

ROBINA FOUNDATION



A LEGACY REPORT



FOREWORD

August 1, 2019

James Binger created the Robina Foundation in 2004 shortly before his death, focusing its assets and efforts on four organizations that he had meaningful relationships with during his life and that he anticipated would be important for decades to come. He believed that funding partnerships with them would increase the organizations' effectiveness and assist them in responding to new societal challenges. He charged the Foundation's Board of Directors with the responsibility of working with the four designated institutions and aspiring to make grants with transformational impact that would benefit the larger society. To do that best, he advised that the Foundation's term need not exceed 20 years.

Since grantmaking began in 2007, Robina's Board of Directors and small staff had the great honor to implement Jim Binger's vision for the Foundation. Over time, and through trial and error, we learned that formulating large multi-year program commitments, and in some cases ultimately making endowment grants, permitted Robina to "punch way above its weight" with grants the size of those made by much larger foundations. Along the way, the Foundation had payout levels exceeding the required 5% and continually strove for the transformative effects Jim Binger hoped to achieve.

In 2017, as we neared the end of our organization's life, we engaged a recognized expert on philanthropic giving, Melinda Marble, to help us and the grantees reflect on how we implemented Jim Binger's vision and other aspects of the Robina experience. Ms. Marble captured these reflections in a Legacy Report. Members of the Robina Foundation Board of Directors believe that the ideas and insights contained in the report might interest donors and other philanthropic leaders.

Following the Legacy Report is a list of Robina's grants to provide more specific information on the ways we sought to fulfill our founder's vision as well as Robina Foundation's "Guiding Principles." It is our hope that Jim Binger's creative approach and meaningful legacy will be a catalyst for similar impactful giving now and into the future.

Kathleen Blatz, Chair
Robina Foundation



Mission Statement

The Robina Foundation, a Minnesota-based private grantmaking foundation, seeks to positively impact critical social issues by encouraging innovation and financially supporting transformative projects of its four institutional partners.

These partners, selected by the Foundation's founder, James H. Binger, are:

**Abbott Northwestern Hospital,
Minneapolis, MN;**

**The Council on Foreign Relations,
New York, NY;**

**University of Minnesota Law School,
Minneapolis, MN;**

**Yale University,
New Haven, CT.**

ROBINA FOUNDATION LEGACY REPORT

By Melinda Marble

The Robina Foundation Legacy Report started with a question: what lessons might a limited-life foundation, smaller in scale and more modest



than some of its well-known national counterparts, offer to donors contemplating the best structure and operations for their philanthropy?

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

Robina will be winding down its operations soon, after having fully spent out its assets during nearly two de-

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

Those interviewed generally agreed on five key findings:

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

two seasoned professionals, including an executive director who welcomed the board's deep engagement.

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

Robina's origins

Shortly before his death at age 88, James H. Binger created the Robina Foundation. Binger was an attorney who served as the in-house counsel and later CEO of the Honeywell corporation. He was married for 60 years to Virginia McKnight, whose father was a transformative leader of 3M and whose parents founded the McKnight Foundation. A life-long Minneapolis resident, Binger was also a race horse owner, an avid polo player, and the owner of a group of Broadway theaters. When he died on November 3, 2004, the lights on Broadway were dimmed in his honor.

Binger established the Robina Foundation late in life. He began by engaging The Philanthropic Initiative (TPI), a charitable advisory firm, to help him draw up bylaws and select and recruit the board. According to TPI, he envisioned Robina as a limited-life foundation from the start, driven in part by concern about possible dilution of

vision over successive generations of trustees and the desire that the assets be put to immediate use. While he did not designate a particular spend down date, he thought that roughly twenty years was an appropriate life span. He knew that he wanted a small and active board rather than a heavily-staffed organization.

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

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

In the Foundation's bylaws, Binger accorded the board great freedom to enact his vision within the structure provided by the limited-life time frame and the four designees. He did provide general guidance within the bylaws via a Mission Statement

on Charitable Activities, in which he briefly outlined principles for the board's consideration. These included encouraging innovation and creativity, forward-thinking projects and initiatives, and major projects as opposed to normal ongoing operating expenses. He also made it clear that resources did not have to be divided evenly among the designees.

