer of the Regents

RATES OF RETURN - Unit Value

Periods Ending May 31, 2023



## 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	20,442,180,412	0.37	2.11	2.05	4.28	3.96	-2.18	10.15	7.99	8.23
<i>GEP TOTAL PORTFOLIO BM AUDIT ADJUSTED</i>	<i>REG44B</i>		-0.16	2.39	2.49	7.98	5.95	2.54	9.17	6.69	6.99
Excess			0.53	-0.28	-0.44	-3.70	-1.99	-4.72	0.98	1.31	1.24
<b>GEP TOTAL US PUBLIC EQUITIES</b>											
GEP TOTAL US PUBLIC EQUITIES	EBKGEP4	3,968,522,831	0.75	5.64	4.43	11.79	10.65	3.14	11.36	9.74	8.96
<i>Russell 3000 ex Tob ex FF</i>	<i>REG5</i>		0.93	4.65	3.24	11.43	9.90	2.13	12.25	10.11	11.49
Excess			-0.18	0.99	1.19	0.36	0.75	1.01	-0.89	-0.37	-2.53
<b>GEP TOTAL NON-US PUBLIC EQUITIES + EQ</b>											
GEP TOTAL NON-US PUBLIC EQUITIES + EQ	EBKGEP5	987,309,095	-4.64	-2.21	0.38	0.95	2.90	-6.55	3.81	2.63	5.33
<i>NON-US EQUITIES POLICY BENCHMARK</i>	<i>REG13</i>		-3.64	0.43	3.99	7.87	4.77	-1.41	7.23	2.22	3.83
Excess			-1.00	-2.64	-3.61	-6.93	-1.87	-5.14	-3.42	0.41	1.50
<b>GEP DEVELOPED NON US PUBLIC EQUITY</b>											
GEP DEVELOPED NON US PUBLIC EQUITY	EBKGEP20	595,776,805	-5.69	-1.94	4.09	10.44	6.40	-1.85	6.89	4.33	6.06
<i>BLENDED EAFE TF + CANADA INDEX</i>	<i>REG9N</i>		-4.31	0.62	5.87	12.26	6.39	1.63	8.87	3.42	4.55
Excess			-1.38	-2.56	-1.78	-1.82	0.00	-3.48	-1.98	0.91	1.51
<b>GEP EMERGING MARKET EQUITY</b>											
GEP EMERGING MARKET EQUITY	EBGEPEME	391,532,290	-2.99	-2.61	-4.97	-12.17	-2.11	-13.38	-0.42	0.34	3.99
<i>EMERGING MARKETS EQUITY POLICY BENCHMARK</i>	<i>REG12</i>		-1.68	0.15	-0.37	-1.97	1.05	-8.49	3.47	-0.67	1.90
Excess			-1.31	-2.76	-4.60	-10.20	-3.16	-4.89	-3.89	1.01	2.09
<b>GEP GLOBAL EQUITY</b>											
GEP GLOBAL EQUITY	EBGEPTGE	2,903,690,307	-0.84	3.19	3.94	11.07	7.94	1.64	9.64	6.43	
<i>MSCI ACWI IMI ex Tobacco</i>	<i>MSI66NUS</i>		-1.16	2.56	2.95	9.81	7.10	0.34	10.05	6.34	
Excess			0.32	0.62	0.99	1.26	0.84	1.30	-0.41	0.09	
<b>GEP - INCOME COMPOSITE</b>											
GEP - INCOME COMPOSITE	EBGEPFIC	1,455,427,117	-0.32	1.73	2.05	1.05	1.66	0.60	-0.12	1.85	1.87
<i>INCOME POLICY</i>	<i>REG159</i>		-0.50	1.83	1.87	0.81	1.82	-0.03	-1.16	2.37	2.44
Excess			0.18	-0.10	0.18	0.23	-0.15	0.63	1.04	-0.52	-0.57

# Chief Investment Officer of the Regents

RATES OF RETURN - Unit Value

Periods Ending May 31, 2023



## 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
GEP TOTAL CORE FIXED INCOME	EBKGEP43	1,455,427,117	-0.32	1.73	2.11	0.94	1.66	0.77	-1.08	1.77	1.60
<i>Blended US Gov Benchmark</i>	REG149		-0.53	1.90	1.77	0.39	1.75	-0.27	-1.60	2.41	1.83
Excess			0.22	-0.17	0.34	0.55	-0.08	1.04	0.52	-0.63	-0.23
GEP TOTAL CREDIT	EBKGEP7C	429,627,703	-0.29	1.69	2.24	1.63	1.98	0.50			
<i>Bloomberg 1-5 Yr Credit</i>	BC78TUS		-0.42	1.67	2.08	1.72	1.97	0.48			
Excess			0.13	0.02	0.17	-0.09	0.01	0.02			
GEP HIGH YIELD	EBKGEP24	518									
<i>UCR BBG BARC Agg (Dly)</i>	REG170		-1.09								
Excess											
GEP TOTAL PRIVATE EQUITY	EBK5AT	4,420,122,150	2.41	1.34	-0.65	-2.53	0.45	-11.66	19.23	20.06	21.00
<i>GEP PRIVATE EQUITY POLICY BENCHMARK</i>	REG32		0.65	4.97	3.90	14.43	10.08	5.12	15.44	12.64	17.09
Excess			1.76	-3.63	-4.55	-16.96	-9.63	-16.78	3.80	7.42	3.91
RUSSELL 3000 GEP	EBYV	21,746									
GEP PE RUSSELL 3000 ex TF FF	REG197		-8.45								
Excess											
GEP AR - DIV - UNIT RETURN	EB7D	965,556,860	-0.04	-0.77	2.44	3.45	2.22	0.68	7.54	5.36	5.14
<i>GEP Absolute Return Benchmark</i>	REG17		0.22	-0.19	1.61	2.80	1.26	1.37	5.37	3.00	2.02
Excess			-0.26	-0.58	0.83	0.65	0.96	-0.69	2.17	2.36	3.12
GEP REAL ASSETS	EB7S	744,411,227	0.41	2.30	3.85	6.37	3.62	8.32	11.89	8.79	4.42
<i>GEP REAL ASSETS LAGGED BENCHMARK</i>	REG100		0.41	2.30	3.85	6.37	3.62	8.32	11.88	8.79	4.42
Excess			-0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

# Chief Investment Officer of the Regents

RATES OF RETURN - Unit Value

Periods Ending May 31, 2023



## 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
GEP TOTAL REAL ESTATE	EBKGEPRE	2,689,409,278	-0.01	1.09	-0.08	-0.76	-0.05	-0.57	13.79	10.29	10.89
<i>GEP PRIVATE RE POLICY BENCHMARK</i>	<i>REG47</i>		<i>0.00</i>	<i>-3.38</i>	<i>-8.37</i>	<i>-8.12</i>	<i>-3.38</i>	<i>-3.91</i>	<i>7.55</i>	<i>6.70</i>	<i>8.60</i>
Excess			-0.01	4.47	8.30	7.36	3.33	3.34	6.24	3.59	2.29
GEP PRIVATE REAL ESTATE	EBKGEPRP	2,689,409,278	-0.01	1.09	-0.08	-0.76	-0.05	-0.57	13.79	10.29	10.93
<i>GEP PRIVATE RE POLICY BENCHMARK</i>	<i>REG47</i>		<i>0.00</i>	<i>-3.38</i>	<i>-8.37</i>	<i>-8.12</i>	<i>-3.38</i>	<i>-3.91</i>	<i>7.55</i>	<i>6.70</i>	<i>8.60</i>
Excess			-0.01	4.47	8.30	7.36	3.33	3.34	6.24	3.59	2.33
MSCI US REIT GEP	EBYR	2,120									
<i>GEP PRIVATE RE POLICY BENCHMARK</i>	<i>REG47</i>		<i>0.00</i>								
Excess											
GEP PRIVATE CREDIT	EBKGEPPC	1,088,452,443	1.54	1.67	3.37	5.07	3.59	4.00			
<i>GEP PRIVATE CREDIT ASSET CLASS ONLY</i>	<i>REG196</i>		<i>-0.18</i>	<i>1.26</i>	<i>4.71</i>	<i>9.06</i>	<i>4.50</i>	<i>5.66</i>			
Excess			1.73	0.41	-1.34	-3.99	-0.90	-1.66			
GEP LIQUIDITY	EBKGEP47	1,213,288,376	0.41	0.97	1.60	2.35	1.40	2.50	1.31	1.72	1.53
<i>ICE BofA Curr 2 Yr US TSY (Inc Ret Only)</i>	<i>VAX</i>		<i>0.33</i>	<i>1.04</i>	<i>2.12</i>	<i>3.67</i>	<i>1.73</i>	<i>3.89</i>	<i>1.58</i>	<i>1.77</i>	<i>1.30</i>
Excess			0.08	-0.06	-0.53	-1.32	-0.33	-1.38	-0.27	-0.05	0.24
<b>STIP</b>											
STIP - UNIT RETURN	EBJ8U	12,969,627,754	0.29	0.87	1.62	2.49	1.36	2.57	1.24	1.57	1.50
<i>STIP POLICY</i>	<i>REG83</i>		<i>0.39</i>	<i>1.03</i>	<i>1.98</i>	<i>3.16</i>	<i>1.67</i>	<i>3.29</i>	<i>1.21</i>	<i>1.52</i>	<i>1.08</i>
Excess			-0.10	-0.16	-0.36	-0.67	-0.31	-0.72	0.03	0.06	0.41
<b>PLANNED GIVING</b>											
PG FIXED INCOME POOL	EBT1	29,404,420	-0.12	1.60	1.89	0.70	1.65	0.13	-0.93	2.22	2.30
<i>Bloomberg U.S. Aggregate</i>	<i>XSL</i>		<i>-1.09</i>	<i>2.04</i>	<i>2.00</i>	<i>-0.58</i>	<i>2.46</i>	<i>-2.14</i>	<i>-3.65</i>	<i>0.81</i>	<i>1.39</i>
Excess			0.97	-0.44	-0.11	1.28	-0.81	2.28	2.72	1.41	0.90

