

Board of Directors Quarterly Meeting

University of California College of the Law, San Francisco
198 McAllister, San Francisco, CA 94102, Auditorium
Mar 15, 2024 9:00 AM - 1:00 PM PDT

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11. Adjournment



Board of Directors Quarterly Meeting Minutes

University of California College of the Law, San Francisco
December 1, 2023

333 Golden Gate Ave., San Francisco, CA 94102, Suite 501 Deb Colloquium Rm. 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

Vice Chair Zecher called the meeting to order at 9:07 a.m., and the Secretary called the roll.

Board Members Present

Director Simona Agnolucci, Chair (joined at 9:09 a.m.)
Director Albert Zecher, Vice Chair
Director Shashi Deb
Director Andrew Giacomini
Director Andrew Houston
Director Claes Lewenhaupt
Director Mary Noel Pepys
Director Courtney Greene Power
Director Chip Robertson (left at 9:17 a.m.)

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
Chief Development Officer Eric Dumbleton
Legal & Executive Assistant Yleana Escalante
Director of Bar Passage Support Margaret Greer
Alumni Engagement Director Meredith Jaggard
Assistant Dean of Career Development Office Amy Kimmel
Assistant Chancellor & Dean/Chief of Staff to the Chancellor & Dean Jenny Kwon
Director of Diversity, Equity, & Inclusion Initiatives Mario Lopez
Professor of Practice and Bar Success Analyst and Strategist Stefano Moscato
Deputy Chief Financial Officer and Controller Sandra Plenski
Provost & Academic Dean Morris Ratner
Chief Human Resources Officer Andrew Scott
Chief Financial Officer David Seward
Deputy General Counsel Laura Wilson-Youngblood

Others Participating

Mike Belote, California Advocates

2. Public Comment Period

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

After public comment, the Board addressed agenda items 6 through 9 and then returned to the order of the agenda with agenda item 3 et seq.

3. Approval of Prior Minutes

Motion:

The Chair called for a motion to approve the minutes of the September 8, 2023 open session meeting and the October 24, 2023 Special Board Meeting.

Motion made and seconded. The motion carried.

4. Report of the UCLAS President

UCLAS was unable to send a representative to this meeting due to final exams.

5. Report of the Board Chair:

Director Deb expressed her gratitude to Mr. Dumbleton and Dean Kwon.

5.1. Report Item: Report of the Chair of the Advancement and Communications Committee:

5.1.1. Report on Advancement

5.1.1.1. FY09-23 Fundraising Results & Trend

Mr. Dumbleton thanked Director Deb. He started off with a retrospective and shared a graph that showed the trajectory and trend of fundraising starting in FY 2009 through FY 2023. Starting with FY 2009, the College raised about \$3.5 million and there was a slight but steady increase over time, with a couple of declines particularly in the transition period from 2015-16 when Mr. Dumbleton joined the College and Dean Faigman was appointed Dean. Each of FY 2018, 2019 and 2020 was a record setting year of \$7 million, \$10 million and \$14.7 million raised, respectively. FY 2019 was the first year that the College raised at least \$10 million total and has now done so for five consecutive years. He explained that spikes in fundraising represent significant commitments and gifts, such as the commitment in FY 2020 from Joe Cotchett and the FY 2022 commitment from former Dean Mary Kay Kane's estate. Chair Agnolucci asked whether fundraising is essentially flat from 2019 to present

without those major commitments. Mr. Dumbleton said that his team is always building those significant commitments in the pipeline, and that other giving is fairly consistent between \$9 million and \$11 million per year.

Chair Agnolucci asked about fundraising goals, and Mr. Dumbleton responded that he is aiming for a consistent upwards trajectory. Vice Chair Zecher asked whether these fundraising numbers include dollars raised through the centers and how much the centers brought in this year. Mr. Dumbleton responded that the centers raised about \$3 million to 3.5 million this year. Vice Chair Zecher asked how much raised this FY 2023 is attributable to the naming opportunities at the Academic Village, and Mr. Dumbleton responded that he would have to look into that, noting that there was a \$500,000 commitment at the very end of the fiscal year to name one of the large classrooms. Vice Chair Zecher noted that for the size of the school, the size of the donor base is impressive.

5.1.1.2. Comprehensive Campaign Update

Mr. Dumbleton announced a \$500,000 planned gift that Tracey Whitlock has secured. He said that the current focus is on soliciting all of the campaign cabinet members, which they have nearly done. His team is also soliciting every individual on the Foundation board and Board of Directors. The campaign cabinet will have about ten different high-level funding opportunities based on different areas within the law school that typically resonate with donors. His team hopes to have a draft of that ready by the end of this calendar year. He said that the campaign will also seek to engage individuals who are not necessarily alumni of the school, but who have a stake in the health and advancement of San Francisco. He added that at the campaign cabinet meeting on September 18th, David Seward led a conversation on the endowment and said that if the Board is interested they could present that at the next meeting.

5.1.1.3. Events Recap

Mr. Dumbleton said that the Martinis by the Dean event will be an annual tradition and shared some pictures. The night after that event was the ribbon cutting for the 198 McAllister building. He added that they had a courtroom dedication for Justice Marvin and Jane Baxter a couple of weeks ago, a very intimate affair for the justice and some of his closest friends and family, which was a very nice event. The chancellor's reception on

Wednesday at the City Club of San Francisco was a successful event.

5.1.1.4. Foundation Board Class Agent Initiative Update

Mr. Dumbleton said that the College had a soft launch with ten total classes and shared a couple of specific examples of success. The Class of '77 has a group that is planning a tour of the new campus, and that is a direct result of the class agent email. He said that Giving Tuesday was very successful. The College raised about \$150,000 from 187 donors. They are still a little bit below last year's total.

5.1.1.5. Alumni Engagement Update

Ms. Jaggard said that the December swearing in ceremony is this evening in the new 198 building auditorium, with about 88 bar passers in attendance and about 300 total guests. She said that the alumni chapters and affinity groups are hosting a lot of holiday events. She announced that Spring Week for 2022 has won four awards, bronze awards for alumni relations initiative and alumni relations pivot out of 4000 nominations internationally, and first place in the district for spring week in the same two categories. She is looking forward to the nominations again for 2023 for this year. This year spring week will be April 1-7 2024. Director Deb asked how the College is tracking donations that are made directly based on the capital campaign initiatives. Mr. Dumbleton said that they have not been yet, but they will meet and devise a way to track the effectiveness of the class agent program. Right now the campaign is focused on re-engagement.

5.1.2. Report on Communications:

Dean Kwon said that the search for the College's head of Communications continues and in the interim she will be supervising the team. She gave a special thanks to both Dean Ratner and Dean Tubbs for their partnership in supporting communications efforts. She said that the College has hired a local communications and marketing firm, Underground, that has worked with Dean Sakamoto in the past on admissions books. Underground will be helping communications efforts with respect to the name change. Over the last 11 months, a variety of departments and teams on campus have communicated about the name change to key constituents. Underground will assist with reaching major metropolitan areas in the US and identifying law firms, judges, public defender offices, district attorney offices and others who are in the market to hire UC Law SF alumni and who should know the College's

identity as UC Law San Francisco, including reaching an audience that was not already connected to the College before. In the absence of state funding to support implementation of Assembly Bill 1936, the College has been judicious and efficient with expenditure of resources on communications and marketing. Director Power said that it would be helpful to develop a message for alumni asking people to change their LinkedIn profile. Dean Kwon responded that the communications team has partnered with Advancement and included instructions in newsletters on how alumni should change their LinkedIn profile.

Dean Kwon also shared a new initiative to optimize search results when people search for the College on sites like Google. The College is partnering with Computer Courage, which worked with the College on the website redesign, to make sure that UC Law SF shows up at the top of the list in any search on San Francisco law schools or UC law schools. Chair Agnolucci asked if the College is paying Computer Courage for this work and if so at what cost. Dean Kwon responded that the work is part of a larger contract the College has with Computer Courage. Chair Agnolucci suggested search engine optimization to improve organic search and ad results.

Dean Kwon said that the alumni magazine is out and was sent to every judge in the country. Dean Faigman confirmed that every Director received a copy in the mail. Dean Kwon said that the feedback received has been very positive. She also showed the banners that will be placed around the city, noting that they are in print this month. The City has approved them and all the locations are set. She highlighted several other communications efforts, particularly regarding social media posts. Director Houston asked for a status update on the hiring process for the new Director of Communications. Dean Kwon said that the hiring team has done several interviews and has a steady flow of applications but has not yet found the right fit. Director Power asked what it is about the candidate pool that is presenting difficulty, and Dean Kwon responded that working at UC Law SF in senior leadership requires an individual to take on roles that on a traditional campus might be two or three people or even full teams. Whomever the College hires needs to know enough about all communications areas to appropriately supervise. Director Houston asked if the College is working with a recruiting firm, and Mr. Scott responded that the College is still getting applicants that on paper seem qualified, and that typically a recruiting firm will be engaged only when that stops or if the College has interviewed a dozen people and it is clear that the right type of person is not responding to the job posting. Dean Faigman commended Dean Kwon for her extraordinary

work, creativity, and initiative filling in on communications in addition to her full-time job.

5.2. Report of the Chair of the Educational Policy Committee

Director Houston introduced this item and turned the report over to Dean Ratner.

5.2.1. July 2023 Bar Results

Dean Ratner thanked Director Houston and discussed the descriptive data that the College has and the statistical analysis that staff are undertaking to better understand bar outcomes. They do a regression analysis in partnership with a statistician, Dr. Stephen Goggin, who is a professor at San Diego State who has been working with the College since 2016. The analysis takes several weeks and is not yet available. There was an increase in UC Law SF overall first-time bar pass rate from 71 percent for Class of 2022 to 74 percent this year for Class of 2023 graduates. He said that the primary driver of the higher bar pass rate was improved performance by class of 2023 LEOP graduates, thanks in large part to a full team assembled by Ms. Greer to provide extra support to the LEOP graduates. UC Law also targeted extra support to the third quartile students, which had a positive effect overall and for LEOP students in particular. The LEOP pass rate improved by 15 percent, from a 49 percent pass rate for class of 2022 to a 69 percent pass rate for class of 2023. Dean Ratner then presented pass rate statistics for the College's graduates between 2010 and 2023. He said that 2016 was a low point when the College's pass rates were well below the ABA-accredited law school average bar pass rate. The bar pass outcomes for 2023 are in line with outcomes from the early 2010s when the College's admissions metrics were much higher. He said that law school GPA is the primary predictor of success on the bar exam and that there is a significant decline in performance between students in the third quartile and those in the fourth quartile by law school GPA. He added that the fourth quartile pass rate overall is just 35 percent and will be the focus of continued attention. Dean Ratner said that admissions metrics correlate highly with bar outcomes. He explained that in 2011 and 2012 when UC Law had much higher overall bar pass rates, seven percent of the incoming class in 2011 had LSAT scores of 150 to 154. In 2016 when bar passage was lowest about 20 percent of that class had LSAT scores of 150 to 154. In 2020 almost 30 percent of the class had LSAT scores in that band. He noted that the public data for peer school performance is not yet available. He also pointed out that students who used BARBRI had a lower bar pass rate than those who used THEMIS. Students who use Kaplan have the lowest pass rates. He said that besides law school GPA, the most important predictor of bar success is

what students do during the formal period of post-graduation commercial bar course study which starts around May 15 and runs through the bar exam, including the percentage of the commercial bar course they complete and when they start doing practice questions and practice essays. Mr. Moscato was able to predict the College's exact bar pass rate based on his review of that data alone and his understanding of the metrics of the students going in. Ms. Greer has been doing one-on-one coaching and developing study plans for students. He thanked both of them.

Mr. Moscato said that the course completion figure is a formula that accounted for how much of the coursework that graduate's bar review company assigned that they were actually doing, and added time spent doing supplemental work with AdaptiBar or UWorld and turning in BEST essays. There is a huge correlation between bar success and coursework completion; if graduates complete 90 percent or more of the coursework they have an 88 percent pass rate. Even for those who are more at risk, if they complete the coursework they are going to pass at high rates. Those graduates who were using AdaptiBar and UWorld from the outset or who started either before graduation or immediately after graduation and used it consistently throughout bar preparation had an 82 percent pass rate.

Director Zecher asked about the two-year average for the bar pass rate, and Dean Ratner responded that it is above 90 percent. Director Power asked for clarification and Dean Ratner responded that that reflects bar passage by UC Law SF grads within two years of graduation. Mr. Moscato noted that repeater pass rates this time were much higher than the ABA average pass rate, with the College's grads at a 50 percent repeat pass rate compared to about 37 percent for the ABA average. Chair Agnolucci suggested communicating directly to the students about how strongly bar course completion correlates with passage rates. She asked whether the people who do their whole bar coursework are also the people who are at the top of the class and have more capacity to pass the bar. Dean Ratner responded that this is the first year Mr. Moscato predicted bar passage with perfect accuracy, and that they do not know whether the positive effect of bar course completion is from the direct benefits of studying and taking tests or from the characteristics that these students possess. Director Power thanked the team doing this analysis and for their dedication. She echoed Chair Agnolucci's suggestion to be candid and transparent with graduates preparing to take the bar exam. She asked about efforts to track and motivate underperforming students. Dean Ratner said that it has been difficult to get students who have accommodations to timely apply for

those accommodations on the bar exam. The College is going to hire a part time position whose sole function is to support students in timely applying for accommodations on the bar exam. Ms. Greer noted that they do offer a number of support programs for students to help address some of the concerns raised. Carbon Health provides a bar support program throughout the summer where graduates can come together and discuss some of their fears and challenges and strategies for dealing with the anxiety that goes with studying and preparing for the bar exam. They also found that when graduates are paired with faculty mentors with whom they have a prior positive relationship, it helps to address some of those emotional concerns. They have sessions with 3L students in the fall as well as the first week of the spring semester. Director Houston expressed that more resources should be allocated to support these efforts. Dean Ratner agreed, noting that in 2016 the College had an academic support department with one employee who was part-time. Now it has an entire cohort of academic skill specialist faculty. He said that the College has one of the most robust infrastructures for bar success of any law school.

5.2.2. Employment

Dean Ratner rested on the written report.

5.2.3. Accreditation - ABA Site Visit

Dean Ratner rested on the written report.

5.2.4. Supporting Students in a Time of Crisis

Dean Ratner rested on the written report.

6. Action Item: Finance Committee Consent Calendar

Mr. Seward presented the consent calendar.

Motion:

Director Robertson called for a motion to approve the consent calendar.

Motion made and seconded. The motion carried.

6.1. Action Item: State Contracts in Excess of \$100,000

6.1.1. Action Item: Hazardous Materials – Inspection Service – Van Brunt
(Ratification)

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

6.2.1. Action Item: Construction Services – Spro Coffee – Build Group
(Ratification)

6.2.2. Action Item: Construction Services – Classroom Buildout – Build Group

- 6.2.3. Action Item: Space Planning Services – Page Southerland Page, Inc.
- 6.2.4. Action Item: Grant Award – The Grove Foundation
- 6.2.5. Action Item: Grant Award – Silicon Valley Community Foundation
- 6.2.6. Action Item: Professional Services – Giant Rabbit LLC
- 6.3. Action Item: Nonstate Budget Change
 - 6.3.1. Action Item: Academe at 198 – Designation of Rent Subsidy Allocation
 - 6.3.2. Action Item: Transfer to Academe at 198 – Tenant Improvement Funding
- 6.4. Action Item: Investment Management – UC Investments – Endowment Overflow
- 6.5. Action Item: Modification – Fiscal Policy and Procedure Manual
- 7. Report of the Chief Financial Officer
 - 7.1. Action Item: Funds Transfer – Wells Fargo General Account to STIP

Mr. Seward said that this item seeks authority to transfer cash from commercial accounts to the short term investment pool. He said that this is a periodic practice to maximize investment income.

Motion:
Director Robertson called for a motion to approve the transfer of funds.
Motion made and seconded. The motion carried.
 - 7.2. Action Item: Loan Fund Change - Conversion of California Bar Preparation Fund Terms

Mr. Seward said this item is a loan fund change representing conversion of the terms of the CA Bar Preparation Fund from a loan fund to a support fund. He said that the faculty is fundraising for a bar preparation loan fund, and the funds were not used because of the complexity of managing a loan fund and the accumulation and complexity will only increase with the new federal changes. The College is seeking authority to change the terms from a loan to a grant support fund. Dean Ratner added that this is pursuant to a faculty vote approving this change.

Motion:
Vice Chair Zecher called for a motion to approve the loan fund change.
Motion made and seconded. The motion carried.
 - 7.3. Long Range Campus Plan & Academic Village Overview

Ms. Bailard provided updates on the long-range campus plan and Academic Village. She said she gave this presentation at the San Francisco Planning Commission yesterday, including an overview of progress on the long-range campus plan. She showed images of the completed 198 building that will be

incorporated into marketing in preparation for the year two licensing cycle. The housing team will also be doing virtual tours and recalibrating the rents. She said that following completion of the Academe at 198, everyone who was in the Tower is moving out. Demolition and abatement at the Tower start on Monday. On approximately March 1, the Construction Manager/General Contractor for the project, Plant Construction, will take over the building though the College will continue to provide Urban Alchemy services. She said that the Tower renovation will add up to 275 beds, with floors 5-14 composed of suite-style living as opposed to the 198 building which is primarily single occupancy. She also provided an update on the CEQA process for the Local 2 project, explaining that the College has completed the notice of preparation, held the scoping meeting, and plans to have a draft EIR in circulation in the spring. She said that during that meeting Anand Singh, president of Local 2 walked through the need for the union hall and the benefit of joining the Academic Village. Completion of the Local 2 project, which remains subject to financing, would bring the bed count at the Academic Village up to approximately 1400. Chair Agnolucci asked about the timeline for the Tower project, and Ms. Bailard responded that the earliest opening date would be fall of 2027.

8. Report Items: Finance Committee Reports

There was no discussion on report items 8.1-8.5.

- 8.1. Investment Report as of August 31, 2023
- 8.2. State Budget Report for 2023-24 as of September 30, 2023
- 8.3. Auxiliary Enterprise Budget Report as of September 30, 2023
- 8.4. Update of Five-Year Budget Model
- 8.5. Listing of Checks and Wire Transfers over \$100,000
- 8.6. Personnel Policy Revisions

There was an action item presented by Mr. DiPaolo. He said that the draft Code of Ethics was included in the materials in redline and clean versions. He worked with Andrew Scott on some edits, which include changing the name and broadening the group to whom the code applies. Previously that was limited to members of the Board and employees and now it would apply to visiting scholars. There are a number of people inside the UC Law SF community who need to behave ethically and without conflict of interest. Another change was to eliminate an odd clarification in the old code that had certain obligations applicable to everybody and a set of obligations that just applied to the Board and senior administrative personnel. He showed that edit, which provides that if an individual has a financial interest in a contract they cannot be involved in decisions to enter into that contract. This should apply to employees as well as the Board, which tracks more closely with the Fair Political Practices

Commission regulations that apply to the College. Chair Agnolucci asked how these changes regarding financial interests will be explained to people, and Mr. DiPaolo responded that there will be a training when people are onboarding at the College. Mr. Scott said that HR has everyone sign this when they are onboarded, and those employees who signed the old version will be given the new version and asked to acknowledge receipt. There will be additional training. Director Lewenhaupt suggested limiting the training to those individuals whose interests will have potential impacts on contracts. Director Giacomini said that it makes sense to have a different policy for the Board than staff given that the conflict of interest applies to decisions made on behalf of the College. The Board makes those kinds of decisions, and operational decisions made on a daily basis likely do not rise to the same level. He questioned broadening the policy in this way. Director Power agreed and suggested that the proposed changes be vetted by adjunct professors who are law firm partners to get feedback and see if it raises any red flags. She asked what other schools are doing and what problem the College is trying to solve with these changes. Director Giacomini also asked for some additional background. Mr. DiPaolo said that he would vet the policy with more people. In terms of context and applicability, this is largely about contracting, where financial interests come into play. He provided an example where a person who was not senior administrative personnel and was in charge of part of a center contracted with that person's sibling for work on behalf of the College. Director Lewenhaupt noted that the rules for federal employees are similar and that this is an important matter, but it should be focused on people who are going to be making contract decisions. Mr. DiPaolo said that he will review this further and bring it back to the Executive Committee for a vote at a later date.

9. 2023 Annual Legislative Report – Mike Belote, California Advocates

Mr. Belote thanked everyone for changing the order of the agenda. He said that a lot has changed in Sacramento including a new wave of elected officials. There are similar changes with new people coming into office in the state legislature. Last year there were more than 30 new members out of 120 in Sacramento and in November of 2024, they expect approximately a third of the legislature to turn over. There are also members retiring from large city and county councils and boards of supervisors. Since last year there is a new Speaker of the Assembly, Rob Reavis. He may be more hands-on and policy driven than his predecessor. There will soon be a new president pro tem of the Senate. Toni Atkins from San Diego is termed out next year. She is reportedly a candidate for lieutenant governor or maybe even governor. There is also a new pro tem designate, Senator Mike Dwyer. He said that Speaker Reavis released a change in his leadership team and new committee chairs and that some of those are critically important. Most especially, he appointed a new chair of the Budget Committee, Jesse Gabriel from the San Fernando Valley. There is also a new subcommittee chair on education finance. The prior was Kevin McCarty from Sacramento, whose father was a Hastings grad, and the new chair is David Alvarez from Chula Vista. Mr. Belote expects

to have a good working relationship with him. In the Senate, the current chair, Nancy Skinner, is still budget chair and John Laird is still the subcommittee chair in the areas most pertinent to the College. He said that it has been an honor and privilege to work with UC Law SF.

He added that there are some financial storm clouds on the horizon with the tax filing deadline postponed to October and then November, which throws the budget process in Sacramento into some disarray. He said that approximately 25 percent of annual state income tax receipts come at the filing deadline, so moving that deadline by a couple of months past the start of the fiscal year creates a lot of uncertainty. He said that the College's message is well-received, particularly on the Academic Village and Urban Alchemy. Director Power thanked Mr. Belote for the overview and asked if there is any general characterization he would give to these new entrants. Mr. Belote responded that they tend to be people from local government and they tend to be diverse. Dean Kwon thanked Mr. Belote for his leadership, advice and commitment. Director Giacomini asked about strategic planning given budget projections, and Mr. Seward responded that the College will avoid making long-term commitments that provide ongoing cost obligations and will do so strategically. He said that one of the key areas of need for the College is compensation, and in order to tackle that we need to develop revenue flows independent of state appropriations. Director Houston asked whether the College has had the opportunity to invite Chairs Gabriel and Alvarez to the law school, and Mr. Belote responded that their positions had not been announced yet. Mr. Seward said that an invitation will be extended shortly.

10. Report of the Chancellor and Dean

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

Dean Faigman said that finals are happening now. He commended the campus community on demonstrated civility, compassion and kindness for one another given the turmoil around the world and turmoil on many campuses. He also thanked the Advancement team for their fantastic work on the comprehensive campaign. He added that Dean Kwon impresses him with her level of commitment to the College and her incredible competence and professionalism. He said the College continues to look into hiring an ombudsperson for a part-time role. He thanked Dean Kwon for working with other colleges on this, noting that he had the opportunity to meet with Dean Mahoney from SFSU, and it appears that we can share time with an SFSU faculty member who could serve as a part-time ombudsperson for UC Law SF. In terms of the bar passage results, he is not satisfied with being at the ABA average and there is room for improvement. He said that he wants to create a center of the law of emerging and advanced technology to focus on policy and is looking for seed funding to get it off the ground. The contemplated center would focus on regulation related to AI and hybrid technologies driven by AI and would study the legal framework that applies to these quickly changing

technologies. He provided an update on the Best School Initiative, which is California legislation to create the California Institute on Neuroscience and Education directed to children, dyslexia and early learning challenges related to literacy and neurodiversity. It is an initiative with UC Law, the UCSF Dyslexia Center and the UCLA CSU Collaborative led by the School of Education at UCLA. He also reported on the California Scholars Program, which has opened an opportunity to have great partnerships and friendships with HBCUs. Mr. Lopez and Dean Faigman went on a trip for a week visiting HBCUs with the goal of creating a greater pipeline for HBCU graduates to come to California. One of their initiatives is reaching out to companies like Google to start the Corporate Pipeline Fellowship program, a one plus three program. It would give students one year living on the UC Law SF campus paid for by the program along with a paid internship in a technology corporate finance placement. There would be at least two people in these placements each year. After the one-year paid internship, the participants would start law school at UC Law SF.

10.2. Report Item: Administrative efforts on name change

Dean Faigman said that the College is working with Underground to make sure that the UC Law SF name is physically on every building in every spot on the campus. Joe Cotchett has generously offered to pay for new signage in the lobby of the 333 Golden Gate building, and Ms. Bailard is working with a contractor to make that happen.

10.3. Report Item: Diversity, Equity and Incusion (DEI) efforts

10.3.1. Report of Chief Diversity Officer Mario Ernesto Lopez

Mr. Lopez presented on three key initiatives. He gave a recap of the second annual campus community forum that was held on November 2. This is one of multiple avenues for leadership to hear from the campus community at large about DEI matters and to inform the campus community about all the things that the College is doing to advance DEI. Mr. Lopez said that he and Dean Faigman met with HBCU presidents and had the opportunity on November 15 and 16 to meet with many California pre-law students at Hampton University one-on-one. UC Law SF was the only law school invited to their career day. The next day they went to the National Black Law Conference in Boston at the Harvard School of Education. It is the preeminent black pre-law conference in the country and attracts 500 prospective black law students. He had the opportunity to be a featured panelist on the SCOTUS decision on affirmative action. He got the list of all the attendees, which Dean Sakamoto and her department use to market UC Law SF programs. The College will have two California Scholars from Hampton University next year.

Mr. Lopez provided an update on the Diversity, Equity & Inclusion Working Group (DEIWG) composed of students, faculty, and staff. This year DEIWG voted on five action items that they want to work on. These include community portraits in the spring. DEIWG will also circulate the LSSSE survey, which is administered at every single law school and helps schools to see what is working and identify areas for improvement at the institution. The College will also have its first ever diversity week the week of March 18. There will be a series of events throughout the entire week celebrating the diversity of the UC Law SF community. Director Deb asked about the forum, especially whether there was an uptick in the amount of attendees from last year and how engaged they are in the issues. Mr. Lopez responded that they have a comment box that's open the entire year where people can submit anonymously, but they also want to get out in front of people and provide them an opportunity to speak live. Director Houston asked Dean Faigman whether there is a cap on how many scholars the College have each year in the California Scholars program. Dean Faigman said that there is no cap and they aim for anywhere from three to five, but that depends on the supply of students who meet the criteria. There has been \$9 million total dedicated to the program to date.

11. Director Comments and Board Announcements

There were no comments.

The Board entered closed session at 11:56 a.m. pursuant to Education Code Section 92032(b)(3), (5) &(7). The Chair reconvened open session at 12:25 p.m., and Mr. DiPaolo reported that in closed session the Board approved emeritus status for Jon Sylvester.

12. Adjournment

The Chair adjourned the open session at 12:27 p.m.

Respectfully submitted,

Laura M. Wilson-Youngblood, Deputy General Counsel

Communications

Board Quarterly Report

March 15, 2024

UC SAN FRANCISCO Law

New Chief Communications Officer John Kepley



Experience



Communications Officer, Co-Chair Communications

Bill & Melinda Gates Foundation

Apr 2022 - Present · 1 yr 11 mos



Director of Executive Communications and Strategic Initiatives

University of Michigan

Sep 2014 - Apr 2022 · 7 yrs 8 mos



Assistant to the President and Director of Presidential Communications

California State University, Sacramento

Aug 2008 - Sep 2014 · 6 yrs 2 mos



Speechwriter

Office of Governor Arnold Schwarzenegger

Apr 2006 - Aug 2008 · 2 yrs 5 mos



Editor/Page Designer

The Sacramento Bee

2000 - 2006 · 6 yrs

Key Communications Efforts

Name Change External Marketing

- Partnering with SF-based firm Underground on external marketing to reach:
 - Major law firms in California and key metro areas in the US.
 - Public agencies (PDs, DAs, US Attorneys, etc.).
 - Broader academic realm, including law schools and main campuses/pre-law advisors, especially outside of California.
 - Corporate GC offices in California and across the US.
- Could include social media, email, print ad, direct mail, and/or media buys
 - LinkedIn outreach, social media ads, Dean's holiday email, magazine ad, etc.



New City Banners are Up

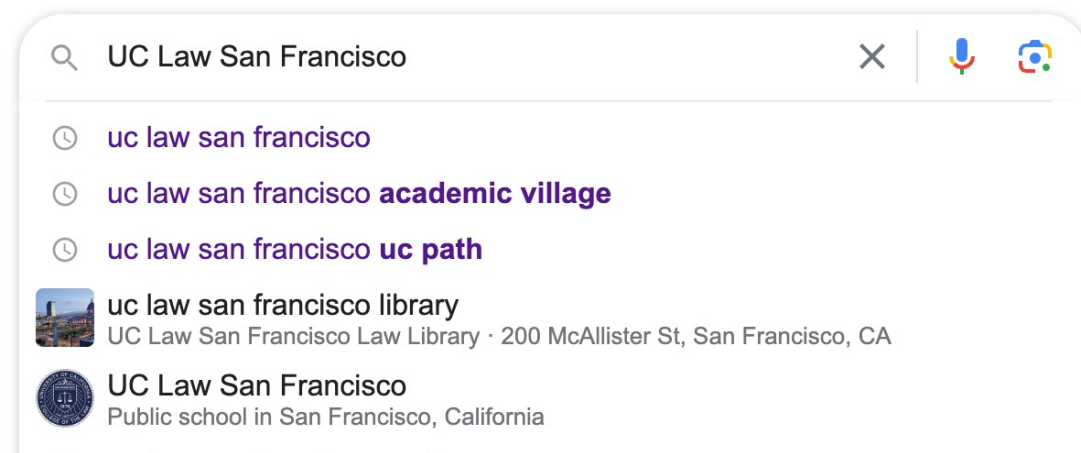


New Freeway Sign Up



Website Search Optimization

- Director of Digital Media and Web Lydia Xia is partnering with Associate Dean for Library & Technology Camilla Tubbs on this.
- Computer Courage has been hired to help us optimize our standing when people search for us on search engines.



Social Media Posts & News Stories

- Social Media posts led by Director of Digital Media and Web Lydia Xia
- News stories led by Senior Writer & Editor Nick Iovino



at UC Law SF

California AG Rob Bonta Urges Law Students to Turn Passion into Action

February 20, 2024



at UC Law SF

Meet 2L Student Jenna Smith of the Black Law Students Association

February 16, 2024



at UC Law SF

Valentine's Day 2024: UC Law SF Celebrates Couples Who Found Love at Law School

February 14, 2024



at UC Law SF

Experts Take on Race, Equality and Citizenship in All-Day Symposium

February 12, 2024



at UC Law SF

Meet 2L Student Sophie Gannon of the Entertainment Law Society

February 07, 2024

Questions?

Endowment Overview

UC Law SF & Foundation

February 2024



Gift Types: Endowed versus Current Use

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

Gift Types: Endowed versus Current Use

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

The Importance of Endowment Building

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

The Importance of Endowment Building

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

Comparative Law School Endowments

ABA Data - 2019

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

* Includes Blum Foundation apportionment.

Comparative Law School Endowments

2023 Survey Data

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

Convincing Donors to support Endowment Building

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

Convincing Donors to support Endowment Building

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

UC Law SF – Relationship with UC Investments

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

GEP STIP UNIT VALUE RETURN SUMMARY REPORT

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

UC Investments – Investment Pools

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

Endowed Funds – UC Law & Foundation

As of December 31, 2023

College

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

Foundation

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

Endowment by Function – UC Law & Foundation

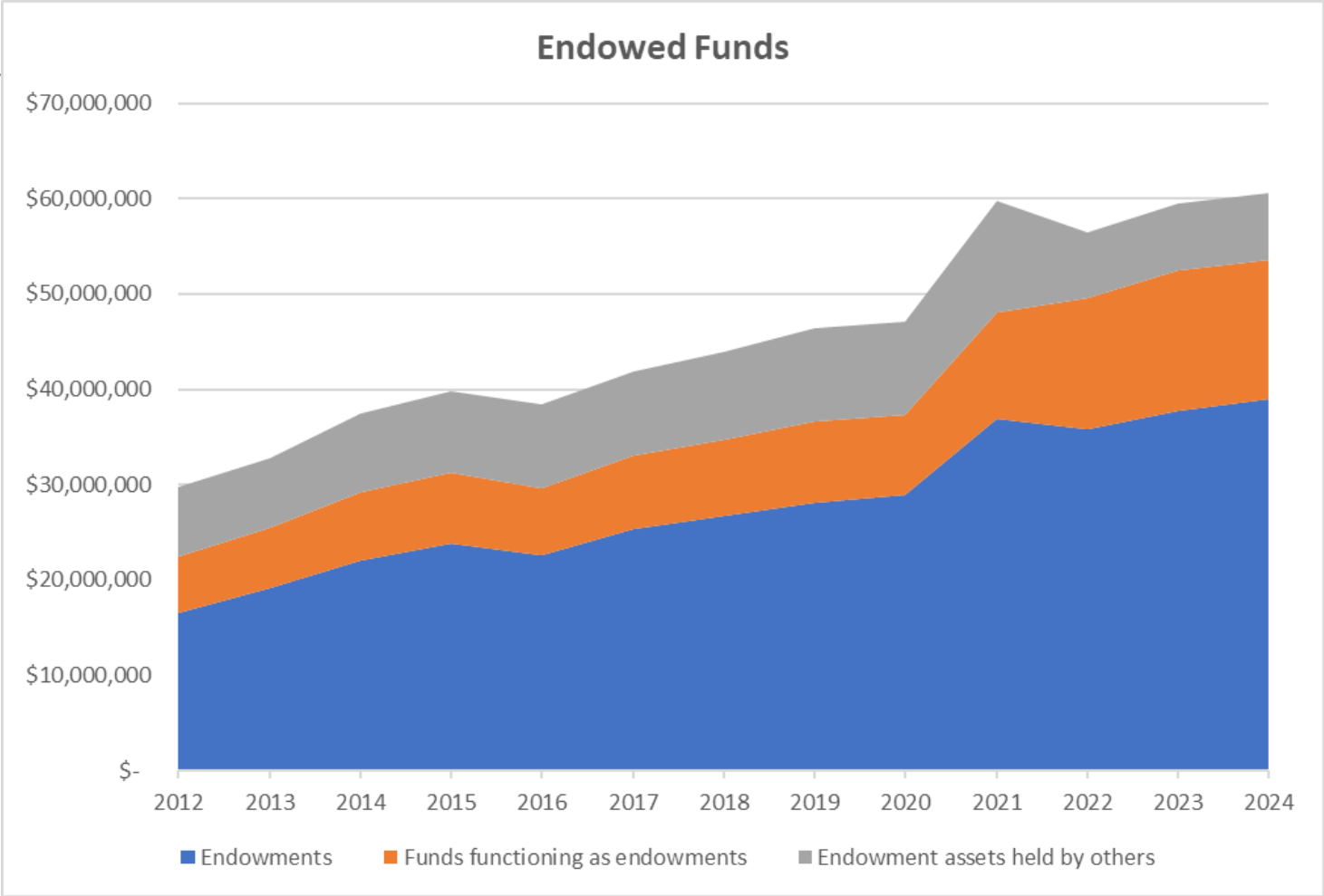
- Endowments support a broad range of activities:
 - Financial Aid Awards - Scholarships and Grants (53.5%)
 - Instruction and Research - Professorships and Faculty Support (32.1%)
 - Institutional Support – General Operations and Decanal Support (14.4%)

- UC Hastings endowment is dedicated to the following functions:

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

Total Endowment - UC Hastings & Foundation

2012-2024



Questions?

The Campaign for UC Law San Francisco



UC Law San Francisco

COMPREHENSIVE CAMPAIGN SUMMARY

- \$100 million goal
- Focus on building the school's endowment
- Currently in the quiet phase of fundraising (began July 1, 2021)
- \$46.7 million raised through February 15, 2024
- Target of minimum \$60 million raised by March 1, 2025
- Concentrate stakeholders on key priorities associated with expected outcomes
- Supporting the school and the neighborhood/SF (expanding prospective donor base)

CAMPAIGN PRIORITIES

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

FUNDING THEME CATEGORIES FOR DONOR CULTIVATION

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

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

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

*Target of Planned Gifts: 25%-35%

CAMPAIGN GIFT TABLE

Gift Commitments Required for \$100M Campaign

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

KEY OBSERVATIONS

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

HOW YOU CAN HELP

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

Thank you!

Questions?



UC LAW ACADEMIC VILLAGE: NAMING OPPORTUNITIES

Cotchett Law Center - 333 Golden Gate Avenue

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

To be Named - 198 McAllister Street

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

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

Report 5.2.1.1 – Supplemental Strategic Plan (Voting Item)

By Chancellor & Dean David Faigman and Provost & Academic Dean Morris Ratner

UC Law SF's strategic planning efforts are described and summarized on this [Sharknet page](#). The Board of Directors adopted the current Operational Strategic Plan in March 2020; that Plan has been a touchstone for reporting and implementation of initiatives since that time.

In the Fall 2023 term, the Board of Directors and faculty engaged in supplemental strategic planning efforts focused on the impact of generative artificial intelligence (GAI) on legal education and the practice of law. The attached Supplemental Strategic Plan re GAI is the product of those conversations. At its February 22, 2024 meeting, the Educational Policy Committee voted to recommend that the full Board of Directors adopt the Supplemental Strategic Plan. At the February 23, 2024 faculty meeting, the UC Law SF faculty voted to recommend that the Chancellor & Dean and Board of Directors adopt the Plan.

The College has already started implementing elements of the Plan, including by creating special courses on GAI law and policy, training community members how to effectively use GAI legal research tools, and establishing an Institute in the Center for Innovation focused on AI and other emerging technologies.

Adoption of the Supplemental Strategic Plan is a voting item for the March 15, 2024 Board of Directors meeting.

UC Law SF

Supplemental Strategic Plan Generative Artificial Intelligence 2024



In the fall of 2023, at the direction of the Chancellor & Dean and Board, UC Law SF engaged in strategic planning focused on generative artificial intelligence (GAI), which is poised to quickly transform society, law practice, and the legal services market.¹ As a center of higher learning co-located in the San Francisco Bay Area with most of the major GAI companies, UC Law SF is committed to remaining at the forefront of this technological revolution and to innovating in our academic program to ensure our students and graduates are well-postured to understand GAI-based tools in practice.

This supplemental strategic plan grows out of an October 6, 2023 faculty retreat and an October 12, 2023 retreat involving the Board of Directors, the Chancellor & Dean’s “Key Issues” advisory group, and faculty. It builds on the work of UC Law SF research and programmatic centers such as the [Center for Innovation](#) and [LexLab](#), and the scholarship and teaching efforts of forward thinking faculty and program directors who have been addressing the intersections of technology, law, policy, and law practice. Given the current pace of technological change, this supplemental plan is intended to be a living document that we adapt over time as new opportunities and challenges emerge. The will be used for reporting purposes to track the law school’s progress on listed goals and initiatives.

The numbered items are goals. Lettered items are initiatives. Lower case Roman-numbered items are tasks.

1. ***Goal: Ensure that UC Law SF is a leader in GAI and other emerging technologies.*** This is an overarching and cross-cutting goal, elements of which are disaggregated in more specific goals and initiatives listed below.
 - a. Partner with technology companies, law firms, and thought leaders to maintain understanding of changes in law practice and to understand how our research and programming can best meet the needs of practitioners and our students.
 - i. Create an advisory board to help the law school ensure that our educational program reflects evolving needs and opportunities.²

¹ Since the Chancellor & Dean and Board of Directors adopted the [Operational Strategic Plan](#) in March 2020, UC Law SF has engaged in supplemental strategic planning on specific topics.

² The Provost & Academic Dean constituted an informal working group that includes, in addition to the Provost, Assistant Dean Amy Kimmel, Associate Dean for Experiential Learning Gail Silverstein, Director of Externships Nira Geevargis, Faculty Assistant Director of Center for Innovation and Director of Startup Legal Garage Paul Belonick,

- ii. Stay abreast of changes in practice by seeking information from existing contacts with legal services professionals (e.g., through LexLab, Startup Legal Garage, Corporate Counsel Externship Program, etc.).
 - b. Link the law school's programming and efforts regarding GAI and other emerging technologies to the public service (e.g., access to justice) element of our mission.³
- 2. ***Goal: Develop and enhance the expertise on our faculty and staff re GAI and other emerging technologies.***
 - a. Faculty hiring: Make strategic hires mindful of the need to build the faculty's expertise.
 - b. Center work and development:
 - i. Create a center or program within an existing center focused on GAI and other emerging technologies.⁴
 - ii. Leverage the work of existing centers including LexLab and the Center for Innovation, and of existing roles such as the Director of Applied Innovation.
 - c. Educate existing faculty.
 - i. Continue to spread knowledge and new developments in pedagogy within the faculty through vehicles such as [this Faculty Resources page](#) and in-person colloquia/instruction.
- 3. ***Goal: Review program learning outcomes to ensure we are graduating students who have the knowledge and skills they need in practice.***
 - a. Ensure that UC Law SF's program learning outcomes capture the degree of understanding of technology necessary for new lawyers to be successful. Consider adding or emphasizing additional knowledge and skills that will become more important as GAI and other new technologies change what lawyers do.

Director of LexLab Drew Amerson, Director of Applied Innovation Alice Armitage, and others, to put together an advisory group.

³ For example, LexLab offers a JusticeTech accelerator that supports companies using technology to increase access to justice and teaches a connected course for students to learn how to advance the same end. See <https://www.uclawsf.edu/2023/06/08/lexlab-accelerator-program-to-support-justice-tech-startups/>.

⁴ In collaboration with Chancellor & Dean David Faigman, Faculty Director of Center for Innovation Robin Feldman and colleagues just launched the AI Law & Innovation Institute. See <https://www.uclawsf.edu/wp-content/uploads/2024/01/C4i-AI-LII-announcement-booklet.pdf>.

4. Goal: Update the curriculum to ensure students become skillful users of AI and other emerging technologies.

- a. Expand the number of courses addressing policy issues such as the regulation of GAI, ethics of GAI in law practice (including unauthorized practice of law issues), impact of use of GAI on “advice of counsel” defenses, etc.⁵
- b. Ensure legal research and writing courses incorporate GAI.
 - i. Incorporate GAI skills into first-year writing classes, including by updating the LRW research module the Library creates and oversees.
 - ii. Add GAI to Advanced Legal Research.
 - iii. Consider whether writing requirement papers should demonstrate competence utilizing GAI research tools.
- c. Create specialized GAI classes, e.g., one unit modules on prompt generation.⁶
- d. Develop a certificate for students and practitioners.

5. Goal: Adopt teaching methods to account for GAI.

- a. Ensure we teach relevant skills:
 - i. Prompt generation.
 - ii. Editing.
 - iii. Critical evaluation / understanding AI’s limits and flaws.
 - iv. Professional identity/ethics.
- b. Teach via pervasive methods:
 - i. Incorporate GAI into assignments.
 - ii. Require students to show their work, including steps taken to incorporate GAI tools.
 - iii. Pervasively incorporate AI into instruction, where faculty members deem it to be helpful and appropriate.⁷

⁵ The Director of Applied Innovation and LexLab manage an existing [Technology and Innovation in the Practice of Law Concentration](#). It includes multiple courses that focus on GAI.

⁶ Deputy Library Director Hilary Hardcastle and Research & Instruction Librarian Holly Herndon have already released an asynchronous multi-part training program to students. Lexis+AI is also offering trainings to faculty and students on its platform.

⁷ Individual faculty members such as Professors of Law Jodi Short and Emily Murphy have already started experimenting with AI tools in their courses.

6. Goal: Update the way we assess students to ensure we are testing their individual skills, not just their use of GAI.

- a. In doctrinal classes, ensure faculty are equipped to make informed decisions about whether to permit take-home exams, etc., and maintain rules requiring in-person and closed-book exams in bar-tested courses.
- b. In seminars:
 - i. Faculty should consider requiring outlines and drafts.
 - ii. Faculty could consider types of writing that are less impacted by GAI.
- c. In general:
 - i. Teach at the cutting edge where AI is less reliable in terms of providing answers.
 - ii. Consider using oral assessments, even in seminars, bearing in mind that assessment in such settings may be more subjective.
 - iii. Consider administering pop quizzes in class.
 - iv. Grading: Consider raising the baseline of what is expected of students (higher standards, raising the floor on what constitutes a passing grade).
 - v. Plagiarism: Consider whether we should change the default (currently that unauthorized use of GAI is cheating), so that we assume students are using it unless its use is expressly cabined in a class.