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

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

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

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

Launch and early operations

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

Binger had not staffed or activated the Foundation before he died. As a result, Robina operated as an independent foundation from the start, with no donor or family presence on the board. Leadership changes and departures soon required the board to recruit new members. The full board discussed and approved new members. The Board has ranged from four to seven members during the life of the Foundation. Presently, there are four trustees. The Foundation has been staffed since 2010 by an executive director, who had substantial previous foundation experience, and an administrative consultant.

This exceptionally lean staffing structure required the board to be more directly engaged with grantees than at many more institutional foundations. The executive director, an exceptionally secure and sophisticated professional, was a critical bridge between trustees and grantees.

Interviewees agree that her deft counsel, clear communication, and ability to synthesize different board perspectives helped to make the Foundation's unusual structure work and was critical to its success.

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

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

Per Binger's wishes, the board asked each designated grantee to identify potential major projects for support. One of the board's first grant actions was to award the institutions planning grants that would help them prepare their respective proposals. While the designees were invited to think big and outside the box, the board felt that some were not ambitious enough in their initial requests. "People brought out their favorite stuff, standard things they would have done anyway,"

recalls a founding trustee. "They were less imaginative and flexible than I'd hoped."

As another board member put it:

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

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

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

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

Members of the board took care to identify projects within each institution that they thought addressed Binger's interests. At Yale, for example, the board homed in on the Yale School of Drama early on

because of Binger's love of theater and Broadway interests. Board members supported programs in human rights and immigration at both universities because they knew Binger thought these were important issues – and because they thought that the proposed work would change and shape the universities in productive ways.

A pattern of support and engagement, partnership and trust

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

As the Foundation developed, a pattern of support began to emerge. When the board identified a promising project, it provided support to plan and to test the idea. This was followed with three to five years of implementation and operating support, renewed for as long as ten years. While board members decided initially not to fund endowment requests, they altered that position over time, making several capstone endowment gifts to sustain projects once they had proven themselves.

After the programs originally funded had largely run their course, the board began to think about its final phase. To launch that, they developed and distributed Guiding Principles for new grants and conducted a “listening tour,” visiting all four institutions to learn more about their priority projects.

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

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

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

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

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

Another grantee described the benefits of deep partnership:

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

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

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

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

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Doing what the trustee did with us was very enjoyable and liberating.

She was clearly a champion. She understood us and seemed to love what we were doing. Robina took a chance on us.

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

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

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

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

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

But they also recognized its limitations:

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



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

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

The grantee experience

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

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

Others noted:

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



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

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

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



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

Two grantees commented on the lack of expertise and valuable subject-matter knowledge that specialist program officers bring to proposal review:

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

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

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

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

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

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Most institutional funders are larger, but they have a broader mandate and do not provide this kind of comprehensive support over time, the kind that lets you develop

the work. They have a more formal process, and program staff who vet everything. Robina didn't have those layers. You could talk directly to the decision-makers.

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

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

Impact

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

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

There is strong consensus among board members that the work of two of the designees was transformational for the institution and society, had notable impact, would not have happened without Robina support, and will be

sustained over time. They think that the work of a third designee had a transformational impact on the institution – showing it the way to a new business model - but that shifting political and societal conditions since its inception limited its ability to achieve impact in the short term. In the case of the fourth grantee, trustees feel that the work was transformational and will have considerable impact on the institution and society – but that it was likely that most of the work would have been undertaken without Robina support.

The board regrets that Robina was not successful in addressing one aspect of Binger's vision: the desire that the grantees, if the right opportunity presented, find a way to work together on a major initiative. While the board broached this idea with grantees repeatedly, there was resistance to collaboration in the early years, and trustees felt that a forced collaboration would be disrespectful to grantees and unlikely to yield results. The different sizes, geography, and interests of the institutions made a natural collaboration topic difficult to identify. There is a sense that fulfilling this vision would have required more bandwidth and resources than the Foundation had.

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

If Robina had not come along, we would have been able to generate some resources, probably less than

ten percent of what we have spent in the past ten years. There would be virtually no field-wide impact.

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

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

A rich and satisfying board experience

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

The Foundation's past and current

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

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

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

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

Our time was efficiently used. We

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

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

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

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

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

Board members also appreciate being compensated for their work and feel that practice has encouraged accountability and making Robina work a

priority. In turn, the major engagement of board members reduced the need for additional staff. They took care to periodically review compensation levels, basing them on norms in the field, the number of hours spent by trustees, and their responsibility levels.