# Chief Investment Officer of the Regents

RATES OF RETURN - Unit Value

Periods Ending May 31, 2023



## 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
PG EAFE STATE ST INTL INDEX FUND	EBT4A1	8,642,796	-3.97	0.76	6.62	11.84	6.77	1.05	8.61	3.39	4.75
<i>BLENDED EAFE TF + CANADA INDEX</i>	<i>REG9N</i>		-4.31	0.62	5.87	12.26	6.39	1.63	8.87	3.42	4.55
Excess			0.34	0.14	0.75	-0.42	0.38	-0.58	-0.26	-0.03	0.20
<hr/>											
PG RUSSELL 3000 INDEX FUND	EBT4A2	31,081,334	0.94	4.71	3.29	11.55	9.95	2.23	12.35	10.23	11.64
<i>Russell 3000 ex Tob ex FF</i>	<i>REG5N</i>		0.93	4.65	3.24	11.43	9.90	2.13	12.25	10.11	11.49
Excess			0.01	0.06	0.05	0.12	0.05	0.10	0.10	0.12	0.15

This report was prepared for you by State Street Bank and Trust Company (or its affiliates, "State Street") utilizing scenarios, assumptions and reporting formats as mutually agreed between you and State Street and information or data provided by State Street's third party data sources ("Suppliers"). While reasonable efforts have been made to ensure the accuracy of the information contained in this report, there is no guarantee, representation or warranty, express or implied, as to its accuracy or completeness. This information is provided "as is" and State Street and its Suppliers disclaim any and all liability and makes no guarantee, representation, or warranty with respect to your use of or reliance upon this information in making any decisions or taking (or not taking) any actions. Neither State Street nor its Suppliers verify the accuracy or completeness of any data, including data provided by State Street for other purposes, or data provided by you or third parties. You should independently review the report (including, without limitation, the assumptions, market data, securities prices, securities valuations, tests and calculations used in the report), and determine that the report is suitable for your purposes.

State Street provides products and services to professional and institutional clients, which are not directed at retail clients. This report is for informational purposes only and it does not constitute investment research or investment, legal or tax advice, and it is not an offer or solicitation to buy or sell any product, service, or securities or any financial instrument, and it does not transfer rights of any kind (except the limited use and redistribution rights described below) or constitute any binding contractual arrangement or commitment of any kind. You may use this report for your internal business purposes and, if such report contains any data provided by Suppliers, including, but not limited to, market or index data, you may not redistribute this report, or an excerpted portion thereof, to any third party, including, without limitation, your investment managers, investment advisers, agents, clients, investors or participants, whether or not they have a relationship with you or have a reasonable interest in the report, without the prior written consent of each such third party data source. You are solely responsible and liable for any and all use of this report.

**FOR IMMEDIATE RELEASE**

Friday, August 4, 2023

University of California Office of the President

UCOP Media Relations: [media@ucop.edu](mailto:media@ucop.edu)

**Real Estate and Equities Lead UC's Investment Assets to \$164 billion at close of fiscal year**

The University of California's investment portfolios ended the 2022-2023 fiscal year at \$164 billion, a \$12 billion increase over the previous year that was fueled by market enthusiasm for artificial intelligence, the Office of the Chief Investment Officer (UC Investments) announced today (August 4). The UC pension was up by 10.1%, while the UC endowment returned 8.8% and working capital, 7%. Since 2014, the University's total investment assets have grown by 73%.

UC Investments manages the University's retirement, endowment, and working capital portfolios, with each financial product tailored to the needs of UC students, faculty, staff, retirees, and the 10 campuses and five medical centers.

"Our culture is defined by what we call the UC Investments Way, and the first of our 10 investment pillars is "Less is More," said Chief Investment Officer Jagdeep Singh Bachher, Ph.D. "That certainly held true for us this year.

"We made some big moves and simplified our lives in the process," he said. "We sold \$4 billion in real estate as markets were rising and then reinvested \$4.5 billion for an 11.25% annualized return over seven years. Acting on our conviction that the best investment opportunities are in the United States, we made a \$10.5 billion investment in the S&P 500. The world's awakening to the transformative power of artificial intelligence gave a big boost to public equities and UC's portfolios reaped the rewards.

"And we continue to look inward at our own UC ecosystem, where we've already invested some \$1 billion in ground-breaking innovation that will continue to power the future."

Said UC Regent Richard Sherman, outgoing chair of the Investments Committee, "Jagdeep and his team at UC Investments are, to paraphrase baseball legend Joe Maddon, 'Doing simple better.' They are leveraging their size and scale to not only lower their costs but to get access to the best opportunities.

"When you tune out the noise and keep your focus streamlined, you have more space and freedom to think creatively and see new ways of doing things. And most important, you have far more bandwidth to be proactive in moving the needle on our most significant opportunities. That's where UC Investments excels."

“Making smart, well-timed decisions in uncertain economic environments is a hallmark of UC Investments,” said President Michael V. Drake, M.D. “Record high inflation, rising interest rates, and the threat of recession were with us for most of the fiscal year. UC Investments successfully navigated these investment risks and many others, including climate change, which is one of my key presidential priorities.

“UC Investments sold its fossil fuel assets five years ago, and the results of that move show that fossil-free investing returned the same or better than traditional energy. The team never wavers from its fiduciary duty to our many University of California stakeholders.”

The 2022-2023 fiscal year marked the last of nine years that Regent Sherman has served as chair of the board’s Investments Committee, where his guidance on asset allocation has proved crucial to UC Investments’ performance gains.

Said Bachher, “Richard’s partnership, his advice and mentorship, have been a constant over the past nine years that I’ve been at UC Investments. He shares in whatever success we have achieved.”

---

The **UC Endowment**, which comprises the **General Endowment Pool** and the **Blue & Gold Pool**, stood at a combined \$23.4 billion as of June 30, 2023, up from \$20.4 billion the year before. UC’s investment office has been investing the General Endowment Pool for 91 years. Since 2014, it has grown by 163%.

The **General Endowment Pool** was at \$20.7 billion as of June 30, 2023, up from \$18.2 billion the year before. The 30-year annualized net return was 8.8%, the 20-year return was 8%, the 10-year return was 8.8%, the five-year return was 8.7%, and the one-year net return was 8.2%.

The **Blue & Gold Pool**, which was launched on March 31, 2019 with \$250 million, stood at \$2.7 billion as of June 30, 2023, up from \$2.2 billion the year before. The three-year return was 0.7%, and the one-year net return was 13.3%. To increase campuses’ liquidity during the pandemic, all assets of the Blue & Gold pool were withdrawn in April 2020. The pool, which is 100% passive and extremely low cost to manage, was re-launched on March 31, 2021 with \$200 million.

The **UC pension** stood at \$88.3 billion as of June 30, 2023, up from \$81 billion the year before. The 30-year annualized net return was 8%, the 20-year return was 7%, the 10-year return was 7.4%, the five-year return was 6.7%, and the one-year net return was 10.1%. UC’s investment office has been investing the pension for 63 years. It is currently funded on an actuarial basis at 83%. The pension has 258,485 members, 134,900 of them currently active.

The **UC Retirement Savings Program**, the nation's second largest public defined contribution plan behind the federal government, stood at \$33.7 billion as of June 30, 2023, up from \$30 billion the year before and \$19.8 billion in 2014. As of June 30, 2023, the program counted with 335,000 UC participants, up from 301,000 in 2014. In keeping with the ethos of Less is More, over that same period, the number of investment funds in the program went from 75 to 14, and the management fee to participants fell by 64% to 0.05%, the lowest in the nation.

**UC Working Capital**, which comprises the **Total Return Investment Pool** and the **Short-Term Investment Pool**, stood at a combined \$18.7 billion as of June 30, 2023, down from \$20.8 billion the year before.

The **Total Return Investment Pool** stood at \$13.5 billion as of June 30, 2023, up from \$11.7 billion the year before. The 14-year annualized net return was 6.6%, the 10-year return was 5.3%, the five-year return was 4.8%, and the one-year net return was 8.6%.

The **Short-Term Investment Pool** stood at \$5.2 billion as of June 30, 2023, down from \$9.1 billion the year before. The 30-year annualized net return was 3.6%, the 25-year return was 3.1%, the 20-year return was 2.5%, the 10-year return was 1.6%, the five-year return was 1.8% and the one-year net return was 3.9%.