7. Goal: Develop co-curricular programs that hone relevant skills.

- a. Reflect on instruction opportunities outside the classroom. The following ideas were floated in the strategic planning process:
 - i. Orientation: Introduce GAI early.
 - ii. Spring AI Bootcamp: Ensure students going into summer jobs have GAI research skills.
 - iii. Use of AI with Cover Letters: Consider advising students to use GAI on cover letters.

8. Goal: Harness AI as a tool in our academic program ops.

- a. Consider uses of AI in academic skills development (as a feedback mechanism for students, etc.).

- b. Consider using AI for advising, etc.
- c. Explore the possibility of using chatbots to answer prospective or current students' basic and repeat questions.

9. **Goal: *Communicate our efforts.***

- a. Ensure that our Communications Office is aware of our multi-pronged efforts.
- b. Create an outward facing page that focuses specifically on GAI-related efforts across the College, including courses, programs, research, and partnerships.
- c. Communicate our students' knowledge and skills development to employers. Differentiate UC Law SF as a leader in legal education through our use of cutting-edge instruction that produces graduates with the knowledge and skills necessary to succeed in a legal profession being transformed by GAI and other technologies.

Report 5.2.1.2 – Academic Year 2024-2025 Sabbaticals (Voting Item)

By Chancellor & Dean David Faigman and Provost & Academic Dean Morris Ratner

Chancellor & Dean David Faigman and Provost & Academic Dean Morris Ratner seek approval of two one-semester sabbaticals for research faculty in academic year 2024-2025. Section I describes the standard for approving sabbaticals. Section II describes the proposals that Chancellor & Dean Faigman and Provost & Academic Dean Morris Ratner have approved subject to Board approval. At its February 22, 2024 meeting, the Educational Policy Committee voted to recommend that the full Board approve these sabbaticals.

I. Background and Standard

The College's Standing Orders, at 102.4¹ and Document III of the Faculty Rules and Procedures ("Sabbatical Leave Policy")² provide the framework for the review of requests for sabbaticals, including:

- Eligibility ("A Ladder full-time faculty member of the College may be considered for a sabbatical leave of absence after six (6) years of service");
- Approval procedure and constraints ("Subject to the availability of funding, sabbatical leaves may be granted by the Board of Directors, upon recommendation of the Dean"; and "[a] sabbatical leave of absence will be granted only after the faculty member's proposed activity has been approved by the Academic Dean");
- Purpose ("Sabbatical leaves are granted to enable recipients to be engaged in intensive programs of research and/or study, thus to become more effective teachers and scholars and to enhance their services to the college"; the phrase "intensive programs of research and/or study" mirrors UCOP APM 740-O);³
- Other requirements ("The recipient, following the leave, will submit a written report on his or her sabbatical accomplishments and continue service at the College for a period at least equal to the period of the leave").

Pursuant to the Faculty Rules, the formula for determining priority is based on years of service minus a period of years for sabbatical and other leaves.⁴ The formula is: (1)

¹ See <https://www.uclawsf.edu/wp-content/uploads/2023/06/College-of-the-Law-San-Francisco-Standing-Orders-Final-2023.pdf> (last amended June 9, 2023).

² See https://uclawsf--simpplr.vf.force.com/apex/simpplr_FileDetail?fileId=0694100000C7zv2AAB.

³ See <https://ucop.edu/academic-personnel-programs/files/apm/apm-740.pdf>.

⁴ Per Standing Order 102.4, the College "shall follow the University of California Academic Personnel Policies in order to calculate the service credit earned toward a sabbatical leave."

current year minus appointment year;⁵ (2) minus the number of years associated with prior leaves (six years for every sabbatical, 4 years for every research leave, and .5 years for each semester not spent teaching at the College for reasons such as visiting at another institution)).

For lateral hires who have accrued service credit at their home institutions that would otherwise be lost in the absence of a contractual sabbatical, the law school also from time to time agrees to a contractual sabbatical that does not deplete service credit. (UC Law SF also agrees to contractual sabbaticals for research faculty as part of decanal appointments, as well.)

II. Proposed Sabbaticals

Upon the recommendation of the Provost & Academic Dean, Chancellor & Dean David Faigman has approved two sabbaticals for academic year 2024-2025. These sabbaticals will advance the law school's research mission.

A. Professor of Law Ming Chen

Professor and Harry & Lillian Hastings Research Chair Ming Hsu Chen⁶ was hired as a lateral tenured faculty member starting July 1, 2022, after having spent a year as a full-time in-residence visitor in the 2021-2022 academic year. Her offer letter includes a contractual sabbatical after two full years of service, which she will have completed by the end of this academic year. Professor Chen is a productive scholar. Among many other accomplishments established the Center for Race, Immigration, Citizenship & Equality at UC Law SF,⁷ and her center just co-hosted the UC Law Journal's 75th anniversary symposium.⁸

While on sabbatical, Professor Chen hopes to complete a book manuscript at UC Berkeley's Center for the Study of Law and Society. Professor Chen notes: "The book proposal has been presented to a series editor and acquisitions editor from UC Press in 2023-24. I hope that it will be under contract by the end of the year, which will make the fall 2024 an excellent time to finish empirical research and writing the remaining book chapters. I will also have interview data to analyze for an empirical project on high-skilled workers and will benefit from D-Labs at UC Berkeley."

B. Professor of Law Thalia González

⁵ If no leaves were taken in the previous year, then the faculty member's net years credit should increase by one year.

⁶ See <https://www.uclawsf.edu/people/ming-hsu-chen/>.

⁷ See Center for Race, Immigration, Citizenship & Equality 2022-2023 Annual Report, at <https://www.uclawsf.edu/academics/centers/the-center-on-race-immigration-citizenship-and-equality-rice/>.

⁸ See <https://www.uclawsf.edu/event/uc-law-journal-symposium/>.

Professor and Harry & Lillian Hastings Research Chair Thalia González⁹ was hired as a lateral tenured faculty member starting July 1, 2022. Her offer letter includes a contractual sabbatical after two full years of service, which she will have completed by the end of this academic year. Professor González is a productive scholar who serves as Faculty Co-Director of the Center for Racial and Economic Justice.¹⁰ She writes extensively in the fields of restorative justice, education law, race and the law, health justice, juvenile justice, and social justice lawyering.

While on sabbatical, Professor González plans to complete an edited volume for Teachers College Press on school-based restorative justice practices; analyze multi-jurisdictional data regarding the collection of fines and fees in K-12 schools; draft two articles (e.g., “interrogating school policing through the theoretical framework of racial capitalism”); and collaborate on comparative assessments of restorative justice legislation in the United States, Belgium, and Brazil.

⁹ See <https://www.uclawsf.edu/people/thalia-gonzalez/>.

¹⁰ See <https://www.uclawsf.edu/academics/centers/center-racial-economic-justice/>.

Report 5.2.1.3 – Tenure for Lateral Hire (Voting Item)

By Chancellor & Dean David Faigman and Provost & Academic Dean Morris Ratner

Chancellor & Dean David Faigman and Provost & Academic Dean Morris Ratner seek the Board's approval of the UC Law SF faculty's vote to hire Professor of Law [Kate Weisburd](#) with tenure in accordance with the procedures for approving faculty hires and awarding tenure under the Faculty Rules and Procedures. The faculty vote occurred at the special hiring meeting on December 6, 2023, which prompted Dean Faigman to extend an offer with tenure to Professor Weisberg. Professor Weisburd accepted the offer with tenure on February 22, 2024. Pursuant to the Board of Directors' [Standing Orders](#) Section 101(a), Board approval is required.

I. Background and Standard

Standing Order 101(a) states that “[a]ll appointments to the tenured faculty...shall be submitted by the Chancellor & Dean to the Board for approval.” The Board delegated establishment of tenure standards to the faculty in Standing Order 102.2(b), which gives the faculty the right to “determine its own membership” and 102.3(c), which grants to the faculty the right and duty to develop educational and research policies. The faculty's tenure standards are codified in the Faculty Rules and Procedures, which state at pp. 22-25 in relevant part:

The College seeks the best qualified persons available for appointment to the faculty, generally seeking either nationally-recognized figures in legal academic or professional life or persons showing true promise of such achievement. It is recognized that wide configurations of strengths are to be found to fit this general qualification.... The College recognizes three (3) general criteria for appointment, promotion, and the award of tenure: (1) teaching; (2) scholarship; and (3) service. In applying these criteria, teaching and scholarship are of equal weight and shall be given the highest priority.

The faculty considered Professor Weisburd's record on all three dimensions and concluded that she meets the criteria for tenure.

II. Professor Kate Weisburd's Background and Record of Accomplishment

Kate Weisburd is Associate Professor of Law at George Washington University School of Law. Her research focuses on criminal investigation, adjudication, and civil rights. She has published in the California Law Review, Virginia Law Review, Boston Law Review, Iowa Law Review, North Carolina Law Review, and UCLA Law Review. Additionally, Professor Weisburd's insights have been featured in the Marshall Project and other mainstream media outlets. Her article "Punitive Surveillance" in the Virginia Law Review garnered recognition with the Privacy Papers for Policymakers Award (Future of Privacy Forum 2023) and the Reidenberg-Kerr Award for Outstanding Scholarship by a Junior Scholar (Privacy Law Scholars Conference 2021). At GW Law, she was honored with the

2023 Distinguished Faculty Service Award, a prestigious recognition bestowed by the graduating class.

Before her tenure at GW Law, Professor Weisburd established and led the Youth Defender Clinic at the East Bay Community Law Center, a major legal service provider in the county and part of UC Berkeley School of Law's clinical program. There, she taught and supervised law students in juvenile court and school discipline cases. She also served as a lecturer at Berkeley Law, focusing on the school-to-prison pipeline. Her earlier roles at Berkeley Law included a fellowship and supervisory position in the Death Penalty Clinic, where she managed cases at various legal stages, from trials to post-conviction proceedings. She has strong teaching evaluations.

A graduate of Columbia Law School, where she was awarded the Bernstein Litowitz Berger & Grossmann Fellowship for Public Interest, Professor Weisburd has a BA from Brown University, earned as a Truman Scholar. Before law school, she worked as an investigator on death penalty cases at the Southern Center for Human Rights. She also clerked for Judge Lawrence K. Karlton in the U.S. District Court for the Eastern District of California.

Report 5.2.2.1 – Bar Success

By Provost & Academic Dean Morris Ratner, Director of Accreditation and Assessment
Andrea Bing, and Director of Bar Passage Support Margaret Greer

I. Comprehensive Bar Success Study Findings

AccessLex Institute funded a study of the determinants of bar success at UC Law SF. Provost & Academic Dean Morris Ratner served as the project lead. The project team also included statistician Stephen Goggin, Ph.D., and UC Law SF Bar Success Analyst and Strategist Stefano Moscato, Director of Bar Passage Support Margaret Greer, and Assistant Dean for the Legal Education Opportunity Program Elizabeth McGriff. We shared excerpts of the final grant report after it was submitted to AccessLex in December 2022. Since that time, the project team has layered Class of 2023 information into the data set and prepared an article that the American Association for Law School's Journal of Legal Education is slated to publish in 2024. Though in regular reporting we have previously shared many of the article's key findings, we are sharing the full draft article because it is the most comprehensive and updated internal study we have conducted to date. The full text of the draft article is attached as Exhibit A.

II. ABA 2023 Data Reporting

Director of Accreditation and Assessment Andrea Bing compiles bar pass data to report to the American Bar Association. She shared calendar year 2023 first-time bar passage data as well as ultimate bar pass rate data for the Class of 2021. Her report is attached as Exhibit B.

First-time bar pass information compiled for the ABA differs from the data we collect and analyze for assessment purposes because, among other things, it includes all first-time takers, regardless of class year; and it includes all jurisdictions (not just California) and a weighted average pass rate. The law school's first-time bar pass rate in calendar year 2021 was 81.72%. That declined in 2022 to 70.92%, with a slight uptick in 2023 to 72.14%.

The ultimate pass rate data demonstrate that nearly all UC Law SF graduates pass a bar exam within two years of graduation. The latest data are for Class of 2021, and put in context with recent class years, show our graduates at a three-year high-water mark.

Bar Success

Exhibit A

Determinants of Success on the Bar Exam: One Law School's Experience 2010-2023

Morris A. Ratner,¹ Stephen N. Goggin,² Stefano Moscato,³ Margaret Greer,⁴ & Elizabeth McGriff⁵

At the start of the study period 2010-2013, the average first-time pass rate on the California Bar Exam (CBX) of graduates of UC Law SF gently followed national and state trends downward. But suddenly, in the space of three years (2014-2016), the law school's bar pass rates dropped 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% - the lowest in the law school's history - into an opportunity to reflect deeply on how it taught academic and bar success skills and, in the process, to help achieve an increase in its graduates' first-time bar pass rate of more than 30 percentage points in three years. The strategies adopted by UC Law SF appear to have helped broad and diverse cohorts of students, though risk factors remain, as evidenced by the decline in bar outcomes for the Class of 2022 and continuing challenges in the Class of 2023, which was most adversely impacted by the pandemic.⁶ Primary study

¹ Provost & Academic Dean and Professor of Law, University of California College of the Law, San Francisco. J.D., Harvard Law School; B.A., Stanford University. Throughout this Article, University of California College of the Law, San Francisco is referred to as "UC Law SF" or "the College." (It was formerly "UC Hastings.") The authors thank and acknowledge the following persons for their contributions to this Article: retired UC Law SF Registrar Gina Barnett and UC Law SF Information Technology Database Administrator Rajeev Sharma. The authors also thank the AccessLex Institute for funding this study. See <https://www.accesslex.org>. The authors presented preliminary findings at the AccessLex Legal Research Symposium in Nashville, Tennessee in 2022 and received invaluable feedback.

² Assistant Professor, San Diego State University, Department of Political Science. Ph.D., University of California, Berkeley; M.A., University of California, Berkeley; B.A., Rice University. Dr. Goggin is responsible for the statistical analyses contained in this Article.

³ Bar Success Analyst & Strategist and Professor of Practice, UC Law SF. J.D., University of California, Los Angeles; B.A., University of California, Berkeley.

⁴ Director of Bar Passage Support and Professor of Practice, UC Law SF. J.D., UC Law SF; B.A., University of California, Berkeley.

⁵ Assistant Dean of the Legal Education Opportunity Program and Diversity, Equity & Inclusion Advisor, UC Law SF. J.D., UC Law SF; B.A., Mills College.

⁶ Class of 2023 graduates experienced their formative 1L year online, and their exams were administered in take-home, open-book format instead of the usual in-person, closed book format for 1L doctrinal exams. The most vulnerable of them took classes in crowded homes where other family members were in the room with them while they were taking classes or studying. Some of the most

findings include the following: data-driven academic program design choices can positively impact bar outcomes; bar success interventions that target the whole student population are a necessary supplement to interventions targeted primarily at students deemed to be particularly at risk based on admissions metrics or law school grade point averages; and post-graduation bar study support is particularly positively impactful given the strong connection between the percentage of commercial bar preparation courses that a graduate completes and first-time pass rates.

As discussed more fully below, UC Law SF assembled an anonymized data set including a broad array of information covering 14 years of graduates, with a total population of 4,726 students, including demographic information, entering metrics, curricular choices, and law school academic performance.⁷ 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.⁸ This Article uses that data set to assess the efficacy of interventions adopted after 2016.

We are able to measure the likely impact of only a subset of the other bar success interventions described below. UC Law SF adopted many reforms pervasively and all at once and tracked and analyzed data regarding only a portion of them. For example, we did not track in a way that can easily be quantified and subjected to rigorous statistical analysis the degree to which faculty changed the way they teach and test in bar subject classes or the degree to which individual students received formative assessments with detailed 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 or for recent fluctuations in bar pass rates, though student preparedness to complete a sufficient percentage of post-graduation bar study and the skills creating that preparedness are key drivers of success and of fluctuations in the law school's pass rates year-over-year. The law school's sustained improvement in bar outcomes appears to be related to an array of initiatives adopted in roughly the same time period (2017-2023), though developments we are not measuring are likely impacting the pass rate as well.

Of the pre-graduation interventions we were able to study, the most impactful included the following: UC Law SF improved bar outcomes after it shifted from an

at-risk students in the Class of 2023 also had significant caregiving responsibilities during the period of time they were in lockdown.

⁷ 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.

⁸ See ADAPTIBAR, <https://www.AdaptiBar.com> (last visited February 3, 2024).

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. Examples include: (1) requiring and encouraging students to take upper division bar subject classes, with each additional bar subject class taken associated with a 3% increase in the probability of bar passage in the post-2016 period; and (2) offering for-credit bar skills classes in the 3L year focused on improving MBE performance (Critical Studies 2) and on overall bar test taking (Critical Studies 3). Impacts vary by law school GPA band.

Of the post-graduation interventions we studied, the most impactful for all students included the following: (1) tracking individual student performance in post-graduation commercial bar preparation courses and advising and coaching individual students to complete a greater percentage of the classes; (2) offering supplemental law school-administered bar essay feedback during bar study; and (3) advising students to effectively practice MBE test taking. Combined with LGPA, percentage of completion of post-graduation commercial bar course and regular post-graduation practice on bar essay and MBE questions are powerful predictors of first-time bar passage.

Some of the interventions we expected to increase students' probability of bar passage did not appear to be efficacious in our analyses. For example, individual specialist skills faculty anecdotally report success working with individual students in 1-1 sessions, but the data suggest that students who frequently used that resource 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, though that could reflect selection bias.

This Article proceeds as follows: Section I provides background on first-time bar pass rates and changing metrics of UC Law SF students during the study period. Section II describes initiatives UC Law SF implemented between 2016 and 2023. Section III reports the results of quantitative and qualitative analyses to identify which of those interventions worked. Section IV explores bar success intervention measurement challenges and potentially relevant factors contributing to UC Law SF's graduates' performance that we have not had the chance to study. Section V addresses academic program design and concludes with reflections regarding the next frontiers for UC Law SF and other similarly situated law schools, including COVID disruption, other continuing risk factors, and contemplated changes to the CBX.

I. The Bigger Picture

A. First-Time Bar Pass Rates During the Study Period

States regulate entry into the legal profession by administering exams applicants must pass in order to be admitted to the bar and to practice law.⁹ The exam as currently structured in most states tests a limited range of skills, mostly related to reading comprehension, issue spotting, and written legal analysis or application of those rules.¹⁰ The focus in this Article is on California because 91.5% of UC Law SF JD program graduates during the study period sat for the CBX.

Currently, the CBX has two sections administered over two days.¹¹ On the first day, the written portion of the exam includes five essays and one performance test, potentially covering the following topics: business associations, civil procedure, community property, constitutional law, contracts, criminal law and procedure, evidence, professional responsibility/legal ethics, real property, remedies, torts, trusts, and wills and succession.¹² The second day of testing is the Multistate Bar Examination (MBE) which is developed and scored by the National Conference of Bar Examiners (NCBE). The MBE includes 200 multiple choice questions covering civil procedure, constitutional law, contracts, criminal law and procedure, evidence, real property, and torts.¹³

Figure 1,¹⁴ below, provides descriptive information about first-time average pass rates for all CBX test takers in a given year, for test takers who graduated from California ABA-accredited law schools, and for UC Law SF graduates who graduated in that calendar year and took the bar exam for the first time that year.

⁹ See Andrea A. Curcio, *A Better Bar: How and Why the Existing Bar Exam Should Change*, 81 NEB. L. REV. 363, 372 (2002); Michael J. Thomas, *The American Lawyer's Next Hurdle: The State-Based Bar Examination Systems*, 24 J. LEGAL. PROF. 235, 240 (2000) (characterizing as “accepted wisdom” the role of the bar exam in protecting the public from professional errors by “ensuring that only competent lawyers are admitted to practice”). This Article takes the CBX’s testing format as a given and does not critically analyze it, though there is a robust literature doing so. See, e.g., Kristin Booth Glen, *Thinking Out of the Bar Exam Box: A Proposal to “MacGrate” Entry to the Profession*, 23 PACE L. REV. 343 (2003).

¹⁰ As discussed below, that is likely to change to a degree with the National Conference of Bar Examiners’ shift to the NextGen Bar Exam starting July 2026. See <https://nextgenbarexam.ncbex.org>.

¹¹ See *Scope of the California Bar Examination*, STATE BAR OF CAL., (<https://www.calbar.ca.gov/Admissions/Examinations/California-Bar-Examination/California-Bar-Examination-Scope>, last visited July 21, 2023).

¹² *Id.*

¹³ *Id.*

¹⁴ Unless otherwise indicated, Figures in this Article present UC Law SF data by graduating class year. Except where indicated, graduating class year is defined as students who graduated in May, August, or December of the same calendar year. The reported pass rate for UC Law SF is the first-time pass rate for graduates of the particular calendar year because the College assesses the connection between the three-year program of study and bar outcomes by class year.

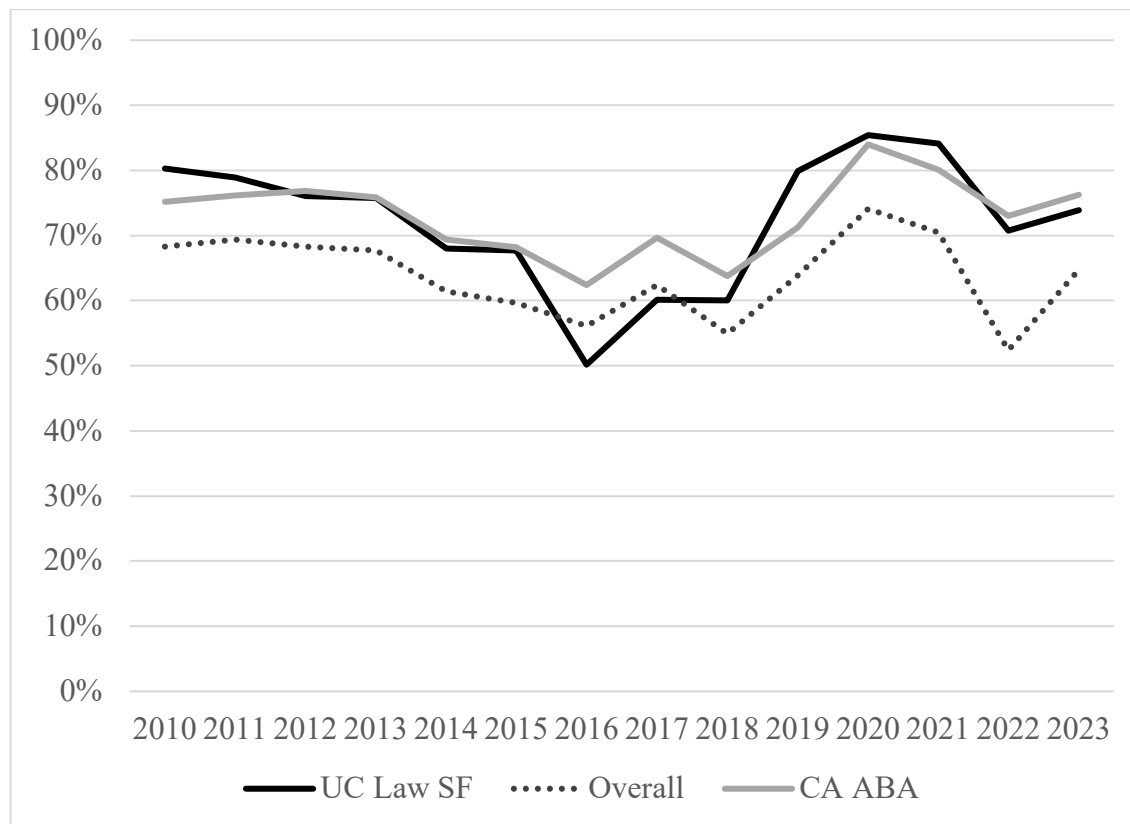


Figure 1: CBX Outcomes Variability by Year

Like most other jurisdictions during the study period,¹⁵ California experienced a decline in first-time bar passage rates¹⁶ in the early years of the study period. First time bar pass rates nationally also fell significantly during the study period. The NCBS, reporting summary data for the period 2012-2023, shows a significant decline in MBE mean scaled scores¹⁷ during the relevant period, from 144.3 on the July 2013

¹⁵ See Raul Ruiz, *Leveraging Noncognitive Skills to Foster Bar Exam Success: An Analysis of the Efficacy of the Bar Passage Program at FIU Law*, 99 NEB. L. REV. 141, 145 (2020) (“Figure 1 shows the mean MBE scaled scores for the February and July bar exams since 2008, as well as the yearly total. While there were minor fluctuations in the mean, a steady trend downward began after 2013. The decline in mean MBE scales scores has corresponded to a decline in passage rates.”).

¹⁶ A study commissioned by the California Committee of Bar Examiners found an 18% drop in first-time pass rates 2008-2016, from 62% to 44%. The first-time pass rate on the CBX on the July 2016 administration - 54% for CA ABA law schools - was the lowest since at least 1990. See ROGER BOLUS, RSCH. SOLS. GRP., RECENT PERFORMANCE CHANGES ON THE CALIFORNIA BAR EXAMINATION (CBX): INSIGHTS FROM CBX ELECTRONIC DATABASES 1 (2017) (available at <https://www.calbar.ca.gov/Portals/0/documents/admissions/Examinations/Final-Bar-Exam-Report.pdf?ver=2018-11-15-110106-057>).

¹⁷ According to the NCBS, “[b]oth a raw score and a scaled score are computed for each examinee. A raw score is the number of questions answered correctly. Raw scores from different administrations of the MBE are not comparable, primarily due to differences in the difficulty of the questions from one

administration to 140.4 on the July 2021 administration,¹⁸ and 140.5 on the July 2023 administration.¹⁹

Historically, the UC Law SF first-time bar pass rate floated above or at the average first-time pass rate of graduates of ABA-accredited law schools in California. The average first-time pass rate for graduates of ABA-accredited law schools and the College's first-time pass rate dipped below 70% in 2014 and again in 2015. The JD class that entered in fall 2013, graduated in May 2016, and took the July 2016 CBX had a first-time pass rate that was significantly below the average first-time pass rate for graduates of other ABA accredited law schools in California. That precipitated a period of intense innovation. It took the College two additional years to help its graduates pull back up to their traditional position at or above the statewide average.²⁰

B. A Changing Student Population

1. Changing Metrics

During the period spanning the graduating classes of 2010 through 2023, UC Law SF's student populations' entering metrics changed significantly. Figures 2 and 3 display UC Law SF's median LSAT scores and undergraduate GPAs by graduating class year (so the graduating class of 2023 has entering class of 2020 data). California ABA-accredited law school average medians are calculated from available public reporting (e.g., ABA Standard 509 reports).²¹

administration to the next. The MBE, like virtually all high-stakes exams, is equated. Equating is a statistical process that adjusts for variations in the difficulty of the questions, producing scaled scores that represent the same level of performance across all MBE administrations." *The Multistate Bar Examination (MBE)*, THE BAR EXAMINER, <https://thebarexaminer.nCBXx.org/2021-statistics/the-multistate-bar-examination-mbe/#step6> (last visited July 21, 2023).

¹⁸ *Id.*

¹⁹ National Conference of Bar Examiners, *NCBE Announces National Mean for July 2023 MBE*, NCBE Website (August 31, 2023) (available at <https://www.ncbex.org/news-resources/national-mean-july-2023-mbe>, last visited January 19, 2024).

²⁰ The UC Law SF Classes of 2019-2021 experienced sustained increases in first-time bar pass rates, including historically high pass rates for graduates of the Legal Education Opportunity Program. The Class of 2022's pass rate fell, driven in part by declines in performance by LEOP graduates, with gains for Class of 2023 driven by the performance of that same cohort.

²¹ Ideally we could compare the changing median to the median of all graduates or bar-takers at other CA ABA-accredited schools. We would need to know the full distribution of LSAT and UGPA data for all these individual students to calculate an overall median, and we only have school-level medians of matriculating classes from these reports. To keep the comparison consistent, all eighteen currently ABA-accredited law schools are used through the entire time period.

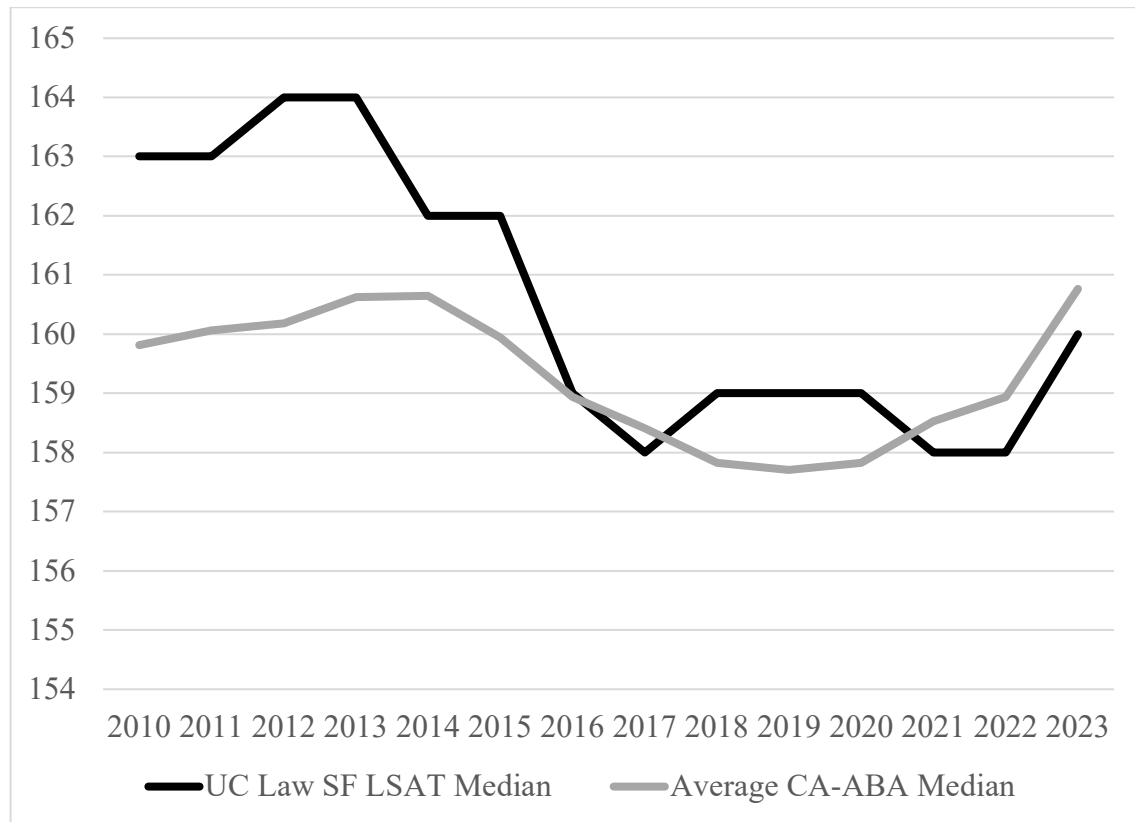


Figure 2: LSAT Medians of UC Law SF's Students

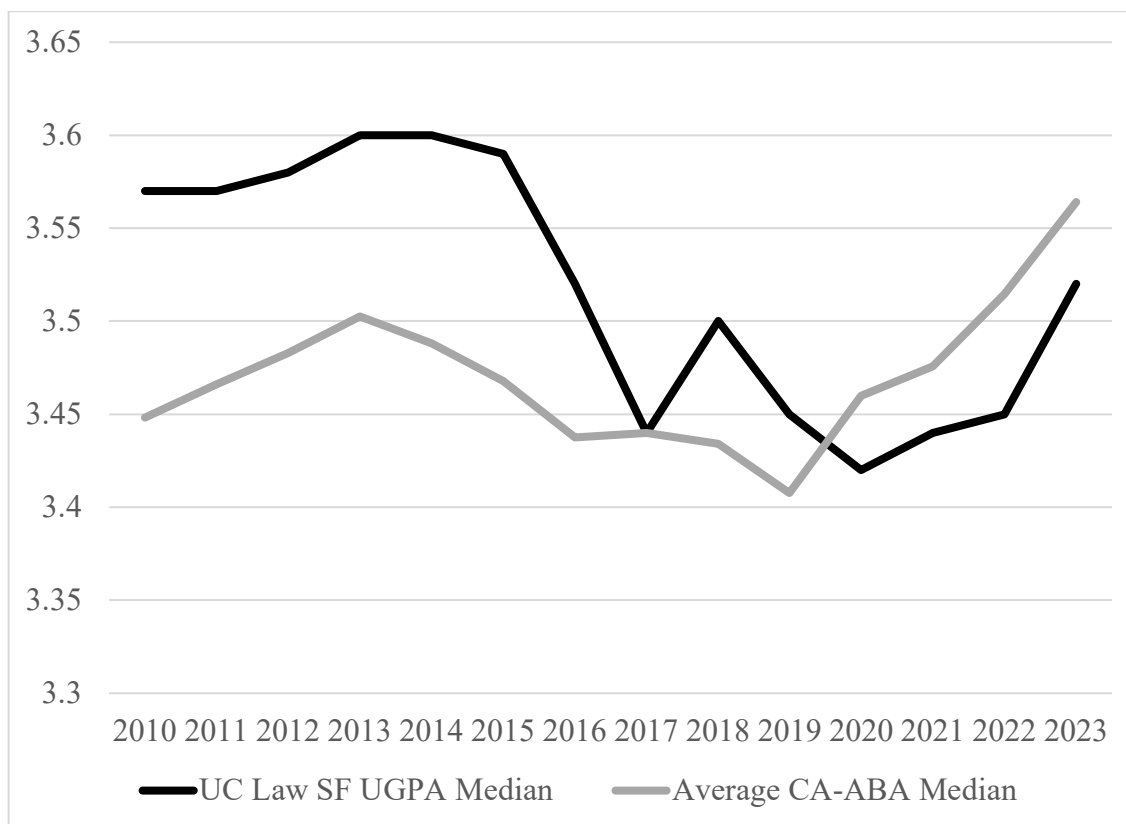


Figure 3: UGPA Medians of UC Law SF's Students

There are a few descriptive stories to tease out of these figures. The strength of students admitted after 2012 (Class of 2015), as measured by LSAT and undergraduate GPA (UGPA) declined or was flat over much of the study period. The decline in bar pass rates for the Classes of 2013-2016 corresponded with but, as discussed below, was not fully predicted by a decline in student entering metrics. The magnitude of the improved bar outcomes after 2016 exceeds the magnitude of the increase in median LSAT and undergraduate GPA and does not appear to track well with the variation in bar outcomes.

2. Legal Education Opportunity Program

The Legal Education Opportunity Program (LEOP) at UC Law SF is for students who have overcome significant adversity.²² The four areas of adversity are educational, economic, social and physical. There are three primary components of the program: admissions, academic support, and community building. LEOP has its own admissions doorway for applicants who demonstrate that they have overcome adversity such that

²² See *Legal Education Opportunity Program*, UC LAW SF, <https://uclawsf.edu/academics/academic-success/legal-education-opportunity-program/> (last visited July 21, 2023).

they can succeed in law school. The LEOP admissions process places relatively less emphasis on traditional metrics such as UGPA and LSAT/GRE score and instead looks more holistically at applicants' files. As a result, the entering metrics of LEOP students is generally below that of students admitted through the general admissions process.

The following figures show the gaps each graduating class year between entering metrics on admission for each UC Law SF class as a whole and for LEOP admits:

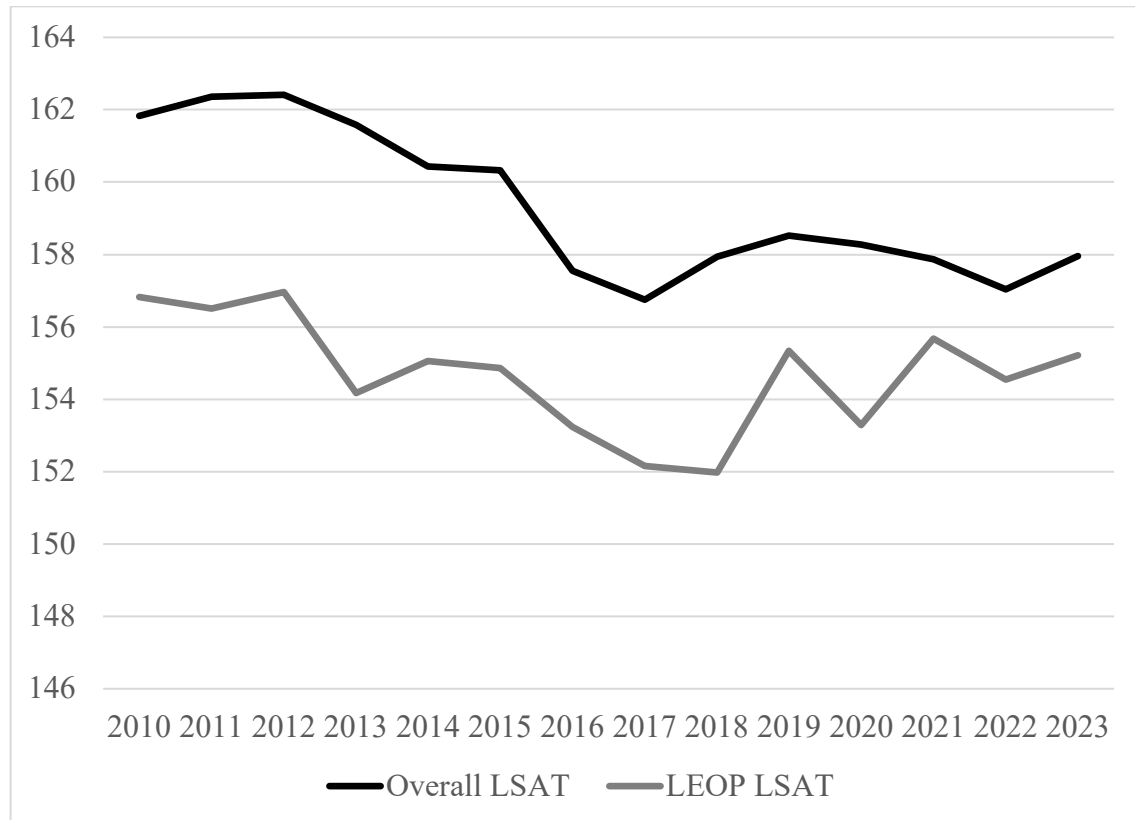


Figure 4: LSAT by Graduating Class

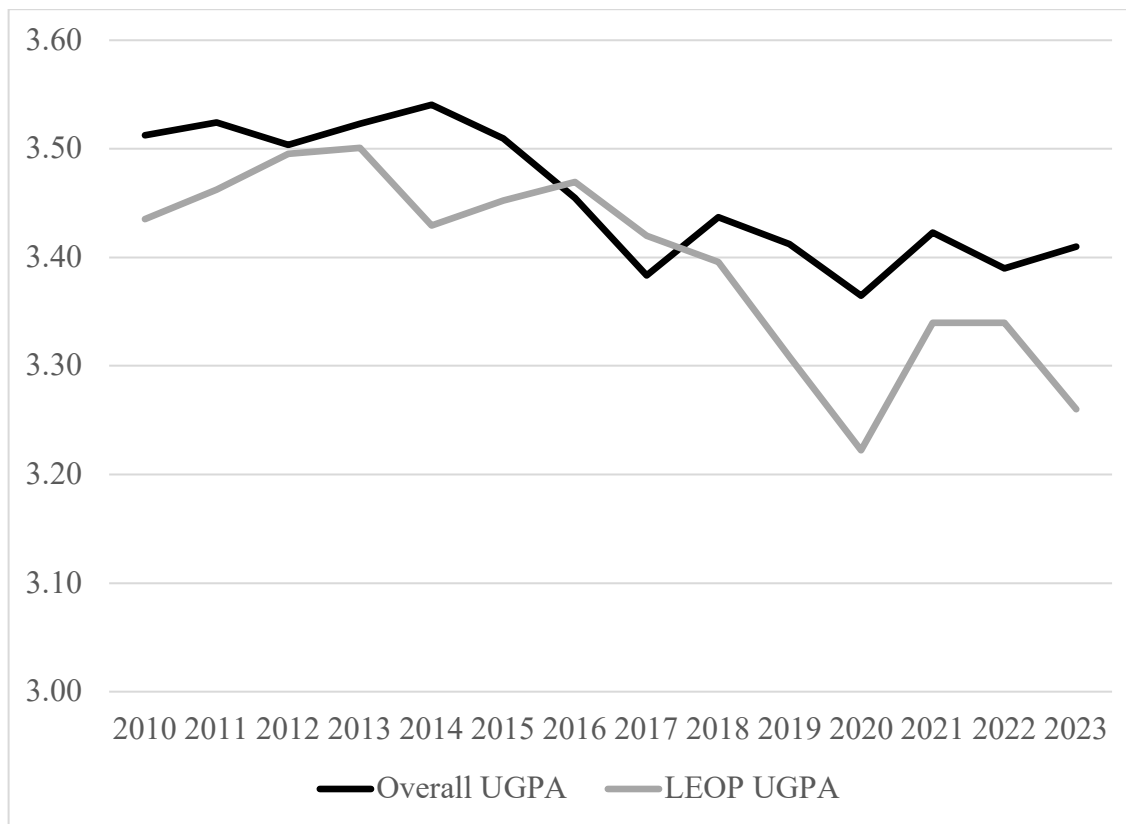


Figure 5: Undergraduate GPA by Graduating Class

Figures 4 and 5 complicate the background factual story. The gap between LEOP and overall entering mean LSAT and UGPA partially closed during the period 2019-2021 (entering cohorts Fall 2016-Fall 2018). The significant decline in LEOP pass rates in 2022 does not neatly correlate with entering metrics; nor do LEIP Class of 2023's improved outcomes.

3. Diversity

During the study period, the UC Law SF JD classes have also become more diverse. This is relevant insofar as some studies suggest that the bar exam as a gateway device disproportionately negatively impacts students of color.²³ Figure 6 shows an increasingly diverse set of graduating classes at UC Law SF over the study period.

²³ See, e.g., Scott Johns, *Putting the Bar Exam on Constitutional Notice: Cut Scores, Race & Ethnicity, and the Public Good*, 45 SEATTLE U. L. REV. 853, 863 (2022) (“based on publicly available data, cut score calculus impacts bar passage outcomes across racial and ethnic groups with those most impacted: historically disadvantaged groups”); Bolus, *Recent Performance Changes – Part 1*, *supra* n. 16, at 15 (“Historically, White students have made up the majority of students sitting for the CBX and have had the highest scores and bar passage rates.”).

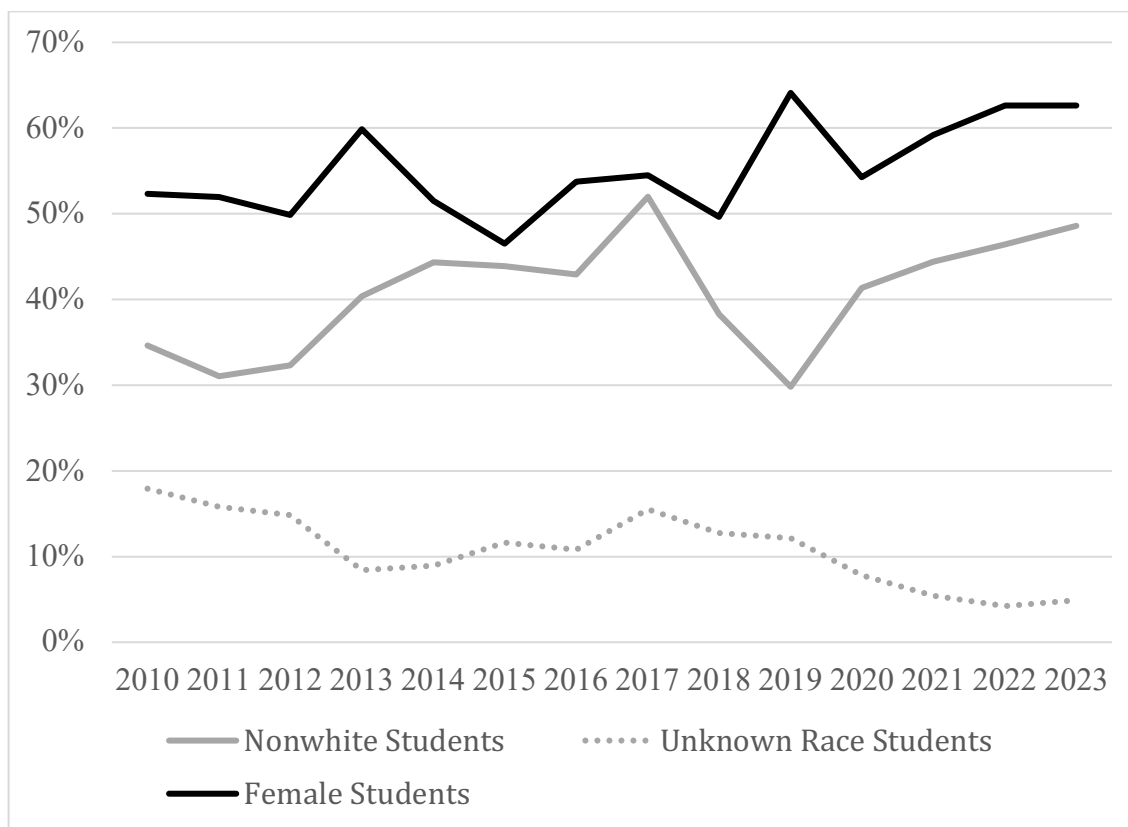


Figure 6: Graduating Class Diversity

UC Law SF accomplished a significant turnaround in bar outcomes during the same period that its entering classes were increasingly diverse.