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

Lessons for the field

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

For donors

- Think carefully about what matters most to you, what you believe about doing good in the world. Then capture that in founding documents that will provide guidance to the board long after you are gone. A donor who articulates an ideal vision of how the foundation should operate provides its trustees with a great and lasting gift.

- Strive for Jim Binger's balance of control through structure and freedom for trustees. If the foundation's resources are not major, limiting program areas can ensure that the foundation will remain strategic and focused. Designating beneficiaries can encour-

age strong partnerships between the foundation and its grantees. Limiting the foundation's life span provides the opportunity for deeper immediate impact.

- Think about the implications of these structural decisions for board and staff. If, like Robina for example, you choose to keep staff small, understand that larger demands will be placed on board members, particularly if you also want close partnerships with grantees. Augmenting staff with external consultants can be desirable and may be necessary.

- Give attention to structuring and appointing the board:

In addition to conveying specific preferences, founding documents can be used to set the tone and culture of the organization, covering such issues as how the donor wants board members to work together and with grantees. They can also encourage transparency, accountability, and partnership with grantees if those are important goals of the donor.

Attention to board processes, setting term limits and selecting trustees who are committed to group process will result in a better experience for trustees.

Reflect on the commitment board members are being asked to make and compensate them if appropriate, benchmarking against norms in the field.

Set clear expectations for how impact will be tracked and assessed. Help board members understand what level of risk is acceptable and what impact would be meaningful to you.

For foundation leadership

- It is possible to make major gifts and have significant impact with minimal infrastructure and lean staffing. But deep partnership in these circumstances is only possible if trustees engage significantly or if there is heavy reliance on external consultants. Foundation staff must also welcome and support this level of board engagement.

- Frequent visits with grantees and deep immersion in their work builds trusting relationships that can enhance the impact of funding.

- Clear communications and rapid “Nos” are key to grantee satisfaction.

- Attracting strong experienced trustees requires thought and care to the design of board meetings. Giving trustees the opportunity to focus on significant issues that matter, time to form relationships and get to know one another, and encouraging free and frank discussion are key to trustee satisfaction.

- If trustees are to be personally engaged in the work, consider the lead trustee model, but rotate lead trustees regularly.

- Take time to regularly assess how the board process is working and whether

the foundation is honoring the wishes of its founder.

- A culture of civility and partnership that is continually nurtured and reinforced will yield dividends in positive relationships and strong impact. Cultivating trust among board members, staff, and grantees is a key management skill.

Final thoughts

The story told in these interviews is of a committed and thoughtful group of trustees who formed unusually deep and respectful partnerships with a small group of grantees. Robina’s success has been based, in large part, on attracting high caliber board members who were challenged by the mix of freedom and responsibility Binger afforded them. These trustees generally did not know each other well when they came together, nor were they Binger family members. Regardless of board membership, donors should be clear about the kind of culture and open exchange they want to see on the boards they are establishing.

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

experienced and active board.

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

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

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

Finally, the Robina experience highlights the importance of trust in philanthropy. Jim Binger laid out a vision, then trusted a board to carry it out, even though he did not know all the members personally. While the trustees were a disparate bunch, they undertook a process together that

built deep bonds of trust and affection among them. When asked what they valued most about Robina, grantees often talked about the trust they felt they earned over time. Being trusted made them bolder and more imaginative in their work, and they believe ultimately more effective. Building and sustaining relationships of trust, then, emerges as a key skill in this work, one that can be cultivated among and with trustees, staff, and grantees.



ROBINA FOUNDATION

**Total funded and committed grants as of December 2018:
\$160,580,436***

**Grants to Robina Foundation's four designated grantees
as of December 31, 2018:**

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Abbott Northwestern Hospital/Allina Health
Total funded and committed grants: \$24,551,454

LifeCourse:

\$18,426,454: three grants: 2012 - 2017

With support from Robina, Abbott Northwestern Hospital and Allina Health designed, implemented, and tested a new care model, in the health system and two senior care facilities. Patients with Alzheimer's, Stage III and IV cancer, and heart failure and their families participated in the initiative, which was delivered by a community health worker in partnership with existing healthcare teams. The study, which used a whole-person approach, focused on improving the quality of life of patients and the reduction of costly and unnecessary/unwanted hospitalizations. Research results showed a savings of \$959 per person per month, improved quality of life and care experience, reduced hospital use, and increased hospice length of stay. Following the successful study, Allina Health began to implement LifeCourse within Allina.