Members of the UC Board of Regents will discuss UC Investments' 2022-2023 fiscal year performance during the September 19, 2023, Investments Committee meeting, which will be held at UCLA and open to the public. It will also be livestreamed from the UC Regents website.



## REPORT ITEM

1. **REPORT BY:** Chief Financial Officer David Seward
2. **SUBJECT:** State Budget Report – Preliminary 2022-23 Year-end
3. **REPORT:**

Attached is the preliminary year-end State budget report for 2022-23. Audited 2022-23 data will be presented in the college-wide *Financial Statements and Independent Auditors' Report* to be prepared by the College's auditors.

### Revenues

- State Appropriations, General Fund – The 2022-23 budget at \$109,674,000 includes \$18,789,000 ongoing base funding and one-time allocations of \$90 million for the 100 McAllister building renovation project and \$885,000 towards renaming costs; actual claimed to-date is \$108,789,000 with the outstanding amount of \$885,000 pending.
- State Appropriations, Lottery Fund – The 2022-23 revised budget was established based on estimates provided by the State. Actuals at \$266,580 include an estimate by the College of the fourth quarter's payment at \$72,807; actual revenues for the first three quarters total \$218,420 and the fiscal year-end actuals include (\$24,646) adjustment for 2021-22 revenues over-estimated.
- Tuition and Related Fees – With only slight budget variations in specific line items, the year-end actual tuition and fee revenues at \$51,083,423 are 100% of the midyear revised budget and reflect these ending FTE enrollments: JD 1,098.7 (87.6 FTE non-residents), JD fee waivers 39.1, LLM 27.2 and MSL/CSL 8.5.
- HPL Revenue Share – Currently the 2022-23 actual of \$583,422 reflects 100% of HPL fee revenues collected by the College. Under the MOU with UCSF for this program, UCLSF and UCSF share profits equally. The revenue share due UCSF is pending posting and will reduce the amount by \$115,276 for net results 2022-23 \$468,146; the projection was \$460,539, for a positive variance of two percent.
- Investment Income – The state fund's share of investment income exceeded midyear revised projections by \$291,103 with total revenues of \$511,103. In 2021-22, when shares of GEP were liquidated, investment income was foregone in favor of realized gains from the sale and investment income totaled \$130,425.
- Unrealized Gain/Loss on Investments – In 2022-23, the State's share of the change in market value of UC-GEP investments were unrealized gains at \$3,225,167. In 2021-22, unrealized losses of (\$3,602,507) were recognized.
- Overhead Allowances – Auxiliary Enterprises of the College (Tower, Garage, Health Services, Business Center, Special Events) contributed \$1.02 million in overhead allowances from nonstate unrestricted funds. Grants and contracts awarded to the

College – federal, private, and state – added \$582,000 to the unrestricted state funds and the small variance to budget is expected to be claimed next fiscal year.

- Miscellaneous – The budget was revised to reflect insurance reimbursement for emergency flood repairs, the expense budgeted at \$736,281 with a \$100,000 deductible; final reimbursements received were \$489,319. Included but not budgeted in 2022-23 is \$145,829 in write-off of retention balances from the completed 200 McAllister renovation project.
- Transfer from other Funds – The midyear budget of \$90,000 was revised in June with the Board’s authorization to fund the \$100,000 deductible for the 333 Golden Gate building’s emergency flood repairs by transfer from the State Plant Fund reserves. Various account write-offs and clean up added \$20,705 in 2022-23.

### Expenses

- Salaries and Wages – The 2022-23 midyear revised budget was \$29.4 million and actual expenses are \$27.8 million reflecting \$1.6 million or 5.5% in salary savings. Classroom salary budgets remaining unspent total \$581,498 inclusive of the budgeted unallocated provision. The Bench to School program (California Institute of Law, Neuroscience and Education) left \$128,773 of the program budget unspent during this second year and the total salary savings from all other allocations was \$921,233 from midyear revised budget projections.
- Staff Benefits – The 2022-23 actual expense is preliminary; it does not yet reflect the non-cash year-end pension liability and OPEB adjusting entries. The current actuals at 96% of budget are aligned with the salary and wages category at 95% of budget.
- Audit, Legal and Case Costs – The 2022-23 midyear revised budget included an allocation of \$1.7 million in projected legal costs to defend the College’s renaming and actual expense was \$1.171 million.
- Printing and Copier Service – The 2022-23 actuals at \$320,193 are increased \$84,894 or 36% over last year’s \$235,299, presumably from returning to campus full-time this year compared to half-year in 2021-22. For example, the Classroom cost center printing expense in 2022-23 was \$106,563 while in 2021-22 was \$74,061, increasing 44%. Budgeted but not spent was \$98,862 in the Communications department; this has been reallocated in 2023-24 to include rebranding activities.
- Travel – The midyear revised budget retained some provisional allocations where participation was unknown to resume by year-end but the largest component of the budget are allocations for faculty professional development where other categories of expense are allowed. The midyear revised budget included here for faculty research accounts was \$238,283 and actual 2022-23 travel expense was \$85,879, for a variance of \$152,404.
- Dues and Subscriptions – The 2022-23 year-end actual is preliminary and expected to increase by \$116,000 when expenditures are final and year-end payments, including Adaptibar and the UCDC Program, are recognized.
- Computer Software – Currently the projected expense in 2022-23 was exceeded by \$122,000; however, adjustments are pending that recognize prepayments for next year and eliminate the budget variance.

- Other Contract Services – A total of \$785,590 remained unspent from allocations for various contracted services. The 2022-23 budget included an allocation of \$1,085,000 for renaming-related expenses and preliminary actuals total \$807,481, contributing \$277,519 to the budget surplus in 2022-23 but re-budgeted in 2023-24. Contracted safety and security services were \$2.93 million against a budgeted projection of \$3.2 million for \$262,435 (8%) in budgetary savings. The base budget in Communications remained largely unspent with a budget balance of \$176,030; this has been reallocated in 2023-24 for publication efforts centering on the College’s renaming.
- Financial Aid Grants – Student financial aid was awarded at a total of \$14.7 million with little variance to the midyear revised budget.

Description	Budget	Actuals	Remaining	% Spent
JD Grants	14,043,404	14,007,654	35,750	100%
Global Programs Scholarships	20,000	-	20,000	0%
Acad & Professional Services Scholarships	3,385	2,940	445	87%
LRAP Loan Cancellations	25,000	2,379	22,621	10%
LLM Grants	611,000	611,000	-	100%
MSL Grants	47,783	47,783	-	100%
<b>TOTAL</b>	<b>14,750,572</b>	<b>14,671,756</b>	<b>78,816</b>	<b>99%</b>

- Transfer to Other Funds – The \$90 million provided by state appropriation in 2022-23 for the McAllister Tower Campus Housing and Seismic Upgrade project has been received and transferred to a separate capital project account where, combined with nonstate College funding, the costs will be tracked across all categories of expense. The revised budget also includes \$500,000 funding to the California Institute for Law, Neuroscience and Education (CILNE), an amount that is augmented by contributions from other partner institutions and tracked in the College’s nonstate restricted funds. Unbudgeted were five small expense adjustments totaling \$1,872 transferring to different programs.

**Summary**

**2022-23 OPERATIONS BUDGET**

This summary illustrates that the net change from operations exceeded projections in the midyear revised budget and, after financial aid, a surplus of \$956,837 is preliminarily reported. With the increase of \$3.2 million from unrealized investment gains, an ending state operating reserve of \$25.3 million results. Preliminary actuals are still subject to change.

	<b>Revised Budget 2022-23</b>	<b>Preliminary Year-end Actual 2022-23</b>
<b>SUMMARY - OPERATIONS</b>		
Operating Revenues (without reserve & gains)	163,886,182	163,199,784
Operating Expense (without financial aid)	<u>(152,033,151)</u>	<u>(147,571,190)</u>
Net Operations	11,853,031	15,628,594
Student Financial Aid	(14,750,572)	(14,671,756)
<b>Net Change after Financial Aid</b>	<b>(2,897,541)</b>	<b>956,837</b>
Realized/Unrealized Gain	-	3,225,167
Beginning Reserves	<u>21,134,946</u>	<u>21,134,946</u>
<b>Ending Reserves - Operating</b>	<b><u>18,237,405</u></b>	<b><u>25,316,951</u></b>

After recognizing that a portion of reserves results from state funding for specific purposes, the unallocated ending operating reserves are \$22 million.

Ending Reserves (Preliminary)	\$25,316,951
Less Carryforwards:	
• Sidewalk Safety – Urban Alchemy	(1,000,000)
• Bench to School Program	<u>(2,267,457)</u>
Adjusted Balance	\$22,049,494

### **PLANT FUND RESERVE**

The Plant Fund Reserve ended 2021-22 with a net asset balance of \$7,746,190. The 2022-23 preliminary ending balance is \$5,249,794, increased by \$739,605 net investment activity and decreased by \$3,236,000 in long-range capital project funding.

### **LEASE-REVENUE BOND RENTAL PAYMENTS**

Included in the State Budget Act is \$3,089,000 under General Fund capital item 6600-003-0001 for support of Hastings. This is the scheduled rental payments for 333 Golden Gate, funded by lease-revenue bonds through the State of California -- a pass-through transaction with no net cash flow impact to the College; the State Public Works Board withdraws through the State Controller's Office.