4. A Growing Population of Students with Disabilities

During the study period, the College saw a significant increase in the number of students presenting with disabilities who sought and obtained exam accommodations, predominantly extra time to complete exams.

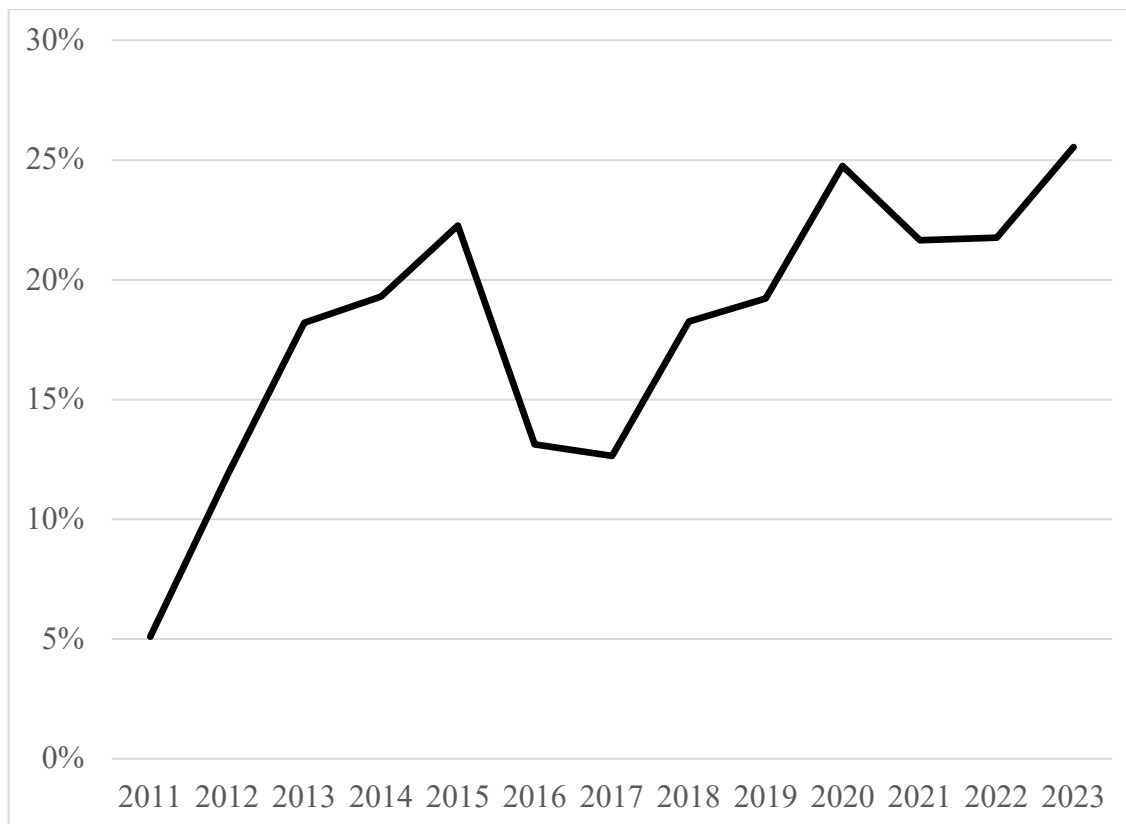


Figure 7: Percent of Graduates with Disability Resource Program (DRP) Accommodations

The relevance of these data is explored more fully below as part of a discussion regarding special bar success challenges faced by students who receive exam accommodations during law school facilitated by the College's Disability Resource Program (DRP). We have not yet identified the causes of those challenges, though we suspect a mismatch between accommodations obtained on law school exams and on the CBX is a significant part of the story. UC Law SF's data suggest that a significant percentage of graduates who received accommodations on law school exams did not obtain such accommodations when taking the CBX for the first time.

C. Changing Risk Profile

Prior to 2016, bar pass challenges appear to be concentrated primarily among the most at-risk students based on law school academic performance (LGPA). Nationally, studies showed a relationship between LGPA, LSAT scores, and first-time bar passage rates, with LGPA being the most reliable predictor of outcomes.²⁴ At UC

²⁴ See, e.g., *What to Make of the State of Legal Education in 2015*, L. SCH. TRANSPARENCY, <https://archive.lawschooltransparency.com/reform/projects/investigations/2015/analysis/#ascertainin>

Law SF, descriptive data suggested a correlation between lower LGPA bands and risk of failure on the first bar exam attempt, with a cliff at the fourth LGPA quartile and a further drop off in average first-time pass rates around the tenth LGPA decile. For example, in 2013, before the College’s pass rate dipped below 70%, the first-time pass rate by quartile appeared as set forth in Figure 8, below for both LEOP and non-LEOP students, with a clear cliff in first-time pass rates associated with the fourth-quartile LGPA cohort.

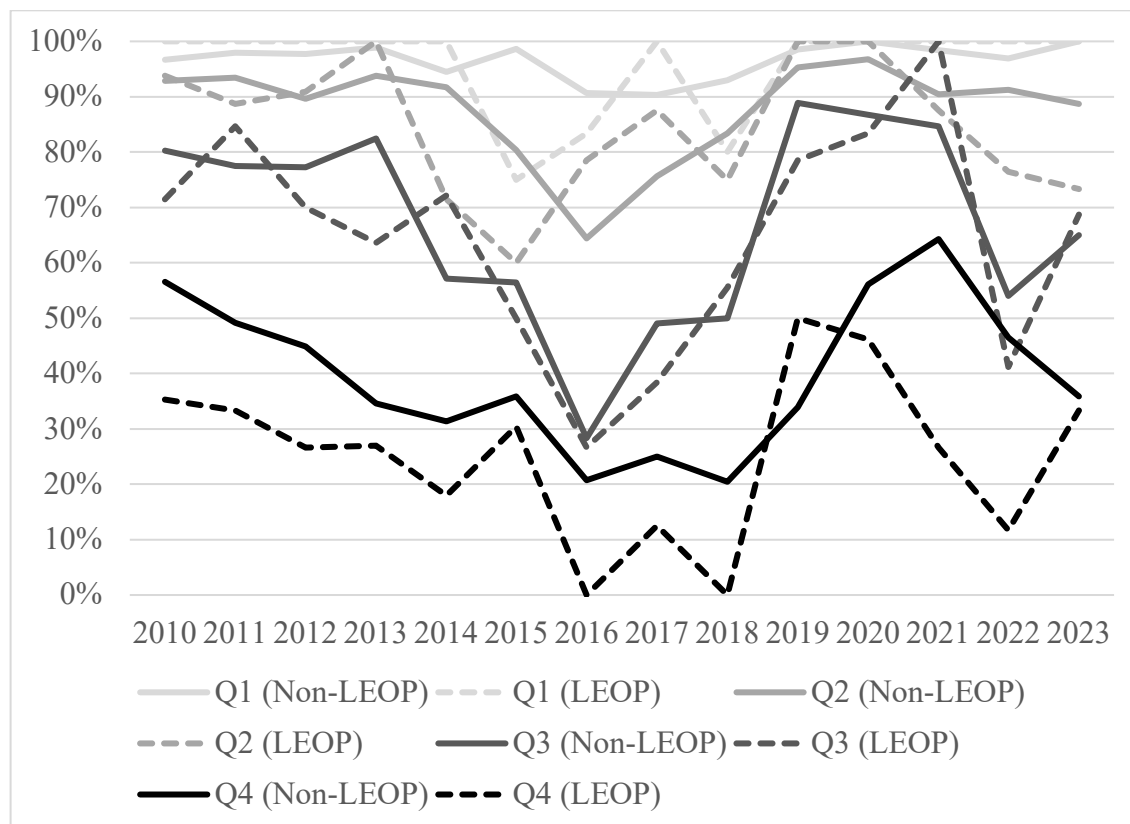


Figure 8: First Attempt CBX Passage by LGPA Quartile and LEOP Status

[g_risk](#) (last visited July 21, 2023) (showing that students with LSAT scores below 150 were at “high” to “extreme” risk of failing the bar exam); LINDA F. WIGHTMAN, L. SCH. ADMISSIONS COUNCIL, LSAC NATIONAL LONGITUDINAL BAR PASSAGE STUDY 55 (1998) (available at <https://archive.lawschooltransparency.com/reform/projects/investigations/2015/documents/NLBPS.pdf>) (“The data in this study, consistent with several earlier studies, identify LGPA as the single best predictor of bar examination outcome, with LSAT score providing significant additional information.”).

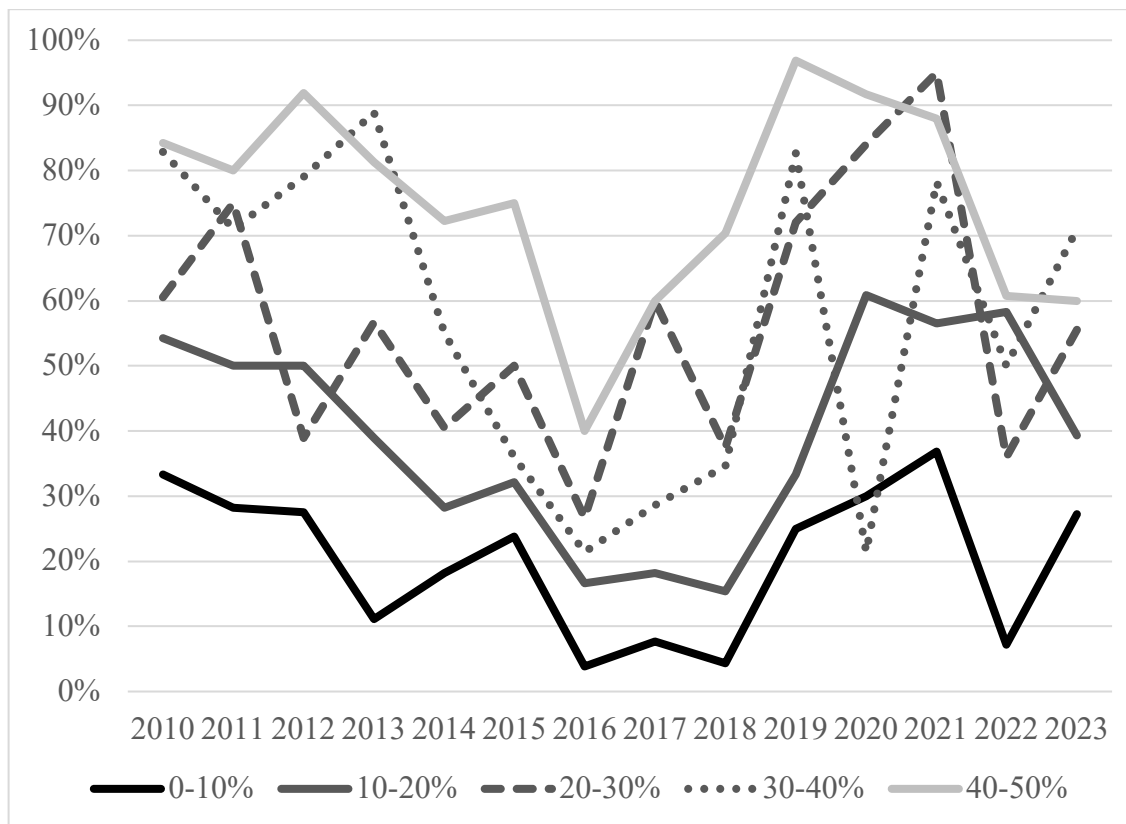


Figure 9: First Attempt CBX Passage by LGPA Deciles (Bottom 50% Only)

Over time at UC Law SF, the average first-time bar passage rate cliff – i.e., the point at which pass rates declined significantly – shifted to higher LGPA deciles, as demonstrated in Figure 8, above.²⁵ Relatedly, because bar passage is a binary outcome (pass or fail),²⁶ the location of the drop-off point in first-time bar pass rates masked growing vulnerabilities prior to 2013 in higher-LGPA cohorts. Figures 8 and 9, above, show how this looked during the study period. Figure 8 shows first-time bar pass rates by graduating class and by quartile for LEOP and non-LEOP graduates. Figure 9 shows first-time bar pass rates by graduating class and by each of the deciles in the bottom half of the class by LGPA.

The College’s study of this changing risk profile in 2016 led to a number of the innovations discussed in Section II.

II. Bar Success interventions at UC Law During the Study Period

By the fall of 2016, when UC Law SF’s first-time bar pass rate precipitously fell, the College was poised for a period of rapid innovation described below, grounded

²⁵ This pattern repeated, less severely, with regard to the Class of 2022.

²⁶ The California State Bar identifies graduates who pass the CBX but does not share their scores.

in a combination of school-specific and individual student-level data and an understanding of what we took at the time to be best practices at other schools that had similar entering student profiles but higher bar pass rates. As described in the preceding sections, it became clear by 2016 that the College's student population was more pervasively at-risk of failing the bar on the first try than was the case in earlier years, suggesting that the scope of interventions should be similarly broad. While some of the interventions described below were aimed at subsets of the student population (e.g., LEOP students), most of the interventions were aimed at the entire student population on the theory that a rising tide would lift all boats.²⁷ This section describes the key initiatives so that the analysis of their efficacy can be appreciated against the larger backdrop of reform. Section III examines the extent to which, controlling for various factors, reforms that we systematically measured and tracked by student identification number improved student LGPAs or graduates first-time pass rates.

A. Academic Program Revamp

Table 1, below, identifies the most significant academic and bar success initiatives adopted by UC Law SF in the period after 2016 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, and grey-colored interventions were targeted.

Bar success measured by first-time pass rates was by no means the only academic program design goal UC Law SF pursued during the period after 2016. For example, the College also added new JD concentrations reflecting pathways for students to develop subject matter expertise in a broader range of practice areas, including a concentration focused on technology and innovation in the practice of law; expanded experiential offerings including new transactional offerings; and developed new professional development opportunities even before ABA Standard

²⁷ 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 HAMLINE L. REV. 110, 116 (2016). Most of the interventions 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.

303 made them mandatory. But bar success was one central strategic initiative as reflected in the breadth of the reforms identified below.

Category	Initiative	Start Date	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; appoint associate dean to lead effort; hire more skills specialist faculty ²⁸	Academic year (“AY”) AY 2016-2017	Class of 2019
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
Academic skills infrastructure	Establish Legal Writing Resource Center for 1-1 writing support available to help all students with legal writing	AY 2018-2019	Class of 2021
Advising	Intensify consistent and regular messaging about CBX preparedness; share outcomes data with students	AY 2016-2017	Class of 2019

²⁸ Prior to 2016, UC Law SF had one full time academic support professional who was responsible for teaching a standalone course called 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, the Legal Education Opportunity Program had an academic skills component focused on providing co-curricular and targeted academic support during 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 (e.g., admissions, non-skills advising, and general student support). Also, general JD population 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 (ultimately about 11% of all full-time faculty at the law school), including a director of Bar Passage Support, a dedicated LEOP academic skills specialist, three general JD program academic skills specialist faculty who worked with 1L 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.

Category	Initiative	Start Date	Class Impacted
Co-curricular instruction (pre-graduation)	Expand academic skills component of orientation ²⁹ and enhance explicit skills development in the three-year JD program ³⁰	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 ³¹	AY2015-2016	Class of 2019
Co-curricular instruction (post-graduation)	Implement a post-graduation summer bar course advising, monitoring, supplemental instruction, and individual coaching (“BEST Program”)	AY 2016-2017	Class of 2017
Curriculum	Adopt 1L Sack Program (systematic 1L study and skills instruction embedded in 1L doctrinal classes, for credit) ³²	AY 2017-2018	Class of 2021
Curriculum	Expand Sack Program to upper division bar classes ³³	AY 2023-2024	Class of 2026
Curriculum	Expand 1L legal writing program – extra unit, second semester converted from credit/no-credit to letter graded	AY 2019-2020	Class of 2022

²⁹ Starting with the class entering in Fall 2016 (Class of 2019), the College expanded the academic skills components of orientation. Programming included an introduction to the case and Socratic methods, an overview of the U.S. legal system, sample classes, and formative assessment in the form of a required short writing exercise on a simple legal question.

³⁰ OASIS co-curricular programming was scaled up to include additional group programming as well as 1-1 office hours with academic skills specialist faculty.

³¹ The primary changes after 2016 pertain to quality rather than format. 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.

³² 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 UC Law SF graduate Jerome Sack, who used to tutor law students). 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.

³³ Reforms are ongoing. Starting Fall 2023, the College introduced a Sack version of a required upper division bar course aimed at 2Ls to reinforce core written legal analysis skills in the 2L year.

Category	Initiative	Start Date	Class Impacted
Curriculum	Offer “Law & Process” versions of upper division bar subject classes (skills instruction embedded in bar subject classes) – offered to all students, but with limited seating allocated in priority basis to lower LGPA students ³⁴	AY 2016-2017	Class of 2018
Curriculum	Expand “Critical Studies” for-credit bar skills suite of classes ³⁵	AY 2016-2017	Class of 2019
Curriculum	Require upper division bar subject classes in addition to Legal Ethics/ Professional Responsibility ³⁶	AY 2017-2018	Class of 2020

³⁴ In recognition of the fact that students should hone core academic and bar success skills iteratively across a three-year program of instruction, UC Law SF 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 low-LGPA students are required or strongly encouraged to take Law & Process classes, these classes 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.

³⁵ 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 (20-30 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 could benefit from instruction aimed at improving core written legal analysis skills. After 2016, UC Law SF invited bar companies to teach Critical Studies 2 and 3. Critical Studies 2 is an MBE-success skills class staffed by Themis Bar Review, which alternates between giving student commercial bar course-like overviews of areas of the law interspersed with special training regarding MBE strategies and practice. The Critical Studies 2 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, staffed by BarBri, is the version of Critical Studies that most closely approximates post-graduation commercial bar course study. It is taught asynchronously and covers multiple testing formats on the CBX, and it also attracts a broad cross-section of students (across LGPA quartiles).

³⁶ Seeing hints in early statistical analyses that taking more than the minimum number of required 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. Later, as indicated in Table 1, the faculty voted to require that students not only pass these

Category	Initiative	Start Date	Class Impacted
Curriculum	Encourage faculty to design syllabi in bar-subject classes that account for CBX coverage in terms of issues ³⁷	AY 2017-2018	Class of 2020
Pedagogy	Encourage and train faculty to teach legal analysis pervasively ³⁸	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 in MBE success skills pervasively ³⁹	AY2019-2020	Class of 2022
Pedagogy	Intensively and systematically encourage faculty to adopt techniques designed to develop students as self-directed learners (e.g., asking students to self-assess)	AY2022-2023	Class of 2025
Pedagogy (Assessment)	Require closed book exams in bar subject classes with bar-like essay questions ⁴⁰	AY 2017-2018	Class of 2020

courses (earning at least a D) but also earn a higher minimum grade of C. (Students who do not earn the required minimum grade must retake the course.)

³⁷ 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.

³⁸ 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.

³⁹ After initial assessment suggested a positive correlation between engagement with AdaptiBar, the College decided to fully integrate AdaptiBar into the JD curriculum. AdaptiBar includes a 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.

⁴⁰ 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.

Category	Initiative	Start Date	Class Impacted
Pedagogy (Assessment)	Require MBE style questions on exams in MBE-tested subjects ⁴¹	AY 2017-2018	Class of 2020
Pedagogy (Assessment)	Encourage faculty to provide individualized feedback on exams	AY 2016-2017	Class of 2019
Pedagogy (Assessment)	Phase out credit/no-credit option in bar subject courses ⁴²	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	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 ⁴³
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 Adopted at UC Law SF

For the reasons discussed below, the overlap between the list of interventions in Table 1, above, and the list of factors studied in the data set is incomplete. Nevertheless, we provide a relatively complete listing of reforms, rather than the shorter list assessed in the quantitative analysis in Section III to provide a clearer

⁴¹ 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 and 2023 graduates suggests that this cohort, 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.

⁴² 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.

⁴³ The impact of this intervention was not immediate, given the need to train new faculty and to expand the programs with which they were associated.

picture of the full range of reforms UC Law SF adopted in its effort to improve first-time bar pass rates.

Recent studies have suggested that some law schools have improved bar outcomes by changing who they admit or graduate. Notably, however, UC Law SF is not one of the schools found to have done so. Bahadur, et al., argue⁴⁴ that efforts to attribute bar success to pedagogical interventions are “empirically untrue” and, worse, damaging to the law school faculty and staff who focus on bar success,⁴⁵ a claim at odds with findings in Section III, below. They argue that “prestidigitation rather than legal pedagogy”⁴⁶ explains bar outcomes they observe at law schools, though they temper that claim in later sections of the article.⁴⁷ In particular, they argue that “academic attrition and net transfer rates...likely affect institutions’ over and underperformance on the bar examination relative to the entering credentials” of law school graduates, and that one of the reasons UC Law SF did not overperform to the degree of other schools in their study is that UC Law SF did not use non-transfer attrition to significantly improve the metrics of graduating students who sat for the bar exam.

III. What Worked

This section explores the question of the extent to which we can use statistical analysis to identify which of the interventions described in the preceding section drove changes in UC Law SF’s graduates’ first-time bar pass rates in the period 2016-2023. It’s worth noting at the outset that we can explain only about half the variation in outcomes using the most comprehensive data set the College has ever assembled for purposes of program assessment. That said, the biggest increase in first-time bar pass rates in the College’s history occurred on the July 2019 administration of the CBX, before the change in California’s cut score from 1440 to 1390, and before the

⁴⁴ Rory Bahadur, Kevin Ruth & Katie Tolliver Jones, *Reexamining Relative Bar Performance as a Function of Non-Linearity, Heteroscedasticity, and a New Independent Variable*, 52 NEW MEXICO L. REV. 119 (2022) (building on and critiquing Jeffrey S. Kinsler & Jeffrey Omar Usman, Law Schools, *Bar Passage, and Under and Over-Performing Expectations*, 36 QUINNIPIAC L. REV. 183 (2018)).

⁴⁵ *Id.*, at 123 (arguing that efforts to link bar success with academic program design places “unjustified pressure on vulnerable, legal educators – such as untenured, academic-support faculty and other bar-preparation professionals – who do not achieve the stellar, although misleading, bar performance results of other schools”).

⁴⁶ *Id.*, in Abstract.

⁴⁷ *Id.*, at 204 (“This article does not argue that academic support and bar-preparation programs are irrelevant; they certainly matter. Many brilliant, hard-working faculty contribute significantly to bar preparation. However, these faculty members should not be expected to magically improve their schools’ bar-pass rates. Pedagogy alone is not responsible for bar passage, and such a belief puts these faculty members in an untenable position.”)

pandemic. As indicated in Table 1, the Class of 2019 was one of the first to receive the full benefit of a three-year JD program designed to include many of the most promising initiatives. The Class of 2022 outcomes reveal persistent vulnerabilities explored below, especially for students admitted through LEOP.⁴⁸

The quantitative analysis in this study proceeds in two parts. First, we consider the extent to which changes in bar outcomes at UC Law SF can be attributed to matters other than academic program design, including student entering metrics, changes in attrition or retention, changes in class size, or other measured changes in the composition of the entering classes at UC Law SF. Second, we consider the extent to which specific measured interventions can be demonstrated through statistical analysis to have contributed to improved outcomes. To put this analysis in context, we also share data regarding the impact of student choices unrelated to bar success interventions, such as decisions to participate in non-classroom work (e.g., journals, fieldwork).

The data set used for this study was pulled from multiple sources. The primary data source is UC Law SF's Ellucian Colleague student information system (SIS), which is built upon Datatel/Unidata, and is a multivalued database containing files and tables. After the AccessLex project team identified student demographic and curricular data to be included in the study, the specific fields and files which housed this data within Colleague were compiled into an Excel file template for the programmer who wrote code to pull the data. The authors supplemented that data with other sources of information tracking student participation in co-curricular programs, with student identification number being the common variable that allowed for merger of the data sets.

As noted, the combined data set includes information about 4,726 UC Law SF graduates from 2010 to 2023.⁴⁹ To prepare the data for statistical analyses, nearly 100 data files exported from the UC Law SF Colleague SIS and other sources were cleaned and merged together so that data for all eleven graduating classes could be analyzed together. Across all these graduating classes, there are over 500 different variables, including curricular choices and grades, co-curricular activity participation, bar-preparatory courses, admissions data, and first-time bar exam outcomes. The first step in the analyses for this project was to bring all this data together and recode the data into meaningful variables that can be used in statistical analyses. Because the UC Law

⁴⁸ The first-time pass rate for non-LEOP graduates on the July 2022 administration of the CBX was approximately 77% (above the statewide average first-time pass rate of graduates of ABA-accredited schools of 75%), compared to a first-time pass rate for LEOP graduates of 49% (well below the ABA average and below the much higher LEOP graduate pass rates in 2019-2022). That gap narrowed for Class of 2023, but persists.

⁴⁹ For various reasons, the 2010 data set is different from the data set for later years, so many of the analyses cover the period 2011-2023, excluding 2010.

SF curriculum and record-keeping practices changed over the 13-year study period, all variables were first standardized and combined.

A. Predicting UC Law SF's Improvement

UC Law SF's first time pass rates in the period 2019-2023 cannot be explained as a function of changing metrics of incoming students or as a function of changes in the difficulty of the bar exam. But, as noted, nor can we fully explain the changes in first-time pass rates looking only at the factors we have measured in the data set. While the study's rich data set can be used to predict whether students will pass the CBX on first attempt,⁵⁰ none of the statistical models perfectly predicts bar passage. Even the most robust models leave variation unexplained, broadly similar in magnitude to previous studies.⁵¹ Even incorporating characteristics of the exam, student characteristics, curricular performance, and the various bar success interventions studied in this Article, there are still factors such as student effort that are not captured by "objective" metrics.

Table 2 displays three separate model fit statistics for each predictive model: 1) the Nagelkerke/Cragg-Uhler pseudo- R^2 ,⁵² 2) the "accuracy," or percent of those who failed the CBX on first attempt who had a predicted probability of passage less than 75%, and 3) "false positives," or percent of those marked with a passage probability of less than 75% who actually did pass the CBX on first attempt.⁵³ First,

⁵⁰ We use logistic regression models predicting first-attempt bar passage on the California Bar Exam for UC Law SF graduates. While all of the predictor variables are important to consider separately, which we do in later sections, the purpose of these models is to estimate the variation in bar passage that we can statistically predict. We use four separate models, all spanning the graduating classes of UC Law SF over at least 2011-2023, with Model 1 including 2010. Given these models are logistic, a pseudo- R^2 value does not have as straightforward of an interpretation as a standard linear model, in which we would interpret R^2 . Nevertheless, we can use this fit statistic to examine the relative fit of each model – Nagelkerke/Cragg-Uhler pseudo- R^2 values are displayed.

⁵¹ See, e.g., Amy N. Farley, Christopher M. Swoboda, Joel Chanvisanuruk, Keanen M. McKinley, Alicia Boards & Courtney Gilday, *A Deeper Look at Bar Success: The Relationship Between Law Student Success, Academic Performance, and Student Characteristics*, 16 J. EMPIRICAL LEGAL STUD. 605, 625 (2019) ("Our best model was still only able to identify 78 percent of students who did not pass the bar, meaning the other 22 percent of students who did not pass were misidentified.").

⁵² This version of a pseudo- R^2 fit statistic cannot be directly interpreted the same way that an R^2 is in linear regression, i.e. the percent of variation in the outcome explained by the model. However, this version of pseudo- R^2 is most comparable to this interpretation here – as a relative measure of the proportion of variation in bar outcomes explained by the model.

⁵³ Because the Nagelkerke/Cragg-Uhler pseudo- R^2 (or any measure of model fit for nonlinear models) is not easily interpretable as the proportion of variance explained, we focus our analyses on the latter two fit statistics here. If one changed the threshold for predicted probability of passage from 75%, these fit statistics would change. The choice of 75% mirrors that in Farley, *et al.*, *supra* n. 51, at 618. In an

across all three sets of models, we see that as we include predictors more close in time to the administration of the exam, the model fit improves. For the full 2011-2023 period, we see that at graduation, 79.85% of the students who failed the California Bar exam on first attempt were correctly flagged as having an at risk probability of passage of below 75%. However, false positive rates are quite high – 45.93% of those marked as having at risk probabilities below 75% actually ended up passing the bar exam on first attempt. Fit statistics for these same students after their 1L year and on admission to UC Law SF are markedly worse, suggesting that performance in law school is an important predictor of first-time bar passage. If we only attempted to predict passage on first attempt with admissions metrics, we would only accurately flag 66.54% of those who fail having a probability of passage below 75%, and 60% of those that we would flag with this low probability would actually pass.

In the second and third portions of Table 1, models of the 2020-2023 graduating classes are estimated, without and with variables for various academic program interventions before and after graduation.⁵⁴ Comparing these two portions of the table, we see that the inclusion of data relating to these interventions generally helps better predict bar success for the 2020-2023 classes. However, even with these measures and the inclusion of post-graduation bar-preparatory work, there is still a large portion of unexplained variation – only 80.50% of those that fail the CBX on first attempt are accurately flagged as having a probability of passage under 75%. And, 43.71% of graduates who are listed as having a probability of passage under 75% actually do end up passing the exam on first attempt.

2011-2023	Nagelkerke		
	pseudo R ²	Accuracy	False Positives
Admissions Characteristics	0.149	66.54%	60.00%
After 1L	0.382	78.08%	47.39%
At Graduation	0.445	79.85%	45.93%

2020-2023	Nagelkerke		
	pseudo R ²	Accuracy	False Positives
Admissions Characteristics	0.106	47.35%	63.61%
After 1L	0.298	69.33%	53.43%

ideal world, a model would maximize accuracy while minimizing false positives, and the values for pseudo-R² would approach 1.

⁵⁴ The portion of the table without interventions for 2020-2023 is included solely as a reference, as the overall fit of the models for 2020-2023 is lower than the full 2011-2023 period. So, the results in the third portion of the table should be compared to the 2020-2023 period without interventions. The time period 2020-2023 was chosen despite increases in 2019, as some interventions were not measured until the class of 2020.

At Graduation	0.393	72.95%	50.97%
2020-2023			
With Interventions	Nagelkerke pseudo R ²	Accuracy	False Positives
Admissions Characteristics	0.106	47.35%	63.61%
After 1L	0.309	70.22%	51.38%
At Graduation	0.405	72.46%	50.16%
Post-Graduation Prep	0.528	80.50%	43.71%

Table 2: Model Fit Statistics for Predicting First-Attempt CBX Passage

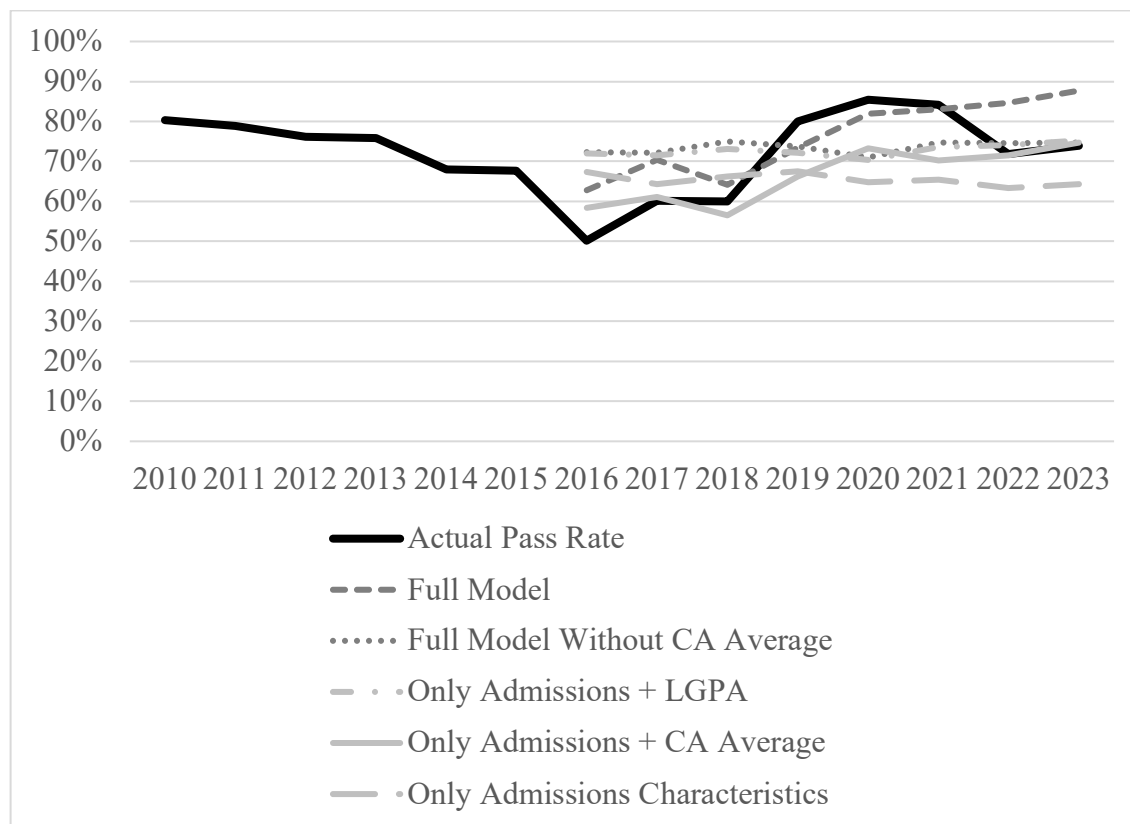


Figure 10: Predicting 2016-2023 CA First-Attempt Bar Passage from 2010-2015 UC Law SF Students

Could UC Law SF's large decline in first-time bar passage rate in 2016 and relatively higher pass rates in the period 2018-2023 have been predicted? Figure 10, above, uses data from UC Law SF students' performance on the CBX from 2010-2015

to predict average first-attempt pass rates for 2016–2023 with five different models.⁵⁵ First, the admissions characteristics model uses only things known upon admission to law school, and predicts a relatively unchanging, flat trend with a pass rate in the mid to high 60% range. Second, we estimate a model with admissions characteristics and the overall pass rate for ABA-accredited law schools in California for each exam administration to account for the overall difficulty of each exam administration. This model predicts a decline from 2015 to 2016, although not as large, and then a line that captures improvement through 2023 though does not capture the massive rise in pass rates between 2019 and 2021. The model with only LGPA and admissions characteristics shows a passage rate roughly 5% higher than the model with only admissions characteristics, but also relatively flat and unchanging. If we incorporate curricular choices, including upper-division bar courses, we see a slightly higher pass rate, suggesting number of bar courses taken in these class years predicts improved outcomes. Finally, the full model uses student metrics known upon admission, performance in law school and adds back in the overall pass rate for ABA-accredited law schools in California for each exam administration. This line appears to fit the actual trend the best, particularly the improvements seen 2019–2021, though it overestimates the pass rate prior to 2019 and after 2021.

Across all five predictive models, the pattern is clear: UC Law SF's graduates' aggregate performance on the exam was unexpectedly low in 2016–2018 and not clearly explained by observable characteristics of the student body or the CBX. However, from 2019–2021, UC Law SF's graduates' overall first-time pass rate on the CBX consistently *exceeded* expectations, given known metrics, including the impacts of the cut score change after July 2019. Together, this suggests that characteristics unmeasured in these models might explain the significant increase in first-time pass rates we see after 2016. Broadly speaking, these unmeasured characteristics likely are of two types – random chance or the numerous academic program changes that UC Law SF implemented in the study period not included in the models. Of course, some of this large rise in bar performance could be due to chance. In particular, for bar results for 2022 and 2023, we see a decline in bar performance, yet no clear decline in any of the predictive models, suggesting this decline was not due to admissions characteristics, curricular choices, or other variables analyzed in these models. This

⁵⁵ All lines except the actual pass rate are estimated from a logistic regression model predicting bar passage on the 2010–2015 graduating classes. Full model uses Final LGPA, 1L GPA, upper-division bar courses, non-classroom units, LEOP, DRP, LSAT, UGPA, transfer status, race, sex, and the average pass rate for ABA-accredited law schools in California for each administration. The uncertainty in prediction surrounding each of these models is not shown here to allow the plot to be readable. As shown in Table 2, however, predicting bar outcomes with precision is extraordinarily difficult, and these predicted pass rates contain a large amount of uncertainty. This uncertainty also significantly varies across models, with the full model having the most precision.

suggests a number of possibilities, including pandemic effects, changes in the level of student engagement with interventions, or simply randomness.

In the next section, we conduct numerous tests of the effect of specific interventions to help rule out the potential that chance explains UC Law SF's improved bar outcomes starting with the Class of 2019, and to help us understand which interventions were most impactful. While overall models at the level of a school are instructive, they do not help us parse which particular interventions make a difference, nor do they allow the level of precision that analyses of individual students give us. This highlights a weakness of school-level studies of bar outcomes because in explaining aggregate outcomes across schools, we cannot necessarily understand the individual-level mechanisms that led to these changes.⁵⁶

⁵⁶ This is known as an ecological inference problem. In this case the predictive models in this section use individual student-level data aggregated to the level of the school, which is why we can unpack them in the next section. Studies of bar exam outcomes and student characteristics that use aggregate school-level data reported through ABA 509 disclosure forms suffer from this problem of inference.

B. Efficacy of Measured Interventions

Some of the interventions described above appear to have materially and positively impacted the College's first-time bar pass rate in the period 2017-2023. Other interventions as to which it was possible to undertake statistical analyses do not appear to be primary drivers of the increase in pass rates, though the degree of impact may depend on factors such as student engagement that are difficult to directly measure.

What independent impact does each of the measured factors have on students' LGPA and first-time CBX passage? In this section, we attempt to answer this question using statistical analysis while controlling for the effects of a number of additional contributing factors such as student metrics, curricular choices, and academic program changes.⁵⁷ Some of the estimated effects we report are "statistically significant," meaning that we have some degree of confidence that the association we see is not likely due to chance. Others do not achieve conventional levels of statistical significance⁵⁸ but nevertheless help paint a fuller picture of the impact of various interventions on student success. As noted, the measured and studied initiatives and academic program changes are not randomized because many of them were implemented for an entire new entering class, while others required student participation and engagement. While this means that one should use caution in interpreting findings as causal, the descriptive patterns are informative for many academic program changes.

⁵⁷ In each model, we attempt to make the set of control variables as parsimonious as possible, restricting it to variables we expect to confound the relationships of interest. Confounding variables are related to both our causal variable of interest and outcome, and can induce a relationship between them, even when a variable has no causal effect. For example, if only higher LGPA students took more bar subject classes, if we examined the relationship between bar subject classes and CBX outcomes, we might be misled, as part of the effect attributed to the coursework would be due to the higher LGPAs of students. We are also careful to avoid post-treatment bias by avoiding controlling for variables measured after particular interventions. We do so by only including variables as controls that are measured before the intervention, curricular choice, or academic program change took place.

⁵⁸ While quantitative statistical analyses typically dichotomize outcomes as statistical significant or as not statistically significant, this dichotomy can be reductive and therefore misleading. Our best guess of the impact of the variables in this section are the estimated effects we report. Even if a variable is statistically significant, this may be due to chance. If a variable has a non-statistically-significant impact, this may also be due to chance or it may be due to lack of statistical power, a common problem with smaller data sets. Importantly, consistency of effects across time and across models should be considered as evidence of the robustness of a particular association. Statistical significance provides information about the uncertainty of estimates, not the value of the estimates themselves – and depending on the control variables included, the size of the subgroups with particular combinations of characteristics, and more – we may be more or less uncertain about particular estimates.

1. Characteristics Known Upon Admission

First, we estimate a series of regression models that predict students' 1L GPA, Final LGPA, and California Bar Exam passage on first-attempt (CBX Passage) from characteristics known on admission and interventions in students' 1L year of law school.⁵⁹ While our focus is primarily on effects of the academic program changes, these models control for a wide variety of known predictors of GPA and CBX outcomes.⁶⁰ The estimates of these predictors are not surprising – both LSAT and UGPA are positive and significant predictors of 1L and 3L (final) LGPA and CBX passage on first-attempt.⁶¹ We see statistically significant effects for 3L GPA for sex, with female students achieving higher LGPAs, as well as consistent negative effects for all three outcomes for being registered with the law school's Disability Resource Program, corresponding to 1L GPAs 0.118 points lower, 3L GPAs 0.092 points lower, and an 10.9% lower probability of CBX passage.⁶² Controlling for other variables in the model such as LSAT and UGPA, transfer students have significantly higher LGPAs than non-transfer students, and a 14.8% higher probability of CBX passage. While age is not a significant predictor of GPA or CBX passage, nonwhite students have 1L GPAs

⁵⁹ All models in this section are Ordinary Least Squares (OLS). While some might argue a nonlinear model is more appropriate for predicting bar passage, as it is dichotomous, OLS produces unbiased estimates of effects even with nonlinear outcomes, and its estimated effects are more easily interpretable.

⁶⁰ Specifically, the models contain the following control variables: LEOP admission, Disability Resource Program (DRP) status, LSAT, UGPA, transfer status, nonwhite, race unknown, female, age bins (up to 26, 26-30, 30-35, over 35), graduation year fixed effects, and the other variables in this table that share the same time span. Models for bar passage also control for the average first-time pass rate of graduates of all ABA-accredited law schools in California for that administration by entering the average pass rate for the exam administration statewide, which is a way to control for varying difficulty of the CBX across administrations. By having these control variables in the model, we're effectively "holding them constant" or removing any variability that they explain in our outcome so it cannot be misattributed to any of the other control variables or interventions of interest. For LEOP and LGPA quartile subgroups, separate models are estimated for clarity. Because of the control variables in the model, however, this does not mean that the overall effect will be a weighted average of the effect in all subgroups, as the interrelationship between covariates may change from subgroup to subgroup. Models are also estimated separately for each of the outcomes, without controlling for the previous outcome along the way (i.e. when estimating the effect on Final GPA, we do not control for overall 1L GPA).

⁶¹ While controlling for all other variables in the model, we see that an increase in one point of LSAT is associated with increases of 0.0273, 0.0217 in 1L and final GPAs, respectively, and an increase of 0.0177 in probability of passage of CBX on first attempt. An increase of 1 in Undergraduate GPA (i.e. 3.0 to 4.0) is associated with increases of 0.217 and 0.245 in 1L and final GPA, respectively, and an increase in probability of passage of CBX on first attempt of 0.173. These effects appear to be relatively linear across the range of each predictor variable, suggesting no clear threshold beyond which its effects are diminished or grow.

⁶² While controlling for all other variables in the model, we see that female students have final GPAs 0.0316 points higher.

0.092 points lower, 3L GPAs 0.083 points lower, and a 5.9% lower probability of CBX passage than white students.

Admission through the Legal Education Opportunity Program is associated with a 4.9% lower probability of passages of the bar on first attempt and a 0.040 higher 1L GPA, although it is not statistically significantly related to final LGPA. This association is present even when controlling for entering metrics. The association was not present in earlier class years (2017-2021). However, due to lower-than-expected performance among LEOP students in the 2022 and 2023 exam, we see a significant association with LEOP.⁶³ Overall, these baseline results are as expected – with only characteristics known upon admission, our models are not highly predictive of law school and CBX performance, and the strongest predictors are measures highly selected upon admission, i.e. LSAT and undergraduate GPA.

2. JD 1L Interventions: Co-Curricular Academic Skills Programming and Legal Analysis I

Table 3, below, shows the estimated effects of a subset⁶⁴ of the JD 1L academic program interventions UC Law SF adopted to improve academic performance and CBX first-time passage rates for the overall student body (including LEOP and non-LEOP students), LEOP students only, and GPA quartiles separately.⁶⁵ All the effects can be interpreted as the estimated change in that outcome (either GPA on a 0-4 scale or probability of CBX passage on first attempt, 0-1) associated with a one unit increase in that variable.⁶⁶ Participation in UC Law SF Office for Academic Skills Instruction

⁶³ Graduation year and bar exam result fixed effects are not described here, although some are statistically significant, which is to be expected, as graduation classes and the CBX exam have varied over time.

⁶⁴ Due to measurement challenges and the lack of a control group, we did not analyze some of the potentially most impactful 1L interventions in this analysis, including early advising about bar skills and success, the introduction of the Sack Program (described in Table 1), and changes to the way 1L faculty teach and test.