Care Guides in the Primary Care Office:

\$6,000,000: one grant: 2008 - 2010

Robina support enabled Abbott Northwestern Hospital to test the feasibility of a new primary care model featuring lay "Care Guides" who were trained to counsel and support chronic disease patients to achieve standard care goals as part of their care. During the first phase of the program, the model was tested at an inner-city clinic affiliated with the hospital with patients who had diabetes, heart failure and hypertension. Following completion of the feasibility study, which highlighted improvement in patients' achievement of care goals and a decrease in hospital and emergency department costs, Robina supported trials to evaluate the efficacy of care guides in a wider variety of clinical situations. The success of these trials resulted in adoption of the Care Guide model by Allina Hospitals and Clinics.

Planning Grants:

\$125,000: two grants: 2005 and 2006

Council on Foreign Relations

Total funded and committed grants: \$29,950,649

IIGG (International Institutions: Global Governance):

\$23,305,357: three grants, including one endowment grant: 2008 - 2018

Robina support fostered the development and implementation of the Council on Foreign Relations' IIGG initiative, designed to inform policy makers about ways to improve the world's management of economic, security, environmental, and human challenges that require international cooperation. IIGG initiatives engage with constituencies in the US and beyond and include the Council of Councils, a newly created association of policy organizations located around the world. The Council of Councils brings together more than 25 national and regional "think tanks" in annual and sustained dialogues. As part of support for IIGG, in 2016, the Foundation endowed a new Chair in Global Governance at the Council to lead the IIGG initiative.

Expanded Diversity Initiative:

\$5,898,737: four grants, including one endowment grant: 2011 - 2016

Robina grants enabled the Council to expand efforts to increase greater participation of talented and underrepresented groups in the American foreign policy community. The Council pursued multiple strategies in this endeavor. These strategies focused on identifying individuals with interest and promise and introducing them to career possibilities, professional networks, and mentorships by supporting the participation of American young people in Humanity in Action's summer programs through funding to the Council and Humanity in Action, expanding the Council's Franklin Williams Internship program, establishing a partnership with the International Career Advancement Program's Alumni Association and launching a jointly sponsored diversity conference, and participating in multiple career fairs targeting underrepresented groups. In 2016, with the understanding that the Council would maintain its support of two Franklin Williams interns, the Foundation provided an endowment grant to permanently expand the Franklin Williams Internship program by the addition of six new internships for undergraduate or graduate students from underrepresented populations.

Online Video Project:

\$696,555: one grant: 2011 - 2012

With the explosion in online video, the Council's lack of video equipment and personnel trained to develop and launch videos hindered the Council's ability to reach elite and mass audiences, including high school and college students. With Robina support, the Council acquired needed video equipment and trained Council experts in the best practices for structuring and conducting video interviews and briefings and developed new expert briefing series.

Planning Grant: \$50,000: one grant: 2006

University of Minnesota Law School

Total funded and committed grants: \$59,771,499

Binger Center for New Americans:

\$28,969,510: three grants, including two endowment grants: 2013 - 2016

A multi-year grant approved in 2013 funded the Law School's development of the Center for New Americans to respond to critical legal and social needs of diverse immigrant groups. Following three years of operations during which the Center met agreed-upon benchmarks, Robina endowed the Binger Center for New Americans and established the Binger Professorship in Clinical Law. Through the Binger Center, the Law School works with law firms that provide pro bono legal support, as well as non-profit organizations, to expand legal services to immigrant communities and to pursue test case litigation that leads to improving the laws affecting immigrants. The Center includes a comprehensive immigration clinic for law students and offers students opportunities to gain experience in litigation, policy development and advocacy. The Binger Center's Education and Outreach Program provides comprehensive screenings to non-citizens and trains lawyers and community members to provide pro bono service to immigrants. Significant accomplishments of the Binger Center include the successful litigation of a case before the United States Supreme Court, a class action law suit that secured an order temporarily blocking the deportation of 92 Somali men and women, involvement of law students at the Minneapolis-St. Paul International Airport to assist arriving immigrants affected by the January 2017 executive order related to immigration, education of more than 2000 immigrants about their rights, and more than 6,000 pro bono hours by the Center's law firm partners, an investment exceeding \$2.3 million.