### **CALIFORNIA SCHOLARS**

Total funding of \$9,000,000 from the State of California (\$4.5 million in 2018-19 and \$4.5 million in 2021-22) is being tracked in a separate restricted fund program for planned expenditure over several years. Funding provides full-fee scholarships and living expenses to qualifying students from historically Black college or university (HBCU) or the American University of Armenia for each of their three years at UC Hastings Law. In 2022-23 student award expense totaled \$660,614 for an ending fund balance of \$6,725,000.

**Attachment:** State Budget Report 2022-23 Preliminary

REVENUES	Beginning Budget 2022-23	Revised Budget 2022-23	Preliminary Year-end Actual 2022-23	Preliminary Year-end Actual as Percent of Revised Budget	Year-end Actual 2021-22
<b>State Appropriations</b>					
General Fund	109,674,000	109,674,000	108,789,000 *	99%	23,289,000
Lottery Fund	170,000	171,000	266,580 *	156%	206,770
<b>Subtotal</b>	<b>109,844,000</b>	<b>109,845,000</b>	<b>109,055,580</b>	<b>99%</b>	<b>23,495,770</b>
<b>Tuition and Related Fees</b>					
Non-resident Tuition	642,000	562,590	562,590	100%	574,659
Registration Fee	50,256,624	49,259,692	49,209,692	100%	46,258,401
Veteran Fee Waivers	(1,343,760)	(1,702,058)	(1,752,066)	103%	(1,297,554)
LL.M. Tuition	1,567,500	1,291,728	1,291,728	100%	1,082,658
MSL and CSL Tuition	313,596	329,875	329,875	100%	441,663
MBE Support Fee	139,560	113,848	113,728	100%	134,280
HPL Revenue Share	460,539	460,539	583,422 *	127%	160,269
Summer Legal Institute	680,000	680,000	577,031	85%	743,858
Other Student Fees	16,700	155,262	167,423	108%	18,983
<b>Subtotal</b>	<b>52,732,759</b>	<b>51,151,476</b>	<b>51,083,423</b> *	<b>100%</b>	<b>48,117,217</b>
<b>Scholarly Publications</b>					
Subscription Revenues	22,000	30,000	36,835	123%	30,972
<b>Subtotal</b>	<b>22,000</b>	<b>30,000</b>	<b>36,835</b>	<b>123%</b>	<b>30,972</b>
<b>Other Income</b>					
Investment Income	125,000	220,000	511,103 *	232%	130,425
Realized Gain/Loss on Sale of Investments	-	-	-	-	-
Unrealized Gain/Loss on Investments	-	-	3,225,167 *	-	(3,602,507)
Overhead Allowances	1,717,336	1,762,900	1,603,604 *	91%	1,272,845
Miscellaneous	41,425	686,806	698,534 *	102%	41,305
<b>Subtotal</b>	<b>1,883,761</b>	<b>2,669,706</b>	<b>6,038,408</b>	<b>226%</b>	<b>(2,157,932)</b>
<b>Transfer from Other Funds</b>	<b>80,000</b>	<b>190,000</b>	<b>210,705</b> *	<b>111%</b>	<b>248,058</b>
<b>Prior Year Reserve/Beginning Fund Balance</b>	<b>\$ 22,196,585</b>	<b>\$ 21,134,946</b>	<b>\$ 21,134,946</b>	<b>100%</b>	<b>15,883,869</b>
<b>TOTAL REVENUES</b>	<b>186,759,105</b>	<b>185,021,128</b>	<b>187,559,897</b>	<b>101%</b>	<b>85,617,954</b>

\*See attached narrative

<b>EXPENDITURES</b>	<b>Beginning Budget 2022-23</b>	<b>Revised Budget 2022-23</b>	<b>Preliminary Year-end Actual 2022-23</b>	<b>Preliminary Year-end Actual as Percent of Revised Budget</b>	<b>Year-end Actual 2021-22</b>
Salaries & Wages	29,282,107	29,417,604	27,808,850 *	95%	26,220,509
Student Wages-Reg. & Work-study	782,543	796,785	511,203	64%	517,617
Staff Benefits	9,849,483	9,746,365	9,317,466 *	96%	8,625,759
Consultants	481,498	629,632	545,516	87%	377,230
Temporary Help (Contracted)	159,920	218,567	245,754	112%	181,885
Employee Development & Testing	208,087	195,014	133,982	69%	158,835
Recruiting & Advertising	601,617	633,829	564,875	89%	498,006
Audit, Legal, and Case Costs	302,000	2,016,000	1,503,742 *	75%	259,026
Insurance	673,257	673,277	661,425	98%	585,933
Printing & Copier Service	365,606	441,699	320,193 *	72%	235,299
Supplies	322,185	346,687	312,590	90%	327,602
Travel	779,949	829,749	635,291 *	77%	185,412
Dues & Subscriptions	371,509	377,326	197,135 *	52%	297,809
Events & Entertainment	613,677	632,397	570,523	90%	319,801
Computer Software	1,013,775	1,105,982	1,246,405 *	113%	804,534
Data Processing	387,306	365,306	354,722	97%	324,410
Electronic Databases & Bibliography Svcs	485,380	492,660	513,173	104%	463,390
Books & Bindings	748,921	754,447	704,492	93%	805,895
Equipment Maintenance	201,017	312,017	360,588	116%	116,817
Building Maintenance	2,200,114	3,142,251	3,060,429	97%	2,103,466
Other Contract Services	5,387,982	5,726,461	4,940,871 *	86%	3,946,944
Utilities	887,709	1,076,109	1,036,735	96%	953,988
Telephone	47,025	46,100	29,940	65%	19,850
Mail	39,948	39,168	11,934	30%	9,894
Misc. (Including Bank Fees)	351,481	352,481	393,607	112%	350,304
Equipment & Improvements	498,769	544,371	546,370	100%	385,652
Space & Equipment Rental	623,867	603,867	536,450	89%	635,327
Financial Aid Grants	15,218,750	14,750,572	14,671,756 *	99%	13,878,987
Collection Costs	17,000	17,000	5,055	30%	26,776
Transfer to Other Funds	90,000,000	90,500,000	90,501,872 *	100%	60,760
<b>TOTAL EXPENDITURES</b>	<b>\$ 162,902,482</b>	<b>166,783,723</b>	<b>\$ 162,242,946</b>	<b>97%</b>	<b>\$ 63,677,717</b>

\*See attached narrative

## REPORT ITEM

1. **REPORT BY:** Chief Financial Officer David Seward
2. **SUBJECT:** Core Operations - State Budget Planning 2024-25
3. **REPORT:**

Annually the College submits its spending and revenue plan to the State of California's Department of Finance along with requests for additional funding through the Budget Change Proposal process for both its operating (i.e., Support) and infrastructure (i.e., Capital Outlay) needs. This process provides information and funding proposals to support the Governor's Budget proposal to be released in January 2024 which in turn serves as the basis for legislative review of the 2024-25 budget.

Based on institutional needs and strategic goals, staff is planning to submit funding requests to the Department of Finance for the following initiatives:

- Core Operations – Spending Plan for Workload Funding and Student Fees

UC Law will submit a budget change proposal seeking state General Fund support for core operating costs such as employee compensation, insurance, and information technology upgrades.

- Student Fee Increase

The College will submit information justifying fee increases being proposed to the Board of Directors for 2024-25 and identify an overall spending plan demonstrating the use of new revenue and General Fund growth to support Core Operations.

A discussion of these and other state funding considerations occurred at the August 24 meeting of the Finance Committee.

## REPORT ITEM

1. **REPORT BY:** Chief Financial Officer David Seward
2. **SUBJECT:** Non-State Budget Report- Preliminary 2022-23 Year-end
3. **REPORT:**

Attached is the year-end non-state budget report for 2022-23. Expenditure data represents preliminary figures; audited 2022-23 data will be presented in the *Financial Statements and Independent Auditors' Report* to be prepared by the College's auditors.

This report is divided into the following categories of non-state funds:

- Restricted Funds
- Unrestricted Funds

## RESTRICTED FUNDS

This report includes all non-state current-use funds having restrictions imposed upon them from external sources, such as donors or granting agencies. Major budget variances are outlined below.

### Overall

On an overall basis, the beginning budget approved by the Board in September 2022 reflected a net effect of planned activity at (\$2,797,845) reduction in restricted fund net assets, a function of expending grant and gift funds received in the prior year or approved spending plans that use accumulated current-use fund balances. This was revised by Board action in March 2023 when the California Institute for Law, Neuroscience and Education (CILNE) MOU was completed. The related budget change added \$1.5 million to revenues and planned \$428,073 in expenditures for a revised net budget of (\$1,725,918). Actual preliminary 2022-23 results are positive at \$468,146, a change of \$2.2 million from budgeted amounts and significant variances to revenues and expenditures are noted below.