⁶⁵ While control variables are included in these models, they are not presented here for simplicity. Controls include LEOP admission, Disability Resource Program (DRP) status, LSAT, UGPA, transfer status, nonwhite, race unknown, female, age bins (up to 26, 26-30, 30-35, over 35), graduation year fixed effects, and the first-attempt CBX pass rate for a given exam administration for the CBX model only. Additionally, the models control for the other interventions when assessing each intervention. The use of the first-attempt CBX pass rate as a control variable has the consequence in that it accounts for changes in the cut score and anything else that affects the average pass rate statewide across administrations.

⁶⁶ Statistical significance is denoted by the presence of one, two, or three asterisks. Through all the models in this section, we report three levels of statistical significance, $p < 0.1$, meaning that even if there were no association, 10% of the time we'd achieve a result as large or larger just by chance, $p < 0.05$, corresponding to 5%, and $p < 0.01$, corresponding to 1%. While $p < 0.05$ is most commonly used

and Support co-curricular academic skills programming in the 1L year (for the 2020-2023 graduating classes) appears to be a mixed predictor of CBX outcomes or 1L GPA, with its effect depending on the type of participation.⁶⁷ Specifically, we see that OASIS student-led discussion group attendance is significantly positively associated with both GPA outcomes as well as CBX passage probability, while the outcomes for 1-1 office hours with specialized skills faculty and faculty-led workshop attendance are not significant. In fact, for LEOP students, we see consistently *negative* and significant effects of office hours attendance (regardless of whether the office hours are staffed by a LEOP-dedicated academic skills specialist or by other OASIS faculty used by general JD students), and a negative effect for all students on CBX passage probability.

While a few other subgroup analyses for LEOP and GPA quartiles show statistically significant results, including several that are negative, there does not appear to be a clear pattern to these findings suggesting consistent effects for certain subgroups, so they may be spurious.⁶⁸ On the other hand, recent matriculating cohorts increasingly exhibit characteristics of passive learners, one feature of which is that they are eager to be told answers but struggle to self-directedly learn how to critically examine their own thinking or work or acquire or apply skills on their own. We speculate that we may be seeing in the data re 1-1 office hours the effects of passive learners proactively seeking advice without applying it between meetings, as suggested by data indicating that students who more frequently use 1-1 office hours do worse. UC Law SF OASIS and other faculty are reflecting on this pattern and on possible solutions.

in social science, we display all three for a broader picture, particularly when models lack statistical power due to small sample sizes in particular subgroups. These thresholds are not corrected for multiple testing – which does mean that some effects reported as statistically significant are likely spurious.

⁶⁷ Because we are analyzing data for graduates only, it is possible that some effects of OASIS are masked because academically disqualified students and students who do not sit for the CBX exam are not included in the analyses. In text we use the $p < 0.1$ threshold to discuss significance because of the relative lack of statistical power in many of these analyses. While this does increase the probability of committing a Type I error (that is, a false positive – finding a statistically significant effect when one does not actually exist), the table displays higher significance thresholds if one wishes to use those, and we emphasize where caution is warranted in interpretation in text.

⁶⁸ There is no obvious causal story as to why attendance at an OASIS event in the 1L year would cause a student to do worse on the CBX several years later. There are, however, a number of possible explanations: that the relationship is just purely due to chance; or that the relationship is confounded by students attending OASIS who are likely to need more help, such that attendance at these workshops is a proxy for students who need help seeking it; or that students attending such sessions are disproportionately passive learners who are looking for an easy answer in lieu of doing the work between College-delivered academic skills sessions to change how they acquire or deploy relevant skills.

Intervention / Factor	Subgroup	Effect on 1L GPA (0-4)	Effect on Final GPA (0-4)	Effect on CBX Probability (0-1)
OASIS Discussion Group Attendance (2020-2023)	Overall	0.0214***	0.0149***	0.0100**
	LEOP	0.0300***	0.0182**	0.0048
	1st Quartile ⁶⁹	0.0023	0.0034	0.0029
	2nd Quartile	0.0018	-0.0014	0.0046
	3rd Quartile	0.0040	0.0011	-0.0095
	4th Quartile	0.0035	-0.0024	-0.0072
OASIS Office Hours Attendance (2020-2023)	Overall	-0.0041	-0.0011	-0.0081**
	LEOP	-0.0135**	-0.0073*	-0.0161*
	1st Quartile	0.0053	0.0020	0.0022
	2nd Quartile	0.0011	-0.0034**	-0.0058
	3rd Quartile	0.0031	-0.0001	-0.0021
	4th Quartile	0.0013	0.0026	-0.0098
OASIS Workshop Attendance (2020-2023)	Overall	0.0167	0.0106	0.0112
	LEOP	0.0232	0.0144	0.0308
	1st Quartile	0.0315**	0.0023	-0.0134**
	2nd Quartile	-0.0063	0.0050	0.0159
	3rd Quartile	-0.0054	-0.0013	0.0076
	4th Quartile	-0.0030	-0.0035	-0.0099
Legal Analysis 1 (2011-2020)	Overall	-0.5290***	-0.3940***	-0.3650***
	LEOP	-0.4980***	-0.3680***	-0.4250***
	3rd Quartile	-0.0102	-0.0349***	-0.0743
	4th Quartile	-0.2260***	-0.1340***	-0.1130***
LEOP-only Interventions (2021-2023)	# of practice exams	0.0485**	0.0325***	0.0158
	# of tutorials	0.0034	0.0057	0.0040

Guide to statistical significance: * = $p < 0.1$, ** = $p < 0.05$, *** = $p < 0.01$

Table 3. Effects of 1L Academic Program Interventions on LGPA and CBX Outcomes

If we examine the overall graduating class, we see that Legal Analysis 1, a curricular intervention that predates UC Law SF's post-2016 academic program revamp and that was discontinued in 2018, is associated with lower GPAs and lower probability of CBX passage.⁷⁰ However, this appears to be due in large part to the

⁶⁹ In all tables, quartiles for 1L GPA are 1L GPA Quartiles, the rest are Final GPA Quartiles.

⁷⁰ Only 13 students in the first or second GPA quartiles were enrolled in Legal Analysis 1 in this entire time period, so these quartiles are excluded from the table.

targeted nature of this course, intended for students who were believed to be at risk based on LGPA, third and fourth LPA quartile students based on 1L grades. If we look within these quartiles, we see that there is only a significant negative effect on 1L GPA in the fourth quartile. Given its targeting, even within these quartiles, the negative effect here may reflect factors other than the efficacy of the course that are simply not measured by other control variables and are due to its targeting, not its causal impact. The College replaced Legal Analysis 1, a standalone course on the skill of legal analysis that was detached from any one course's doctrine or substantive law, with the Law & Process model of Constitutional Law 1 in the 1L year and of upper division bar subject classes; due to some of the same factors, it appears that the Law & Process classes show a similar lack of efficacy in terms of improving bar outcomes, as described more fully below.

Finally, for the 2021-2023 graduating classes, we estimate the effect of two interventions intended to help LEOP students during their 1L year – practice exams and tutorial sessions.⁷¹ While statistical significance is hard to achieve given the smaller numbers of LEOP graduates, we see a significantly positive effect of practice exams on 1L & Final GPA, with each practice exam taken associated with a 0.049 increase in 1L GPA, and a 0.033 increase in final GPA.

3. Upper Division Bar-Subject Classes

Next, we turn to bar success interventions aimed at upper division students (2Ls and 3Ls).⁷² First, we turn to unpacking the estimated effects on LGPA and CBX passage of taking additional upper-division bar subject courses tested on the CBX (e.g., Business Associations, Constitutional Law, and Evidence), which is displayed in Table 4.⁷³ Because UC Law SF made significant changes to the pedagogical and assessment techniques used in bar subject courses starting in the 2016-2017 academic year, the

⁷¹ We assess these LEOP interventions for the 2021-2023 graduating classes because UC Law SF began systematically tracking these 1L interventions in 2018. As a result, we do not have reliable participation data for earlier years.

⁷² For these models, we include all the control variables above plus 1L GPA in bar courses and Legal Research & Writing 1, both of which are positive and significant predictors of final LGPA and CBX passage on first attempt. Additionally, all of the variables analyzed in this section on 2L and 3L interventions are together in the same model, meaning their effects are estimated while controlling for the effect of all others available in those academic years.

⁷³ One could model the effect of each of these classes separately to see if any one particular class seems to matter more than others. Unfortunately the number of classes and the highly variable enrollments/distribution makes it difficult to robustly measure the impact of each by itself, which explains our decision to assess the efficacy of bar subject classes overall rather than by specific bar class or subject.

effects are estimated for graduates before and after this change.⁷⁴ We see positive and significant effects across the time period, although they are larger after 2017, suggesting that pervasive changes to teaching and testing methods described in Section IV may have had an effect we are indirectly seeing in the increase in efficacy of bar-subject classes.

Intervention / Factor	Subgroup	Effect on Final GPA (0-4)	Effect on CBX Probability (0-1)
Upper-Division Bar Courses (2017-2023)	Overall	-0.0012	0.0334***
	LEOP	-0.0039	0.0196
	1st Quartile	0.0033	0.0182***
	2nd Quartile	0.0016	0.0340***
	3rd Quartile	-0.0028	0.0377**
	4th Quartile	-0.0051	0.0365**
Upper-Division Bar Courses (2011-2016)	Overall	-0.0043**	0.0102*
	LEOP	-0.0013	-0.0172
	1st Quartile	0.0019	0.0076
	2nd Quartile	-0.0001	0.0197*
	3rd Quartile	-0.0021	0.0214
	4th Quartile	0.0018	-0.0038

Guide to statistical significance: * = $p < 0.1$, ** = $p < 0.05$, *** = $p < 0.01$

Table 4. Effects of Upper-Division Bar Subject Courses on LGPA and CBX Outcomes

Specifically, over the entire time period, we find that each additional bar subject class is associated with a final GPA lower in magnitude, although it is not statistically significant after 2016. This is likely due to the fact that most bar subject classes are subject to the mandatory grade normalization requirements (curve), so the grade distribution in these courses is generally and significantly lower than in non-bar courses. Since 2017, we see that each additional bar subject course is associated with an increase in probability of passage of 0.033, or a 3.3% increase. While this effect is not statistically significant for LEOP students, it is positive and relatively consistent in magnitude across all four LGPA quartiles.⁷⁵ While the estimated effects are still generally positive, they are smaller for the 2011-2016 graduating classes, with

⁷⁴ Additionally, because of changes to LEOP academic support in 2017 described in Section IV, in analyses that span the full 2011-2023 period in this section, we analyze LEOP graduates from 2018-2023 separately.

⁷⁵ Additionally, if we examine those students graduating in 2021-2023, we continue to see positive and statistically significant impacts of bar subject coursework, even if such courses were taught online during the pandemic.

an estimated effect of 0.010 increase in probability of passage, or 1%, for each additional bar subject class taken by UC Law SF students in that period. Additionally, if we examine the bivariate relationship between bar subject courses and CBX passage on first attempt, we see that the effect is relatively linear from 2017-2023, suggesting gains with each additional course, while the relationship from 2011-2016 suggests a plateau, and even potentially a slight decline after six courses.

4. Upper Division Curricular Interventions to Improve Bar Outcomes

There are also five upper division (post-1L year) academic program changes to assess: three courses intended as preparatory for the CBX (Critical Studies 1, 2, and 3),⁷⁶ which we analyze separately from 2011-2016 and 2017-2023, Legal Analysis 2 (which ends in the 2018 graduating class), and “Law and Process” versions of upper-division bar courses, a replacement for Legal Analysis. Table 5 displays the estimated effects of the Critical Analysis courses on GPA and CBX outcomes, while Table 6 displays the estimated effects of Legal Analysis 2, and its replacement, Law & Process courses. First, we see that Critical Studies 1, is negatively associated with GPA & CBX probability of passage, with effects concentrated among LEOP students from 2011-2016. The 2017-2023 version of Critical Studies 1, however, shows no statistically significant association with GPA or CBX probability of passage. Critical Studies 2, offered for 2017-2023 graduates, is also associated with lower GPAs but not overall statistically significant association with CBX passage. However, we see a large, positive, and statistically significant effect for students in the fourth GPA quartile.

Intervention / Factor	Subgroup	Effect on Final GPA (0-4)	Effect on CBX Probability (0-1)
Critical Studies 1 (2011-2016)	Overall	-0.0925***	-0.1030***
	LEOP	-0.1390***	-0.1420**
	1st Quartile	0.0238	-0.1730**
	2nd Quartile	0.0019	0.1230
	3rd Quartile	0.0006	-0.0341
	4th Quartile	-0.1080***	-0.0395
Critical Studies 1 (2017-2023)	Overall	-0.0074	-0.0103
	LEOP	0.0072	-0.0589
	1st Quartile	-0.0126	0.0248
	2nd Quartile	-0.0095	-0.0239
	3rd Quartile	0.0064	0.0770
	4th Quartile	0.0170	-0.0971*

⁷⁶ See *supra* n. 35, describing these courses.

Intervention / Factor	Subgroup	Effect on Final GPA (0-4)	Effect on CBX Probability (0-1)
Critical Studies 2 (2017-2023)	Overall	-0.0202***	0.0273
	LEOP	0.0071	0.0346
	1st Quartile	-0.0145	0.0079
	2nd Quartile	-0.0107	-0.0074
	3rd Quartile	-0.0033	0.0210
	4th Quartile	-0.0095	0.1370**
Critical Studies 3 (2020-2023)	Overall	-0.0211**	0.0387
	LEOP	0.0023	0.0999
	1st Quartile	-0.0006	0.0073
	2nd Quartile	-0.0049	0.0466
	3rd Quartile	-0.0071	0.1140*
	4th Quartile	-0.0225	0.0093

Guide to statistical significance: * = $p < 0.1$, ** = $p < 0.05$, *** = $p < 0.01$

Table 5. Effects of 2L & 3L Coursework on GPA & CBX Passage

For Critical Studies 3, offered for 2020-2023 graduates, positive associations with CBX passage are statistically significant for the third quartile. However, it is associated with lower GPAs overall. Legal Analysis 2, offered for 2011-2018 graduates, is not significantly associated with final GPA, however it is negatively associated with CBX passage.⁷⁷ Finally, in Table 6, if we count the number of Law & Process courses that students took, a curricular offering intended to replace and move beyond the standalone Legal Analysis course, we see that they are significantly associated with an increase in GPA, but not CBX passage probability. Each additional course is associated with an increase in GPA of 0.030, with this effect most clearly present for LEOP students and those in the first and fourth GPA quartile.⁷⁸

Intervention / Factor	Subgroup	Effect on Final GPA (0-4)	Effect on CBX Probability (0-1)
Legal Analysis 2 (2011-2018)	Overall	-0.0176	-0.0845**
	LEOP	-0.0102	-0.1040
	3rd Quartile	0.0001	0.0527

⁷⁷ Fewer than ten students in the first or second quartile took Legal Analysis 2 in the study period, so these quartiles are excluded from analysis. These extremely small number of quartile 1 & 2 students for whom this intervention was targeted likely drive the overall negative result.

⁷⁸ While we see a statistically significant and negative effect on CBX probability of passage for those in the third quartile, and a slight negative association overall, driven by this strong association in the third quartile, there is no plausible causal mechanism here.

Intervention / Factor	Subgroup	Effect on Final GPA (0-4)	Effect on CBX Probability (0-1)
	4th Quartile	0.0037	-0.0172
Law & Process Courses (2017-2023)	Overall	0.0301***	-0.0307*
	LEOP	0.0129	-0.0452
	1st Quartile	0.0272**	-0.0017
	2nd Quartile	-0.0078	0.0256
	3rd Quartile	0.0031	-0.1030***
	4th Quartile	0.0239***	-0.0321

Guide to statistical significance: * = $p < 0.1$, ** = $p < 0.05$, *** = $p < 0.01$

Table 6. Effects of Legal Analysis 2 and Law & Process Courses on GPA & CBX Passage

5. Other Curricular Choices

Next, we turn to examining the impact of other curricular choices that students made in their 2L and 3L years over the 2011-2023 graduating classes, with the estimated effects of eight shown in Table 7.⁷⁹ This section does not address the efficacy of bar success interventions per se and instead explores the broader question of the effect of competing curricular choices that students inevitably make in their 2L and 3L years.

First, we see positive and statistically significant overall effects of completing units as a Teaching Assistant or Research Assistant on final GPA, with each unit of credit associated with a 0.012 or 0.016 increase in GPA, respectively. However, we do not see overall statistically significant effects on probability of CBX passage for RA units. This is not surprising because TA work often reinforces core CBX success skills whereas RA work often involves tasks like research on scholarly projects that may not directly hone the skills necessary for success on the CBX. For GPA outcomes, we see that these effects are generally largest and sometimes statistically significant for those in LEOP and those in the 4th GPA quartile. For CBX outcomes, we see that Teaching Assistant units are significant predictors of CBX passage for LEOP students

⁷⁹ If one examines the effects of these eight factors over a shorter timeframe, i.e. 2017-2023, the estimated effects are nearly identical in substantive interpretation. We show the estimated effects over the entire study period because we have greater statistical power. These effects are estimated controlling for the effects of the other variables in this section. However, it is worth noting that some of these choices are zero sum – taking more bar subject courses inevitably leaves less room for units in other curricular experiences. As a result, one might wish to compare the relative magnitude of effects in these models and consider whether particular variables are serving as proxies for student involvement and effort.

and those in the fourth quartile.⁸⁰ For example, each TA unit is associated with a 0.052 (or 5.2%) increase in probability of CBX passage on first attempt for fourth GPA quartile students.

Units earned in student competitions (e.g. Moot Court) are a statistically significant predictor of CBX passage but not GPA. Overall, we see that each unit is associated with a 1.1% increase in probability of passage. The effects appear to be concentrated among upper GPA quartiles, although their statistical significance varies. Units earned in judicial externships are a statistically significant predictor of both GPA and CBX passage, with each additional unit associated with an increase of 0.005 in GPA and 0.6% increase in probability of CBX passage. These effects for both GPA and CBX appear to be concentrated among LEOP and fourth quartile students.

For the number of experiential course fieldwork units completed, we see a modest, positive, and statistically significant effect on probability of CBX passage on first attempt, suggesting that each unit associated with a 0.7% increase. We do not see significant associations with GPA, and the largest associations with CBX are seen among the second and fourth GPA quartiles.

Intervention / Factor	Subgroup	Effect on Final GPA (0-4)	Effect on CBX Probability (0-1)
TA Units Completed (2011-2023)	Overall	0.0107***	0.0153**
	LEOP	0.0201***	0.0643***
	1st Quartile	0.0062**	-0.0013
	2nd Quartile	0.0020	-0.0025
	3rd Quartile	-0.0013	0.0206
	4th Quartile	0.0163**	0.0515*
RA Units Completed (2011-2023)	Overall	0.0162***	-0.0043
	LEOP	-0.0074	0.0276
	1st Quartile	0.0105*	0.0077
	2nd Quartile	0.0028	-0.0218
	3rd Quartile	0.0058	0.0334
	4th Quartile	0.0185	-0.0353
Competition Units Completed (2011-2023)	Overall	0.0010	0.0110***
	LEOP	-0.0015	0.0255*
	1st Quartile	-0.0008	0.0074**
	2nd Quartile	-0.0002	0.0118**
	3rd Quartile	0.0016	0.0095

⁸⁰ While it is not common for fourth quartile LGPA students to serve as TAs, the UC Law SF Academic Regulations require a student serving as a TA to have earned a minimum grade in the class for which they are serving as TA and do not have a minimum LGPA requirement.

Intervention / Factor	Subgroup	Effect on Final GPA (0-4)	Effect on CBX Probability (0-1)
	4th Quartile	0.0030	0.0057
Judicial Externship Units Completed (2011-2023)	Overall	0.0045***	0.0053***
	LEOP	0.0043**	0.0058
	1st Quartile	0.0002	0.0041***
	2nd Quartile	0.0009	-0.0022
	3rd Quartile	-0.0004	0.0006
	4th Quartile	0.0060***	0.0122*
Fieldwork Units Completed (2011-2023)	Overall	0.0007	0.0066***
	LEOP	0.0000	0.0079*
	1st Quartile	-0.0013	0.0033*
	2nd Quartile	-0.0001	0.0062*
	3rd Quartile	0.0000	0.0032
	4th Quartile	0.0018	0.0079*
Journal Participation (2011-2023)	Overall	0.0066	0.0218
	LEOP	0.0226	0.1110**
	1st Quartile	0.0008	-0.0041
	2nd Quartile	-0.0023	0.0051
	3rd Quartile	-0.0013	0.0070
	4th Quartile	0.0097	0.0708
Study Abroad (2011-2023)	Overall	-0.0159	0.0293
	LEOP	-0.0443*	-0.0178
	1st Quartile	-0.0303*	-0.0850***
	2nd Quartile	-0.0030	0.0208
	3rd Quartile	-0.0103	0.0618
	4th Quartile	-0.0127	0.0544
Concentration (2011-2023)	Overall	0.0236***	0.0044
	LEOP	0.0012	0.0156
	1st Quartile	0.0112	-0.0264*
	2nd Quartile	-0.0022	-0.0036
	3rd Quartile	0.0000	-0.0275
	4th Quartile	0.0302***	-0.0016

Guide to statistical significance: * = $p < 0.1$, ** = $p < 0.05$, *** = $p < 0.01$

Table 7. Effects of Other 2L & 3L Curricular Choices on GPA & CBX Passage

Finally, we measure the impact of participation in three programs – working for a journal, study abroad, or earning a JD concentration certificate (i.e., specializing). Conventional wisdom is that journal work improves probability of first-time passage

on CBX and that, by decreasing opportunities to take upper division bar classes, study abroad and concentrating likely negatively impact CBX first-time pass rates. For journal participation, we see no overall statistically significant effect on GPA or CBX passage, but, we do see positive and statistically significant effects on CBX passage for LEOP students.

For study abroad, we see that students who studied abroad had slightly lower GPAs, and that this effect is concentrated in the first quartile. Additionally, for the first quartile, it is associated with a lower probability of CBX passage, 8.5% lower. Finally, we see that students who chose a concentration have significantly higher GPAs, 0.024 higher than those that did not, but there is no clear association with CBX passage.

6. Post-Graduation Interventions

For the graduating classes 2017-2023, we also have important predictors of post-graduation preparation for the CBX. Specifically, we have measures of commercial bar course completion, as well as other specific interventions for a subset of these years. We estimate models predicting CBX passage on first attempt, displayed in Table 9.⁸¹ First, we examine three commercial bar preparation courses taken by the vast majority of UC Law SF graduates during the study period – BarBri, Kaplan, and Themis – as well as the UC Law SF-created supplemental summer bar support programming (BEST), and AdaptiBar (an MBE skills development tool). Specifically, we look to see whether and how participation in these programs predicts CBX passage on first attempt. If we just know whether a graduate participated in these programs or not, we see only some statistically significant differences in CBX passage probability, particularly for BarBri, Themis, and BEST. That is largely because a binary analysis (participation or non-participation) fails to account for engagement.

However, in the second results column for these programs, we have measures of *how much* graduates completed.⁸² Here, we see the massive impact completion of these preparatory programs can have. For commercial bar preparation courses BarBri, Kaplan, and Themis, we see that completing 100% of the program (versus 0% of it), is associated with a 32.5%, 29.7%, and 42.9% increase in probability of CBX passage on

⁸¹ These models control for all of the variables in preceding models – admissions characteristics, 1L performance, and 2L/3L curricular choices, as well as 3L GPA. Unsurprisingly, final LGPA is a statistically significant predictor of CBX probability of passage.

⁸² For BarBri, Kaplan, and Themis, the measure is from 0-1, where 0 indicates a graduate completed 0% of the program, and 1 if the graduate completed 100% of the program, and varies continuously between. For AdaptiBar, it is measured in the 100s of questions answered correctly, and for BEST, in the number of essays submitted. Due to a few outliers, any student who completed more than twenty-five BEST essays (the 99% percentile) is winsorized and recoded to twenty-five.

first attempt.⁸³ These effects are generally large and positive, although their statistical significance varies across subgroups, and are greatest in magnitude among lower GPA quartiles.

With BEST, UC Law SF's supplemental post-graduation bar study program offered to recent graduates studying for the CBX, we see an increase in probability of CBX passage of 0.0038 (or 0.38%) for each essay submitted. This is different from just doing practice essays because trained faculty and other bar tutors score and provide individualized feedback on each practice essay. In 2022 and 2023, especially, we noticed a good portion of at-risk students who substituted practice essays for commercial bar course completion, which was not a successful bar success strategy for the reasons noted in the preceding paragraph, given the dramatically positive effects of course completion.

With AdaptiBar, we see an increase in probability of CBX passage of 0.0083 (or 0.83%) for each 100 questions answered correctly.⁸⁴ Effects appear to be concentrated in the lowest GPA quartiles. Once a graduate answers roughly 1000 AdaptiBar questions correctly, the probability of first-time bar passage is very close to 100%, although this has changed slightly year to year, partly owing to the very small number of students who do this.

All of these estimated effects on CBX passage are controlling for the effects of each other – suggesting that these gains are additive, and not eclipsed by one preparatory method or another.

		Participation/ Indicator	Usage / Completion
Intervention / Factor	Subgroup	Effect on CBX Probability (0-1)	Effect on CBX Probability (0-1)
BarBri (2017- 2023)	Overall	0.1090*	0.3250***
	LEOP	0.0979	0.4400***
	1st Quartile	-0.0229	0.0997***
	2nd Quartile	0.3820***	0.4730***
	3rd Quartile	0.0913	0.2280**
	4th Quartile	-0.2010	0.2020*
	Overall	0.0605	0.2970***

⁸³ These effects are linear across the percentage of course completion, too, with no clear “threshold” beyond which bar passage is more likely. Because of their linear nature, one can interpret an increase in probability of bar passage in smaller increments, too. For example, completion of 10% of BarBri is associated with an increase of 3.25%, completion of 10% of Kaplan is associated with an increase of 2.97%, and completion of 10% of Themis is associated with an increase of 4.29% in probability of CBX passage.

⁸⁴ This effect appears to also be linear across the full span of questions answered, although we see near 100% CBX pass rates above roughly 1,000 questions answered.

		Participation/ Indicator	Usage / Completion
Kaplan (2017-2023)	LEOP	-0.0592	0.4530*
	1st Quartile	-0.0777	0.0661
	2nd Quartile	0.0806	0.2510**
	3rd Quartile	0.3020*	0.3910***
	4th Quartile	-0.0797	0.2800
Themis (2017-2023)	Overall	0.1720***	0.4290***
	LEOP	0.1950	0.6770***
	1st Quartile	-0.0348	0.0980***
	2nd Quartile	0.3750***	0.5070***
	3rd Quartile	0.2250	0.4220***
	4th Quartile	0.4480	0.5800***
BEST (2017-2023)	Overall	0.0746***	0.0038*
	LEOP	0.1060	0.0089*
	1st Quartile	0.0097	0.0009
	2nd Quartile	0.0612*	0.0022
	3rd Quartile	0.1560***	0.0103**
	4th Quartile	0.0483	0.0281
AdaptiBar (2017-2023)	Overall	0.0409	0.0083***
	LEOP	-0.0536	0.0093
	1st Quartile	-0.0118	0.0018
	2nd Quartile	0.0072	0.0098**
	3rd Quartile	0.0509	0.0163**
	4th Quartile	0.1690*	0.0117
Private Tutor (2017-2023)	Overall	0.0809	-
	LEOP	0.0800	-
	1st Quartile	0.0041	-
	2nd Quartile	-0.0064	-
	3rd Quartile	0.0789	-
	4th Quartile	0.1930	-
Obligations (2019-2021)	Overall	-0.0237	-
	LEOP	-0.0795	-
	1st Quartile	-0.0056	-
	2nd Quartile	-0.0453	-
	3rd Quartile	-0.2389**	-
	4th Quartile	0.1006	-
	Overall	0.0163	-
	LEOP	0.3460*	-

		Participation/ Indicator	Usage / Completion
AdaptiBar Funds (2020- 2021)	1st Quartile	-0.0072	-
	2nd Quartile	0.0332	-
	3rd Quartile	0.0718	-
	4th Quartile	0.0502	-
Bar Prep Funds (2020-2021)	Overall	0.0065	-
	LEOP	-0.0980	-
	1st Quartile	0.0000	-
	2nd Quartile	0.1361	-
	3rd Quartile	-0.0698	-
	4th Quartile	-0.1177	-

Guide to statistical significance: * = $p < 0.1$, ** = $p < 0.05$, *** = $p < 0.01$

Table 9. Effects of Post-Graduation CBX Commercial Bar Courses

We also have measures of several other post-graduation characteristics – whether the student hired a private tutor, had other obligations while studying, or received law school funding for AdaptiBar or to otherwise assist in preparation for the CBX. We see no statistically significant overall effects for any of these measures, partly owing to small sample sizes, although we do see a negative effect of obligations for those in the 3rd LGPA quartile, and a large and positive effect of AdaptiBar funds for LEOP students.

All of the above reported effects control for all prior student characteristics and curricular choices, including typical highly predictive measures such as LSAT and GPA. Nevertheless, we see that these additional programs help explain further variation in CBX probability of passage. When controlling for these bar preparatory programs, we still see that some earlier predictors remain significant, although many have effects swamped by these more proximate predictors. For example, the number of upper-division bar subject courses still has an estimated effect of 0.026 (or 2.6%) on probability of passage, and remains significant at $p < 0.01$. When controlling for all these things, we also see that few characteristics known upon admission are significant predictors or have large substantive magnitudes – LEOP admission, DRP status, race/ethnicity, sex, and age all lack statistical significance. While these had some predictive power when examining entering students, once we control for performance during and after law school, their predictive power wanes.

IV. Measurement Challenges

A. Factors Not Measured

For some of the bar success interventions UC Law SF adopted after 2016, we simply lack sufficient data to assess efficacy. For example, after the law school hired and trained a full team of academic skills specialist faculty in 2016, these specialist faculty were able to share pedagogical expertise with other doctrinal faculty, which likely improved teaching across the board in ways we have not systematically measured. For other interventions, we have data, but the interventions were rolled out for all students, depriving us of a control group within graduation cohorts. For example, UC Law SF added a unit of writing instruction to the second semester of legal writing, moving from two to three units, and converted the grading scheme from credit/no-credit to graded. But that happened in a single year, all at once, for all 1Ls that year. For yet other interventions, we have data revealing whether students participated at all, but we have struggled to account for the quality of student engagement, creating the possibility that information about the efficacy of the intervention is being suppressed. We also struggled with how to address various forms of bias, including selection bias (e.g., the fact that less confident or self-directed students often more heavily lean on 1-1 office hours with skills specialists or take particular classes like Critical Studies 1) and post-treatment bias (controlling for which, as indicated above, can lead to unreliable estimates of the effects of some interventions).

B. Assessment Challenges in Unstable Environments

1. A Dynamic Academic Program

A major challenge of this study has been to control for effects of many simultaneously implemented reforms the precise features of which changed over time. In some instances, that change was the result of real-time innovation in programming. Also, different faculty implemented interventions differently. For example, we analyzed the impact of Law & Process versions of upper division bar courses, but each faculty member teaches that class differently, using a range of pedagogical techniques and assessment methods. Similarly, we looked at the effect of student 1-1 meetings with academic skills specialist faculty, but different faculty approach those meetings differently. We have not parsed data at the professor level, partly due to a lack of statistical power, given the small sample sizes across faculty.

2. Changing Exam Conditions

During the time period covered by this study, the CBX format changed at five key moments, and the amount of variability in exam administration format is most significant in the latter part of the study period when the data set is richest, i.e., in the

period 2017-2021, due to the tracking of co-curricular intervention participation not normally captured in the law school's student information system. First, in 2017, the California State Bar changed the CBX from a three-day exam to a two-day exam, reducing the number of one-hour essay questions from six to five, and reducing the performance tests from two three-hour tests to one 90-minute test.⁸⁵ In the summer of 2020, when the pandemic first disrupted exam administration, the July administration was delayed until October, giving students extra months to study, the number of MBE questions was reduced from 200 to 100, and scoring was handled in a unique way for that administration.⁸⁶ Then, in 2021, the cut score was changed from 1440 to 1390, as discussed below.⁸⁷ Starting with the October 2020 administration, the exam was administered on the ExamSoft platform, which some examinees found glitchy.⁸⁸ Finally, in the period 2020-2021, the exam was mostly take-home, with relatively longer breaks than normally afforded between essays and performance tests. In July 2022, the exam reverted to an in-person format, with shorter breaks. California has just announced new expected changes, as well.⁸⁹

In addition, just before the July 2019 administration of the CBX, the California Bar inadvertently released exam questions to some law school deans, prompting the State Bar to take remedial action that materially changed exam conditions.⁹⁰ Because of the accidental release of information, the Bar decided to notify all exam takers of the tested subjects in the days leading up to the July administration of the CBX. That allowed test takers to focus last minute preparation on the subset of topics that might

⁸⁵ Patrick R. Dixon & Alan S. Yochelson, *Shhh...California Examinees May be Sleeping in After Day Two of the Bar Exam*, 86 THE BAR EXAMINER 30 (June 2017) (available at <https://thebarexaminer.ncbex.org/article/june-2017/shhh-california-examinees-may-be-sleeping-in-after-day-two-of-the-bar-exam-2/>, last visited August 20, 2022).

⁸⁶ See Order Concerning Modifications to the California Bar Exam (August 10, 2020) (available at <https://newsroom.courts.ca.gov/sites/default/files/newsroom/document/20200810121225776.pdf>, last visited August 20, 2022).

⁸⁷ See Order re Request for Approval of Proposed Amendments to the California Rules of Court (January 28, 2021) (available at <https://newsroom.courts.ca.gov/sites/default/files/newsroom/2021-01/20210128062716391.pdf>, last visited August 20, 2022).

⁸⁸ See, e.g., Sam Skolnik, *California Bar Exam Flaws Hurt 2% of Test Takers, State Finds*, BLOOMBERG LAW (September 18, 2021) (available at <https://news.bloomberglaw.com/business-and-practice/california-bar-exam-flaws-hurt-2-of-test-takers-state-finds>, last visited August 20, 2022) (reporting on both summer 2021 and summer 2020 exam technical challenges).

⁸⁹ See California State Bar Memo (January 18, 2024) (noting reduction in testing sites, among other changes expected starting February 2024) (available at <https://board.calbar.ca.gov/docs/agendaItem/Public/agendaitem1000032055.pdf>, last visited January 20, 2024).

⁹⁰ See Michelle Lou, *California State Bar Accidentally Releases General Topics of Its Upcoming Exam*, CNN (July 28, 2019) (available at <https://www.cnn.com/2019/07/28/us/california-bar-exam-general-topics-released-trnd>, last visited August 20, 2022).

be covered in the written portion of the exam, making that administration arguably different from any prior or subsequent administrations.

The analysis in this Article attempts to control for these variations by controlling for exam difficulty, but it's possible that UC Law SF students as a cohort responded differently than some other graduating class cohorts to disruptions listed above.

V. Lessons for Academic Program Design; Next Frontiers

A. Academic Program Design Choices Matter

As noted, there is a relationship between entering metrics and bar outcomes. But entering metrics tell only part of the story. A law school's interventions in its JD program can significantly affect student bar outcomes. And while every intervention cannot be easily studied, we can measure the efficacy of many of the program design choices we make. Those analyses can in turn inform the exercise of professional education judgment regarding further program innovation.

B. Academic Program Design Extends Past Graduation and Into the Post-Graduation Bar Study Period

The findings regarding the powerful impact of post-graduation interventions suggest that law school bar support ideally extends through bar study to ensure that via advising, coaching, and practice test feedback, graduates don't stop short of the finish line. In 2016, UC Law SF graduates didn't complete as much of their post-graduation bar courses as did graduates of peer schools. Once we discovered that fact and started systematically tracking the post-graduation effort of each graduate, we were able to design effective interventions, including 1-1 advising and coaching based on actual completion data supplied in real-time by bar companies, and we were able to supplement that with additional practice and feedback opportunities to supplement bar company feedback. Using data from those efforts, we were able to articulate a clear message to our graduates, i.e., that to build on the foundation of law school and pass the exam on the first try, they needed to complete at least 80% of the commercial bar preparation course assignments and also supplement such work with additional practice essays and practice MBEs. The data analyzed above show that these interventions are capable of markedly increasing the probability of bar passage.

C. Pervasive v. Targeted Interventions

A major theme of this Article is that pervasive interventions can lift all boats. But we don't mean to suggest that pervasively applied interventions that affect all

students should substitute for targeted ones. Class of 2022 LEOP outcomes suggest that vulnerable cohorts can be disproportionately impacted by disruption even controlling for factors such as admission metrics and LGPA. Significant gains for the LEOP Class of 2023 cohort suggest that targeted advising and support interventions for especially vulnerable populations can have a positive impact as a supplement to pervasive interventions applied to all students. (The main programmatic changes for Classes of 2022 and 2023 LEOP students were in the form of targeted 3L and post-graduation bar success advising and support.)

D. A Key Nexus: Educators' Insight, Assessment, and Program Design

To obtain the evidence necessary to inform program design, a law school needs to ask the right questions, which in turn depends on involvement of administrators and faculty with knowledge of the academic program, the law school's culture, classrooms, students, and programming. For example, if one looks at the UC Law SF data set assembled for this study and asks whether a particular upper division bar subject class correlates with greater success on the bar exam, the answer is "no." But if one asks whether the total number of upper division bar classes positively correlates with higher bar pass rates, the answer is "yes." Administrators and faculty who have worked with graduates in the trenches and seen how challenging it is for them to memorize bodies of law they have not previously studied understand the difference between the efficacy of any one specific bar subject class and the efficacy of taking enough bar subject courses, in total, before graduation to make bar study manageable. Insight supports the framing of hypotheses that statistical analysis can test.

E. The Next Frontiers

1. Persistent Gaps

a. LEOP

Before we added 2022 and 2023 data, LEOP status was not associated with negative bar outcomes when only controlling for admissions metrics. These 2022 and 2023 LEOP class outcomes suggest that students in this cohort continue to have special needs, even after the period of reform described above. One theory is that LEOP students were especially vulnerable to pandemic disruption, given their backgrounds (students who had overcome adversity). But LEOP graduates had historically high pass rates for the program in 2020 and 2021, which were also pandemic years, suggesting that a pandemic narrative only goes so far to explain the LEOP Class of 2022 outcomes.

b. Exam Accommodations

UC Law SF has not yet determined why there is such a significant bar pass rate penalty associated with Disability Resource Program status. Theories include the fact that approximately up to half the DRP students who receive disability-based exam accommodations while in law school do not apply for accommodations on the CBX, such that they are not getting the time accommodations to which they have become accustomed. Also, many of the students' disabilities place them at a disadvantage relative to students who do not have disabilities when the period of bar study is essentially a marathon and race against a clock that ticks down from graduation in May to the July CBX administration. Because students are not required to report the degree to which they obtain accommodations on the CBX that mirror the exam accommodations they received during law school, we have not yet been able to rigorously test our hypotheses.

2. Student Engagement and Self Directedness

In several places, this Article has gestured at the complicating effect that student engagement has on measuring the efficacy of bar success interventions. A related problem, also mentioned above, is that the law school faces an increasingly difficult challenge of helping students develop along the spectrum from being passive to self-directed learners.⁹¹ It may be that some interventions, such as faculty-staffed 1-1 office hours held for the purposes of honing academic and bar success skills, will show greater efficacy if we can identify and better support those students who struggle to self-assess and self-directedly change in order to apply what they are being taught. The College is still in the process of identifying proxies for self-directedness that can be measured, such that we can rigorously assess our efforts to help students advance on the spectrum and the effects of those efforts on first-time bar pass rates.

3. A New Bar Exam

The California State Bar established a California Attorney Practice Analysis (CAPA) Working Group to “gauge the alignment between the content of the California Bar Exam (CBX) and the practice of law in California” by studying what new attorneys do and what they need to know in order to function effectively.⁹² In

⁹¹ See Michael Hunter Schwartz, *Teaching Law Students to be Self-Regulated Learners*, 2003 MICH. ST. DCL L. REV. 447 (2003).

⁹² The Practice of Law in California: Findings from the California Attorney Practice Analysis and Implications for the California Bar Exam: Final Report of the California Practice Analysis Working

May 2020, the Working Group released its recommendations. The Working Group recommended that the exam focus on a more limited array of topics than does the current CBX, reducing the scope of coverage from 13 subject areas to eight.⁹³ Also, the Group identified six broad competencies that should be assessed on the CBX: drafting and writing, research and investigation, issue-spotting and fact gathering, counsel/advice, litigation, and communication and client relationship.⁹⁴ To follow up on these recommendations, the California Supreme Court and State Bar Board of Trustees established a Blue Ribbon Commission on the Future of the California Bar Exam, which released its final report in May 2023.⁹⁵

We still do not know what the new CBX will look like because, as of the date this Article was submitted for publication, the California Supreme Court had not responded to the Commission's proposals. It is likely that UC Law SF and other law schools will need to reevaluate and redesign their academic programs to ensure success on the new exam, once its contours are clear. This merely underscores that the specific initiatives adopted by UC Law SF matter less than the example of the use of evidence, including quantitative and qualitative data, to continuously assess and reform our academic program and bar success interventions.

Group (May 11, 2020) (<https://www.calbar.ca.gov/Portals/0/documents/reports/2020/California-Attorney-Practice-Analysis-Working-Group-Report.pdf>).

⁹³ *Id.*, at 2. The topics are: Administrative Law and Procedure, Civil Procedure, Constitutional Law, Contracts, Criminal Law and Procedure, Evidence, Real Property, and Torts.

⁹⁴ *Id.*

⁹⁵ See <https://board.calbar.ca.gov/docs/agendaItem/Public/agendaitem1000030806.pdf#page=6>.

Bar Success

Exhibit B

First-Time Bar Passage

Calendar year of graduation	Graduates in the calendar year	Graduates who took the bar exam before graduation	Graduates who took bar exam after graduation	Grads who have not taken the bar	Grads with no bar info	First time takers from prior grad years	Total first-time takers	Total who passed the bar	Law school bar passage rate*	ABA weighted average bar pass rate**	Difference in bar pass rate***	Graduates admitted via alternative pathways to licensure	Total First-Time Bar Passage Rate: first time takers and alternative pathways to licensure
2023	343	3	308	31	1	12	323	233	72.14%	72.67%	-0.53%	0	72.14%
2022	308	-	-	23	0	21	306	217	70.92%	72.52%	-1.6%	0	70.92%
2021	287	-	-	29	2	34	290	237	81.72%	77.05%	4.67%	0	81.72%

*Law School pass rate is how the Law School's graduates performed across all jurisdictions where they took the bar examination for the first time.

**The ABA weighted average bar pass rate is the average pass rate for graduates from ABA-accredited law schools for each jurisdiction in which the Law School's graduates sat for the bar exam. This number is weighted so that bar pass rates from jurisdictions where more of the Law School's graduates sat for the bar exam have a greater impact on the ABA weighted average bar pass rate than bar pass rates from jurisdictions where fewer of the Law School's graduates sat for the bar exam.

***The difference between the Law School pass rate and the ABA weighted average bar pass rate compares the performance of the Law School's graduates on the bar exam in all jurisdictions where they took the bar exam for the first time with the performance of graduates from all ABA-accredited law schools on the bar exam in those same jurisdictions.

Details 2023:

Jurisdiction	Takers	Passers	Pass %	State Pass % for ABA approved law schools	Difference
CALIFORNIA	309	221	71.52%	72.33%	-0.81%
6 REMAINING JURISDICTIONS	14	12	85.71%	77.15%	8.56%

Details 2022:

Jurisdiction	Takers	Passers	Pass %	State Pass % for ABA approved law schools	Difference
CALIFORNIA	285	202	70.88%	72.15%	-1.27%
16 REMAINING JURISDICTIONS	21	15	71.43%	76.27%	-4.84%

Details 2021:

Jurisdiction	Takers	Passers	Pass %	State Pass % for ABA approved law schools	Difference
CALIFORNIA	273	223	81.68%	76.99%	4.69%
8 REMAINING JURISDICTIONS	17	14	82.35%	76.51%	5.84%

Two-Year Ultimate Bar Passage

Calendar year of graduation	Total graduates in calendar year	# of grads with no info	# who did not take a bar	Graduates who sat for a bar exam within two years of their date of graduation			Graduates who have been admitted via an alternative pathway to licensure	Ultimate Bar Passage Rate Total % (incl. alternative pathways)
				# of takers	# who passed	% who passed		
2021	288	0	7	281	264	93.95%	0	93.95%
2020	295	7	3	285	261	91.58%	3	91.67%
2019	312	8		304	285	93.75%		93.75%

Report 5.2.2.2 – Employment

By Assistant Dean Amy Kimmel

I. Class of 2023 Employment (Year Over Year Data)

The UC Law SF Career Development Office (CDO) captures employment data for the graduating 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 employment status may still change.