Robina Institute of Criminal Law & Criminal Justice:

\$11,857,215: two grants: 2012 - 2017

Robina funding created and supported the Robina Institute of Criminal Law and Criminal Justice, which has enabled the Law School to play a significant role in national and state efforts to rethink the aims and methods of criminal justice systems with the goal of making them more just, effective, and cost-effective. Robina's first multi-year grant supported the Institute's three program areas: Criminal Justice Policy, Criminal Law Theory, and Sentencing Law and Policy.

The Foundation provided a second multi-year grant to jump-start four targeted projects within the Sentencing Law and Policy program area:

1) Criminal History Project, which included the publication of the Criminal History Enhancements Sourcebook, an in-depth examination of criminal history scores and their impact on sentencing and policy; 2) Multi-State Probation Revocation Project to research probation revocation practices nationally and work with specific jurisdictions across the United States to reform their existing revocation practices; 3) Sentencing Guidelines Repository Project, which collect-

ed sentencing reform materials from states and created the online Sentencing Guidelines Resource Center to facilitate the exchange of information, expertise and experience on sentencing policy, guidelines, and commissions and to promote the adoption and retention of best practices in sentencing guidelines systems; 4) Parole Release and Revocation Project, which worked to inform and improve prison release and parole revocation practices nationwide by gathering and publicizing information about current practices and directing law reform work with selected jurisdictions.

Robina Public Interest Scholars Program and Bridge Fellowship Program:

\$8,208,375: three grants: 2012 - 2020

Robina funding launched the Law School's Public Interest Scholars Program aimed at attracting top students committed to public interest work to the Law School. The program offers scholarships and a seamless path to public service through summer internships, year-long post-graduate fellowships that help launch students' careers, and loan repayment assistance to make those careers affordable. The program has increased the Law School's reputation as a top public interest law school, attracted strong public interest students, increased the number of students employed in public service, and has encouraged other donors to support law students' public interest careers. Students in the classes of 2012 – 2020 have benefitted from 91 three-year scholarships, 128 summer fellowships and 31 post-graduate, year-long fellowships. A dedicated public interest career counselor provides support to students in the program.

LaPPS (Program on Law, Public Policy, and Society):

\$8,061,399: two grants: 2008 - 2012

Robina's multi-year grant funded the development and implementation of the Law School's Program on Law, Public Policy, and Society, which supported public policy research and helped prepare law students to serve as agents of social transformation. For five years LaPPS funding supported two research chairs, a clinical chair, a research fund and annual conferences in LaPPS. Four new capstone courses were created during the five years, and the Law School began to provide student internships in public policy. The Law School's "Law in Practice" course (originally referred to as "Practice and Professionalism"), a required first year course developed with LaPPS funding, is ongoing, as are other elements created during the five years of Robina funding.

Strengthening the Law School's Fundraising: Robina Scholars Match Program, Endowed Scholarship Match Program and Class Agent Pilot Program:

\$2,200,000: three grants: 2012 - 2020

To challenge the Law School to secure donor commitments for scholarships, the Robina Scholars Match Program was created with a grant of \$1,250,000 from Robina payable over five years beginning in 2012. As of May 2017, the Law School has been paid or has received \$1,158,380 in commitments for the Robina-matched scholarships. The matching gift program is an important incentive for new giving

to support students at the Law School. In 2017 Robina committed an additional \$500,000 to support the Endowed Scholarship Match Program by providing a 1:2 match for major scholarship support of \$100,000 for scholarships at the Law School. The Foundation's multi-year grant of \$450,000, beginning in 2016, funds the development and implementation of a new Class Agent Pilot Program, which involves "class agent" alumni volunteers who solicit their peers on behalf of the Law School. Funding for the final years of the grant will be based on an evaluation of the effectiveness of the first three years of the initiative.

Faculty Retention:

\$250,000: one grant: 2008

Robina provided funds to support the incoming dean's efforts to strengthen significantly retention packages for key faculty at risk of leaving the Law School. Retention of the faculty through augmented salaries, research accounts, and travel and conference budgets were critical to the curricular and research objectives of the school.

Dean's Innovation Fund:

\$100,000: one grant: 2018

Robina's one-year grant seeks to determine the potential of a dedicated, flexible funding source available for the Dean to support and foster strategic opportunities that fall outside the school's annual budget.