### Revenues

- Grants and Contracts – The beginning budget reflected expectations of new grant and contract revenues to be received in the 2022-23 fiscal year at the time budgets developed in May. Preliminary year-end actuals were \$823,175 more than projected for a total \$6.1 million received in 2022-23; in 2021-22 the total was \$6.7 million. The following revenues were received in 2022-23:
  - \$579,017 federal grants



- \$552,784 state grants and contracts
- \$2,529,423 private non-exchange grants
- \$3,441,340 private exchange grants and contracts
- \$183,000 city and county grants
- Other Income – The beginning budget for 2022-23 was \$5,781, revised in March 2023 with the expectation of \$1,000,000 in partner contributions to CILNE. \$955,296 to CILNE is included in the preliminary 2022-23 actuals. Received but not budgeted in 2022-23 was \$42,500 restricted to the Center for Gender and Refugee Studies. The College manages the cash of student organizations; they are not required to budget activity and in 2022-23 income from events was deposited at \$31,202 adding to the budget variance; in 2021-22 this was \$77,448.

### **Expenses**

- Instruction and Research, Salaries and Benefits – The beginning budgets of \$5,670,373 salaries and \$2,125,374 benefits was revised in March 2023 with the Board’s approval of projected CILNE salaries \$129,167 and benefits \$53,646. The preliminary 2022-23 actuals reflect 94% of budget expended and the \$377,789 in unspent cash has been re-budgeted for expenditure next year. Compared to 2021-22 actual expenditures of \$4.8 million, 2022-23 at \$5.5 million has increased 13 percent or \$638,755.
- Instruction and Research, Program Support – The beginning budget of \$2,125,374 was revised in March 2023 with projected CILNE expenditures of \$245,260. Actual 2022-23 expenditures are preliminarily reported at \$1,557,369 and the \$813,265 in unspent funds is reallocated for use in future years. Actual expense for administrative overhead allowed on grants and contracts totaled \$538,868 in 2022-23 and this amount was added to unrestricted funds available to the College.
- Student Services, Program Support – In 2021-22 a \$200,000 state grant was received for the College Student Right to Access project; encumbered but not spent last year, \$132,729 is included in the 2022-23 actual expenditures (and the balance is budgeted to be spent next year).
- Student Organizations – The \$20,000 budget in 2022-23 represents the College’s funding transfer from nonstate unrestricted funds to HPILF for summer public interest grant expenditures. The College manages the cash of student organizations; they are not required to budget activity and in 2022-23 incurred \$110,227 in expenses.

### **Nonoperating Revenues/(Expenses)**

- Donations – Actual cash gifts received in 2022-23 exceeded projections and totaled \$1,375,646 net of gift processing fees (6%). Funds receiving significant donations as part of the positive variance are:
  - \$256,575 Building UC Hastings
  - \$427,555 Center for Gender and Refugee Studies (budgeted at \$250,000)
  - \$125,000 Center for Business Law

- \$100,076 General Scholarship Fund
- These accounts were budgeted to receive funding in 2022-23 but have not as of this preliminary accounting:
- Leon & Esther Blum Scholarship \$390,778 (expected delay and reduced amount \$238,636)
  - Kenneth E. Olivier '77 Scholarship \$125,000 (gift re-directed)
  - Tony Patino Memorial Fellowship Trust \$105,000 (pass-through awards)
- Unrealized Gain/Loss on Investments – In 2022-23, the nonstate restricted fund's share (e.g., CGRS Stronach reserves) share of the change in market value of UC-GEP investments were unrealized gains of \$123,381. In 2021-22, unrealized losses at (\$197,635) were recognized.
  - Net Transfer to/from Other Funds – The beginning budget of \$124,940 was revised with the Board authorized transfer of \$500,000 Bench to School state funds into the nonstate CILNE account shared with partner institutions; this transfer was made after the March 2023 Board meeting. The variance to budget in 2022-23 is from close-out of a CGRS account to an unrestricted CGRS account at \$454,940 and the Center for Negotiation and Dispute Resolution closed out accounts with net profits of \$154,174 to their nonstate unrestricted general fund.

## UNRESTRICTED FUNDS

This report includes all non-state current-use funds that do not have restrictions imposed upon them from external sources. These funds include gifts given without restriction such as the UC Law SF Foundation funding in the form of block grants for support of Institutional Advancement and Alumni Office functions. In addition, funds generated that support the budget of individual programs such as membership programs and conferences are also recorded here. Miscellaneous revenue sources such as student application fees (currently from non-JD programs), room rental and vending machine commissions fund programs that may not have income of their own such as academic conferences, student and college-wide events, and administrative support funds. Auxiliary Enterprises, while unrestricted nonstate funds, are reported separately. Designated Funds, those funds restricted as to use by the Board of Directors (e.g., Digardi Professorship, Hastings Chair, PICAP) are also categorized as unrestricted current-use funds because it is within the Board's power to remove such restrictions and related activity is included in this report.

### **Overall**

On an overall basis, the net effect of planned activity was budgeted at (\$1,501,612) change in unrestricted fund net assets and the preliminary actual is reported at (\$2,888,220).

### Revenues

- Dues/Memberships – The 2022-23 budget of \$150,000 represented the Center for WorkLife Law’s projected membership program; actual revenue was \$95,000 and in 2021-22 was \$125,000.
- Other Income – The 2022-23 beginning budget of \$1,376,798 is reduced to \$143,948 currently budgeted. The Hastings Digardi Hall nonstate unrestricted fund is excluded at \$1,289,000; because these funds are now being used to support the College’s Long-Range Campus Plan, all activity is now only included in the LRCP item reporting. With 2022-23 actuals at \$249,961, positive variances to revised budget were generated by WorkLife Law service revenues, non-auxiliary rental income, and alumni program events income.

### Expenses

- Instruction and Research, Salaries and Benefits – The Center for WorkLife Law’s actual expenditures for salaries and benefits was \$72,621 more than the beginning projection, funded by available sources.
- Student Services, Program Support – The total budget included in this category for long-term Bridge Fellows was \$480,000 and actual expenditures were \$316,042 with the \$163,958 unspent budget balance carried forward to fund commitments that will be realized in 2023-24. The unspent budgets in the Wellness Activities account totaled \$49,839 and have been re-allocated for future use.
- Institutional and Building Support -- The 2022-23 beginning budget of \$4,829,958 is reduced to \$1,573,534 currently budgeted. The Hastings Digardi Hall nonstate unrestricted fund is excluded at \$3,239,526; because these funds are now being used to support the College’s Long-Range Campus Plan, all activity is now only included in the LRCP item reporting. With 2022-23 actuals at \$1,177,217 a positive variance of \$396,317 to the revised budget exists including \$160,185 from unspent allocations to Advancement (consulting and printing) and \$83,826 from Alumni Programs (events).
- Financial Aid, Scholarships and Fellowships – The beginning budget included scholarship allocations from funds managed by the Dean under the Institutional Program Support category at \$471,514; now reported here, the actual 2022-23 awards from unrestricted sources were \$357,046. Of the 2022-23 beginning budget for Hastings Scholarships at \$143,453 a total of \$25,000 was expended for \$118,453 in budgetary savings, the cash available for future awards.

### Nonoperating Revenues / (Expenses)

- UCLSF Foundation Grants and Other Donations -- The 2022-23 beginning budget of \$3,988,342 is reduced to \$1,974,811 currently budgeted. The Hastings Digardi Hall nonstate unrestricted fund is excluded at \$2,013,531; because these funds are now being used to support the College’s Long-Range Campus Plan, all activity is now only included in the LRCP item reporting. The block grant from the College’s

Foundation was budgeted at \$1.1 million and actual cash transferred was \$750,000 for a budget shortfall of (\$350,000). With 2022-23 total actuals at \$2,247,370 a positive variance of \$272,559 to the revised budget exists. In 2021-22 the total was \$3,292,440 that included extraordinary donations from the estate of Emeritus Chancellor and Dean Mary Kay Kane.

- Endowment Payout -- The 2022-23 beginning budget of \$398,732 is reduced to \$179,692 currently budgeted and this is the actual amount posted. The Hastings Digardi Hall nonstate unrestricted fund is excluded because these funds are now being used to support the College's Long-Range Campus Plan, all activity is now only included in the LRCP item reporting.
- Unrealized Gain/Loss on Investments – In 2022-23, the nonstate unrestricted fund's share of the change in market value of UC-GEP investments were unrealized gains of \$735,954. In 2021-22, unrealized losses at (\$821,915) were recognized – now adjusted to exclude Hastings Digardi Hall.
- Net Transfers to/from Other Funds -- The 2022-23 beginning budget of \$38,017 is reduced to (\$2,783,625) currently budgeted when the Hastings Digardi Hall nonstate unrestricted fund is excluded at \$40,000 and the State Plant Fund Reserve is included at (\$3,236,000). The variance to budget in 2022-23 includes close-out of a restricted CGRS account to an unrestricted CGRS account at \$454,940 and the Center for Negotiation and Dispute Resolution closed out accounts with net profits of \$154,174 to their nonstate unrestricted general fund.

**Attachments:** Non-State Budget Report- Preliminary 2022-23 Year-end

## REPORT ITEM

1. **REPORT BY:** Chief Financial Officer David Seward
2. **SUBJECT:** Preliminary 2022-23 Year-end Auxiliary Enterprises Budget Report
3. **REPORT:**

The 2022-23 preliminary year-end budget reports for auxiliary enterprises – McAllister Tower, Parking Garage, Student Health Services, Business Center, and Special Events and Guest Services – are attached. Major variances are outlined below.