- February 3, 2024: 85/345 (25% are unemployed and/or we do not have complete data on their employment status).¹
- February 1, 2023: 66/309 (21% unemployed and/or we do not have complete data on their employment status)
- February 15, 2022: 61/284 (21% unemployed and/or we do not have complete data on their employment status)

The numbers are promising, especially given the larger cohort for Class of 2024. But we should be careful about reading too much into them because they could reflect the pace of reporting by students rather than the pace of hiring year-over-year. Because of recent initiatives, including the Academic Regulation 708 Professional Development Program overseen by CDO and the requirement that all students have regular touch-points with the office, students may be more accustomed than they may have been in past years with regular communications to and from this office.

II. Summer OCI

Our on-campus interview program focused on 2L Summer hiring for Big Law is now called “Summer OCI,” in recognition of the fact that interviewing on campus now occurs year-round. Summer OCI will occur in late July or early August, on roughly the same schedule that it has taken place in the past. However, this summer, CDO will also implement a “Preview Program” in June, structured along the lines of similar programs at peer schools that have advanced the law firm interviewing timeline in recent years. In the Preview Program, students can apply for interviews with up to ten (10) firms, which make their own interview arrangements in contrast to the law school-structured interview schedules of regular Summer OCI. This innovation aligns with the shift nationally and locally to early recruiting or “pre-recruiting” and ensures that UC Law SF students are

¹ These are rough numbers and do not include our Bridge Fellows (14 long-term and 3 short-term fellows).

competitive within our region. We are still finalizing the details and dates of these programs.

III. Updates on Current School Year Programs – DEI Training

The CDO and the Office of Student Services have contracted with UCSF Vice Chair for Equity, Inclusion and Structural Change [Dr. LaMisha Hill](#) to prepare an asynchronous co-curricular series that provides implicit bias training to all UC Law SF students in line with the requirement of ABA Section 303. This program, “Anchor in Equity. Cultivate Belonging” contains six modules: (1) The Science of Implicit Bias; (2) The Psychology of Implicit Bias; (3) How Society & Culture Shapes Bias; (4) Bias, Race, and Racism; (5) Implicit Bias in the Legal Profession; and (6) Strategies to Address Implicit Bias. We plan to launch this program during UC Law SF’s inaugural Diversity Week (March 18-22).²

² Diversity Week is an initiative spearheaded by the law school’s Diversity, Equity & Inclusion Working Group. *See* Report 5.2.2.5.

Report 5.2.2.3 – Faculty Hiring

By Provost & Academic Dean Morris Ratner

UC Law SF has hired four Ladder Faculty members, one Visiting Assistant Professor, and two legal writing Professors of Practice. This year's hiring process is ongoing, and so we will have information to share about additional new faculty in the next reporting cycle.

I. Ladder Faculty Hiring

The current Ladder Faculty (tenure-track research faculty) hiring cycle is still in process and has so far yielded four new faculty members who start July 1, 2024, all of whom are pre-tenure. One of the lateral hires is with tenure and so is the subject of a separate voting item in Report 5.2.1.3.

A. Prithika [Balakrishnan](#)

One of two new criminal law expert hires this year, Prithika Balakrishnan will join the UC Law SF Ladder Faculty as a pre-tenure Associate Professor of Law starting July 1. She currently holds the inaugural C. Keith Wingate Visiting Assistant Professor position at UC Law San Francisco's Center for Racial and Economic Justice. Her research focuses on the intersections of criminal law, technology, and ethics. Additionally, she co-directs the Criminal Practice Clinic and leads a seminar in Criminal Law and Ethics. Before her current role, she taught Criminal Law and Ethics, as well as Advanced Criminal Trial Practice, at UC Berkeley Law School. Before her academic career, Professor Balakrishnan worked as a Deputy Public Defender in San Francisco for over a decade. Professor Balakrishnan's research focuses on the intersections of criminal law, technology, and ethics. She received her J.D. from Yale Law School and her B.A. from Stanford University.

B. Kate [Weisburd](#)

Our second criminal law lateral hire is Kate Weisburd. She joins the faculty of UC Law SF with tenure and so is the subject of a separate voting item, Report 5.2.1.3.

C. Benjamin [Barsky](#)

One of two new Ladder Faculty pre-tenure health law hires this year, incoming Associate Professor of Law Ben Barsky will join the UC Law SF faculty on July 1. He currently serves as a Fellow at the Harvard Law School Project on Disability and as an Initiative Fellow at the Edmond & Lily Safra Center for Ethics. He is also a Fellow at the University of

Pennsylvania's Scattergood Program for Applied Ethics of Behavioral Healthcare. He is expected to earn his Ph.D. in health policy from Harvard University in 2025.

Incoming Associate Professor Barksy has an ambitious and original interdisciplinary research agenda and brings methodological sophistication to analyzing problems in the field of health law. He has already secured funding for multiple empirical projects (e.g., from National Institute of Drug Abuse, Robert Wood Johnson Foundation), all of which are well underway. While his expertise and interests place him squarely in the core areas of health law, his scholarship explores several facets of the interface between health policy and criminal justice. He characterizes his current research as falling into three general areas: telemedicine and federal controlled substances law; health and incarceration; and non-police alternative response programs to behavioral health emergencies. Oakland is one of the data-gathering sites for an empirical project falling within this third category. Benjamin's expertise positions him well to meet the teaching needs of the health law program. Professor Barksy received his J.D. from the University of Pennsylvania Carey Law School, his Master of Bioethics from the University of Pennsylvania Perelman School of Medicine, and his B.A. from Johns Hopkins University.

D. George [Horvath](#)

Our second health law hire will start as an Associate Professor at UC Law SF on July 1, as well. Professor Horvath is currently an Assistant Professor at the University of Akron School of Law who transitioned from cardiology to law. His scholarship combines his background as a practicing physician and medical scholar with empirical and doctrinal legal analysis to study the fraught intersections of law and health care. His work examines the ways in which statutory, regulatory, and implementation choices about the FDA's role in regulating medical devices and drugs has impacted safety and innovation. His work also explores the ways in which multiple regulatory systems function together to create "emergent" regulatory systems whose effects on medical products are often quite different from those of any one system. Prior to joining the Akron Law faculty, Professor Horvath was a postdoctoral Fellow in Public Law at the University of California, Berkeley, School of Law. He clerked for Judge John T. Noonan, Jr. on the Ninth Circuit Court of Appeals. Professor Horvath earned his J.D. from Berkeley Law where he served as Editor in Chief of the California Law Review, his M.D. from Temple University, and a B.A. from Brown.

II. Center for Innovation Visiting Assistant Professor

Starting July 1, 2024, Zachary Henderson will serve as a Center for Innovation (C4i) Visiting Assistant Professor collaborating with C4i Faculty Director and Distinguished Professor Robin Feldman on various research projects. He will also teach in the J.D.

program. Professor Henderson previously worked as a litigation associate at Kirkland & Ellis and as the General Counsel, Company Officer, and Data Protection Officer for Levels Health, Inc. He received his J.D. from the University of Chicago Law School and his B.A. from the University of Arkansas.

Visiting Assistant Professors (VAPs) have the status of Lecturers under our Faculty Rules and Procedures because they are contract faculty on term appointments of 1-5 years. Typically, VAPs are pre-tenure-track faculty who teach and research and also receive training and support in anticipation of going on the Ladder Faculty hiring market in later years.

III. Legal Writing Lecturers

To backfill as a result of recent turnover, we have two new full-time legal writing faculty joining UC Law SF in June 2024.

A. Mimi Glumac

Currently a full-time lecturer at San Francisco State University where she teaches legal writing and substantive law classes, Professor Glumac previously worked as a staff attorney at the U.S. Court of Appeal for the Ninth Circuit for a half decade before joining Gordon & Rees, LLP. She also previously taught as an adjunct professor in the legal writing program at UC Law SF. Professor Glumac received her J.D. from the University of San Francisco School of Law and her B.A. from San Francisco State University.

B. Nehal Khorraminejad

Most recently having taught legal writing at Golden Gate University School of Law, Professor Khorraminejad previously worked as an associate attorney at Nutter, McClennen & Fish, LLP in Boston, and, later, as an attorney at Bay Area Legal Aid on the Youth Justice Team. She received her J.D. from the University of Michigan Law School and her B.A. from the University of California, Los Angeles.

Report 5.2.2.4 – Sponsored Research

By Provost & Academic Dean Morris Ratner and Director of Office of Sponsored Projects Yael Nadel-Cadaxa

The [Office of Sponsored Projects](#) at UC Law SF supports third party projects, including grant-funded research. Director Yael Nadel-Cadaxa's report regarding Fiscal 2023 funded projects is attached.

MEMORANDUM

To: Morris Ratner, Provost & Academic Dean

From: Yael Nadel-Cadaxa, Director of the Office of Sponsored Projects

Date: January 8, 2023

Re: Sponsored Project Funding Report for Fiscal Year 2023

Sponsored (third-party funded) research is an important part of UC Law SF's effort to advance the research and public service elements of its mission. This memorandum describes funding amounts in the most recent fiscal year (FY), compares it to prior years, and describes funding sources. The memo is part of regular reporting by the Office of Sponsored Projects (OSP) established by the Provost & Academic Dean in 2021 to support the academic program and provide administrative support and guidance to UC Law SF faculty and staff in their pursuit of federal, state, local, and private funding for research, instruction, and public service-related grants, contracts, and other externally sponsored projects.¹

Focusing on the most recent FY, the total funding recorded in FY2023 was \$9,128,823. While the total revenue in FY2023 was slightly lower than FY2022 (decrease of \$768,961 or -7.8%), it represents a substantial increase over the average annual funding in FY2017-FY2023 (increase of \$3,157,180 or 47.1%), demonstrating a sustained increase in overall funding levels over time, particularly in recent FYs.

The overall results of the FY2023 year-end analysis are summarized in the table and paragraphs below in Section I. Additional data on the funding by source and by recipient is included in the tables and charts in Section II. Additional details on the methodology of the analysis and different types of revenue categorized as "sponsored project funding" are included in Section III.

UC Law SF community members interested in exploring the possibility of grant or other third-party funding for research, public service, or programmatic efforts should contact OSP: osp@uclawsf.edu. Community members seeking information about grants support available at the College and through OSP should visit the [OSP Sharknet page](#).

I. Summary of FY2023 Year-End Analysis of Sponsored Project Funding

In 2022, OSP and Fiscal conducted an initial analysis of all revenue recorded by the College from FY2017 through FY2022, with the ultimate goal of developing a methodology for analyzing and tracking external funding over time. This analysis identified the specific revenue codes/types constituting external funding for research (and other scholarly projects) and then categorized and quantified the various streams of funding². For the purposes of this analysis, all streams of funding are referred to as "sponsored

¹ OSP Director Nadel-Cadaxa started supporting grant functions prior to the establishment of OSP in 2021. As part of this role, OSP leads an initiative, in collaboration with the Office of Fiscal Services ("Fiscal"), to accurately capture all sponsored funding received by the College and track progress supporting and expanding sponsored projects at the College over time.

² Further details on the definitions of and distinctions between revenue codes/types including in this analysis are provided in Section III.

project funding.”³ This memo updates that prior analysis with FY23 data, providing a more complete picture of sponsored project funding in the most recent FY and trends in funding over time.⁴

As detailed in the table below, the total sponsored project funding recorded in FY2017-FY2023 was \$41,801,503 and the average annual funding in FY2017-FY2023 was \$5,971,643. Within the FY2017-FY2023 total, \$23,239,162 in funding was composed of federal, state, city/country, and private grant/contract awards, and special appropriations to UC Law SF for a variety of sponsored projects, representing the majority (55.6%) of total funding. The remaining sponsored project funding in FY2017-FY2023 was composed of \$14,971,179 in gifts/donations and non-exchange grants⁵ to the UC Hastings Foundation, which were transferred to UC Law SF for use by research centers for sponsored projects (representing 35.8% of total funding), and \$3,591,163 in funding from other sources, including fee for service contracts, investment income, conference fees, and dues/membership fees (hereinafter referred to as “other sources,” representing 8.6% of total funding).

Focusing on the most recent FY, the total funding recorded in FY2023 was \$9,128,823. While the total revenue in FY2023 was slightly lower than FY2022 (decrease of \$768,961 or -7.8%), it represents a substantial increase over the average annual funding in FY2017-FY2023 (increase of \$3,157,180 or 47.1%), demonstrating a continued upward trend in overall funding levels over time, particularly in recent FYs. Within the FY2023 total, \$6,581,441 in funding came from federal, state, city/country, and private grant/contract awards, and special appropriations, representing the vast majority (72.1%) of total FY2023 funding and a substantial increase over FY2022 (increase of \$1,004,480 or 18%). The remaining funding in FY2023 was composed of \$2,123,848 in gifts/donations and non-exchange grants to the UC Hastings Foundation (representing 23.3% of total FY2023 funding), and \$423,534 in funding from other sources (representing 4.6% of total FY2023 funding).

As detailed in the table below, annual funding amounts indicate a continuing positive overall trend in year-over-year growth in FY2019, FY2021, and FY2022 and a modest decrease in FY2023. While the trend in year-over-year growth in total funding did not continue in FY2023, focusing exclusively on total funding hides more nuanced trends in funding across revenue types. Specifically, while revenue from

³ For the purposes of this analysis, “sponsored project funding” only includes revenue recorded for a given FY, which does not necessarily equate with total award amounts or total revenue received in each FY and does not include unexpended revenue on open grants/contracts. For example, if a multi-year \$1 million grant was awarded in FY2021, \$500,000 in revenue was received in FY2021, and \$400,000 in expenses were incurred in FY2021, the “sponsored project funding” for that grant in FY2021 would be recorded in this analysis as \$400,000. The remaining \$100,000 in revenue received in FY2021, but not spent in FY2021, would be reclassified to future FYs, and recorded in the FY in which associated expenses are incurred. The remaining \$500,000 in funding would be recorded in subsequent FYs, once the revenue was received and associated expenses incurred. Note: For grants/contracts where the grantor/funder restricts use of the funds to specific purposes, when the grant/contract closes, any revenue received that remains unspent is return to the grantor/funder, absent approval by the grantor/funder to reallocate the funds to other purposes. For grants/contracts where use of the funds is unrestricted (e.g., gifts), when the grant/contract closes, then all remaining revenue received is recorded in that FY, regardless of total expenses incurred.

⁴ Given the multitude of revenue codes/types within the General Ledger (GL) Chart of Accounts and variation over time in policy, procedure, and practices regarding the categorization of external funding for sponsored projects, the analysis required judgment calls to define “sponsored project funding.” OSP & Fiscal are confident that the results of the analysis are accurate and form a sound basis for analyzing historical and future trends in sponsored project funding.

⁵ “Non-exchange grants” are classified as revenue provided to the UC Hastings Foundations in the form of gifts/donations specifically intended for use by designated research centers, which is then transferred to the College for use by those research centers. While this revenue is often provided through “grant awards” or “grant agreements,” acceptance of these funds does not create an “exchange relationship”, as the College is not obligated to provide any specific benefit or service to the donor and only minimal restrictions are placed on use of the funds.

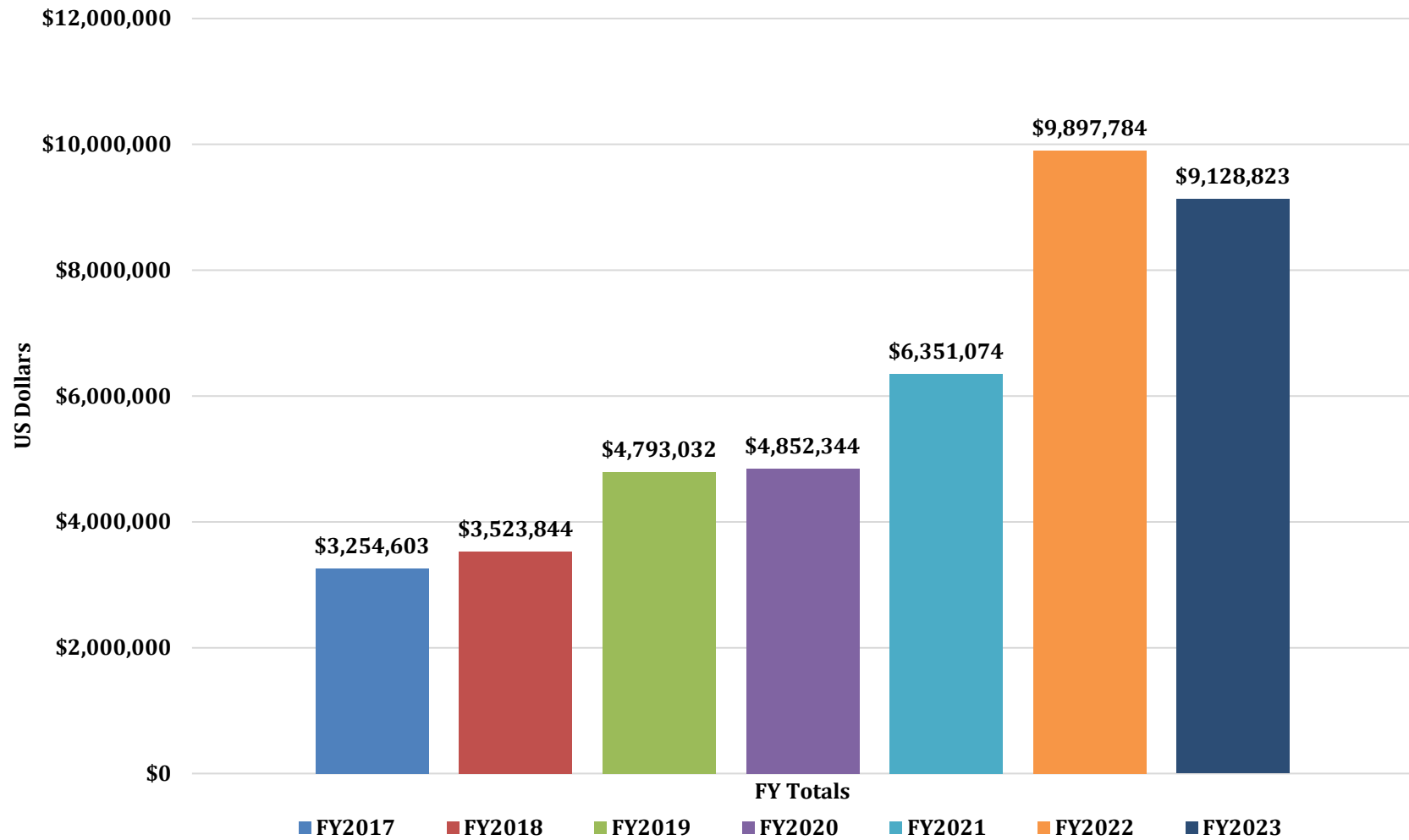
non-exchange grants, gifts, and other sources all decreased in FY2023⁶, revenue from federal, state, city/county and private grants all increased.⁷ Thus, while the FY2023 sponsored project funding picture is not universally positive, the continued year-over-year growth in revenue from governmental and private sources is a promising trend that OSP will seek to extend into future FYs through expanded outreach and capacity building initiatives for grants-interested faculty and staff.

⁶ Year-over-year revenue from non-exchange grants decreased by \$1,215,320 or 48%. Revenue from gifts/donations decreased by \$374,939 or 31.6%. Revenue from other sources decreased by \$183,181 or 30.2%.

⁷ Year-over-year revenue from federal sources increased by \$273,922 or 110%. Revenue from state sources increased by \$322,020 or 15%. Revenue from city/county sources increased by \$14,017 or 9.1%). Revenue from private sources increased by \$384,521 or 13%).

Total Sponsored Project Funding FY2017 - FY2023			
FY	FUNDING	% of FY17-FY23 Total	Variance from Prior FY
2017	\$3,254,603	7.8%	N/A
2018	\$3,523,844	8.4%	\$269,241
2019	\$4,793,032	11.5%	\$1,269,188
2020	\$4,852,344	11.6%	\$59,312
2021	\$6,351,074	15.2%	\$1,498,730
2022	\$9,897,784	23.7%	\$3,546,710
2023	\$9,128,823	21.8%	(\$768,961)
FY17-FY23 Total	\$41,801,503		
FY17-FY23 Average	\$5,971,643		

Total Sponsored Project Funding FY2017 - FY2023



II. Detailed Sponsored Project Funding Data for FY2017-FY2023

The tables/charts below include more detailed data on funding trends in FY2017-FY2023.

Sponsored Project Funding by Source (Total \$) ⁸ FY2017 - FY2023								
FY	Federal	State	City	Private	Non-Exchange Grant	Gift	Other Sources	TOTAL
2017	\$539,098	\$110,450	\$0	\$1,162,007	\$628,301	\$319,456	\$495,292	\$3,254,603
2018	\$360,641	\$0	\$0	\$1,175,336	\$1,088,524	\$454,958	\$444,386	\$3,523,844
2019	\$133,779	\$0	\$0	\$1,794,870	\$1,467,748	\$702,430	\$694,206	\$4,793,032
2020	\$62,673	\$112,395	\$137,493	\$2,040,363	\$1,602,977	\$527,482	\$368,961	\$4,852,344
2021	\$93,480	\$0	\$154,392	\$3,203,784	\$1,531,037	\$810,311	\$558,070	\$6,351,074
2022	\$249,117	\$2,217,892	\$153,793	\$2,956,160	\$2,529,423	\$1,184,684	\$606,715	\$9,897,784
2023	\$523,038	\$2,549,912	\$167,810	\$3,340,681	\$1,314,103	\$809,746	\$423,534	\$9,128,823
FY17-FY23 Total	\$1,961,825	\$4,990,649	\$613,488	\$15,673,200	\$10,162,111	\$4,809,067	\$3,591,163	\$41,801,503
FY17-FY23 Average	\$280,261	\$712,950	\$87,641	\$2,239,029	\$1,451,730	\$687,010	\$513,023	\$5,971,643

⁸ This table details the total sponsored project funding recorded in each revenue code/type in each FY and for the entirety of FY2017-FY2023. For the purposes of this analysis, “sponsored project funding” recorded only includes revenue recorded in each FY, which does not necessarily equate with total award amounts and does not include unexpended revenue on open grants/contracts.

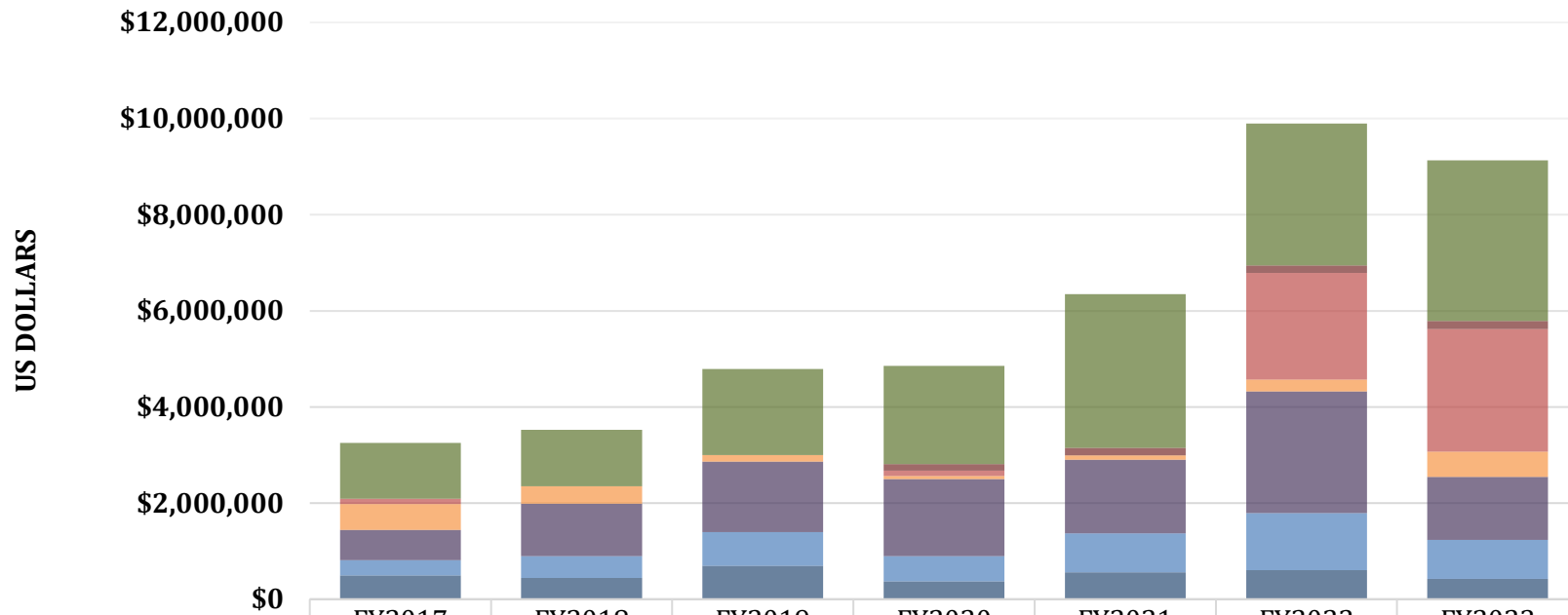
Sponsored Project Funding by Source (% of Total)⁹ FY2017 - FY2023								
FY	Federal	State	City	Private	Non-Exchange Grant	Gift	Other Sources	% of FY17-FY23 Total¹⁰
2017	16.6%	3.4%	0.0%	35.7%	19.3%	9.8%	15.2%	7.8%
2018	10.2%	0.0%	0.0%	33.4%	30.9%	12.9%	12.6%	8.4%
2019	2.8%	0.0%	0.0%	37.4%	30.6%	14.7%	14.5%	11.5%
2020	1.3%	2.3%	2.8%	42.0%	33.0%	10.9%	7.6%	11.6%
2021	1.5%	0.0%	2.4%	50.4%	24.1%	12.8%	8.8%	15.2%
2022	2.5%	22.4%	1.6%	29.9%	25.6%	12.0%	6.1%	23.7%
2023	5.7%	27.9%	1.8%	36.6%	14.4%	8.9%	4.6%	21.8%
% of FY17-FY23 Total¹¹	4.7%	11.9%	1.5%	37.5%	24.3%	11.5%	8.6%	100%

⁹ This table details the percentage of total sponsored project funding recorded in each revenue code/type in each FY and for the entirety of FY2017-FY2023.

¹⁰ This column represents the total sponsored project funding recorded in each FY as a percentage of total sponsored project funding for FY2017-FY2023.

¹¹ This row represents the total FY2017-FY2023 sponsored project funding recorded from each source type as a percentage of total sponsored project funding for FY2017-FY2023.

Sponsored Project Funding by Source (Total \$) FY2017 - FY2023



	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023
Private	\$1,162,007	\$1,175,336	\$1,794,870	\$2,040,363	\$3,203,784	\$2,956,160	\$3,340,681
City	\$0	\$0	\$0	\$137,493	\$154,392	\$153,793	\$167,810
State	\$110,450	\$0	\$0	\$112,395	\$0	\$2,217,892	\$2,549,912
Federal	\$539,098	\$360,641	\$133,779	\$62,673	\$93,480	\$249,117	\$523,038
Non-Exchange Grant	\$628,301	\$1,088,524	\$1,467,748	\$1,602,977	\$1,531,037	\$2,529,423	\$1,314,103
Gift	\$319,456	\$454,958	\$702,430	\$527,482	\$810,311	\$1,184,684	\$809,746
Other	\$495,292	\$444,386	\$694,206	\$368,961	\$558,070	\$606,715	\$423,534

FUNDING BY FISCAL YEAR

Sponsored Project Funding by Recipient (Total \$)¹² FY2017 - FY2023						
FY	WLL¹³	CGRS¹⁴	C4i¹⁵	CON¹⁶	Others¹⁷	TOTAL
2017	\$1,334,607	\$1,182,748	\$200,129	\$511,205	\$25,913	\$3,254,603
2018	\$754,296	\$1,539,184	\$534,680	\$397,619	\$298,065	\$3,523,844
2019	\$1,277,851	\$2,231,190	\$292,601	\$534,098	\$457,291	\$4,793,032
2020	\$804,168	\$2,414,809	\$484,742	\$1,007,683	\$140,943	\$4,852,344
2021	\$1,243,733	\$2,420,004	\$1,105,909	\$1,129,423	\$452,005	\$6,351,074
2022	\$1,414,089	\$2,842,995	\$980,842	\$3,655,056	\$1,004,803	\$9,897,784
2023	\$1,320,439	\$2,441,867	\$886,356	\$3,349,646	\$1,130,515	\$9,128,823
FY17-FY23 Total	\$8,149,184	\$15,072,796	\$4,485,259	\$10,584,729	\$3,509,535	\$41,801,503
FY17-FY23 Average	\$1,164,169	\$2,153,257	\$640,751	\$1,512,104	\$501,362	\$5,971,643

¹² This table details the total sponsored project funding recorded by each recipient group in each FY and for the entirety of FY2017-FY2023. For the purposes of this analysis, “sponsored project funding” recorded only includes revenue recorded in each FY, which does not necessarily equate with total award amounts and does not include unexpended revenue on open grants/contracts.

¹³ The Center for WorkLife Law.

¹⁴ The Center for Gender and Refugee Studies.

¹⁵ The Center for Innovation.

¹⁶ UCSF/UC Hastings Consortium on Law, Science & Health Policy

¹⁷ Other research/programmatic centers and individual faculty unaffiliated with specific research/programmatic centers.

Sponsored Project Funding by Recipient (% of Total) ¹⁸ FY2017 - FY2023						
FY	WLL ¹⁹	CGRS ²⁰	C4i ²¹	CON ²²	Others ²³	TOTAL
2017	41.0%	36.3%	6.1%	15.7%	0.8%	7.8%
2018	21.4%	43.7%	15.2%	11.3%	8.5%	8.4%
2019	26.7%	46.6%	6.1%	11.1%	9.5%	11.5%
2020	16.6%	49.8%	10.0%	20.8%	2.9%	11.6%
2021	19.6%	38.1%	17.4%	17.8%	7.1%	15.2%
2022	14.3%	28.7%	9.9%	36.9%	10.2%	23.7%
2023	14.5%	26.7%	9.7%	36.7%	12.4%	21.8%
% of FY17- FY23 Total ²⁴	19.5%	36.1%	10.7%	25.3%	8.4%	100.0%

¹⁸ This table details the percentage of total sponsored project funding recorded by each recipient group in each FY and for the entirety of FY2017-FY2023.

¹⁹ The Center for WorkLife Law.

²⁰ The Center for Gender and Refugee Studies.

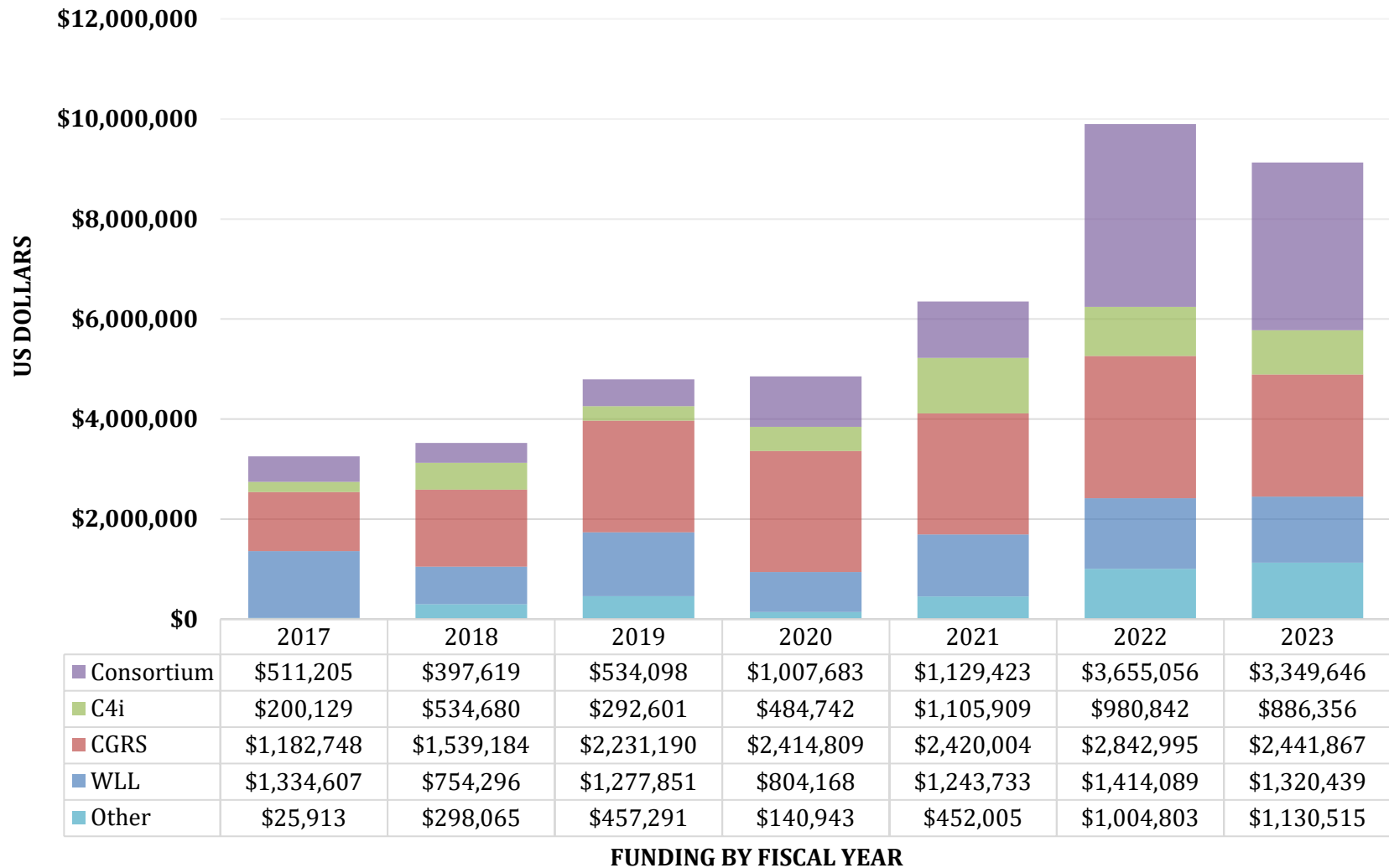
²¹ The Center for Innovation.

²² UCSF/UC Hastings Consortium on Law, Science & Health Policy

²³ Other research/programmatic centers and individual faculty unaffiliated with specific research/programmatic centers.

²⁴ This row represents the total FY2017-FY2023 sponsored project funding recorded by each recipient group as a percentage of total sponsored project funding for FY2017-FY2023.

Sponsored Project Funding by Recipient FY2017 - FY2023



III. Methodology for Categorization of Sponsored Project Funding

a. Categorization of Sponsored Project Funding by Source

Based on the categories outlined in the GL Chart of Accounts, along with the descriptions for those categories, OSP & Fiscal determined that the following revenue codes should be considered as “sources” of sponsored project funding:

- 4100 – Conference Fees
- 4105 – WLL Services
- 4200 – Federal Grants, Contracts, and Special Appropriations
- 4310 – State Grants, Contracts, and Special Appropriations
- 4352 – Gifts
- 4357 – Non-Exchange Grants
- 4360 – Private Grants, Contracts, and Special Appropriations
- 4400 – Investment Income
- 4505 – SF City & County Grants, Contracts, and Special Appropriations
- 4540 – Dues/Membership Fees
- 4571 – Administrative Overhead (External)
- 4999 – Non-Mandatory Transfers from Other Funds

These revenue codes were designated as “sponsored project funding” given that, in all cases, external funds are being provided to the College (either directly or through the UC Hastings Foundation) in support of research and other scholarly projects, which would otherwise lack support through regular state and tuition funding mechanisms.

Codes 4100 (“Conference Fees”), 4400 (“Investment Income”), and 4540 (“Dues/Membership Fees”) are assigned to revenue allocated to various recipients and was included within “Other Sources” for the purposes of this analysis.

Code 4105 (“WLL Services”) is assigned to revenue exclusively allocated to WLL in support of its activities and was included within “Other Sources” for the purposes of this analysis.

Code 4571 (“Administrative Overhead (External)”) is assigned to revenue from administrative overhead (“indirect costs”) billed under federal grant awards that is not already included under code 4200. In prior fiscal years, Fiscal separately categorized direct cost revenue and indirect cost revenue from federal grant awards. This practice was discontinued in FY2021 and currently all direct and indirect cost revenue from federal grant awards is assigned code 4200. Codes 4200 and 4571 are included within “Federal Grants, Contracts, and Special Appropriations” for the purposes of this analysis.

Code 4352 (“Gifts”) is assigned to revenue provided to the UC Hastings Foundation in the form of unilateral gifts/donations that is transferred to the College for its general use. For the purposes of this analysis, OSP/Fiscal identified the specific accounts into which such revenue was being allocated to support research and other scholarly projects. Specifically, OSP/Fiscal determined that, within code 4352, only revenue associated with established research centers should be considered as “sponsored project” funding. Such funding was labelled as “Gifts” for the purposes of this analysis.

Code 4357 (“Non-Exchange Grants”) is assigned to revenue provided to the UC Hastings Foundations in the form of gifts/donations specifically intended for use by designated research centers, which is then transferred to the College for use by those research centers. While such gifts/donation are often provided through “grant awards” or “grant agreements,” acceptance of these funds does not create an “exchange”

relationship as the College is not obligated to provide any specific benefit or service to the donor and only minimal restrictions are placed on the use of such funds. Such funding was labelled “Non-Exchange Grants” for the purposes of this analysis.

Code 4999 (“Non-Mandatory Transfers from Other Funds”) is assigned to revenue transferred from existing externally funded accounts held by the College, which may include gifts/donations to the UC Hastings Foundation and revenue from other sources, is available for the general use of the College, and may also be transferred to other accounts based on the intent of the sponsor and at the discretion of the fund’s controller. For the purposes of this analysis, OSP/Fiscal identified the specific accounts into which such revenue was allocated to support research and other scholarly activities and determined that, within code 4999, only transfers to established research centers/faculty from gift/donation-funded accounts based on the specific intent of the sponsor should be considered as “sponsored project” funding. Such funding was included within “Gifts” for the purposes of this analysis.

b. Categorization of Sponsored Project Funding by Recipient

In addition to categorizing sponsored project funding by revenue code (as outlined above), OSP & Fiscal also categorized sponsored project funding by recipient, separating the four largest research centers from all other research centers and individual faculty into the following five categories:

- The Center for WorkLife Law (WLL)
- The Center for Gender & Refugee Studies (CGRS)
- The Center for Innovation (C4i)
- UCSF/UC Hastings Consortium on Law, Science & Health Policy (CON)
- Other research/programmatic centers and individual faculty unaffiliated with specific research/programmatic centers (“Others”)

ACTION ITEM

1. **REPORT BY:** Finance Committee Chair Chip Robertson
2. **SUBJECT:** State Budget Report for 2023-24
– As of December 31, 2023, and Mid-year Budget Changes
3. **RECOMMENDATION:**

That the Board of Directors approves the 2023-24 State Budget for core operations as revised at mid-year.

4. BACKGROUND

Attached is the mid-year budget report for 2023-24 as of December 31, 2023. The mid-year revised budget was developed after reviewing departmental budget performance and evaluating revenues and expenditures based on year-to-date figures. Changed from past practice, as noted in the beginning budget, are expenditure budgets related to security and engineering costs, which are centralized as state expenses; also, the rental payment for academic and office space at 198 McAllister building started in August 2023. The result of midyear adjustments is a projected budget deficit of \$1.37 million (-1.8%), an improved position by \$1.22 million from the beginning budget projected deficit of \$2.59 million (-3.2%) and the result of revenue budgets increasing \$1.69 million offset by \$0.1 million increased tuition discounts and \$0.37 million increased operating expenses. Major variances are described below.

Revenues

▪ State Appropriations

General Fund support for operations in the Budget Act of 2023 is \$23,956,000. 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 and revised per Governor's budget with a 2023-24 appropriation of \$3,096,000.

Lottery fund for 2023-24 has been revised from \$172,000 to \$234,000 with a 36% increase per updates included in the 2024-25 governor's budget.

State of California Funding Appropriations

Description	2022-23	2023-24	\$ Change	% Change
Ongoing General Fund Support	18,789,000	20,956,000	2,167,000	11.53%
100 McAllister St. Building Renovation Project	90,000,000		(90,000,000)	-100.00%
Renaming Cost	885,000		(885,000)	-100.00%
Alternative Public Safety Program (BCP= 3 years)		3,000,000	3,000,000	-
California Institute on Law, Neuroscience & Education			-	-
State General Fund Operations	\$ 109,674,000	\$23,956,000	\$ (85,718,000)	-78.16%
333 Golden Gate Rent, General Fund Lease-revenue	3,089,000	3,096,000	7,000	0.23%
Total State General Fund Appropriation	\$ 112,763,000	\$27,052,000	\$ (85,711,000)	-76.01%
State Lottery - Instructional Support	288,000	234,000	(54,000)	-19%

▪ Tuition and Related Fees

The 2023-24 midyear revised budget increased \$894,674 or 2% based on actual paid enrollment fees as of January and reflects an increase in FTE enrollment from beginning budget projections.

Registration fee – Enrollment fee paid by JD student was projected at 1082 FTE student in 2023-24 beginning budget and revised to 1093 FTE student with and 1% increase. Budgeted at 380 FTE 1L JD student, actual was 380.5 students at beginning of fall semester and 371.5 at beginning of spring semester for a drop of 9 FTE student or (2.4%) and a combined enrollment at 376 FTE which missed projection target. Continuing JD student attrition occurred at rates slightly lower than projected.

Veteran Fee waivers - An unfunded mandate that provides full enrollment fee for eligible students, were budgeted at 39 and as of spring numbered 33 for \$1.53 million in foregone revenues. Last year fees were waived for 39 FTE students.

Non-resident Tuition – Non-California resident tuition was projected at historical averages and budgeted at 89 FTE non-resident students in 2023-24 beginning budget, it has been revised to 112 FTE non-resident student based on actual payment received as of January 2024 with an 25% increase.

LLM Tuition - The enrollment fee of \$47,500 for LL.M. students was budgeted to be paid by 30 FTE students. As of January 2024, revenue from 25 FTE students has been recorded. The LLM tuition budget has been revised to \$1,198,408 with 16% decrease per actual payment received as of January.

FTE Student Enrollment 2023-24	Beginning Budget	Midyear Revised Budget	Budget Change
JD	1,082	1,093	11
JD Fee Waivers	-39	-33	6
LLM	30	25	(5)
MSL & CSL	13	13	-
TOTAL	1,086	1,098	12

HPL Revenue Share – The 2023-24 \$592,841 budget remains unchanged and represents the revenues retained after the shared funding agreement with UCSF. After direct expenses incurred by UC Law SF, the 2023-24 year is projected with a net operating income of approximately \$60,628, an equal amount to be incurred by UCSF. The \$976,644 HPL revenue received as of December 2023 includes the revenue share for UCSF.

- **Investment Income** – Investment yields are performing well, and as of December 2023, \$394,340 has been posted to the state account, the beginning budget was revised from \$150,000 to \$600,000 with 300% increase to align with actuals. Last year a total of \$511,103 was received.
- **Unrealized Gain/Loss on Investments** – This category accounts for the change in the market value of the state fund’s share of the UC General Endowment Pool (GEP). As of December 2023, unrealized gain of \$1,250,398 have been posted. Unrealized losses of (\$27,598) were recognized as of December 2022, it turned to unrealized gain of \$3,225,167 by June 2023 fiscal year-end.
- **Overhead Allowances** – This includes administrative overhead revenue from grants and contracts and 5% of the operating revenue from Auxiliary Enterprises. The midyear revised budget increased \$210,119 or 26% due to new grants and contracts received and the slight revenue increase projection for Auxiliary enterprises. \$268,710 had been posted as of December 2023 mainly because we normally post Auxiliary Enterprise administrative overhead revenue at year end.
- **Transfer from Other Funds** – This \$50,000 nonmandatory transfer was from the nonstate Dean’s Priority Fund, approved by the Chancellor and Dean, for the renaming marketing contract which was not initially funded.

Expenditures

- **Salaries and Wages & Contracted Temporary Help** - The midyear revised budget for salary and wages decreased \$(466,237) or 2% due to savings from staff and faculty turnover, which lead to contracted temporary help wages budget increased by \$60,763 or 107% to cover the regular staff vacancy. The 2023-24 beginning budget included funding for:

- Faculty compensation adjustments of 3% effective October 1, 2023.
- Non-represented staff compensation adjustments of 3% effective October 1, 2023.
- General salary adjustments for represented staff – AFSCME and AFT-Librarians -- per collective bargaining agreements providing 3% a wage increase effective January 1, 2024.
- Approved special funding request to increase Non-LRW Adjunct Compensation by 10% and LRW Adjunct Compensation by 4% effective January 1, 2024.
- A provisional allocation of \$250,000 to fund Classroom instructional needs.
- Projected staff salary savings at 2% or \$(273,489) from turnover and temporary vacancies.
- One-time savings from partial buyouts of state salaries through nonstate grant and chair funding.