Planning Grants:

\$125,000: two grants: 2005 and 2006

Yale University

Total funded and committed grants: \$45,599,709

Robina Foundation Human Rights Fellowship Initiative (Yale Law School):

\$22,000,000: seven grants, including two endowment grants: 2008 - 2016

From 2008 through 2016, the Foundation provided annual support for the Robina Foundation Human Rights Fellowship Initiative designed to support human rights leaders at all stages of their careers, from JD scholars to senior-level fellows. The initiative provides scholarships for the academic year, summer fellowships for work with human rights organizations around the world and postgraduate fellowships to students interested in human rights and experienced senior-level fellows who teach at the law school. In 2016, the Foundation provided an endowment grant to sustain the initiative and endowed the Binger Clinical Faculty Chair in Human Rights to teach human rights-related courses and clinics and lead the Robina Human Rights Fellowship Initiative. Robina's grant required that Yale Law School augment Robina's endowment funding with an additional \$1 million provided by gifts from alumni, friends and the Law School.

Binger Center for New Theatre (Yale School of Drama):

\$21,825,000: three grants, including one endowment grant: 2008 – 2012

Robina Foundation provided four years of annual support for the launch and implementation of the Yale Center for New Theatre. In 2012, following four years of successful operation of the Center, Robina endowed the Binger Center for New Theatre to provide annual commissions of new plays and support these commissions through all stages of development, including residencies, readings, workshops, and full productions. In addition, the Binger Center facilitates playwrights' residencies as lecturers at Yale School of Drama and includes a "Production Enhancement Fund" to support other not-for-profit theaters producing world premieres or second productions of plays commissioned by the Center. The Binger Center's 50 commissions have supported the creation of 10 plays that have had multiple productions in American theaters, including on Broadway. Fifteen theaters have received Production Enhancement Fund grants.

Dean's Innovation Fund (Yale School of Drama):

\$100,000: one grant: 2018

Robina's one-year grant seeks to determine the potential of a dedicated, flexible funding source available for the Dean to support and foster strategic opportunities that fall outside the school's annual budget.

Gilder Lehrman Center for the Study of Slavery, Resistance, and Abolition:

\$1,424,709: one grant: 2016 - 2019

The Gilder Lehrman Center is dedicated to acquiring and disseminating knowledge concerning all aspects of slavery, including contemporary forms of forced labor and human trafficking. Robina's grant supports the organization and work of the Human Trafficking and Modern Day Slavery Working Group, increased use of media to provide online curricular resources for teachers and the implementation of a major Teacher Outreach and Africa Teachers' Institute to be held in 2018 and 2019.

Tom Crosby Memorial Gift:

\$200,000: one endowment grant: 2013

To honor Crosby, who served as advisor to the Foundation and long-standing board chair, the Foundation established a fund at Yale to provide scholarships for students who demonstrate the values, character and leadership he demonstrated during his life.

Planning Grant:

\$50,000: one grant: 2006

*In addition to grants to Robina’s designated grantees, Robina provided a small number of grants to organizations aligned with the spirit and vision of Jim Binger in recognition of his professional accomplishments and the work of others to launch and support the Foundation. These grants accounted for less than 0.5% of the Foundation’s total grants.

The Robina Foundation Board of Directors may consider additional grants as part of the Foundation’s “spenddown.”

The Robina Foundation Legacy Report emphasizes that Robina Foundation operated with a small actively engaged board of directors, very small but experienced staff, and selective use of consultants. The Foundation’s limited infrastructure resulted in operating and administrative expenses that averaged 2.5% of the Foundation’s qualifying distributions.



Guiding Principles for Robina Grantmaking

Principle: a fundamental truth or proposition that serves as the foundation for a system of belief or behavior or for a chain of reasoning.

The Robina Foundation will:

- Work closely with Robina Grantees to hear their ideas and ensure a full partnership with them;
- Fund programs that fill an important niche with the possibility of substantial achievement, with particular emphasis on impacting people's lives rather than producing abstract ideas;
- Be willing to go through trial and error processes to get things right and be ready to persist despite criticism;
- Seek to influence the larger environment in which programs operate and increase the chances of impact and sustainability through partnerships with other funders and substantial matching funds raised by Robina Grantees;
- Invest in leadership of institutions and individuals;
- Strive to establish a Robina legacy of impact in areas of need.

Programs involving several Robina Grantees are desirable but will not be required. In addition to programs that address the Foundation's Guiding Principles, the Robina Board is interested in programs, whether joint or individual, that:

Advance human rights, justice, fairness and equality
Make diversity an asset, not a liability
Prepare the next generation of leaders
Foster artistic / cultural creativity
Ease human suffering



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