### SUMMARY

On an overall basis, auxiliary enterprise operations fell short of break-even by \$212,036 after debt service, overhead and other non-operating revenues (investment activities); the projection at midyear was a shortfall of \$59,263. Auxiliary Enterprises provided \$1,025,567 in administrative overhead assessments, cash transferred to the state unrestricted account, and absent those assessments a surplus operating net result of \$813,530 is reported.

### McALLISTER TOWER

#### Revenues

- Apartment and Commercial Rent – The mid-year budget adjusted the rent revenues upward by \$350,000 reflecting the current occupancy rate of 90% and assuming a drop to 50% in June. Actual revenues fell short of projection by \$218,609 with occupancy around 85% in May and 37% in June. Rent revenues in 2022-23 at \$4.7 million increased \$766,000 over 2021-22 at \$3.9 million.

#### Expenditures

- Regular Contract Services – This reporting category includes contracted engineer, janitorial and security services. The 2022-23 projection based on the prior year was exceeded by \$321,086 with security services over budget by \$166,486 (40%) and engineering services over by \$182,742 (27%).
- Utilities – The midyear revised budget for utilities was exceeded by 11% or \$108,310 with water expense \$69,218 (30%) more and steam \$88,671 (20%) more than projected.
- Miscellaneous – A number of small-value activities are recorded in this category and software expense exceeded budget by \$27,346 with the training and implementation

of the new Starrez housing management system at a total \$71,226 in 2022-23 (inclusive of annual ongoing license fees).

- Overhead Pro Rata – Administrative overhead to the College is based on 12% of operating revenues. In 2022-23 this amounted to \$564,709, slightly reduced from the midyear budget estimate because actual revenues were less. In 2021-22, total overhead pro rata revenues excluded the Federal Cares Act funding of \$342,990.

### **Non-operating Revenues/(Expenses)**

- Investment Income – Budgeted at \$20,000 based on last year’s actual, investment income attributed to the Tower is \$66,356 in 2022-23. The actual investment income in 2021-22 was \$15,041.
- Unrealized Gain/Loss on Investments – The Tower’s share of the UC GEP market gains in 2022-23 were \$365,740. In 2022-23 market losses of (\$408,460) were posted.
- Transfer to Other Funds – Following the nonstate budget change authorized by the Board of Directors at the June 2023 meeting, a transfer of \$436,469 from McAllister Tower reserves was made to fund costs supporting the Academic Village.

## **PARKING GARAGE**

### **Revenues**

- Parking Operations – Actual revenues from parking operations in 2022-23 exceeded even the increased midyear projection by \$167,735 or 6%. This year’s actuals at \$2.755 million are increased by \$379,914 over last year 2021-22 and revenues have returned to pre-pandemic levels; where 2020-21 was reduced to \$1.363M, pre-pandemic year 2019-20 was \$2.009M, 2018-19 was \$2.267M and 2017-18 was \$2.136M.
- Retail Leases – The non-cash effect of entries to comply with the accounting standard GASB Statement 87 “Leases” is increasing actual retail rent revenues attributed to the building’s commercial tenants by \$3,769. Also included in the 2022-23 actuals is \$60,400 writing off the allowance for bad debt established for tenant Subway in 2020-21. Absent these the actual this year is \$328,061, in line with the midyear revised budget.
- Other (including Storage) – Subsequent to the midyear revised budget, revenues from cell tower leases were recognized at \$18,000.

### **Expenses**

- Maintenance and Special Repairs – This reporting category includes regular ongoing maintenance costs including equipment, elevators, fire-life safety systems, and pest control. The 2022-23 budget for one-time special repairs is \$179,100 including resurfacing the garage floor (estimated at \$150,000) and replacing damaged windows.

Actual expense at \$54,686 included \$18,015 to replace damaged glass door and the resurfacing project has been delayed and re-budgeted in 2023-24.

- Overhead Pro Rata – Administrative overhead to the College is based on 12% of operating revenues and with increased revenues the overhead assessment at \$333,221 increased \$31,863 over projected amounts.

#### **Non-operating Revenues/(Expenses)**

- Investment Income – One effect of implementing the accounting standard GASB Statement 87 “Leases” is recognition of investment income; this non-cash entry is not a budgeted event (also see Revenues-Retail Leases).
- Capital Asset Additions/Deductions (GASB 87) – These two report lines are from entries required from lease accounting standard GASB Statement 87 “Leases”; the net is a non-cash change of \$1,257 to the bottom line.

### **STUDENT HEALTH SERVICES**

#### **Expenses**

- Consultants and Contracted Services – Recorded here is the contract with service provider Carbon Health, funded by student fees. Quarterly billings are based on actual student enrollment and year-to-date expense is less than projected.
- Overhead Pro Rata – Administrative overhead to the College is based on 5% of revenues and in 2022-23 this amounted to \$55,822.

#### **Non-operating Revenues/(Expenses)**

- Investment Income – Budgeted at \$1,000 based on last year’s actual, investment income attributed to Student Health Services is \$11,276 in 2022-23. The actual investment income in 2021-22 was \$1,098.
- Unrealized Gain/Loss on Investments – Student Health Service’s share of the UC GEP market gains in 2022-23 were \$15,380. In 2022-23 market losses of (17,176) were posted.

### **BUSINESS CENTER**

#### **Expenses**

- Overhead Pro Rata – Administrative overhead to the College is based on 12% of revenues and with increased revenues the overhead in 2022-23 at \$19,403 was \$7,403 more than projected.

## SPECIAL EVENTS AND GUEST SERVICES

### Revenues

- Room Rental – The projected annual revenues from room rental of College facilities was \$395,000 and actual year-end is \$436,760 with UC Davis Graduate School of Management and UC Riverside the largest renters. The non-cash effect of entries to comply with accounting standard GASB Statement 87 “Leases” is increasing actual rent revenues by \$2,859.

### Expenditures

- Overhead Pro Rata – Administrative overhead to the College is based on 12% of revenues and with increased revenues the overhead in 2022-23 at \$52,411 was \$5,011 more than projected.

### Non-operating Revenues/(Expenses)

- Investment Income – An effect of the GASB 87 lease accounting standard is recognition of investment income; this non-cash entry is not a budgeted event (also see Revenues-Retail Leases).
- Capital Asset Additions/Deductions (GASB 87) – These two report lines are from entries required from accounting standard GASB Statement 87 “Leases”; this non-cash entry is not a budgeted event.
- Nonmandatory Transfers to/from Other Funds – The net cash generated from this auxiliary is transferred to the unrestricted nonstate college-wide support fund, supporting programmatic expenses that have no revenues of their own.

### **Attachments:**

- 2022-23 Preliminary Year-end Auxiliary Enterprises Budget Report



**REPORT ITEM**

1.     **REPORT BY:**       Chief Operating Officer Rhiannon Bailard  
                                  Director of Construction Flora Li
  
2.     **SUBJECT:**         The Academe at 198 Campus Housing Project – Construction &  
                                  Leasing Update
  
3.     **REPORT:**

A presentation was made at the August 24, 2023 meeting of the Hastings Campus Housing Finance Authority. Construction is complete, the final Certificate of Occupancy was received on July 26, 2023, and residents began their move-in on August 4. The PowerPoint presentation goes into greater detail.

## REPORT ITEM

1. **REPORT BY:** Chief Financial Officer David Seward
2. **SUBJECT:** McAllister Tower Seismic Upgrade - Project Overview
3. **REPORT:**

The renovation of McAllister Tower will follow the completion of the Cotchett Law Center at 333 Golden Gate Avenue and the Academe at 198 as the next step in the fulfillment of UC Law's Long Range Campus Plan and its strategic centerpiece, the development of an Academic Village. The McAllister Tower Seismic Upgrade Project is made possible with an appropriation of \$90 million for the first phase of work.

The project includes seismic structural upgrade, replacement of MEP systems including fire/life safety, window replacement and interior remodeling to achieve compliance with ADA/Title 24. The project also renovates space on the building's lower levels that would be used for academic purposes. Renovation of McAllister Tower will maintain 252 campus housing units at below market rents in addition to adding a minimum of five more campus housing units for a total of 257 units at below market rents.

The project is necessitated by the existing facility age, nearing 100 years old, and the fact the building's structural system no longer meets seismic standards.

### **Long Range Campus Plan & McAllister Tower**

The Long-Range Campus Plan was adopted in 2017. The plan included as a core element the renovation and seismic upgrade of McAllister Tower; specifically, and to quote:

*With completion of the Campus Housing at 198 McAllister, the McAllister Tower and Great Hall renovation will commence. Rehabilitation of this signature structure will provide up to three hundred rehabilitated units of housing and restore access to the Great Hall, an historic but no longer used cathedral with frontage on McAllister St. at United Nations Plaza.*

*Each of these projects is planned to tailor critical features of our urban campus to promote the vibrant academic and cultural environment that contemporary professional schools require. UC Hastings will amplify these benefits for our students through our partnerships with other institutions in a Shared Platform of development. The Long Range Campus Plan documents and operationalizes our commitments to students, faculty, alumni, partners and supporters for continued renewal of our legacy of academic excellence and public service.*

## **UC Law Seismic Safety Policy**

In 2017, the College's Board of Directors adopted the institution's first Seismic Safety Policy. The policy are modeled on those adopted by the University of California and California State University systems with performance standards generally exceeding California's Uniform Building Code. Embracing these standards was essential as the Regents of the University of California require conformance to their standards for any structure owned or leased by the University, a critical consideration in light of the Academic Village strategic initiative.