The midyear revised salaries and wages budget includes the following adjustments:

- An augmentation to the staff reclassification/equity adjustment funding of \$69,021 providing a total of 16 staff adjustments effective January 1, 2024.
- Reduction of the Classroom provisional allocation by \$(50,000), leaving \$51,829 unallocated and available to fund instructional needs after other allocations needed.
- Salary saving adjustments recognizing position turnover to-date, departmental reorganizations, paid leaves, and estimated cost to fill currently vacant positions.
- Bench to school Temporary help wages budget reduced by \$(217,598) due to difficulty in filling all the position projected in beginning year includes chief of staff and research fellows, also due to reallocate funding source from state to nonstate program.
- Regular staff salaries budget for Communications was reduced by \$(79,594) due to the vacancy of Executive Director of Communications; the position is budgeted to be filled in February.
- Decreased budget allocations totaling \$(48,000) for part-time instructors in Legal Writing and Research based on actual expenditures.
- Special funding request for temporary help wages of \$10,000 in FY24 and ongoing for Graduate Fellows for LEOP.
- Augmentation of 0.25 FTE for Administrative Assistant for the Pro Bono Program/Increased Admin support for Externships with amount of \$1,204 in FY24, and \$14,448 ongoing cost requested by Center for Social Justice.

- **Insurance** – The midyear revised budget for insurance cost has increased by \$139,051 or 21% due to statewide insurance premium surges. Insurance premiums are normally paid annually at the beginning of the fiscal year. As of December 2023, we paid \$803,331 to Alliant Insurance Services, which increased \$141,906 or 21% from the insurance premiums paid in 2022-23.
- **Supplies** – The midyear revised budget for supplies increased by \$115,590 or 49% mainly due to the \$123,026 budget increase for Building Maintenance supplies which was not budgeted in the beginning by mistake. As of December 2023, \$163,986 or 47% of the revised budget has been spent.
- **Events and Entertainment** – With in-person events planned again in 2023-24 the revised budget increases by \$62,712 or 10% from beginning budget; increased by \$142,234 over 2022-23 actuals of \$570,523, 30% of the revised budget has been spent as of December 2023. The biggest budget increase is \$24,509 for UCSF/Hastings Consortium allocated from salary savings and \$12,648 for Accreditation to host event for ABA site visit. Included in this revised budget are \$5,000 special funding request to host campus-wide diversity week, and \$3,500 special funding request to host third annual UCSF-UC Law SF first generation program community mixer event.
- **Building Maintenance** – The majority of building maintenance projections are allocated to janitorial services, engineering, and special repairs and maintenance. The midyear revised budget decreased by \$(438,568) or -9% mainly due to the refined cost estimates related to Building Maintenance engineering; the budget was reduced by \$(500,000). 39% of the revised budget has been spent as of December 2023.
- **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. The midyear revised budget increased by \$617,358 or 9%. Included in the revised budget are:
 - \$280,000 security service contract increase needed to have UCSF security cover the Academe at 198 building for 24/7.
 - \$82,000 contract increase for Build Group 200/379 IT Suite tenant improvements & Crown Movers Tower moves.
 - \$67,716 contract increase for Avidex Service Agreement for maintaining classrooms at Academe of 198.
 - \$3,522 special funding request for contract increase for 333 Golden Gate Main Entrance's Door Reprogram.
 - \$18,000 special funding request for Lavalier Microphones for 198 Courtrooms and LexLab.
 - \$115,000 special funding request for Firewall Replacement.
 - \$100,000 special funding request for T5 Solutions Technology Consulting Services for UC Law SF.

- **Equipment and Improvements** – The midyear revised budget increased by \$290,887 or 140%. Included in the revised budget are:
 - \$44,636 capital equipment replacement budget increase for CENIC circuit upgrade.
 - \$27,605 capital equipment replacement budget increase for new AV network switch equipment for Academe at 198 classrooms.
 - \$37,973 capital equipment replacement budget increase for new classroom and new office computers at Academe at 198.
 - \$172,000 building improvement budget increase for a one-time special funding request for classroom lock down project.
- **Space & Equipment Rental** - Most of the space and equipment rental projections are allocated to rental of space. The midyear revised budget increased by \$244,542 or 8%; this is mainly due to the offices located at Tower building with planned moved out to 198 McAllister building in November 2023, and we started to pay office rental to Academe at 198 in August 2023.

Summary – Operations

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 \$24.5 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). Not included are 2023-24 realized/unrealized gains on investments at \$1.25 million as of December 2023. The prior year reserve is updated and currently reported at actual ending \$25.9 million.

SUMMARY - OPERATIONS		Midyear		Actual Dec-2023
	Beginning	Revised	Actual	as a
	Budget	Budget	as of	Percent of
	2023-24	2023-24	31-Dec-2023	Revised Budget
Operating Revenues (without Gains/Losses)	78,362,735	80,051,313	66,533,018	83%
Operating Expense (without Financial Aid)	(66,542,857)	(66,911,040)	(31,802,774)	48%
Operating Income (Loss)	11,819,878	13,140,273	34,730,244	264%
Financial Aid Grants	(14,406,930)	(14,511,086)	(14,473,569)	100%
Realized/Unrealized Gains (Losses)	-	-	1,250,398	∞
Change in Net Assets	(2,587,052)	(1,370,813)	21,507,073	-1569%
Beginning Net Assets - Operating	25,311,559	25,899,200 *	25,899,200	100%
Ending Net Assets - Operating	\$ 22,724,507	\$ 24,528,387	\$ 47,406,273	193%

Beginning Net Assets - Operating

The carryover of the prior year net assets was budgeted at a preliminary balance of \$25.3 million, has been finalized at \$25.9 million. This is the net amount of state fund assets less liabilities with the non-cash pension accounts excluded (i.e., deferred outflows/inflows of resources, net pension, and retiree health benefits liabilities with UCRP).

PLANT FUND RESERVE

The Plant Fund Reserve ended 2022-23 with a fund balance of \$4,987,881 increased by \$326,193 net investment activity. The 2023-24 Long-Range Campus Plan (LRCP) budget does not include any new project expenditure funding from this source and estimates addition from investment income at \$128,193.

LEASE-REVENUE BOND RENTAL PAYMENTS

Included in the State Budget Act of 2023 is \$3,096,000 under General Fund capital item 6600-003-0001 for support of UC Law SF. 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; \$402,186 scholarship has been awarded as of December 2023.

5. PROPOSED RESOLUTION:

Resolved that the Board of Directors approves the 2023-24 mid-year revised State Budget for core operations.

Attachment:

- State Budget Report 2023-24 as of December 31, 2023

ACTION ITEM

1. **REPORT BY:** Chair of the Finance Committee Chip Robertson
2. **SUBJECT:** Auxiliary Enterprises Budget Report for 2023-24
-- As of December 31, 2023, and Mid-year Budget Changes
3. **RECOMMENDATION:**

That the Board of Directors approve the attached revised 2023-24 mid-year budgets for auxiliary enterprises – McAllister Tower, Parking Garage, Student Health Services, and Special Events and Guest Services.

4. BACKGROUND:

Attached are the mid-year budget reports as of December 31, 2023. The mid-year revised budget was developed after reviewing each auxiliary enterprise budget performance and evaluating revenues and expenditures based on year-to-date figures. Effective 2023-24 the Business Center moves from an auxiliary enterprise operation to a state-funded administrative service cost center. Major variances discussed below.

The following budget variances apply to all auxiliary enterprises with these categories:

Expenditures

- Administrative Overhead -- All auxiliary enterprises are assessed administrative overhead expense to reflect indirect costs; the rate is 5% of total operating revenues for all auxiliary enterprises except for McAllister Tower that was budgeted at 0% at the beginning of the fiscal year and adjusted back to 5% assessment at mid-year. Overhead expenditures from auxiliary enterprises will be posted at 2023-24 fiscal year-end. The 2023-24 mid-year revised budget for administrative overhead is a total of \$233,096 for all auxiliaries.

Nonoperating Revenues/(Expenses)

- Realized Gain/Loss on Sale of Investments – This activity results from the transfer or liquidation of shares in the UC General Endowment Pool (GEP) to cash for operational needs and is not a budgeted item as there is no basis for a projection. There has not been any activity to-date in the 2023-24 fiscal year.

- Unrealized Gain/Loss on Investments – This category accounts for the change in the market value of the UC General Endowment Pool (GEP) and is not a budgeted item as there is no basis for a projection. Unrealized gains of \$147,762 (\$141,799 for McAllister Tower and \$5,963 for Student Health Services) have been recognized as of December 31, 2023.

McALLISTER TOWER

Revenues

- Apartment and Commercial Rent – The mid-year budget revenue has been adjusted to \$353,103 from \$414,418 with 15% decrease. This adjustment is due to the occupancy of residential units ending in August 2023 and offices located in Tower building moved out in November 2023, rather than the previously planned move out time of December 2023. The actual rental income as of December 2023 includes \$166,088 from residential income earned in July and August, and \$187,015 from commercial rental income generated from offices spaces from July to November 2023.

Expenditures

- Regular Contract Services – The mid-year revised budget decreased by \$86,000 or 49% because we had centralized all security service contract expenses to state funded cost which was budgeted at \$104,000 at the beginning budget. The \$89,778 midyear revised budget for janitorial services increases from \$71,778 beginning budget for McAllister Tower which closed for renovation in November 2023 rather than previously assumed December 2023.
- Utilities – The mid-year budget has been revised from \$535,000 to \$335,000 with 37% decrease due to budget reduction of \$200,000 for steam cost to align with year-to-date actuals and assumes the McAllister Tower will be vacant from December 2023.
- Insurance – The 2023-24 budget developed in April was established at last year's actual. The mid-year budget has been adjusted down by 27% to reflect a decrease in premiums based on year-to-date actual payment and insurance premiums normally are fully paid at the beginning of the year.

Nonoperating Revenues/(Expenses)

- Investment Income – Investments are performing well, and as of December 2023, \$44,708 has been posted, so we revised the beginning budget from \$40,000 to \$80,000 with 100% increase to align with actuals. Last year a total of \$66,356 was received.

PARKING GARAGE

Expenditures

- Maintenance and Special Repairs – This reporting category includes regular ongoing maintenance costs including equipment, elevators, fire-life safety systems, and pest control. The 2023-24 budget includes one-time special repairs of \$157,100 for resurfacing the garage ramps, which have not been completed yet, which reflects in low year-to-date expenses at 10% of the revised budget as of December 2023. The mid-year revised budget includes a \$10,000 budget increase for special repairs and maintenance as a placeholder for repairs needed such as to replace broken windows.
- Insurance - The 2023-24 budget developed in April was established at last year's actual. The mid-year budget was adjusted up by \$17,353 or 13% to reflect an increase in premiums due to high inflation and statewide insurance premium surges. Insurance premiums normally are fully paid at the beginning of the year, that is why 100% has been paid as of December 2023.

STUDENT HEALTH SERVICES

Revenues

- Fees – The mid-year revised fee revenue projections estimated 1,154 FTE students paying the \$965 Health Center Fee and 572 FTE (49.6%) paying the \$100 GSHIP Administration Fee for \$1,170,846 total revenues. The mid-year budget has been increased by \$ 22,151 or 2% to reflect higher year-to-date revenues of \$1,175,295 as of end of December 2023.

Expenditures

- Consultant and Contracted Services – The contract with Carbon Health is budgeted at \$59.51 per student per month and the 2023-24 projected enrollment of 1,154 FTE students. Only \$286,333, or 34% of the budget was posted as of December 2023 because the \$139,898 contracted services fee from May to August 2023 was not paid until January 2024.

SPECIAL EVENTS AND GUEST SERVICES

Revenues

- Room Rental – The mid-year revised revenue projection increased by 12% to \$532,500 includes continuation of classroom and space rental contracts with UC Davis Graduate School of Management, and increased space rental revenues from the 333 Golden Gate building's Roof Garden and Colloquium Room, and the Alumni Reception Center and Dining Commons in Kane Hall. As of December 2023, \$372,580 or 70% of the projected room rental has been posted.

Expenditures

- 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.

SUMMARY

The proposed mid-year revised budget, reflecting the best projections of revenue and expenses estimates, yields net operations of \$1,355,578 and after debt service on the Parking Garage bonds, falling just short of a balanced budget by (\$349,447). With administrative overhead expenses of \$233,096, this net would be (\$116,351).

	McAllister Tower	Parking Garage	Student Health	Special Events and Guest Services	Total 2023-24 Mid Year Revised Budget
Revenues	357,630	2,600,924	1,170,846	532,500	4,661,900
Expenditures*	833,185	1,160,166	1,096,246	216,725	3,306,322
Net Operations	(475,555)	1,440,758	74,600	315,775	1,355,578
Nonoperating Revenues/(Expenses)					
Investment Income	80,000	-	6,000	8,400	94,400
Funded from Bond Proceeds		13,936			13,936
Debt Service		(1,489,186)			(1,489,186)
Transfer to/from Other Funds	-			(324,175)	(324,175)
<i>Sub-total</i>	80,000	(1,475,250)	6,000	(315,775)	(1,705,025)
TOTAL CHANGE IN NET ASSETS	\$ (395,555)	\$ (34,492)	\$ 80,600	\$ -	\$ (349,447)

*Includes indirect cost charge of \$233,096.

5. PROPOSED RESOLUTION:

Resolved, that the Board of Directors approve the attached revised auxiliary enterprise budgets for 2023-24.

Attachment:

- Auxiliary Enterprises Budget Report as of December 31, 2023

Auxiliary Enterprises --
2023-24 Midyear Revised Budget Summary

	McAllister Tower	Parking Garage	Student Health	Special Events and Guest Services	Total 2023-24 Mid Year Revised Budget
Revenues	357,630	2,600,924	1,170,846	532,500	4,661,900
Expenditures*	833,185	1,160,166	1,096,246	216,725	3,306,322
Net Operations	(475,555)	1,440,758	74,600	315,775	1,355,578
Nonoperating Revenues/(Expenses)					
Investment Income	80,000	-	6,000	8,400	94,400
Funded from Bond Proceeds		13,936			13,936
Debt Service		(1,489,186)			(1,489,186)
Transfer to/from Other Funds	-			(324,175)	(324,175)
<i>Sub-total</i>	80,000	(1,475,250)	6,000	(315,775)	(1,705,025)
TOTAL CHANGE IN NET ASSETS	\$ (395,555)	\$ (34,492)	\$ 80,600	\$ -	\$ (349,447)

*Includes \$233,096 in administrative overhead assessments charged as a percentage of operating revenues.
Absent these indirect costs the budgeted net result for auxiliary enterprises is (\$116,351).

Auxiliary Enterprises - McAllister Tower

2023-24 Budget Status Report - December 31, 2023

	Beginning Budget 2023-24	Midyear Revised Budget 2023-24	Actual as of 31-Dec-23	Actual Dec-23 as a Percent of Revised Budget	Year-end Actual 2022-23	Actual as of 31-Dec-22	Actual Dec-22 as a Percent of 2022-23 Year-end
REVENUES							
Apartment & Commercial Rent	414,418	353,103 *	353,103	100%	4,690,983	2,375,126	51%
Other	1,200	4,527	4,527	100%	14,926	4,500	30%
TOTAL OPERATING REVENUES	\$ 415,618	\$ 357,630	\$ 357,630	100%	\$ 4,705,909	\$ 2,379,626	51%
EXPENSES							
Salaries and Wages	-	-	-	-	131,481	61,639	47%
Student Wages--Regular & Work-study	-	4,337	4,336	100%	45,689	18,796	41%
Staff Benefits	-	-	-	-	31,907	5,841	18%
Regular Contract Services	175,778	89,778 *	65,029	72%	1,748,243	667,667	38%
Other Contract Services	-	-	-	-	432,941	-	0%
Utilities	535,000	335,000 *	270,952	81%	1,129,429	463,469	41%
Maintenance & Special Repairs	172,000	140,000	60,577	43%	273,304	171,242	63%
Insurance	286,337	210,065 *	210,065	100%	286,337	286,337	100%
Supplies	32,773	7,773	507	7%	98,733	46,219	47%
Printing & Reproduction	1,800	105	104	99%	672	102	15%
Telephone & Mail	1,600	1,568	1,350	86%	2,551	1,184	46%
Computer Software	-	5,034	14,372	286%	70,632	55,903	79%
Miscellaneous	39,650	6,643	3,864	58%	58,829	9,876	17%
Equipment & Building Improvements	-	15,000	11,713	78%	13,590	7,832	58%
Overhead Pro Rata	-	17,882 *	-	0%	564,709	-	0%
TOTAL OPERATING EXPENSES	\$ 1,244,938	\$ 833,185	\$ 642,871	77%	\$ 4,889,049	\$ 1,796,107	37%
OPERATING INCOME (LOSS)	\$ (829,320)	\$ (475,555)	\$ (285,241)	60%	\$ (183,140)	\$ 583,519	-319%
NONOPERATING REVENUES (EXPENSES)							
Investment Income	40,000	80,000 *	44,708	56%	66,356	21,066	32%
Realized Gain/Loss from Sale of Investments	-	- *	-	-	-	-	-
Unrealized Gain/Loss on Investments	-	- *	141,799	-	365,740	(3,132)	-1%
Transfer to Other Funds	-	-	-	-	(436,469)	-	0%
NET NONOPERATING REVENUES (EXPENSES)	\$ 40,000	\$ 80,000	\$ 186,507	233%	\$ (4,372)	\$ 17,934	-410%
CHANGE IN NET ASSETS	\$ (789,320)	\$ (395,555)	\$ (98,734)	25%	\$ (187,513)	\$ 601,453	-321%

* See attached narrative report.

Auxiliary Enterprises

Parking Garage and Retail Operations

2023-24 Budget Status Report - December 31, 2023

	Beginning Budget 2023-24	Midyear Revised Budget 2023-24	Actual as of 31-Dec-23	Actual Dec-23 as a Percent of Revised Budget	Year-end Actual 2022-23	Actual as of 31-Dec-22	Actual Dec 2022 as a Percent of 2022-23 Year-end
REVENUES							
Parking Operations	2,775,999	2,765,999	1,257,462	45%	2,754,780	1,354,711	49%
Parking Tax	(400,000)	(400,000)	(155,764)	39%	(418,031)	(170,851)	41%
Retail Leases	226,925	226,925	117,765	52%	392,230	227,001	58%
Other (including Storage)	8,000	8,000	338	4%	18,000	-	0%
TOTAL OPERATING REVENUES	\$ 2,610,924	\$ 2,600,924	\$ 1,219,801	47%	\$ 2,746,978	\$ 1,410,862	51%
EXPENSES							
Salaries and Wages	304,846	306,978	145,094	47%	290,361	135,957	47%
Staff Benefits	140,712	141,586	61,308	43%	123,901	58,581	47%
Regular Contract Services	30,000	30,000	15,282	51%	264,488	96,376	36%
Utilities	86,880	86,880	38,692	45%	83,032	36,044	43%
Maintenance & Special Repairs	194,939	203,939 *	21,136	10%	55,314	15,714	28%
Insurance	131,000	148,353 *	148,352	100%	130,766	130,766	100%
Supplies & Noncapital Equipment	10,000	7,500	4,873	65%	5,069	3,053	60%
Printing, Telephone and Mail	18,000	12,000	4,504	38%	12,656	6,516	51%
Credit Card & Bank Fees	67,200	76,200	41,539	55%	75,577	28,837	38%
Miscellaneous	16,884	16,684	3,686	22%	28,966	19,355	67%
Overhead Pro Rata	130,546	130,046 *	-	0%	329,330	-	0%
TOTAL OPERATING EXPENSES	\$ 1,131,007	\$ 1,160,166	\$ 484,466	42%	\$ 1,399,461	\$ 531,198	38%
OPERATING INCOME (LOSS)	\$ 1,479,917	\$ 1,440,758	\$ 735,334	51%	\$ 1,347,517	\$ 879,664	65%
NONOPERATING REVENUES (EXPENSES)							
Investment Income	-	-	10,073	--	31,945	15,255	48%
Funded from Bond Proceeds	13,936	13,936.00	3,484	25%	13,936	3,484	25%
Debt Service (Principal & Interest)	(1,489,186)	(1,489,186.00)	(186,046)	12%	(1,480,811)	(194,921)	13%
Capital Asset Additions (GASB 87)	-	-	189,476	--	691,803	345,169	50%
Capital Asset Deductions (GASB 87)	-	-	(179,817)	--	(690,546)	(358,196)	52%
Cash Short/Over	-	-	(647)	--	(2,560)	(158)	6%
NET NONOPERATING REVENUES (EXPENSES)	\$ (1,475,250)	\$ (1,475,250)	\$ (163,477)	11%	\$ (1,436,233)	\$ (189,367)	13%
CHANGE IN NET ASSETS	\$ 4,667	\$ (34,492)	\$ 571,857	-1658%	\$ (88,716)	\$ 690,297	-778%

* See attached narrative report.

Auxiliary Enterprises - Student Health Services
2023-24 Budget Status Report - December 31, 2023

	Beginning Budget 2023-24	Midyear Revised Budget 2023-24	Actual as of 31-Dec-23	Actual Dec-23 as a Percent of Revised Budget	Year-end Actual 2022-23	Actual as of 31-Dec-22	Actual Dec 2022 as a Percent of 2022-23 Year-end
REVENUES							
Fees	1,148,695	1,170,846 *	1,175,295	100%	1,162,823	1,165,106	100%
Other	-	-	-	--	-	-	--
TOTAL OPERATING REVENUES	\$ 1,148,695	\$ 1,170,846	\$ 1,175,295	100%	\$ 1,162,823	\$ 1,165,106	100%
EXPENSES							
Salaries and Wages	136,043	133,917	65,453	49%	134,367	65,496	49%
Staff Benefits	59,366	57,927	26,006	45%	56,063	27,583	49%
Consultants and Contracted Services	841,239	841,239 *	286,333	34%	729,264	281,408	39%
Supplies	1,000	1,000	-	--	-	-	--
Printing and Mail	200	200	-	--	-	-	--
Travel and Training	2,500	2,500	-	--	-	-	--
Miscellaneous	620	620	-	--	1,654	1,078	65%
Events	300	300	-	--	-	-	--
Overhead Pro Rata	57,435	58,543 *	-	--	55,822	0	0%
TOTAL OPERATING EXPENSES	\$ 1,098,703	\$ 1,096,246	\$ 377,791	34%	\$ 977,169	\$ 375,564	38%
OPERATING INCOME (LOSS)	\$ 49,992	\$ 74,600	\$ 797,504	1069%	\$ 185,654	\$ 789,542	425%
NONOPERATING REVENUES (EXPENSES)							
Investment Income	6,000	6,000	1,520	25%	11,276	3,349	30%
Realized Gain/Loss on Sale of Investments	-	- *	-	--	-	-	--
Unrealized Gain/Loss on Investments	-	- *	5,963	--	15,380	(132)	-1%
NET NONOPERATING REVENUES (EXPENSES)	\$ 6,000	\$ 6,000	\$ 7,483	125%	\$ 26,656	\$ 3,217	12%
CHANGE IN NET ASSETS	\$ 55,992	\$ 80,600	\$ 804,986	999%	\$ 212,309	\$ 792,760	373%

* See attached narrative report.

Auxiliary Enterprises

Special Events and Guest Services

2023-24 Budget Status Report - December 31, 2023

	Beginning Budget 2023-24	Midyear Revised Budget 2023-24	Actual as of 31-Dec-23	Actual Dec-23 as a Percent of Revised Budget	Year-end Actual 2022-23	Actual as of 31-Dec-22	Actual Dec 2022 as a Percent of 2022-23 Year-end
REVENUES							
Room Rental	<u>475,000</u>	<u>532,500</u> *	<u>372,580</u>	<u>70%</u>	<u>436,760</u>	<u>341,785</u>	<u>78%</u>
TOTAL OPERATING REVENUES	\$ 475,000	\$ 532,500	\$ 372,580	70%	\$ 436,760	\$ 341,785	78%
EXPENSES							
Staff Salaries and Wages	81,200	88,000	40,000	45%	73,162	31,687	43%
Staff Benefits	33,292	34,850	14,855	43%	32,219	15,368	48%
Other Contract Services	30,000	30,000	-	0%	171	-	0%
Supplies	20,000	20,000	9,232	46%	4,953	1,353	27%
Printing and Mail	5,000	5,000	505	10%	2,286	956	42%
Miscellaneous	9,000	12,250	6,448	53%	5,547	2,444	44%
Overhead Pro Rata	<u>23,750</u>	<u>26,625</u> *	<u>-</u>	<u>0%</u>	<u>52,411</u>	<u>-</u>	<u>0%</u>
TOTAL OPERATING EXPENSES	\$ 202,242	\$ 216,725	\$ 71,040	33%	\$ 170,747	\$ 51,809	30%
OPERATING INCOME (LOSS)	\$ 272,758	\$ 315,775	\$ 301,540	95%	\$ 266,012	\$ 289,977	109%
NONOPERATING REVENUES (EXPENSES)							
Investment Income	-	8,400	4,231	50%	5,864	1,137	19%
Capital Asset Additions (GASB 87)	-	-	122,840	--	224,199	102,634	46%
Capital Asset Deductions (GASB 87)	-	-	(122,480)	--	(224,548)	(102,067)	45%
Nonmandatory Transfers to/from Other Funds	<u>(272,758)</u>	<u>(324,175)</u> *	<u>-</u>	<u>0%</u>	<u>(268,427)</u>	<u>-</u>	<u>0%</u>
NET NONOPERATING REVENUES (EXPENSES)	\$ (272,758)	\$ (315,775)	\$ 4,590	-1%	\$ (262,911)	\$ 1,704	-1%
CHANGE IN NET ASSETS	\$ -	\$ -	\$ 306,130	--	\$ 3,102	\$ 291,681	9405%

* See attached narrative report.

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 authorize award of the state contracts in excess of \$100,000 as described in this report.

Item: *6.3.1

Title: Technology Consulting Services
Vendor: T5 Solutions
Cost: \$100,000
Term: 4 Months

Description:

Requested is authority to retain a consultant to assess the College's technology infrastructure, application environment to document the technologies in use, and provide recommendations thereof to ensure the technological functioning of the campus for the existing community as well as the anticipated future campus community including capital projects. Scope is also to include necessary personnel to provide adequate service level for the campus.

Item: *6.3.2

Title: Debris and Waste Removal – Tower Seismic Upgrade Project
Vendor: Suddath
Cost: \$150,000 (Not to exceed)
Term: 2 Months

Description:

Requested is authority to enter a contract with Suddath to effectuate the removal of trash, junk and debris from McAllister Tower to move the seismic upgrade project forward. Suddath is a global transportation, relocation management, specialized logistics and workplace services

company. The College is utilizing a preexisting master services agreement piggybacking on that used by the University of California.

4. PROPOSED RESOLUTION:

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

*6.3.1	Technology Consulting Services - T5 Solutions – Program Assessment	\$100,000
*6.3.2	Debris and Waste Removal – Suddath - Tower Seismic Upgrade (Not to exceed)	\$150,000

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 the nonstate grants and contracts in excess of \$100,000 as described in this report.

Item: *6.4.1

Title: Underwriting – Raymond James & Loop Capital – Term Extension
Vendor: Raymond James & Loop Capital
Cost: N/A
Term: Additional three years

Description: Continued underwriting services related to the financing of renovations and improvements to campus housing at 100 McAllister and the Local 2 Unite project.

Item: *6.4.2

Title: Grant – Kellogg Foundation – Center for WorkLife Law
Grantor Name: W.K. Kellogg Foundation
Revenue: \$600,000
Term: 3 Years

Description: Grant to provide core support for the Center for WorkLife Law to advance racial, gender and class equity (the Grant Purpose).

Item: *6.4.3

Title: Land & Site Surveying Services
Grantor Name: Martin M. Ron Associates
Revenue: \$114,797
Term: Through 6/30/2025

Description: Contractor to provide land and site surveying services to support various capital improvement projects.

Item: *6.4.4

Title: Grant – Security Upgrade - AI Weapon Detection Pilot Project

Grantor: Chris Larsen

Revenue: \$243,000 (Includes \$50,000 UC Law cost share)

Term: 1 Year

Description:

Grant to establish a one (1) year AI Weapon Detection pilot project, which includes exterior camera upgrades to improve overall effectiveness of the College’s video surveillance system. The scope of the project includes:

- Integrate up to 75 exterior and 25 interior cameras with Volt.ai for weapon detection.
- Upgrade exterior cameras across 3 city blocks, participating in the TLCBD camera network.
- Provide one (1) dedicated monitoring workstation at the security desk for notifications.
- One (1) year of Volt.ai monitoring and reporting.
- Coordination with SFPD and other stakeholders.

The total grant would be \$243,000 inclusive of a 12% indirect overhead rate. Of this amount, \$50,000 will be borne by the College as its cost share contribution. This is a ratification item as the grant was approved by the Executive Committee at its meeting of January 16, 2024.

4. PROPOSED RESOLUTION:

That the Board of Directors authorizes the receipt of the 2023-24 nonstate grants and award of contracts in excess of \$100,000 listed below:

*6.4.1	Underwriting – Raymond James & Loop Capital – Term Extension	N/A
*6.4.2	Grant - General Operating Support – WLL – Kellogg Foundation	\$600,000
*6.4.3	Land and Site Surveying Services	\$114,797
*6.4.4	Grant - Security Upgrade – AVS Systems	\$243,000
		(Ratification Item)

ACTION ITEM

- 1. REPORT BY:** Chair of the Finance Committee Chip Robertson
- 2. SUBJECT:** The Academe at 198 Campus Housing Project – Rental Rate, Marketing & Operations Update
- 3. RECOMMENDATION:**

That the Board of Directors approve the second year rent structure and accompanying rent subsidy outlined below for residential rental rates for the non-UCSF units at the Academe at 198 for 2024-25.

4. BACKGROUND:

The Occupancy Agreement with UCSF provides that 230 units of the building's total of 656 be allocated to UCSF at stipulated rents. The Development Agreement and supporting financing indenture requires stipulated revenue levels to support debt service and achieve a requisite debt service coverage ratio.

UC Law SF is finalizing preparations for lease-up of the Academe at 198 McAllister for the second year of occupancy. The attached presentation, which was shared at an investor meeting for 198 McAllister on January 17, 2024, provides an overview of the 198 McAllister project summary, construction closeout, and the project fund status as of that date. The attached presentation also includes a leasing status update, as well as an overview of year two marketing strategies and finally a leasing renewal timeline.

In the project's inaugural year of operations, a rent subsidy of approximately 10%, on average, was applied to reduce amounts charged to non-UCSF residents. In year two of operations, the pro forma requires a 3% increase over year one pro forma rental rates for all units. For the second year of operations, the College is proposing to apply a rent subsidy of approximately 13%, on average, to the year two pro forma rents. On average, this results in rental rates remaining flat relative to pro forma rental rates (i.e., year two pro forma rental rates, which reflect a 3% increase over year one pro forma rental rates, decreased by 13% equate to year one pro forma rental rates decreased by 10%). However, based on refinements to the rental rate structure as described below, the proposed rental rates for certain units reflect an increase over the in-place 2023-2024 rental rates. As a result of this calibration, to the extent that an in-place resident elects to renew their unit license, the renewal rental rate is proposed to be the lower of the proposed rental rate and a 5% increase over the in-place 2023-2024 rental rate.

Based on the residential rental rates described above and assuming a 75% renewal rate, a 95% occupancy rate, and assuming available Golden Gate Avenue retail space and academic classroom/office space remains vacant in 2024-2025, the estimated subsidy required to be provided by the College to achieve the 1.2 DSCR target contained in the indenture agreement is \$2.6 million.

The \$2.6 million in nonstate funds used to finance the rent subsidy would be treated as an expense funded from the upcoming 2024-25 nonstate budget.

Rent Structure for 2024-25 – The Academe at 198

The College, working with the College’s real estate advisors, revised the rental rates for the Academe at 198 to better reflect the distinctions between units considering location, size, amenities, and view rather than only distinguishing between floors in the building as was done in year one of operations (i.e., zone 1 vs. zone 2 as shown in the 2023-24 rates below). The resulting 2024-25 rental rates, which are subject to further refinement, more closely align with the value provided by each unit type while also considering market value.

The recommended rental structure for 2024-25 for non-UCSF units is listed below:

Unit Type	Min Rate	Max Rate
Efficiency	\$1,880	\$2,185
Studio	\$2,200	\$2,455
1 Bedroom	\$3,105	\$3,170
2 Bedroom*	\$2,075	\$2,265

*Note, price per bed rather than per unit.

**All utilities are included in rental rates.

Rent Structure for 2023-24 – The Academe at 198

For purposes of comparison, the rent structure for 2023-24 follow.

Level Unit Count	Efficiency 224	Studio 411	1-Bedroom 10	2-Bedroom 11
Zone 1 - Floors 3-5	1,850	2,200	2,800	3,400
Zone 2 - Floors 6-14	2,200	2,500	3,150	3,700
UCSF Units (230 units)	2,021	2,400	3,164	N/A
UCH Pro Forma Rent	2,276	2,640	3,425	3,850
* All utilities are included.				

5. RESOLUTION:

That the Board of Directors approve of the fee structure and rent subsidy outlined above for 2024-25.

Hastings Campus Housing Finance Authority

198 McAllister Campus Housing Project

Investor Presentation

Series 2020 A & 2020 B

January 17, 2024



UC Law San Francisco

Meeting Agenda

1. Introductions
2. Project Summary and Construction Closeout
3. Leasing Updates – 2023-24 and 2024-25 Forecast
4. Financial Status – 2023-24
5. Financial & Operational Outlook - 2024-25
6. Questions

Project Summary & Construction Closeout

- **Sponsor:** UC Law San Francisco (formerly Hastings)
- **Issuer:** Hastings Campus Housing Finance Authority (the Authority), a Joint Powers Authority (JPA) whose members are UC Law SF (formerly UC Hastings) and the California Public Finance Authority. UC Law SF has effective control of the JPA, as it has sole power to appoint the seven Directors that constitute the Governing Board.
- **The Project:** 656 units of student housing (667 beds), 7,764 square feet retail/café, 44,390 square feet Academic Space (for which UC Law SF is making lease payments under a Space Lease), 301,000 GSF Residential and Resident amenities.
- **Site:** 198 McAllister Street/50 Hyde Street, San Francisco
- **Tenants:** Professional and Graduate students at UC Law SF (law) and University of California San Francisco (health sciences). Other potential tenants include students from other local, not-for-profit institutions of higher education.
- **Developer:** Greystar
- **Contractor:** Build Group
- **Bond Term:** 41 years

Project Summary & Construction Closeout

• Total Net Proceeds	\$360,998,216
• Date of Sale	August 27, 2020
• All Inclusive Interest Cost	5.24%
• Debt Rating	Unrated
• Average Maturity	29 Years
• Construction Start	September 14, 2020
• Project Move-in – Contracted	July 1, 2023
• Project Completion – Amended	July 31, 2023
• Resident Move-in	August 4, 2023

Project Fund – Fiscal Status

As of December 31, 2023

Line #	Description of Work	Original Budget	Total Changes	Revised Budget	Total Costs To Date	% Complete	Remaining Costs to Complete
1	UCH Managed Costs	11,204,650.00	(3,519,846.16)	7,684,803.84	7,683,044.94	100.0%	1,758.90
2	Hard Costs	229,995,058.00	15,195,465.61	245,190,523.61	239,893,645.98	97.8%	5,296,877.63
2.1	Owner Managed Hard Costs	3,797,630.00	(1,956,177.74)	1,841,452.26	1,841,452.26	100.0%	-
2.2	Construction in Progress	225,936,958.00	17,151,643.35	243,088,601.35	237,803,943.72	97.8%	5,284,657.63
2.3	Insurance	260,470.00	-	260,470.00	248,250.00	95.3%	12,220.00
3	Furniture, Fixtures & Equipment	2,722,806.00	(645,815.21)	2,076,990.79	2,076,990.79	100.0%	-
4	Design & Consulting Fees	12,442,112.00	2,991,039.74	15,433,151.74	15,409,185.37	99.8%	23,966.37
4.1	Architect	8,862,391.00	1,818,131.34	10,680,522.34	10,680,522.34	100.0%	-
4.2	Engineering & Surveying	3,579,721.00	1,172,908.40	4,752,629.40	4,728,663.03	99.5%	23,966.37
5	Development/Legal/Closing Costs	2,762,420.00	307,023.52	3,069,443.52	3,068,723.52	100.0%	720.00
5.1	Legal	315,000.00	10,472.80	325,472.80	325,472.80	100.0%	-
5.2	Municipal Fees	1,497,420.00	453,134.37	1,950,554.37	1,949,834.37	100.0%	720.00
5.3	Other Development Costs	200,000.00	(156,583.65)	43,416.35	43,416.35	100.0%	-
5.4	Preleasing	500,000.00	(500,000.00)	-	-	0.0%	-
5.5	Construction Management Costs	250,000.00	500,000.00	750,000.00	750,000.00	100.0%	-
6	Project Contingency	12,396,120.00	(12,364,172.62)	31,947.38	-	0.0%	31,947.38
7	Development Fee	10,412,741.00	36,305.12	10,449,046.12	10,449,046.12	100.0%	0.00
	TOTAL CASH REQUIREMENT	281,935,907.00	2,000,000.00	283,935,907.00	271,589,214.44		12,346,692.56
100%	91.28% Less: Bond, Series 2020A	257,351,095.91	-	257,351,095.91	247,906,634.93	96.3%	9,444,460.98
	8.72% Less: Bond, Series 2020B	24,584,811.09	-	24,584,811.09	23,682,579.51	96.3%	902,231.58
	UC Law Funding	-	2,000,000.00	2,000,000.00	-	0.0%	2,000,000.00

Key Points:

- General Contractor's final contract amount is \$243.1 million. All outstanding construction change orders have been fully resolved.
- Cash required to closeout the project: \$12.3 million, including \$5.3 million to be billed and \$7 million retention to be released.
- Cash required for project closeout (\$12.3 million) to be funded by:
 - Remaining balance from the Project Fund – Series 2020A&B - \$10.3million
 - UC Law Funding - \$2 million (\$1.4 million from excess earnings from Project Fund and \$600,000 from UC Law external funding)









Leasing Status: 2023-24 & 2024-25 Forecast

Unit Count	
Total Units	656
Vacancy Rate (5%)	-33
Pro Forma Occupancy Level (95%)	623

Institution		2023-24*	2024-25	%	Comments
UC Law San Francisco					
First Year Students		162	162	0%	Assumes same entering class as 2023-24.
Second Year Students		40	122	204%	Assumes 75% retention rate from prior year
Third Year Students		17	30	76%	Assumes 75% retention rate from prior year
Others (LLM, MSL, Staff, etc.)		18	18	0%	Assumes same size cohort as 2023-24.
Office uses		22	0	-100%	Temporary allocation of units for staff offices
<i>Sub-Total</i>		259	382	47%	
UCSF	1	110	230	109%	Occupancy Agreement - UCSF Obligation (35%)
UC Davis	3	8	8	0%	Assumes same size cohort as 2023-24.
UC Berkeley	3	0	5	NA	Conservative growth estimate
<i>Sub-Total</i>		118	243	106%	
University of the Pacific - Dugoni	2	7	14	100%	No housing availability; Marketing Priority
University of San Francisco	3	2	2	0%	Assumes same size cohort as 2023-24.
Golden Gate University		2	2	0%	Assumes same size cohort as 2023-24.
San Francisco State University		0	3	NA	Conservative growth estimate
<i>Sub-Total</i>		11	21	91%	
<i>Grand Total</i>		388	646	66%	
<i>Occupancy Rate</i>		59%	98%		

Notes:

* Data for 2023-24 is as of 10-19-2023.

- (1) UCSF 20-year Occupancy Agreement tolls to 2024-25 due to late project delivery (August 4, 2023 instead of July 1, 2023 per agreement)
- (2) UOP Dugoni estimated demand at 80 units prior to pandemic; campus located 0.6 miles from Academe at 198 (15 minute walk).
- (3) University/UC Davis program markets housing opportunity on their website.

Leasing Status: 2024-25 Marketing

1. Marketing consultant and strategic advisor: **Scion Advisory Group***
 - *One of the largest campus housing owners and operators in US
2. Website Strategies: **academe198sf.com**
 - Website updated with photos of exterior, interiors, and units
 - Virtual tour of building and units
3. Social Media & Internet Strategies
 - Facebook
 - Instagram
 - Google Ads: Targeted to young professionals in greater SF Bay Area
 - Student housing websites: e.g., student.com, rentable.com, apartments.com
4. In-Person Strategies
 - Physical tours with model units
 - On-site open houses with Academic Village partners (e.g., UCSF, UOP, USF)
5. Partnership Opportunities
 - Outreach to higher education programs with Bay Area footprint
 - Law firm, corporate, and judicial clerkship programs

Leasing Status: 2024-25 Renewal Timeline

- February 2024:
 - Campus housing survey sent to all residents

- 2024-2025 rental rates published & commence 2024-25 leasing efforts
- March 2024:
 - Renewal offers sent to existing residents
 - Housing offers sent to new applicants with July 2024 move-in, which will continue on rolling basis
- April 2024:
 - Housing offers sent to new applicants with August 2024 move-in, which will continue on rolling basis
- June 2024
 - Primary move-in month for UOP Dugoni residents
 - Anticipate majority of leasing status completed by end of month
- July 2024: Primary move-in month for UCSF residents
- August 2024:
 - Primary move-in month for UC Law SF residents
 - Majority of move-ins and move-outs complete

Leasing Status: Retail Spaces

➤ **Lobby Retail Tenant: Spro Café**

- Size of café: 460 sq. ft.
- Lease executed on August 5, 2023
- Term of 8 years
- \$5,750 per month with 3% annual increase
- Hours: Mon. – Fri. 7 a.m. – 5 p.m.; Sat. & Sun. 8 a.m. – 3 p.m.
- Opening estimated February 2024 (subject to Public Health permit)

➤ **Golden Gate & Hyde Retail Tenant: Under Pursuit**

- Space available: 4,500 sq. ft.
- Accessible via separate entrance located on Golden Gate
- Retail Broker: Maven, commercial real estate broker, specializing in San Francisco market

Financial Status: 2023-24

Budget to Actual Expenses as of December 31, 2023

	Approved Budget 2023-2024	Official Statement Budget	Projected Actual 2023-24*
Total Income	\$14,450,995	\$21,489,348	\$12,606,757
Total Expenses	\$2,280,216	\$2,227,761	\$2,236,362
Net Revenues Available for Debt Service	\$12,170,779	\$19,261,587	\$10,370,395
Interest	\$16,555,000	\$16,655,500	\$16,655,500
Principal	\$0	\$0	\$0
Capitalized Interest	(\$8,903,988)	(\$8,327,750)	(\$8,917,706)
Total Debt Service	\$7,651,012	\$8,327,750	\$7,737,794
Debt Service Coverage	1.59	2.31	1.34
*Actuals as of December 31, 2023 plus projected for January 1, 2024 - June 30, 2024			
NOTE: See appendix for detailed information			

Financial Status: 2023-24

Rent Comparison to Institutional Market Rate Benchmarks

						CoStar Data	Website Data
Property	Address	Units	Avg. Size	Built		Avg. Rent	Avg. Rent
1	Fifteen Fifty	1550 Mission	78	543	2020	2,822	2,490
2	The George	434 Minna	107	423	2022	2,346	2,150
3	The Civic	101-103 Polk	30	453	2015	2,848	3,017
4	Prism	1028 Market	86	432	2022	2,525	2,062
5	AVA 55 Ninth	55 9th Street	40	558	2014	2,304	NA
6	50 Jones	1066 Market	88	446	2013	1,926	1,675
7	1188 Mission	1188 Mision	2	377	2009	1,793	NA
8	1190 Mission	1190 Mission	3	448	2013	1,586	NA
Wgt. Average		434	465	NA	\$	2,405	\$ 2,158
The Academe	198 McAllister	635	260	2023	\$	2,178	\$ 2,178

vs. Comps 91% 101%

- Rents at the Academe at 198 are below or near market for comparable units
- Differentiators - the Academe at 198
 - All units are fully furnished and include 24-hour security
 - Rents include all utilities
 - Residents have access to all campus amenities regardless of institutional affiliation
 - UC and UC Law residents are served by the UCSF shuttle bus system

Financial & Operational Outlook: 2024-25

Rent Structure* & Gross Revenue

2024-2025 Residential Revenue Comparison				
	Pro Forma	Projected	Variance \$	Variance %
Gross Residential Revenue	\$19,785,904	\$18,652,055	(\$1,133,849)	-5.73%

2024-2025 Pro Forma Average Rental Rates				
	Units	Pro Forma 2023-2024	Pro Forma 2024-2025	Adjusted 2024-2025
<u>UCH</u>				
Efficiency	194	\$2,340	\$2,410	\$2,217
Studio	218	\$2,704	\$2,785	\$2,562
1 Bedroom	3	\$3,499	\$3,604	\$3,316
2 Bedroom	11	\$3,914	\$4,031	\$3,709
Total/Average	426	\$2,575	\$2,652	\$2,440

- Rent subsidy to be reduced from \$1.4 million (10%) to \$1.1 million (8%) for non-UCSF units
- List rents for 2024-25 to increase by 5% for both license renewals and vacant units
- UCSF Occupancy Agreement
 - Obligates UCSF for 230 units (35%) effective 7-1-24 for twenty-year term
 - Payment cap of \$5 million in initial year (indexed)
- Break-even occupancy is 76% based on Pro Forma operating expense and UC Law subsidy (85% without).