The UC Law Seismic Safety Policy requires buildings owned or leased by the College have a seismic rating of IV or better (fair or better). For McAllister Tower, a 2017 seismic evaluation and retrofit study concluded that the building had a seismic rating of either V or VI (Poor or Very Poor). The Board of Directors acted on this information and directed the administration to remedy the building's deficiencies or vacate the structure.

## **McAllister Tower - Interim Use Plan**

The Board of Directors then adopted an interim use plan for the structure. The Seismic Safety Policy allowed the continued occupancy for a limited time under the terms of an Interim Use Plan which detailed 1) a mitigation strategy for seismic retrofit, or 2) a strategy for the relocation of staff and students from the building by a certain future date. Calculations were performed using the probabilities of major earthquakes on the regional faults, to determine the chance of collapse in a one-year period. The conclusion was that there existed a 10% probability of collapse in a single year, a variable used to determine the length of time in years. For this building, the length of time until the certain future date of upgrade or decampment was 9 years.

As the Board of Directors adopted this plan in 2017; the nine-year interim use period extended through 2026. The administration achieved this mandate and construction of the new, policy-compliant 656-unit campus housing facility at 198 McAllister was completed in August 2023. McAllister Tower is being decommissioned: all residential tenants will be out of the building by September 1, 2023; all administrative uses ceasing by December 31, 2023.

## **Budget Act of 2023**

The May Revision to the Governor's 2022-23 budget proposal included a grant of \$90 million to UC Law for the McAllister Tower project.

*Support for 100 McAllister Street Project—An increase of \$90 million one-time General Fund to support the facility improvement project at the institution's 100 McAllister Street building. This project will provide for the institution's continued use of 252 campus housing units at below market rents, will add at least 5 additional campus*

*housing units, and will renovate space within the facility to be used for academic purposes.*

Two previous proposals seeking funding from the State of California for the project were unsuccessful.

### **Project Phasing & Budget Plan**

The project is being delivered in two phases. The Phase 1 cost estimate provided by Plant Construction reflects the following anticipated scope of work major components: temporary construction; structural shoring and bracing; demolition; salvage of historical building materials; hazardous materials remediation; concrete patching and repairs, concrete, shotcrete and structural steel work for building seismic retrofitting; new metal exit stairs; waterproofing; sprinkler systems; initial plumbing, HVAC, and electrical design-build work; electrical system including switchgear procurement; soil grouting and stabilization; and site utilities.

In addition to the major components listed above, the Phase 1 scope of work is also anticipated to include items such as scaffolding, roofing, fireproofing, doors, storefront windows, window washing davits, dewatering, and foundation drainage. The hard construction cost is estimated at \$64.4 million.

<b>UC LAW SF - MCALLISTER TOWER SEISMIC PROJECT</b>			
<b>Phase 1 - Preliminary Budget Estimate</b>			
<b>Program: 48-17026</b>			
<b>Description</b>	<b>Vendor</b>	<b>Amount</b>	<b>% of Total</b>
PreConstruction/Construction	Plant Construction	\$64,374,040	71.5%
Design Services	Perkins + Will	\$11,267,493	12.5%
Geotechnical Services	Langan Engineers	\$467,100	0.5%
Soils Environmental Testing	Langan Engineers	\$35,000	0.0%
Building Scan	Locus Laser Scanning	\$86,310	0.1%
Site Survey	Martin Ron Associates	\$18,900	0.0%
Materials Testing	Consolidated Engineering Laboratories	\$450,000	0.5%
Deputy Building Official	RFQ	\$126,000	0.1%
Seismic Peer Review Panel	RFQ	\$115,000	0.1%
Inspector of Record	NorCal	\$340,000	0.4%
Special inspections	RFQ	\$800,000	0.9%
Permits & Fees	State of California & CCSF	\$2,000,000	2.2%
Insurance	Alliant	\$1,000,000	1.1%
Legal Services	Lubin Olson	\$100,000	0.1%
Market Study	The Concord Group	\$18,500	0.0%
Advisory & Other Services	Centurŷ Urban	\$2,000,000	2.2%
Contingency - Hard & Soft Costs	Various	\$6,801,657	7.6%
<b>Total</b>		<b>\$90,000,000</b>	<b>100.0%</b>

Phase 2 work involves window replacement and exterior repairs, tenant improvement and buildouts of residential units. The Great Hall and offices on 2<sup>nd</sup> through 4<sup>th</sup> floors would be left in a cold shell condition until such time as specific use plans are developed and funding identified.

While funding should be sufficient for Phase 1 work, financing will be necessary to fully fund Phase 2. Preliminary plans call for the use of conventional financing and federal Historic Tax Credits to bring all phases of the work to full fruition.

**Attachment:**

- Long Range Campus Plan – Timeline 2015 – 2023, August 13, 2023

## REPORT ITEM

1. **REPORT BY:** Chief Financial Officer David Seward
2. **SUBJECT:** McAllister Tower Seismic Upgrade - Project Overview
3. **REPORT:**

The renovation of McAllister Tower will follow the completion of the Cotchett Law Center at 333 Golden Gate Avenue and the Academe at 198 as the next step in the fulfillment of UC Law's Long Range Campus Plan and its strategic centerpiece, the development of an Academic Village. The McAllister Tower Seismic Upgrade Project is made possible with an appropriation of \$90 million for the first phase of work.

The project includes seismic structural upgrade, replacement of MEP systems including fire/life safety, window replacement and interior remodeling to achieve compliance with ADA/Title 24. The project also renovates space on the building's lower levels that would be used for academic purposes. Renovation of McAllister Tower will maintain 252 campus housing units at below market rents in addition to adding a minimum of five more campus housing units for a total of 257 units at below market rents.

The project is necessitated by the existing facility age, nearing 100 years old, and the fact the building's structural system no longer meets seismic standards.

### **Long Range Campus Plan & McAllister Tower**

The Long-Range Campus Plan was adopted in 2017. The plan included as a core element the renovation and seismic upgrade of McAllister Tower; specifically, and to quote:

*With completion of the Campus Housing at 198 McAllister, the McAllister Tower and Great Hall renovation will commence. Rehabilitation of this signature structure will provide up to three hundred rehabilitated units of housing and restore access to the Great Hall, an historic but no longer used cathedral with frontage on McAllister St. at United Nations Plaza.*

*Each of these projects is planned to tailor critical features of our urban campus to promote the vibrant academic and cultural environment that contemporary professional schools require. UC Hastings will amplify these benefits for our students through our partnerships with other institutions in a Shared Platform of development. The Long Range Campus Plan documents and operationalizes our commitments to students, faculty, alumni, partners and supporters for continued renewal of our legacy of academic excellence and public service.*

## **UC Law Seismic Safety Policy**

In 2017, the College's Board of Directors adopted the institution's first Seismic Safety Policy. The policy are modeled on those adopted by the University of California and California State University systems with performance standards generally exceeding California's Uniform Building Code. Embracing these standards was essential as the Regents of the University of California require conformance to their standards for any structure owned or leased by the University, a critical consideration in light of the Academic Village strategic initiative.

The UC Law Seismic Safety Policy requires buildings owned or leased by the College have a seismic rating of IV or better (fair or better). For McAllister Tower, a 2017 seismic evaluation and retrofit study concluded that the building had a seismic rating of either V or VI (Poor or Very Poor). The Board of Directors acted on this information and directed the administration to remedy the building's deficiencies or vacate the structure.

## **McAllister Tower - Interim Use Plan**

The Board of Directors then adopted an interim use plan for the structure. The Seismic Safety Policy allowed the continued occupancy for a limited time under the terms of an Interim Use Plan which detailed 1) a mitigation strategy for seismic retrofit, or 2) a strategy for the relocation of staff and students from the building by a certain future date. Calculations were performed using the probabilities of major earthquakes on the regional faults, to determine the chance of collapse in a one-year period. The conclusion was that there existed a 10% probability of collapse in a single year, a variable used to determine the length of time in years. For this building, the length of time until the certain future date of upgrade or decampment was 9 years.

As the Board of Directors adopted this plan in 2017; the nine-year interim use period extended through 2026. The administration achieved this mandate and construction of the new, policy-compliant 656-unit campus housing facility at 198 McAllister was completed in August 2023. McAllister Tower is being decommissioned: all residential tenants will be out of the building by September 1, 2023; all administrative uses ceasing by December 31, 2023.

## **Budget Act of 2023**

The May Revision to the Governor's 2022-23 budget proposal included a grant of \$90 million to UC Law for the McAllister Tower project.

*Support for 100 McAllister Street Project—An increase of \$90 million one-time General Fund to support the facility improvement project at the institution's 100 McAllister Street building. This project will provide for the institution's continued use of 252 campus housing units at below market rents, will add at least 5 additional campus*

*housing units, and will renovate space within the facility to be used for academic purposes.*

Two previous proposals seeking funding from the State of California for the project were unsuccessful.

### **Project Phasing & Budget Plan**

The project is being delivered in two phases. The Phase 1 cost estimate provided by Plant Construction reflects the following anticipated scope of work major components: temporary construction; structural shoring and bracing; demolition; salvage of historical building materials; hazardous materials remediation; concrete patching and repairs, concrete, shotcrete and structural steel work for building seismic retrofitting; new metal exit stairs; waterproofing; sprinkler systems; initial plumbing, HVAC, and electrical design-build work; electrical system including switchgear procurement; soil grouting and stabilization; and site utilities.

In addition to the major components listed above, the Phase 1 scope of work is also anticipated to include items such as scaffolding, roofing, fireproofing, doors, storefront windows, window washing davits, dewatering, and foundation drainage. The hard construction cost is estimated at \$64.4 million.

<b>UC LAW SF - MCALLISTER TOWER SEISMIC PROJECT</b>			
<b>Phase 1 - Preliminary Budget Estimate</b>			
<b>Program: 48-17026</b>			
<b>Description</b>	<b>Vendor</b>	<b>Amount</b>	<b>% of Total</b>
PreConstruction/Construction	Plant Construction	\$64,374,040	71.5%
Design Services	Perkins + Will	\$11,267,493	12.5%
Geotechnical Services	Langan Engineers	\$467,100	0.5%
Soils Environmental Testing	Langan Engineers	\$35,000	0.0%
Building Scan	Locus Laser Scanning	\$86,310	0.1%
Site Survey	Martin Ron Associates	\$18,900	0.0%
Materials Testing	Consolidated Engineering Laboratories	\$450,000	0.5%
Deputy Building Official	RFQ	\$126,000	0.1%
Seismic Peer Review Panel	RFQ	\$115,000	0.1%
Inspector of Record	NorCal	\$340,000	0.4%
Special inspections	RFQ	\$800,000	0.9%
Permits & Fees	State of California & CCSF	\$2,000,000	2.2%
Insurance	Alliant	\$1,000,000	1.1%
Legal Services	Lubin Olson	\$100,000	0.1%
Market Study	The Concord Group	\$18,500	0.0%
Advisory & Other Services	Centurŷ Urban	\$2,000,000	2.2%
Contingency - Hard & Soft Costs	Various	\$6,801,657	7.6%
<b>Total</b>		<b>\$90,000,000</b>	<b>100.0%</b>



Phase 2 work involves window replacement and exterior repairs, tenant improvement and buildouts of residential units. The Great Hall and offices on 2<sup>nd</sup> through 4<sup>th</sup> floors would be left in a cold shell condition until such time as specific use plans are developed and funding identified.

While funding should be sufficient for Phase 1 work, financing will be necessary to fully fund Phase 2. Preliminary plans call for the use of conventional financing and federal Historic Tax Credits to bring all phases of the work to full fruition.

**Attachment:**

- Long Range Campus Plan – Timeline 2015 – 2023, August 13, 2023

**REPORT ITEM**

1. **REPORT BY:** Chief Financial Officer David Seward  
Director of Business Services James Ferrell
2. **SUBJECT:** Annual Report on Insurance Coverage 2023-24
3. **REPORT:**

UC Law SF continues to work with Alliant Insurance Services as its broker and provider of insurance products and services. For 2023-24, United Educators continues to serve as the provider of liability coverages including general, excess, educators, and licensed professional lines.

Summarized below is a summary of the year-over-year changes in the College’s insurance program:

Line of Coverage		2022-23 Premium	2023-24 Total Cost	% Change	\$ Change	
General Liability	United Educators	91,052	94,954	4.29%	3,902	
Excess Liability (\$30M xs Primary)	United Educators	202,903	217,701	7.29%	14,798	
Educators Legal	United Educators	223,115	230,438	3.28%	7,323	
Licensed Professional Liability	United Educators	18,943	20,495	8.19%	1,552	Includes Endorsement for pro bona legal services - Center for Litigation and Courts
UE Package Total	United Educators	536,013	563,588	5.14%	27,575	
Excess Liability (\$10M xs GL/ \$10M xs \$25M ELL)	AWAC	105,000	113,498	4.69%	5,086	
Excess Liability (\$10M xs \$40M GL/ \$10M xs \$35M ELL)	Liberty Surplus	68,250	82,286	16.77%	11,818	
Auto Liability (1 units)	State of CA	303	303	0.00%	-	
Property	Chubb (Federal Ins Co)	304,875	340,267	11.61%	35,392	\$250,000 Retention
Cost for New Bldg. 198 McAllister			200,658			Incremental Cost for New Building
Property Total		304,875	540,925	77.43%	236,050	
Cyber Liability	Tokio Marine HCC	37,315	39,053	-0.07%	(26)	
Pollution Liability	Chubb (Illinois Union)	12,963	15,274	14.12%	1,889	Renewed with AXA XL
Crime	National Union Fire Ins Co (ACIP)	6,672	6,338	-5.01%	(334)	
Workers' Compensation	PRISM	99,057	104,751	5.75%	5,694	Final Quote
Garage Keepers Legal Liability	Gotham Ins. Co.	10,000	10,850	5.09%	525	
<b>Total</b>		<b>1,180,448</b>	<b>1,476,866</b>	<b>24.25%</b>	<b>\$ 288,277</b>	

The College is self-insured for workers’ compensation but carries an excess line through Public Risk Innovation Solutions and Management (PRISM).

Premium cost growth occurred primarily in the areas of excess commercial liability and property lines of coverage, with a slight decrease in cyber coverage premium under new carrier: Houston Casualty Company. In total, premiums for 2023-24 are \$1,476,623., a 24.23% increase over the prior year.

## REPORT ITEM

1. **REPORT BY:** Deputy CFO and Controller Sandra Plenski
2. **SUBJECT:** Listing of Checks and Electronic Transfers over \$100,000
3. **REPORT:**

Listed below are checks & electronic transfers issued by the College for the period of 5/1/23 – 7/31/23:

Check Date	Check Number	Vendor	Check Amount	Description
5/2/2023	ACH2317	Regents of the University of California	3,239,418.19	Payroll – March 2023
5/9/2023	E0071549	Opening Technologies, Inc.	173,001.82	Retrofitting of Classroom Door Locks
5/9/2023	E0071557	The Regents of the University	479,819.57	Partial payment for UCSHIP Spring 2023
5/9/2023	E0071556	The Regents of the University	800,000.00	Partial payment for UCSHIP Spring 2023
5/10/2023	280000	Build Group, Inc.	342,980.24	Water damage restoration-April 2023
5/12/2023	E0071656	Another Planet Entertainment	125,447.75	Payment for Graduation 2023
5/17/2023	280036	Mid-Market Foundation	145,774.01	Urban Alchemy – March 2023
5/23/2023	E0071726	Nor Cal Inspection	101,090.00	IOR-198 McAllister-April 2023
5/23/2023	E0071735	Township Building Services, In	115,314.08	Custodial Services – May 2023
5/23/2023	E0071718	George S. Hall, Inc.	131,428.76	Engineering Services – April 2023
5/23/2023	E0071737	UCSF Police Department	297,811.50	Campus Safety Officers – Q3 2023
5/24/2023	ACH2324	Regents of the University of California	4,240,725.64	Payroll – April 2023
5/30/2023	E0071799	Restoration Management Company	196,988.24	Water Damage Restoration – 333 Golden Gate
5/30/2023	E0071789	Carbon Health Technologies, In	230,431.25	Student Health Services Fee – Fall 2023
6/2/2023	E0071897	277 Golden Gate LLC	142,157.67	Final Payment – Good Neighbor Agreement
6/14/2023	280135	Mid-Market Foundation	146,596.94	Urban Alchemy – April 2023
6/20/2023	E0071995	George S. Hall, Inc.	133,063.08	Engineering Services – May 2023
6/21/2023	280162	PG&E Company	108,025.56	Electricity Services – Nov. 2022 – June 2023
6/27/2023	E0072102	Township Building Services, In	115,314.08	Custodial Services – June 2023
7/3/2023	E0072155	Gibson, Dunn & Crutcher LLP	103,128.97	Name Change Litigation – May 2023
7/3/2023	E0072161	Nor Cal Inspection	111,210.00	IOR – 198 McAllister – May 2023
7/6/2023	280210	Mid-Market Foundation	224,435.49	Urban Alchemy – May 2023
7/6/2023	ACH2329	Regents of the University of C	3,481,267.94	Payroll – May 2023
7/11/2023	E0072203	PRISM	104,751.00	Worker's Compensation-Annual Premium FY24
7/11/2023	E0072196	Ellucian Inc.	397,060.00	Managed Cloud Service – July 2023
7/11/2023	E0072197	Eplus Technology, Inc.	472,067.87	Internet Domain Change
7/18/2023	E0072221	Carbon Health Technologies, Inc.	217,425.00	Student Health Services Fee-Spring 2023
7/18/2023	E0072228	Eplus Technology, Inc.	237,466.00	Internet Domain Change
7/19/2023	280246	UMKC - School of Law	180,187.28	Instructional Services-Y. Lindgren-AY23-24
7/25/2023	E0072297	Nor Cal Inspection	118,215.00	IOR – 198 McAllister – June 2023
7/25/2023	E0072285	Alliant Insurance Services	808,224.02	Insurance Coverage – AY23-24
7/26/2023	280263	University of California San Francisco	115,276.16	HPL Program Share to UCSF – AY23
7/31/2023	ACH2333	Regents of the University of California	4,314,992.97	Payroll – June 2023