Appendix

Budget to Actual 2023-2024

	Approved Budget 2023-24	Official Statement Budget	Projected Actual 2023-24 *
Rental Revenue	\$10,599,968	\$18,249,135	\$8,978,627
Rental Support from UC Law SF	\$1,400,000	\$0	\$1,400,000
Hastings Space Lease Payment	\$2,157,630	\$1,855,000	\$2,157,630
Hastings Space Lease CAM Expenses	\$0	\$232,580	\$0
Retail Lease Income	\$73,605	\$304,583	\$25,000
Office - Reading/Class Conv. Sublease Incremental Revenue	\$0	\$70,050	\$0
Auditorium Rental	\$ 100,000	\$103,000	\$45,000
Utility Recovery From Tenants	\$0	\$675,000	\$0
Other Income	\$119,792	\$116,792	\$500
Total Income	\$14,450,995	\$21,489,348	\$12,606,757
G&A Payroll/Benefits (Incl. Leasing)	\$394,171	\$321,600	\$382,940
Marketing (Computer Software)	\$10,000	\$30,000	\$116,267
Custodial Services	\$252,000	\$396,000	\$252,000
Engineering Services	\$200,000	\$228,000	\$200,000
Building Systems - Maint. & Testing	\$25,000	\$18,500	\$99,071
Building Maint. - Other	\$25,000	\$18,000	\$28,276
Elevator Maintenance	\$100,000	\$56,000	\$107,907
Window Washing	\$95,000	\$22,000	\$47,500
Landscaping	\$0	\$19,200	\$15,000
Pest Control	\$45,000	\$18,000	\$27,878
Supplies	\$20,009	\$10,800	\$39,221
Miscellaneous	\$53,900	\$9,600	\$24,132
Utilities	\$745,000	\$675,000	\$550,971
Insurance	\$180,000	\$180,000	\$210,064
TL Community Benefits District Assessment	\$0	\$36,000	\$0
Issuer / Audit	\$0	\$53,925	\$0
Replacement Reserves	\$135,136	\$135,136	\$135,136
Total Expenses	\$2,280,216	\$2,227,761	\$2,236,362
Net Revenues Available for Debt Service	\$12,170,779	\$19,261,587	\$10,370,395
Interest	\$16,555,000	\$16,655,500	\$16,655,500
Principal	\$0	\$0	\$0
Capitalized Interest	(\$8,903,988)	(\$8,327,750)	(\$8,917,706)
Total Debt Service	\$7,651,012	\$8,327,750	\$7,737,794
Debt Service Coverage	1.59	2.31	1.34

*Actuals as of December 31, 2023 plus projected for January 1, 2024 - June 30, 2024

NOTE: Figures exclude \$1.18M in institutional funds transferred into the project to support the cost of rental improvements for retail use.

Questions?

ACTION ITEM

1. **REPORT BY:** Chair of the Finance Committee Chip Robertson
2. **SUBJECT:** The Academe at 198 McAllister Budget Report for 2023-24
- As of December 31, 2023, and Mid-year Budget Changes
3. **RECOMMENDATION:**

That the Board of Directors approves the attached inaugural first-year operating budget for The Academe at 198, including the attached Hastings Campus Housing Finance Authority budget for 2023-24 as revised at mid-year.

4. BACKGROUND:

The Academe at 198 building opened in August 2023 and offers a total of 656 residential units, academic space as well as retail space (Café) which buildout will continue throughout 2024. The Occupancy Agreement with UCSF provides that 230 housing units be allocated to UCSF at stipulated rents. The Development Agreement and supporting financing indenture require stipulated revenue levels to support debt service and achieve 1.20 and 1.05 debt service coverage ratios for senior and subordinate debt. Presented here for approval by the Board of Directors are separate 2023-24 midyear budgets for operating The Academe at 198 and for the Hastings Campus Housing Finance Authority (HCHFA).

THE ACADEME AT 198 MCALLISTER

Revenues

- **Residential Rent** – Revenue from renting residential units in 2023-24 is budgeted at \$10.6 million. The occupancy rate is projected at 60% for \$11.526 million projected revenues and the budget factors (\$1.601) million rent loss with a 30-day delay. In the project's inaugural year of operations, a \$1.4 million rent subsidy was recommended and approved by the Board of Directors, that would reduce amounts charged to non-UCSF residents by approximately 10% on average. As of December 2023, \$4,551,505 or 43% of the budgeted revenue has been posted includes \$636,364 residential rent subsidy.

Rent Structure for 2023-24 – The Academe at 198

Level Unit Count	Efficiency 224	Studio 411	1-Bedroom 10	2-Bedroom 11
Zone 1 - Floors 3-5	1,850	2,200	2,800	3,400
Zone 2 - Floors 6-14	2,200	2,500	3,150	3,700
UCSF Units (230 units)	2,021	2,400	3,164	N/A
UCH Pro Forma Rent	2,276	2,640	3,425	3,850
* All utilities are included.				

- **Retail Leases** – The budget of \$73,605 remains same and assumes the Golden Gate Avenue retail space remains vacant. The full-year pro forma projected revenue was \$304,583. As of December 2023, no retail lease revenue has been posted, as retail space buildouts are still in progress.
- **Other Revenue** – Sources of revenue in this category include meeting room rentals and is factored in the 2023-24 budget at the project's original pro forma estimate. The budget remains the same as the beginning budget, and as of December 2023, no revenue has been posted.

Expenditures

- **Regular Contract Services** – Budgeted here are janitorial and engineer contract services. The mid-year budget has been revised from \$452,000 to \$352,000 with 22% decrease due to the budget for janitorial services has been reduced by \$100,000 based on year-to-date actuals.
- **Other Contract Services** - The mid-year budget has been revised from \$25,000 to \$54,000 with 116% increase to align with actual payment for Quadient and Wash Multifamily Acquisition contracts as well as gym maintenance.
- **Utilities** – The \$831,100 midyear revised budget includes cost projection for electricity, water, natural gas, and refuse disposal. The mid-year revised budget increased \$86,100 or 12% primarily due to the \$111,100 budget increase for refuse disposal. As of December 2023, only \$83,946 or 10% of the revised budget has been posted primarily due to delay in receiving billings from PG&E.
- **Maintenance and Special Repairs** – This reporting category includes regular ongoing building and elevator maintenance, pest control, window washing, and landscaping. The mid-year revised budget includes a \$30,000 budget increase for landscaping services. As of December 2023, only \$7,996 or 3% of the revised budget has been posted for pest control, fire monitoring and landscaping services. Since this is brand new building open to use in August 2023, window washing, and elevator maintenance services were not requested as of December 2023.
- **Insurance** – The mid-year revised budget increased by \$30,064 or by 17% increase to reflect an increase in premiums due to high statewide insurance premium surges. Insurance premiums have already been paid for the fiscal year.
- **Computer Software** – The mid-year revised budget has been adjusted to accommodate Starrez contract of \$100,000 for housing management software and support services plus additional service hours for the total of \$106,500 which was not budgeted in the beginning of the year. As of December 2023, 85% of the revised budget has been posted, because we paid the \$72,582 annual subscription fee in July 2023.
- **Miscellaneous** – Included in this category for 2023-24 are \$10,000 for events, and allocations for travel and training. The mid-year budget increased by \$28,000 or by 201% primarily due to the \$25,000 budget increase to accommodate SF DPW Street space permit fee for “no parking” curb painting.
- **Equipment & Building Improvements** – The mid-year revised budget of \$1,180,000 is a Board approved transfer from Hastings Digardi Hall to fund the Academe of 198 McAllister ground floor Café Space Buildout by Build Group Inc.

Non-Operating Revenues / (Expenses)

- **Funded from Bond Proceeds and Debt Service** – The midyear revised budget has reallocated the budget for debt service back to Hastings Campus Housing Finance Authority where the actual debt service paid from.
- **Transfer from Other Funds** – The midyear revised budget is a December Board meeting approved transfer of \$1,180,000 from Hastings Digardi Hall to the Academe of 198

McAllister to fund the ground floor Café Space Buildout. The actual transfers as of December 2023 are \$593,596 transferred from HCHFA to reimburse the Academe of 198 operating expenses from August to November 2023. We do not budget these transfers since they are internal transfers to offset each other under fund 70.

- **Transfer to Other Funds** - The actual transfers as of December 2023 are \$4,338,101 transferred to HCHFA for the Academe of 198 operating revenues from August to November 2023. We do not budget these transfers since they are internal transfers to offset each other under fund 70.

HASTINGS CAMPUS HOUSING FINANCE AUTHORITY (HCHFA)

Expenditures

- Midyear Revised budget for operating expenditures related to travel, training, events, and Board of Directors Meeting have been fully re-allocated to Academe at 198. The auditor services budget has been reduced from \$24,000 to \$2,625 to fund the Bank of New York Memon Trust Company trustee fee which has been fully paid as of December 2023.

Non-Operating Revenues / (Expenses)

- **Funded from Bond Proceeds and Debt Service** - The midyear revised budget of bond proceeds and debt service is reallocated from the Academe of 198 budget. Hasting Campus Housing Finance Authority is the correct program to fund all debt service-related expenses for Academe of 198.
- **Transfers from Other Funds** – The mid-year revised budget of \$6,125 is to fund the operating expenditures of the Authority. The actual transfers as of December 2023 are \$28,101,341 include \$23,763,240 transfers from series 2020A and 2020B bond to fund the Academe of 198 project, \$4,338,101 transfers from the Academe of 198 for revenue from August to November 2023. We do not budget these transfers since they are internal transfers to offset each other under fund 70.
- **Transfer to Other Funds** - The actual transfers as of December 2023 are \$593,596, which were transferred out to the Academe of 198 to reimburse the operating expenses from August to November 2023. We do not budget these transfers since they are internal transfers to offset each other under fund 70.

SUMMARY

Including the \$1.4 million rent subsidies in this first year of operations, the projected change in net assets for The Academe at 198 and the HCHFA is \$2.97 million.

	The Academe at 198 Midyear Revised Budget	HCHFA Midyear Revised Budget	Total 2023-24 Midyear Revised Budget	The Academe at 198 Actual as of December 2023	HCHFA Actual as of December 2023	Total 2023-24 Actual as of December 2023
Revenues	13,050,995	-	13,050,995	5,532,246	-	5,532,246
Expenditures	3,521,648	6,125	3,527,773	881,729	2,625	884,354
Net Operations	9,529,347	(6,125)	9,523,222	4,650,517	(2,625)	4,647,892
Nonoperating Revenues/(Expenses)						
Funded from Bond Proceeds	-	8,917,706	8,917,706	-	9,378,230	9,378,230
Debt Service	-	(16,655,500)	(16,655,500)	-	(9,378,230)	(9,378,230)
Building Depreciation	-	-	-	-	(1,131,138)	(1,131,138)
Transfer from Other Funds*	1,180,000	6,125	1,186,125	593,596	28,101,341	28,694,937
Transfer to Other Funds	-	-	-	(4,338,101)	(593,596)	(4,931,697)
<i>Sub-total</i>	1,180,000	(7,731,669)	(6,551,669)	(3,744,505)	26,376,606	22,632,101
TOTAL CHANGE IN NET ASSETS	\$ 10,709,347	\$ (7,737,794)	\$ 2,971,553	\$ 906,013	\$ 26,373,981	\$ 27,279,994

*The actual transfers from other funds as of December 2023 for HCHFA include \$23,763,240 transfers from series 2020A and 2020B bond to fund the Academe of 198 project.

5. PROPOSED RESOLUTION:

Resolved that the Board of Directors approves the attached mid-year revised operating budget for The Academe at 198, and the attached Hastings Campus Housing Finance Authority budget for 2023-24.

Attachments:

- Housing Authority Programs 2023-24 Budget Report as of December 31, 2023

ACTION ITEM

1. **REPORT BY:** Chair of the Finance Committee Chip Robertson
2. **SUBJECT:** Endowment Management – Spending Rate for 2024-25
3. **RECOMMENDATION:**

That the Board of Directors approve an endowment spending rate of 4.55% for 2024-25.

4. **BACKGROUND:**

The Board of Directors has adopted a *Total Return* spending policy for the General Endowment Pool (GEP) for the College's endowed funds. The policy established a baseline spending rate of 4 percent calculated on a 12-quarter rolling average of the market value of endowed funds. The spending rate for any given year would be reflective of market conditions and/or College needs. The Board of Directors approved a modification of the process by adding an Endowment Management Surcharge of .35% for cost recovery purposes. An increase of this surcharge to .55% was approved by the Board of Directors in October 2020.

Payout amounts based on application of alternative payout rates to a 12 quarter rolling averages ending December 2023:

Total Payout Rate	Total Payout Amount
3.00%	\$ 1,472,451
3.25%	1,595,155
3.50%	1,717,859
3.75%	1,840,563
4.00%	1,963,268
4.25%	2,085,972
4.50%	2,208,676
4.55%	2,233,217
5.00%	2,454,085

Market value and rolling averages by 12 quarters ending December 2023:

Quarter	Market Value Endowment	Rolling Average Market Value
3/31/2021	\$ 43,259,057	\$ 37,200,968
6/30/2021	48,401,229	38,320,994
9/30/2021	48,584,476	39,254,038
12/31/2021	49,293,898	40,090,693
3/31/2022	48,145,299	42,903,453
6/30/2022	49,760,768	43,589,184
9/30/2022	48,471,654	44,033,045
12/31/2022	48,072,209	44,369,642
3/31/2023	49,569,386	45,727,098
6/30/2023	51,855,611	47,013,679
9/30/2023	50,775,027	48,068,581
12/31/2023	52,791,703	49,081,693

Maintaining a spending rate of 4.55% is recommended because its preservation will allow for a modest growth of support for endowed scholarships and professorships.

5. PROPOSED RESOLUTION:

Resolved that the Board of Directors approve an endowment payout rate of 4.55% for 2024-25.

ACTION ITEM

1. **REPORT BY:** Chair of the Finance Committee Chip Robertson
2. **SUBJECT:** Establishment of UC Law SF Employee Scholarship for the Master of Studies in Law and Certificate of Studies in Law
3. **RECOMMENDATION:**

That the Board of Directors authorizes the establishment of the UC Law SF Employee Scholarship for employees who wish to pursue a Master of Studies in Law or Certificate of Studies in Law at UC Law SF.

4. **BACKGROUND:**

The UC Law SF Master of Studies in Law (MSL) is a 24-unit degree program for individuals who do not seek to practice law, but who wish to equip themselves with a sophisticated understanding of legal reasoning and doctrine. The Certificate of Studies in Law (CSL) is a 12-unit certificate for students who do not wish to pursue the full MSL degree. The MSL and CSL may be taken on a part-time basis and tuition is charged per unit taken. Students may take most classes in the existing curriculum, although in recent years the Program has developed many more MSL-only courses, including many that are synchronous or asynchronous online. The goal is to have a fully asynchronous track that students may opt to take that allows students to proceed through the degree program without set class times.

Proposed is a 75% tuition discount scholarship available to UC Law SF employees who meet admissions criteria and are admitted to the MSL or CSL (the “Employee Scholarship”). 2023-2024 tuition for the MSL and CSL programs is \$1,625 per unit. The Office of Enrollment Management, the MSL Program, Human Resources, and Fiscal Services will coordinate the implementation of the Employee Scholarship, including eligibility requirements, tax implications on employees, and coordination with supervisors.

Because the Employee Scholarship is a tuition discount, the cost to the College of the Employee Scholarship is forgone tuition revenue. Historical evidence suggests that demand for this degree program among current employees is not high, so few employees will likely take advantage of the tuition discount. The advantages of offering such a scholarship include the ability to promote the opportunity for further learning when recruiting new employees, the positive impact on employee satisfaction and therefore retention for that subset of employees for whom earning the MSL degree is a logical

progression in their educational and professional development, and a clear message from the College that we care about our employees.

5. PROPOSED RESOLUTION:

Resolved, that the Board of Directors approves the establishment of the UC Law SF Employee Scholarship for employees who wish to pursue a Master of Studies in Law or Certificate of Studies in Law at UC Law SF.

REPORT ITEM

- 1. REPORT BY:** Chief Financial Officer David Seward
- 2. SUBJECT:** Investment Overview as of December 31, 2023
– UC Office of the Chief Investment Officer

3. REPORT:

Attached is an overview of all funds invested under the authority of the Regents of the University of California as of December 31, 2023.



UC INVESTMENTS

As of December 31, 2023

February 13, 2024
Office of the Chief Investment
Officer of the Regents

Our Team



UC INVESTMENTS ASSETS

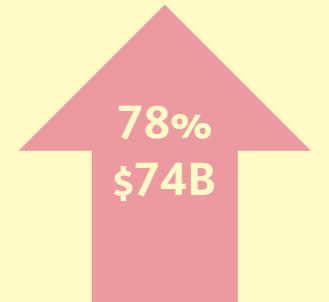
9 Years

June 30, 2014

December 31, 2023

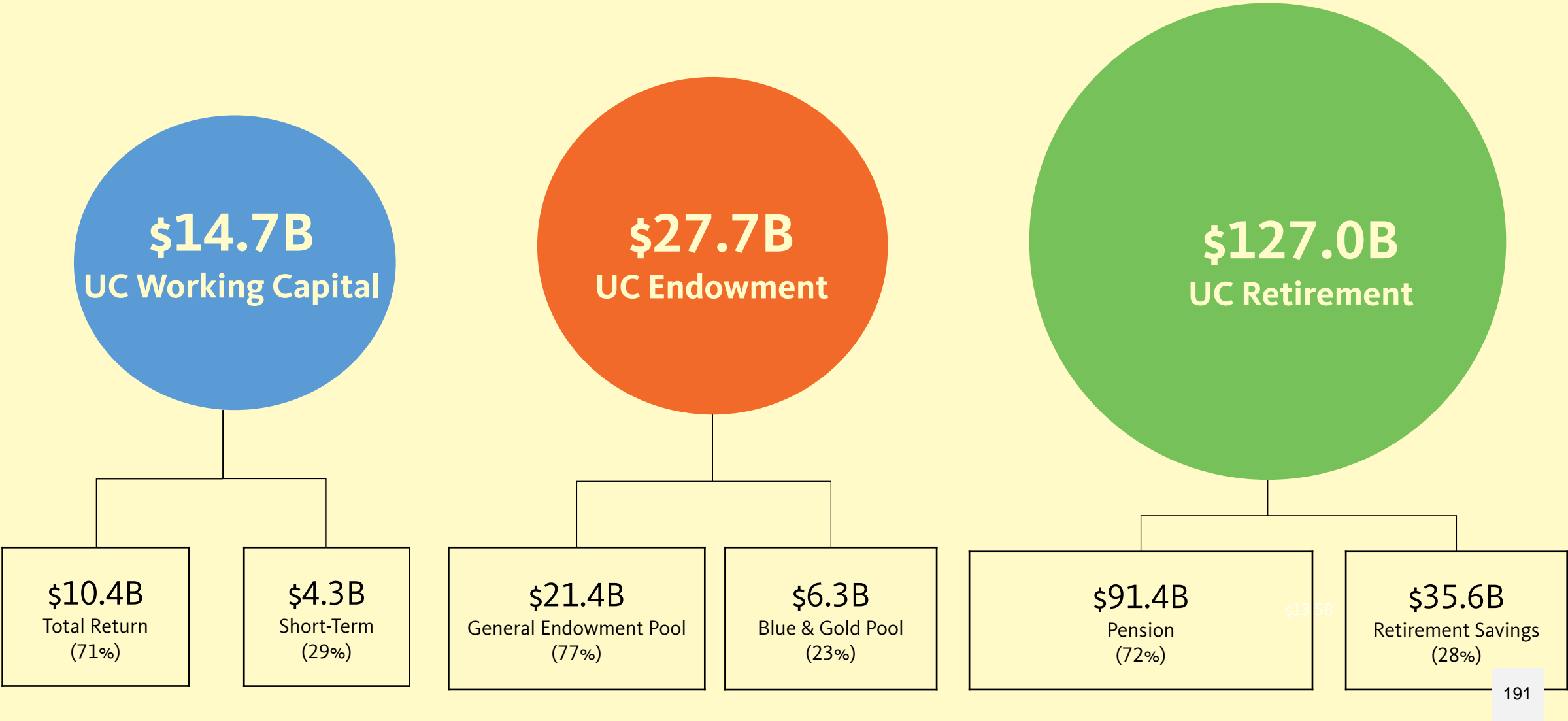
\$95B

\$169B



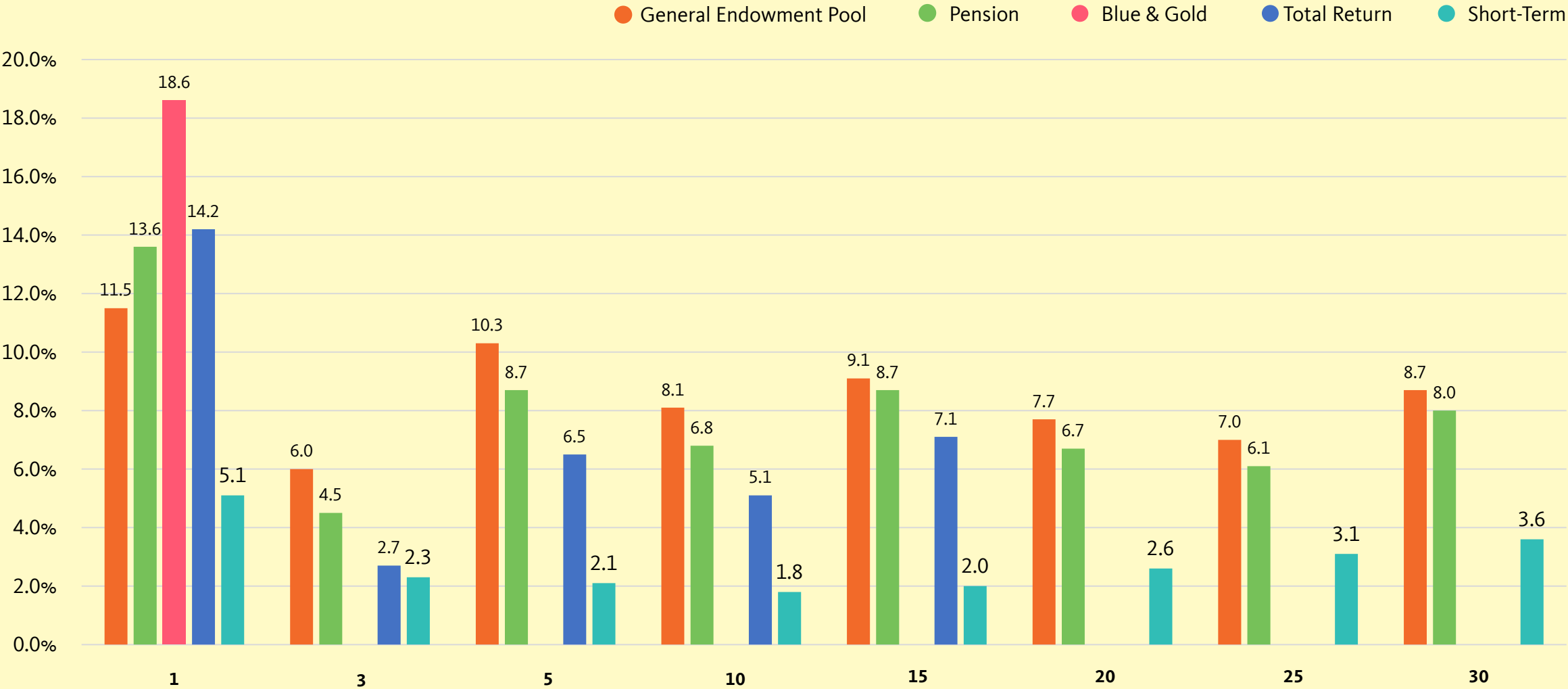
UC INVESTMENTS ASSETS

\$169 Billion in Six Products as of December 31, 2023



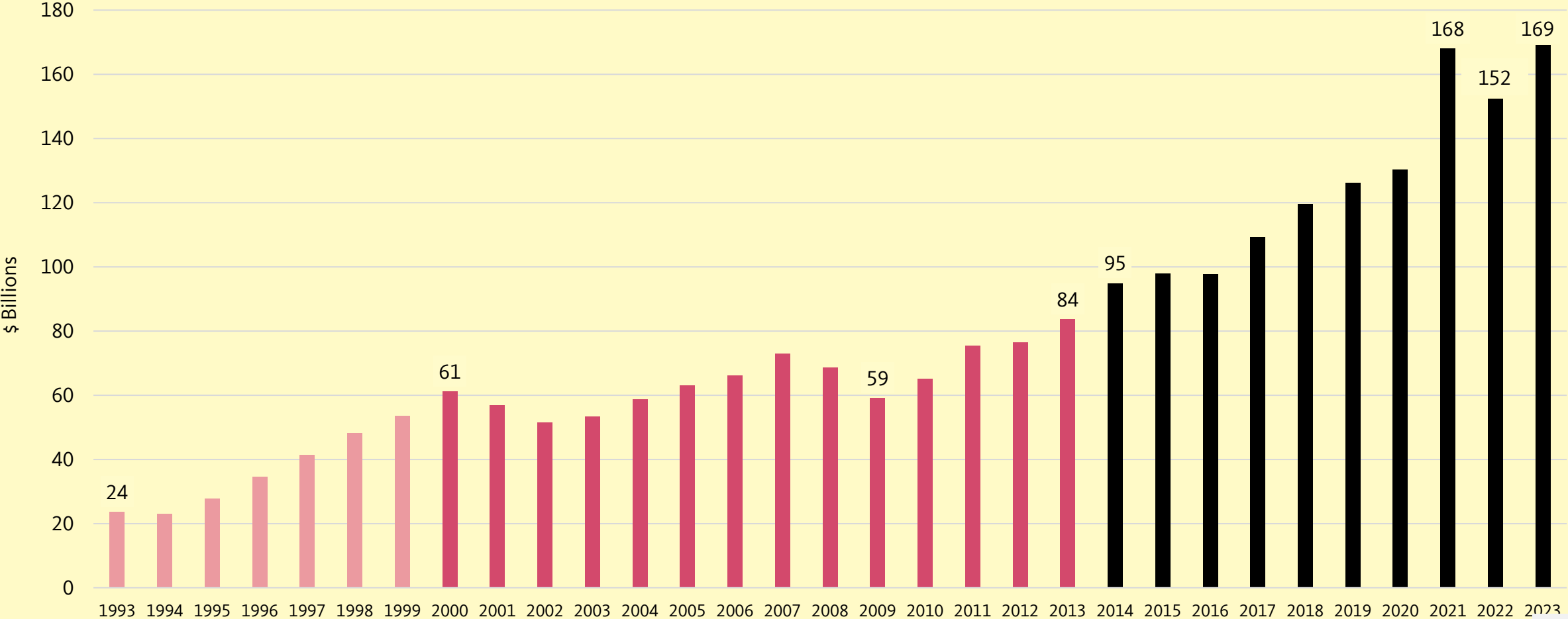
UC INVESTMENTS NET RETURNS: 30 YEARS

As of December 31, 2023



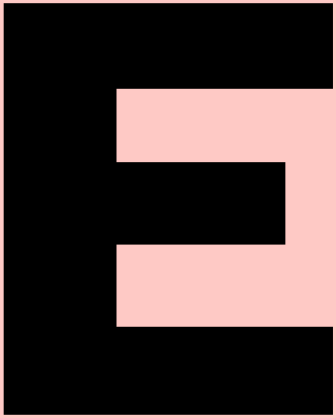
UC INVESTMENTS ASSETS

30 Years (1993 – 2023)



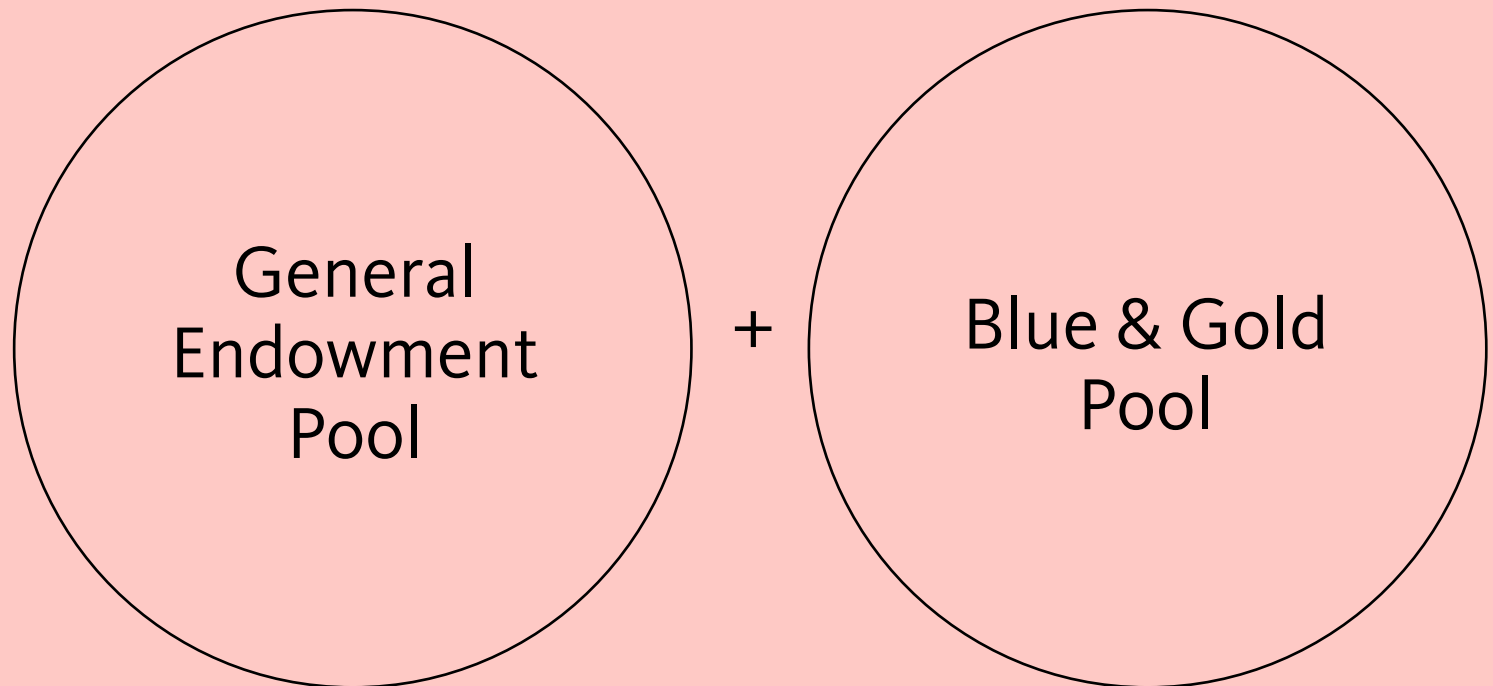
ENDOWMENT





ENDOWMENT

Critical financial support for the programs and initiatives that make our public research university system the best in the world.



GENERAL ENDOWMENT POOL

Investing for 92 years

SUPPORTING

294,309

STUDENTS



ASSETS UNDER MANAGEMENT

\$21B

ANNUAL PAYOUT

\$625M

NUMBER OF INDIVIDUAL FUNDS

6,700+

30 YEAR ANNUALIZED NET RETURN

8.7%

1 YEAR NET RETURN

11.5%

GENERAL ENDOWMENT POOL

Asset Allocation

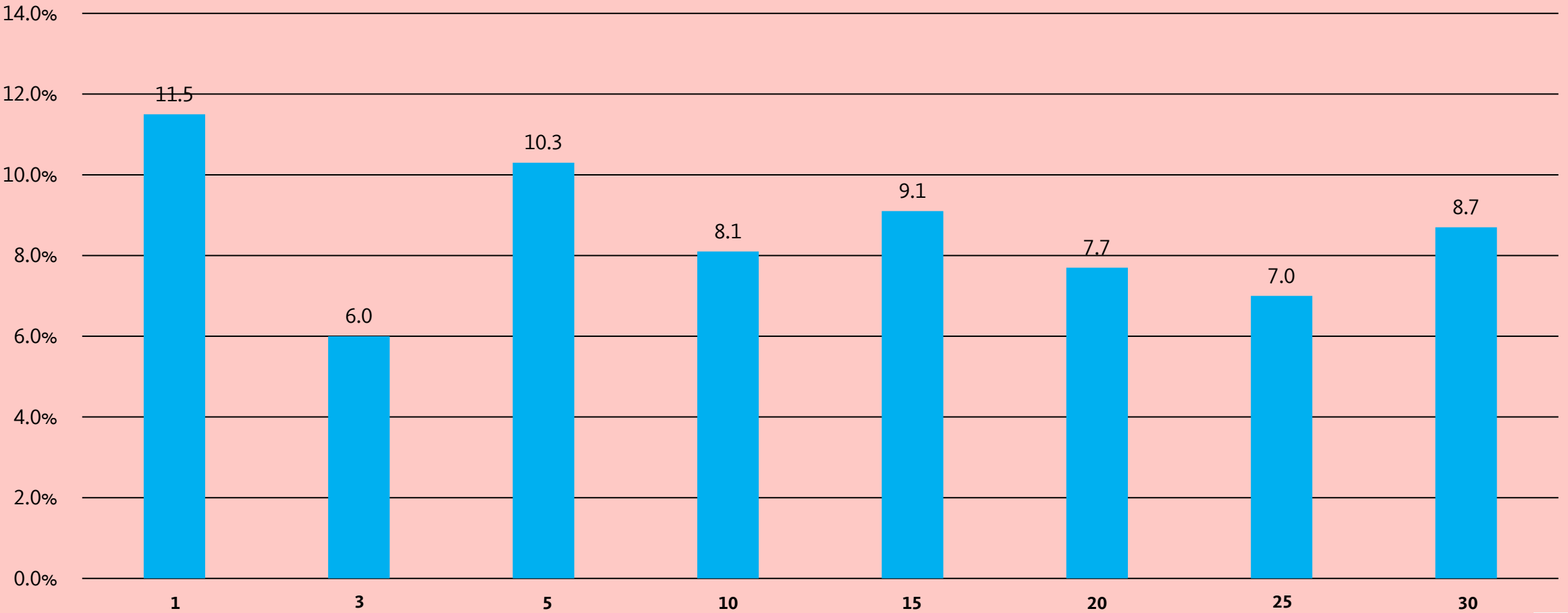
As of December 31, 2023

	Market Value in Billions (\$B)	Weight (%)	Policy (%)
Public Equity	8.4	39.3	40
Fixed Income	1.5	7.0	8
Private Assets	9.7	45.3	50
Private Equity	4.4	20.6	24
Absolute Return	0.9	4.2	10
Private Credit	1.0	4.7	4
Real Estate	2.7	12.6	8
Real Assets	0.7	3.3	2
Cash	1.8	8.4	2
Total	21.4	100	100

GENERAL ENDOWMENT POOL

As of December 31, 2023

General Endowment Pool Annualized Net Returns: 30 Years



GENERAL ENDOWMENT POOL

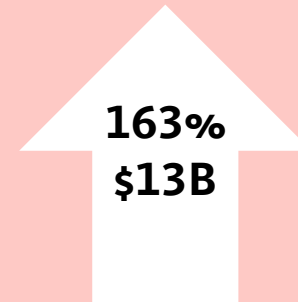
9 Years

June 30, 2014

December 31, 2023

\$8B

\$21B



163%
\$13B

BLUE & GOLD

1. Asset Allocation
2. Performance
3. Asset Classes
4. Risk Allocation

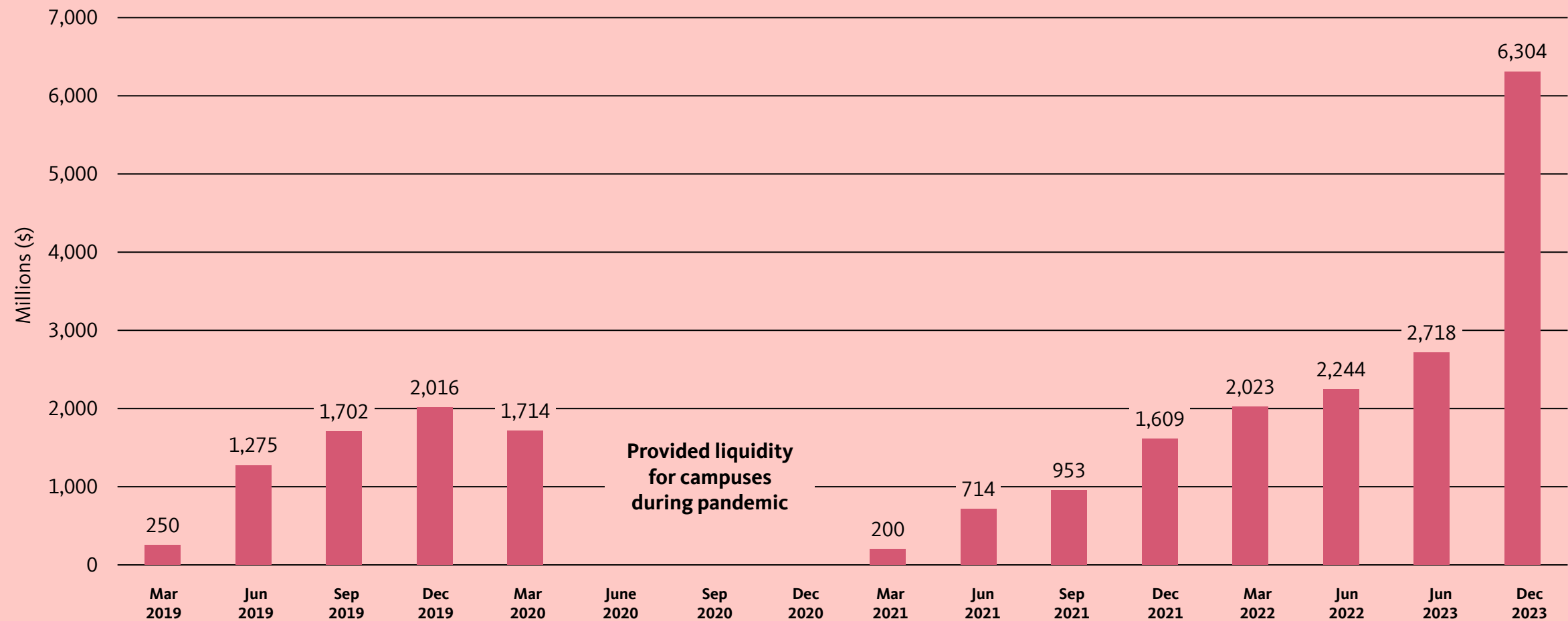
INVESTMENT OBJECTIVES

Blue and Gold

- Provide low cost, liquid, diversified investment vehicle for long-term excess capital reserves.

BLUE & GOLD POOL

Assets



BLUE & GOLD POOL

Asset Allocation

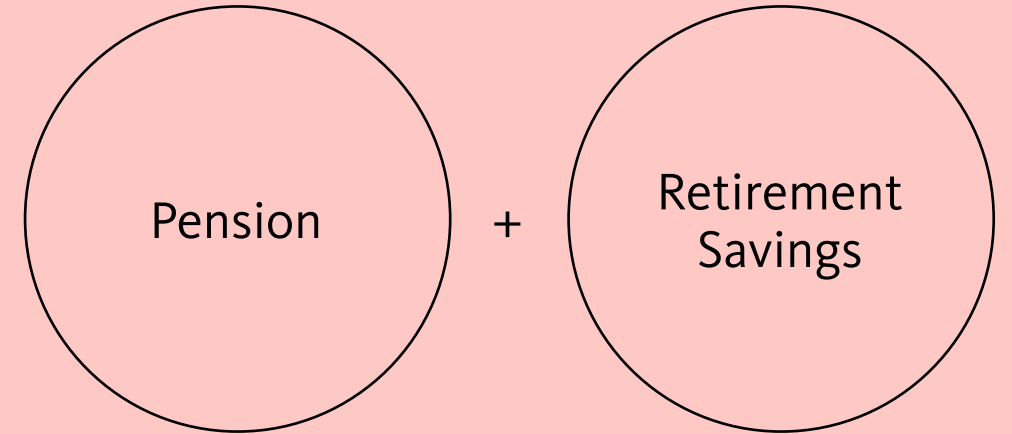
As of December 31, 2023

	Market Value in Millions (\$M)	Weight (%)	Policy (%)
Public Equity	4,776	76	80
Fixed Income	1,528	24	20
Total	6,304	100	100

RETIREMENT



RETIREMENT



P

Pension

A plan that invests across a broad range of asset types to provide retirement income security for all our members.

R

Retirement Savings

The Retirement Savings Program serves 355,000+ members, making it the second largest U.S. public defined contribution plan behind the federal government.

PENSION

Investing for 64 years

SUPPORTING

267,847

PENSION PLAN MEMBERS



ASSETS UNDER MANAGEMENT

\$91B

FUNDING RATIO (ACTUARIAL)

82%

ACTIVE MEMBERS

141,416

30 YEAR ANNUALIZED NET RETURN

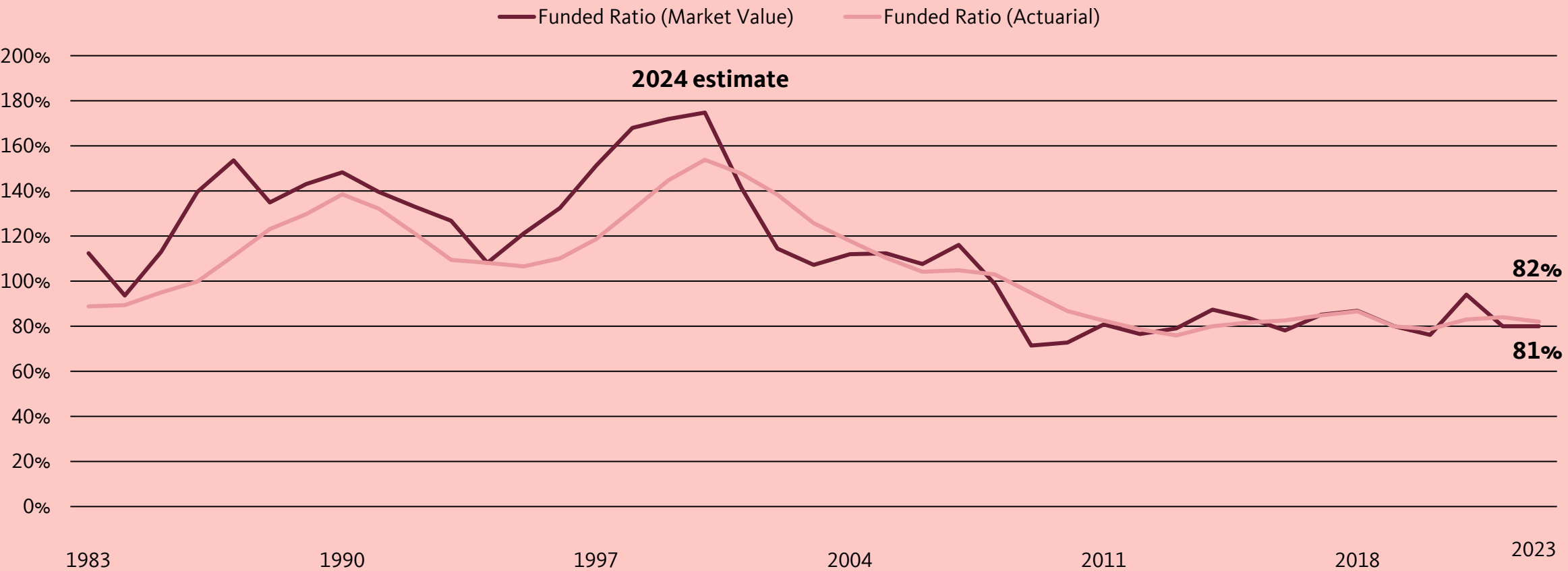
8.0%

1 YEAR NET RETURN

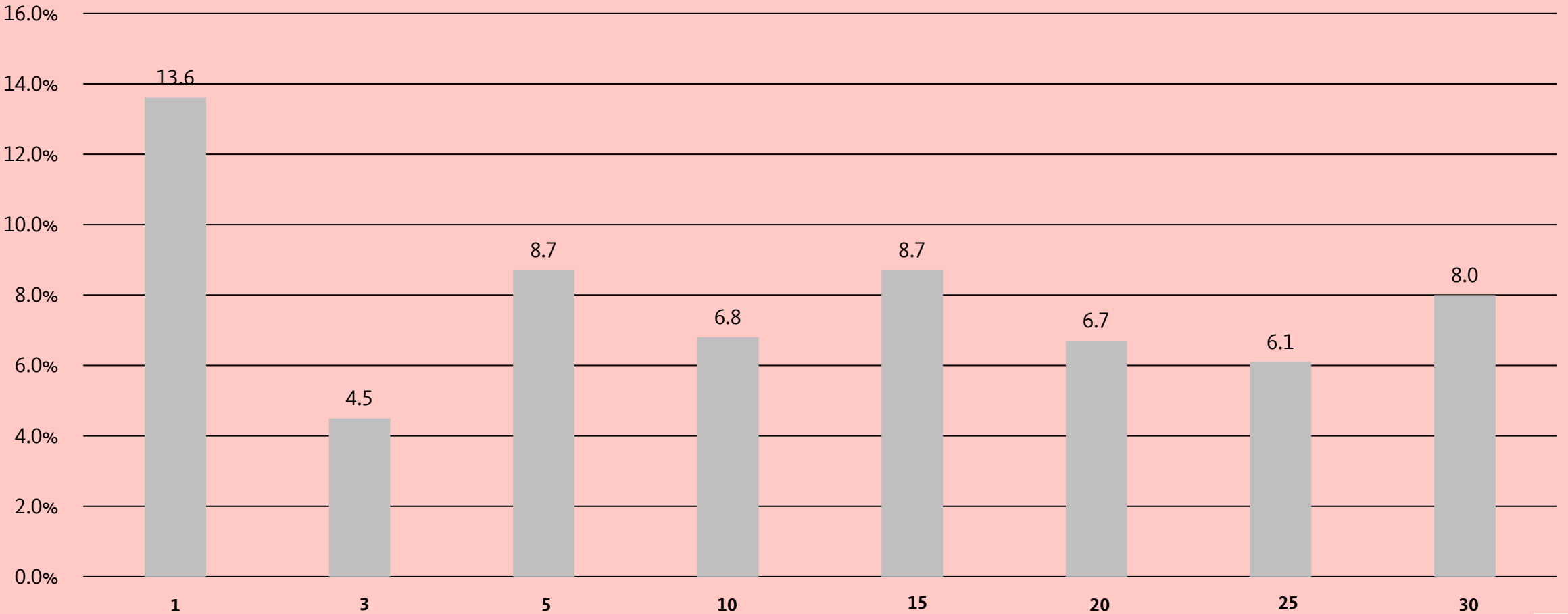
13.6%

PENSION

Investing for 64 years



Pension Annualized Net Returns: 30 Years



Pension

Asset Allocation

As of December 31, 2023

	Market Value in Billions (\$B)	Weight (%)	Policy (%)
Public Equity	48.5	53.1	53
Fixed Income	12.7	13.9	17
Private Assets	24.5	26.8	30
Private Equity	9.1	9.9	12
Absolute Return	1.6	1.8	3.5
Private Credit	3.1	3.4	3.5
Real Estate	7.1	7.8	7
Real Assets	3.6	3.9	4
Cash	5.7	6.2	0
Total	91.4	100	100

PENSION

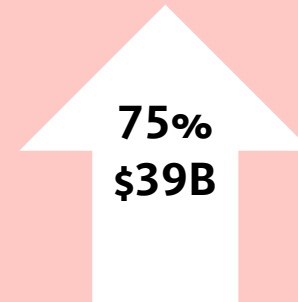
9 Years

June 30, 2014

December 31, 2023

\$52B

\$91B



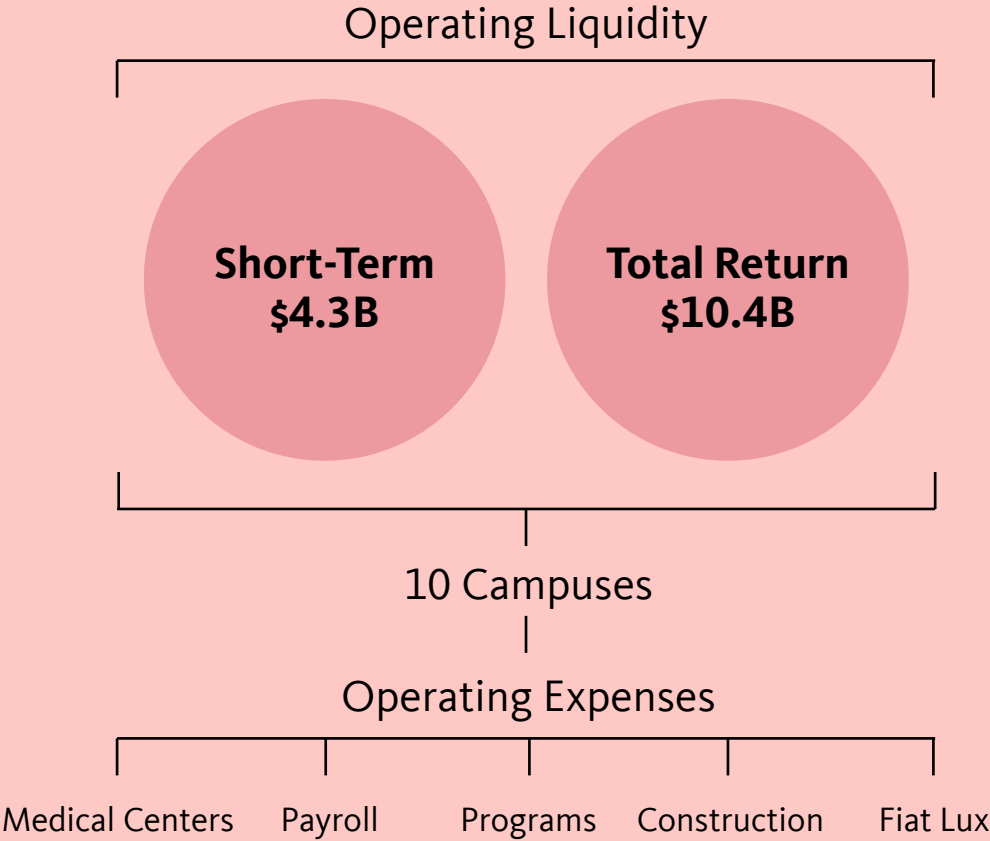
WORKING CAPITAL



W

WORKING CAPITAL

Capital, working.



WORKING CAPITAL

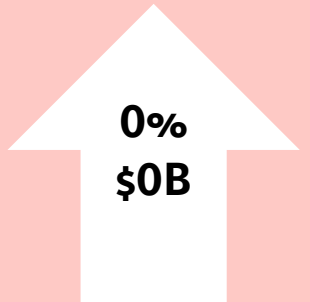
9 Years

June 30, 2014

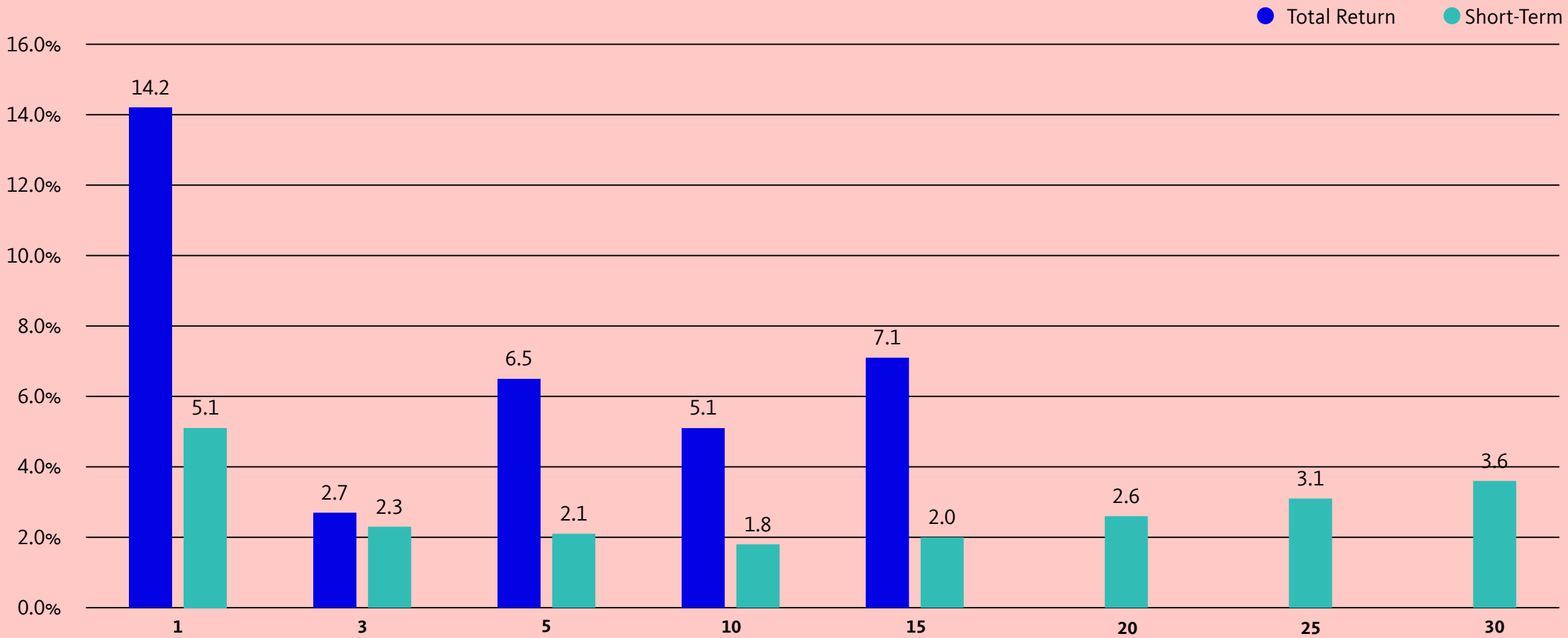
December 31, 2023

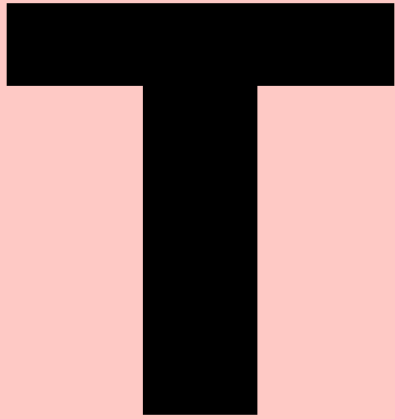
\$15B

\$15B



Working Capital Annualized Net Returns: 30 Years





TOTAL RETURN INVESTMENT POOL

A working capital portfolio created in August 2008 with an asset and risk allocation geared to an intermediate-term horizon.

TOTAL RETURN INVESTMENT POOL

Asset Allocation

As of December 31, 2023

	Market Value in Millions (\$)	Weight (%)	Policy (%)
Public Equity	5,249	50.4	50
Fixed Income	5,112	49.1	50
Cash	55	0.5	0
Total	10,416	100	100



SHORT-TERM INVESTMENT POOL

A working capital portfolio managed to ensure adequate liquidity to meet our system's cash needs.

SHORT-TERM INVESTMENT POOL

Asset Allocation

As of December 31, 2023

	Market Value in Millions (\$)	Weight (%)	Duration (Years)	Rating
Governments	1,571	36	0.10	AA+
Commercial Paper	2,759	64	0.06	A+
Total	4,330	100	0.16	AA-

Our Culture

The UC Investments Way

**I Less is More
II Risk Rules
III Concentrate
IV Creativity Pays
V Build Knowledge**

**VI Team Up
VII What Makes UC, UC
VIII Perfect Alignment
IX Human Meets Machine
X Centennial Performance**

Our ten pillllllllllars

- | | | | |
|------------|------------------------|-------------|-------------------------------|
| I | Less is More | VI | Team Up |
| II | Risk Rules | VII | What Makes UC, UC |
| III | Concentrate | VIII | Perfect Alignment |
| IV | Creativity Pays | IX | Human Meets Machine |
| V | Build Knowledge | X | Centennial Performance |

Our 10 Pillars

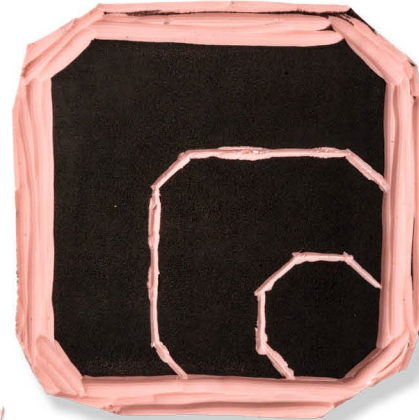
1. Less is More



2. Risk Rules



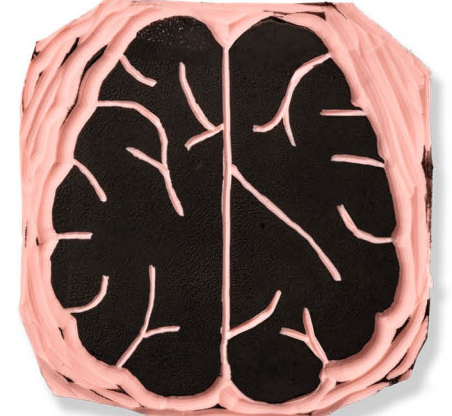
3. Concentrate



4. Creativity Pays



5. Build Knowledge



6. Team Up



7. What Makes UC, UC



8. Perfect Alignment



9. Human Meets Machine



10. Centennial Performance



UC INVESTMENTS 2022–2023

OFFICE OF
THE CHIEF
INVESTMENT
OFFICER
OF THE
REGENTS

UNIVERSITY
OF
CALIFORNIA



REPORT ITEM

1. **REPORT BY:** Chief Financial Officer David Seward
2. **SUBJECT:** Investment Report – As of December 31, 2023
3. **REPORT:**

Investment fund balances held by the University of California are displayed below:

	As of 6-30-2022	As of 6/30/2023	As of 12/31/2023	FYTD %
Hastings Endowment Fund (GEP)	\$49,760,768	\$51,855,613	\$54,617,558	5.3%
Hastings Operating Fund (GEP)	64,797,832	70,108,481	72,415,667	3.3%
Endowed Funds Held by Regents (GEP-7)	9,757,634	10,450,415	10,430,419	-0.2%
Hastings Operations – STIP	661,881	16,454	558,000	3291.3%
100 McAllister Project Fund – STIP	0	46,931,656	47,969,706	2.2%
100 McAllister Project Fund – TRIP	0	45,000,000	47,557,780	5.7%
Total	\$124,978,115	\$224,362,619	\$233,549,130	4.1%

REPORT ITEM

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

A series of reports was presented to the Finance Committee at its February, 2024 meeting.

Attachments:

- 100 McAllister - Monthly Report - Jan 2024
- 100 McAllister Street Project - Historic Tax Credit - Preliminary Consultation Meeting - Great Hall - January 25, 2024
- McAllister Tower Seismic Upgrade Project - Historical Tax Credit Presentation



UC College of the Law, San Francisco

100 McAllister Street Tower Retrofit and Renovation Phase 1

Monthly Report
January 2024

Prepared by Century | Urban

Project Overview

Originally built in 1929 by the Methodist Episcopal Church, the 100 McAllister Street Tower served as both a church and a hotel. The first four floors feature spacious common rooms, lofty ceilings, and a flexible assembly hall, while the Tower’s height allowed for the operation of a hotel to provide revenue for the construction and operation of the church. The project’s lender foreclosed on the property in the midst of the Great Depression in 1936, and the structure was rebranded as the “Empire Hotel” and boasted the city’s first 360-degree view lounge in the “Sky Room” on the 24th floor. The Tower was then sold to the US government during World War II initially for wartime uses and eventually as an IRS office building before UC College of the Law, San Francisco (“UC Law SF”) acquired the building in 1978 and converted it to campus housing, a purpose it serves to this day. An iconic Gothic Revival and Art Deco structure, the Tower is located within the Uptown Tenderloin Historic District, which is listed in the National Register of Historic Places, and has been designated by the City of San Francisco as a Category I Significant Building, a designation that typically prohibits demolition or visually significant exterior alterations.

The Tower rises 28 stories and currently includes 252 housing units, offices for academic and administrative functions, as well as the Sky Room and other amenity/support spaces. The Tower also includes the Great Hall, which is the church’s former sanctuary space and has been vacant and unused for over three decades.

The project will be implemented through two phases:

- **Phase 1**
 - Full Seismic Upgrade
 - Partial Window Repair/Replacement, Waterproofing Improvements, and State Office of Historic Preservation Interface
 - Exterior Skin Repair
 - Interior Abatement/ Demolition
 - Sustainability Feasibility Review
 - Design and Permitting for Phase 2
- **Phase 2**
 - Full Seismic Upgrade
 - Exterior Skin Repair
 - Residential Apartment and Academic/Office/Retail Space Modernization Improvements
 - Comprehensive Building Systems (e.g., MEP, Fire Life Safety, IT/Data, Code/Wayfinding/Identity Signage, Sustainability, Elevator, etc.) Replacement and Upgrades
 - Building amenities (e.g., fitness facilities, study rooms) renovations
 - Potential Great Hall design and renovation

The current project program and unit mix based on the conceptual design package are summarized in the tables below.

Building Area by Program Area	
Program	Total Area (SF)
Circulation/Other	28,600
Core	48,400
Lobby	1,900
Amenity	68,400
Great Hall	5,400
Academic/ Administrative	14,900
Residential	89,400
Total	256,900

Building Area by Level	
Building Level	Total Area (SF)
Basement	22,300
Ground Level	13,000
Level 1	15,600
Level 1 Mezzanine	12,900
Level 2 Option 1	10,600
Level 3 Option 1	9,700
Level 4 Option 1	10,700
Level 5	14,700
Mid-Rise Even Levels 6, 8, 10, & 12	42,600
Mid-Rise Odd Levels 7, 9, 11, & 13	42,600
Levels 14 - 19	51,500
Level 20	4,000
Level 21	2,400
Level 27	2,100
Level 28	2,100
Total Building Area	256,900

Residential Unit Mix			
	Average SF	Units	Beds
1 - Bed	650	13	13
2 - Bed	875	22	44
3 - Bed	1,000	6	18
4 - Bed	1,250	31	124
5 - Bed	1,695	13	65
Total		85	264

Note: Total building area listed in Conceptual Design Package dated 9/26/2023 is 251,890 SF. Specific program areas and areas by floor level listed in package both total to 256,900 SF. Difference between these square footage amounts is to be reconciled with design team.

Project Budget/Costs

Prior costs to date for the 100 McAllister Phase 1 project total \$1,936,141.90. Current project costs to be paid upon approval for payment total \$987,643.86. Prior and current project costs to date total \$2,923,785.76 or approximately 3.2% of the total Phase 1 project budget of \$90 million.

UC LAW SF

2/5/2024

100 McAllister Project - Phase 1

Project Budget Summary

No.	Description of Work	Original Budget	Current Changes	Previous Changes	Total Changes	Revised Budget	Prior Costs to Date	Current Cost	Total Costs To Date	% Complete	Remaining Costs to Complete
1.)	Pre-Construction/ Construction	\$64,374,040.00	212,341.35	158,666.11	\$371,007.46	\$64,745,047.46	\$ 301,501.16	\$ 154,942.65	\$ 456,443.81	0.7%	\$ 64,288,603.65
2.)	Design Services	11,267,493.00	-	25,400.00	25,400.00	11,292,893.00	807,704.29	703,843.71	1,511,548.00	13.4%	9,781,345.00
3.)	Geotechnical Services	467,100.00	-	-	-	467,100.00	205,411.53	33,290.50	238,702.03	51.1%	228,397.97
4.)	Soils Environmental Testing	35,000.00	-	24,500.00	24,500.00	59,500.00	36,500.00	9,857.50	46,357.50	77.9%	13,142.50
5.)	Building Scan	86,310.00	-	685.00	685.00	86,995.00	86,995.00	-	86,995.00	100.0%	-
6.)	Site Survey	18,900.00	-	-	-	18,900.00	14,900.00	-	14,900.00	78.8%	4,000.00
7.)	Materials Testing	450,000.00	-	-	-	450,000.00	-	-	-	0.0%	450,000.00
8.)	Deputy Building Official	126,000.00	-	-	-	126,000.00	14,437.50	-	14,437.50	11.5%	111,562.50
9.)	Seismic Peer Review Panel	115,000.00	-	-	-	115,000.00	31,155.68	11,740.00	42,895.68	37.3%	72,104.32
10.)	Inspector of Record	340,000.00	-	-	-	340,000.00	1,200.00	1,850.00	3,050.00	0.9%	336,950.00
11.)	Special Inspections	800,000.00	-	-	-	800,000.00	-	-	-	0.0%	800,000.00
12.)	Permits & Fees	2,000,000.00	-	-	-	2,000,000.00	3,932.00	-	3,932.00	0.2%	1,996,068.00
13.)	Insurance	1,000,000.00	-	-	-	1,000,000.00	-	-	-	0.0%	1,000,000.00
14.)	Legal Services	100,000.00	-	75,000.00	75,000.00	175,000.00	92,310.35	-	92,310.35	52.7%	82,689.65
15.)	Market Study	18,500.00	-	-	-	18,500.00	18,500.00	-	18,500.00	100.0%	-
16.)	Environmental Services	-	-	313,050.00	313,050.00	313,050.00	63,360.00	22,032.00	85,392.00	27.3%	227,658.00
17.)	Real Estate Advisory	2,000,000.00	-	-	-	2,000,000.00	258,234.39	50,087.50	308,321.89	15.4%	1,691,678.12
18.)	Contingency - Hard & Soft	6,801,657.00	(212,341.35)	(597,301.11)	(809,642.46)	5,992,014.54	-	-	-	0.0%	5,992,014.54
Total Draw		\$90,000,000.00	\$ -	\$ -	\$ -	\$90,000,000.00	\$ 1,936,141.90	\$ 987,643.86	\$2,923,785.76	3.2%	\$ 87,076,214.24

Project Timeline

Major milestones from the current draft preliminary project schedule prepared by Plant Construction Company dated October 31, 2023 are summarized in the table below.

Project Milestone	Schedule Date
Conceptual Design Completion	9/29/2023
Existing Conditions Surveys and Studies Completion	1/9/2024
Schematic Design Completion	1/26/2024
Historic Tax Credits Approval	5/24/2024
Design Development Completion	5/30/2024
Basement to Level 4 Soft Demolition and Abatement Completion	8/8/2024
Seismic Review Committee Approval	10/10/2024
Early Basement Foundation/Below-Grade Underground Work Completion	1/6/2025
Construction Documents Completion	2/13/2025
Department of State Architect Approval	3/21/2025
Lobby, Walnut Room, Levels 5-28 Soft Demolition and Abatement Completion	3/25/2025
State Fire Marshall Final Approval	5/23/2025
Superstructure, Foundation, Hard Demolition and Structural Work Completion – Phase 1 Complete	10/13/2026
Architectural, TI Fit-Out, MEPS, Façade/Windows, Site Work Completion – Phase 2/Project Complete	3/30/2028

The Schematic Design phase will be completed in early February 2024. Materials testing and exploratory investigations continued in January with slight delays due to constraints and logistics for accessing the requested test locations. The first phase of materials testing, and exploratory work is anticipated to be completed by late February or early March.

Project Photos

There are no project photos for the current month.

MCALLISTER TOWER SEISMIC UPGRADE PROJECT HISTORICAL TAX CREDIT PRESENTATION

FEBRUARY 2024



Federal Historic Preservation Tax Credit

How Does the Program Work?

Jointly administered by 2 Federal Agencies

U.S. Department of the Interior

- ☐ National Park Service (NPS)
 - State Historic Preservation Officer (SHPO)

U.S. Department of the Treasury

- ☐ Internal Revenue Service (IRS)

Historic Tax Credit: 4 Threshold Issues

Rehabilitation must involve or be:

1. Building which is
 - ☐ (a) a certified historic structure
 - or
 - ☐ (b) of historic significance to registered historic district
2. Certified under the Secretary of the Department of Interior's (DOI) Standards for Rehabilitation.
3. Substantial, timely within DOI standards
4. Building which is treated by owner **as** income producing and depreciable property.

Steps/Application Parts

- ☐ **Part 1 - Evaluation of Significance** (i.e., determination of property eligibility). **Before** any substantial work or expenditures are incurred.
- ☐ **Part 2 - Description of Rehabilitation** (i.e., approval of construction plans). **Before** any substantial work or expenditures are incurred. Multiple Part 2 amendments **during** construction are allowed and common.
- ☐ **Part 3 - Request for Certification of Completed Work** (i.e., final inspection). **After** property renovation is complete (also known as “placed in service”).

Property must satisfy following two major tests (in addition to smaller tax steps and rules):

- ☐ (i) property must be “Income Producing and Depreciable Property”
and
- ☐ (ii) property must be “Substantially Rehabilitated Property”

“Income Producing and Depreciable Property Requirements” (sometimes referred to as “Pickle Rules”)

Limitation Part I: Tax Exempt Ownership of Property - Ownership by Tax Exempt Owners is Limited

Property entirely owned by Tax Exempt/Non-Profit entity is generally NOT eligible for Federal Tax Credit. Tax Exempt entity must create taxable corporation to insert between itself and property to access Federal Tax Credit. This is why 100 McAllister must be transferred and re-titled in name of a new taxable corporation for it to be eligible for historic tax credits.

Examples of Tax Exempt entities include non-profits, state and local governments and their agencies, educational institutions and pension funds.

Limitation Part II: Tax Exempt Use of Property - Use by Tax Exempt Tenants is Limited

Issue ONLY if at least 50% of leasable square footage is leased to tax exempt entities and one or more of the following is true.

- ☐ One lease is for greater than 20 Years
- ☐ A Tax Exempt tenant has a fixed price purchase option
- ☐ Property was previously owned and used by tax exempt tenant
- ☐ Property is financed by tax exempt debt.

Structuring and planning to ensure (e.g., use of management contract as opposed to lease) that 50% of property is not leased to tax exempt entities.

“Substantially Rehabilitated Property”

What is substantial and timely rehabilitation?

Building is substantially rehabilitated when Qualified Rehabilitation Expenditures (QREs) exceed greater of building's adjusted basis or \$5,000 during 60-month measuring period.**

- ❑ Example: Owner buys building for \$50 million. Allocated price of land is \$20MM, so building basis is \$30MM, assuming no other adjustments. Owner must incur QREs of \$30MM + \$1 within 60-month period.

QREs include capitalizable costs such as:

- ❑ Construction: interior/exterior walls and rehabilitation, floors, ceilings and structural elements, permanent coverings, life safety and building utility infrastructure.
- ❑ Financial: construction period interest, loan fees, utilities and property taxes.
- ❑ Soft costs: architect/engineers, preservation consultant and developer fees.

*** 60 months is used for renovations, which will be performed in several stages over several years (like 100 McAllister). 24 months is used for smaller one-stage renovation projects.*

What is a Tax Credit?

\$1 of tax credit reduces income tax owed by \$1

Tax credits are far more valuable than tax deductions as deductions only save taxpayer amount based on applicable tax bracket. \$1 tax deduction for a taxpayer in 30% tax bracket saves taxpayer \$0.30 whereas \$1 tax credit saves taxpayer \$1.

20% Federal Rehabilitation Tax Credit

❑ Tax Credits Generated

- ❑ \$100,000,000 in QREs; $20\% \times \$100,000,000 = \$20,000,000$ credit
- ❑ Example: assume corporation owes corporate income tax of \$20,000,000 without credit
- ❑ Corporate tax due after investment in historic rehabilitation:

$$\begin{array}{r} \$20,000,000 \\ (\underline{\$20,000,000}) \\ \$0 \end{array}$$

- ❑ California has new State historic tax credit, which is still in early stages. Project may pursue State tax credits to extent available and applicable.

Transaction Structure

- ❑ Before rehabilitation completion, property leased by new taxable entity (i.e., entity to which property has been transferred) to new lessee entity held by new taxable entity and tax credit investor.
- ❑ New lessee entity is controlled by taxable entity as managing member.
- ❑ Taxable entity holds minority interest (e.g., 1%) and tax credit investor holds majority interest (e.g., 99%) in new lessee entity.
- ❑ At or near rehabilitation completion, tax credit investor contributes tax credit investment proceeds in exchange for right to use tax credits.
- ❑ Tax credit investor uses tax credits during 5-year recapture period.
- ❑ At end of 5-year recapture period, taxable entity has right to buy tax credit investor out of structure at which point structure can be unwound or collapsed.

Recapture

(i.e., when tax credit no longer available)

☐ **Dates / Amount**

- Measurement period starts after renovation and property placed in service
- Recapture risk declines 20% every 12 months thereafter

☐ **Triggers**

- Disposition of property to new owner during 5-year recapture period
- Major casualty of property during 5-year recapture period (i.e., no longer historic structure)
- Non-compliance with NPS requirements

☐ **Guarantees Required**

- Tax credit investor typically requires tax credit recapture guarantees to be provided by owner / developer (i.e., if credits are recaptured due to triggers above, “tax credit guarantor” agrees to make payments to tax credit investor to offset loss)

Net Tax Credit Proceeds

❑ Illustrative Example

- Total QREs of \$100M incurred in connection with renovation project.
- Available tax credits equal to 20% of \$100M
- Tax credit investor assumed pricing of \$0.85 per \$1.00 of tax credit

Numerical Example

\$100,000,000 of QREs

x 20% historic tax credit rate

\$20,000,000 of tax credits generated

\$20,000,000 of tax credits generated

x \$0.85 per tax credit

\$17,000,000 gross investment into project by tax credit investor

- Tax credit investor gross investment of \$17,000,000 is offset by:
 - ❑ One-time transaction costs
 - ❑ Annual cash-on-cash return to tax credit investor
 - ❑ Exit fee to tax credit investor at end of 5-year recapture period
 - ❑ Annual property taxes due/paid resulting from interim transfer to taxable entity (may be reduced by applying for/receiving Mills Act property tax relief).

Net Tax Credit Proceeds

■ Illustrative Example

	<u>Amount</u>
Tax Credit Investor Gross Investment	\$17,000,000
One-Time Transaction Costs	(\$500,000)
Tax Credit Investor Cash-on-Cash Payment (2.5% annually during 5-year investment/recapture period) *	(\$2,125,000)
Tax Credit Investor Exit Fee (12.5% at end of 5-year investment/recapture period) *	(\$2,125,000)
Property taxes payable during 5-year investment/recapture period (assumes \$50M assessed value at 1% property tax rate resulting in annual property tax payment of \$500,000)	(\$2,500,000)
Available Net Tax Credit Proceeds	\$9,750,000

** Tax credit investor's investment can be viewed as low interest loan for 5 years on which 2.5% interest is paid each year and for which only 12.5% is required to be repaid. Additionally, these key economic terms (2.5% annual cash-on-cash return and 12.5% exit fee) are negotiable, and projects may obtain less or more favorable terms.*

Additional Information

Additional detailed information (including Q&A materials for the most commonly inquired about questions) can be found at following links:

<https://www.novoco.com/public-media/documents/irs-htc-frequently-asked-questions-06092021.pdf> - Prepared by Novogradac accounting firm

<https://www.irs.gov/pub/irs-utl/faqrehab.pdf> - Prepared by the Internal Revenue Service

Please also see attached 3-page tax memorandum with further explanation of many topics discussed in above slides.

Notable Local Tax Credit Projects Where Tax Counsel was Farella, Braun + Martel LLP

- ❑ Approximately \$125 million rehabilitation of the Ferry Building in San Francisco
- ❑ Approximately \$125 million rehabilitation of Pier 70 in San Francisco
- ❑ Approximately \$75 million rehabilitation of the Cavallo Point -- The Lodge at the Golden Gate
- ❑ Approximately \$75 million rehabilitation of the One Kearny office building in downtown SF, California
- ❑ Approximately \$75 million rehabilitation of Piers 1 ½, 3 & 5 in SF, California
- ❑ Approximately \$50 million rehabilitation of the historic structures within the Fort Mason complex in SF, California
- ❑ Approximately \$40 million rehabilitation of the Strand Theatre in SF, California
- ❑ Approximately \$40 million rehabilitation of the Henry J. Kaiser Convention Center (including the Calvin Simmons Theatre) in Oakland, California
- ❑ Approximately \$25 million rehabilitation of the Presidio Theatre in the center of the Presidio in SF, California
- ❑ Approximately \$25 million rehabilitation of the apartment building project located at 973 Market Street in downtown SF, California
- ❑ Approximately \$25 million rehabilitation of The Bay School in the heart of the Presidio in SF, California
- ❑ Approximately \$25 million rehabilitation of the International Center to End Violence Conference Center in the center of the Presidio in SF, California





100 McAllister Street Historic Tax Credit Preliminary Consultation Meeting: Great Hall

January 25, 2024

Participants

UC College of the Law

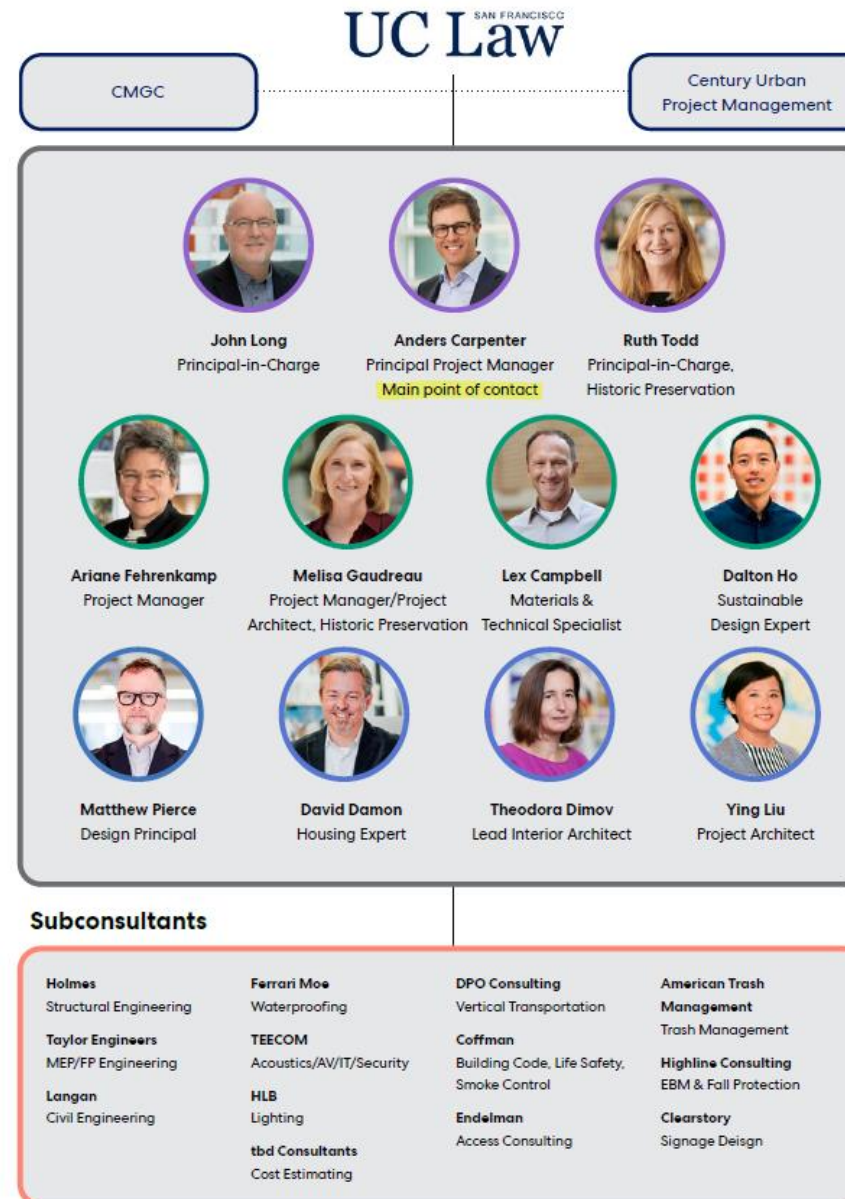
- David Seward
- Flora Li
- Jon Knorpp (Century Urban)

Page & Turnbull

- Ruth Todd
- Jen Hembree
- Clare Flynn

Perkins & Will

- Anders Carpenter



Agenda

1. Project Introduction
2. Building Overview
3. Discussion Topic
 - Great Hall Treatment
4. Discussion & Next Steps

Project Introduction

- What is UC Law?
 - Founded 1878
 - No funding from UC
 - 1,100 FTE students
- 100 McAllister owned since 1978
- Academic Village - Master Plan
- Project Objectives
 - Affordable student housing
 - Revitalization of Tenderloin
- Funding and Phasing
 - Phase 1: Seismic
 - Phase 2: Interiors
 - Phase 3: Great Hall occupancy
- Importance of Tax Credits
 - Need federal assistance



UC Law Academic Village



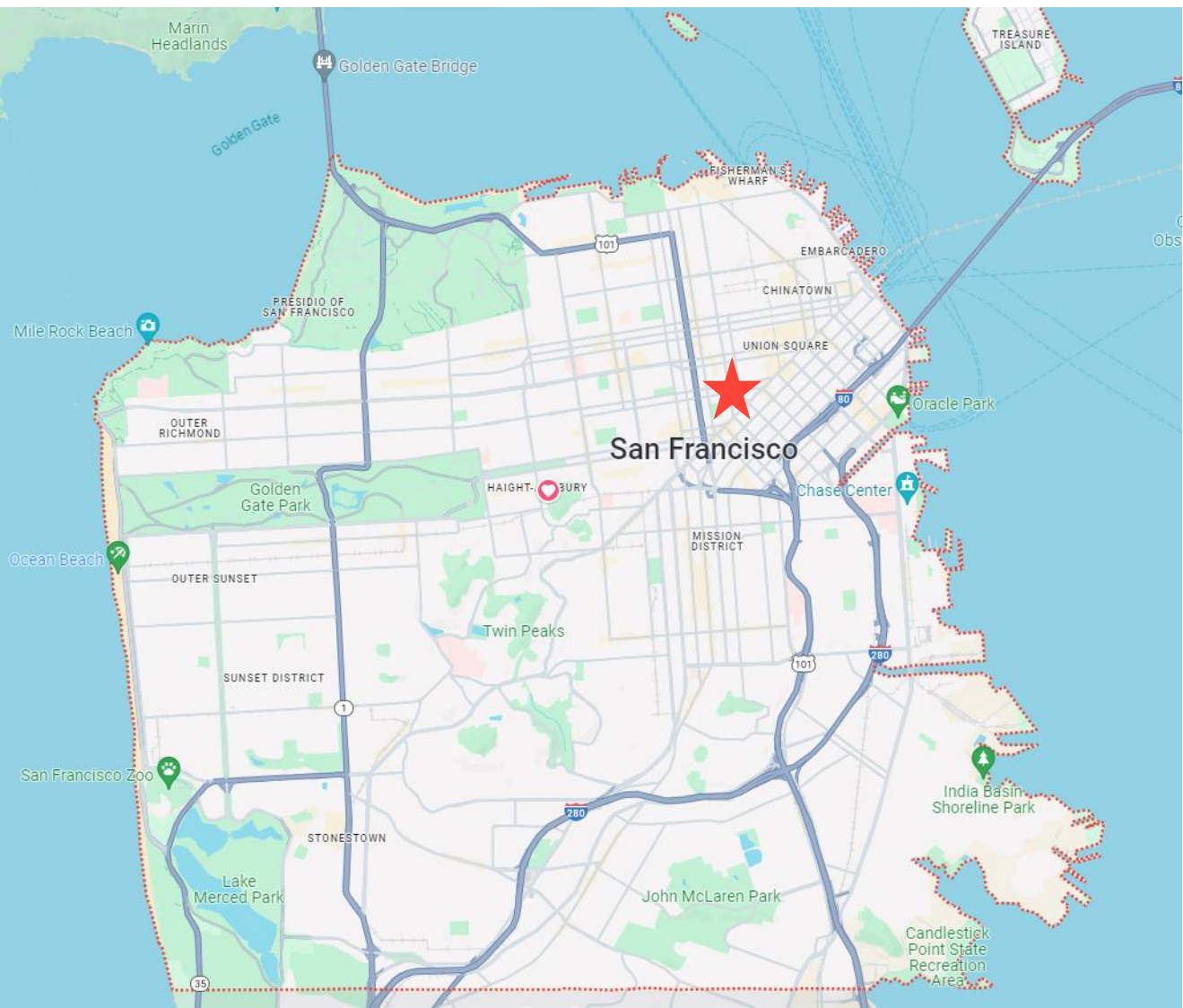
“100 McAllister” – Brief History/Significance

- Constructed in 1930 as William Taylor Hotel & Temple Methodist Church
- By / for the Temple Methodist Church
- Art Deco skyscraper / Gothic Revival style
- Single building / Dual-use (+/- 250,000 sq.ft.)
 - 28-story hotel tower
 - 5-story church (4.5% of total sq.ft.)
- Contributor to Uptown Tenderloin Historic District



South Façade (McAllister Street, ca. 1930-1938)

Uptown Tenderloin Historic District – Location



Uptown Tenderloin Historic District – Overview



- National Register-listed district since 2009
 - 409 contributing resources
- Significance
 - Development of hotel and apartment life in SF
- Character-Defining Features
 - Building types: hotels, apartments, non-residential buildings that support neighborhood life
 - “Revival” architecture styles
 - Fire-resistant construction with brick or stucco facades
 - Continuous street wall
 - Flat roofs with parapets and decorative cornices
 - Cast iron, terra cotta, cast concrete decoration

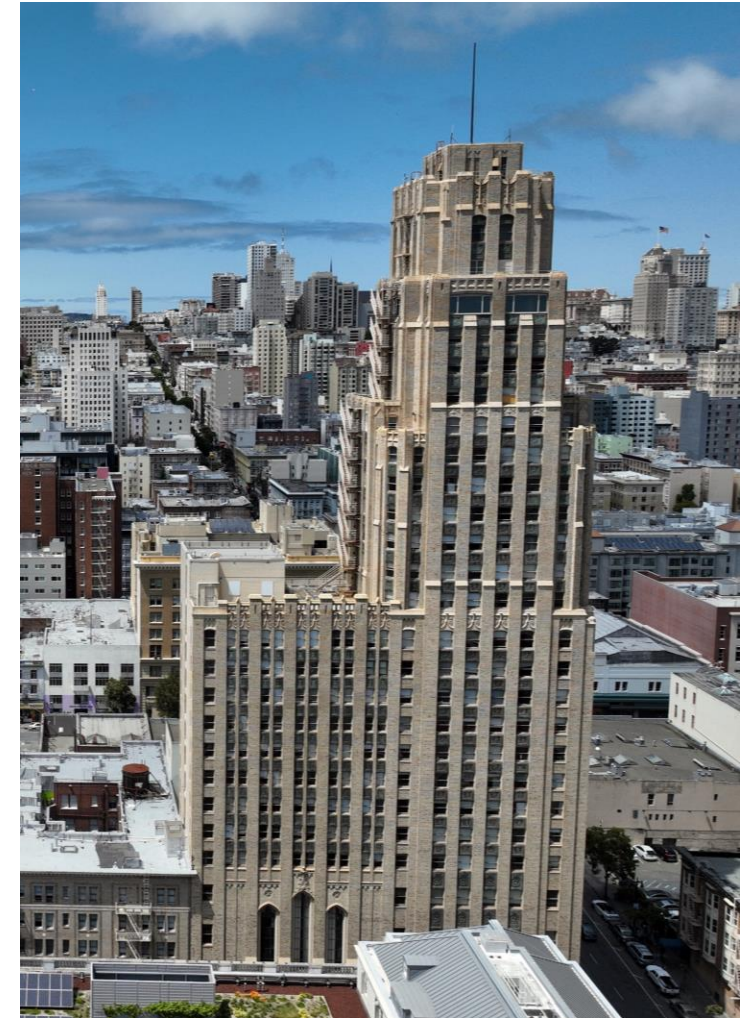
Exterior – Current Photos



South (front) and east facades, view northwest.



Main entrance at south façade.



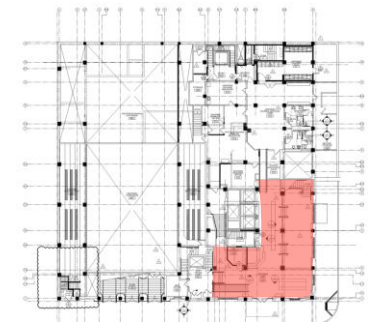
South (front) facade, view north.

Exterior – Great Hall Entry



Primary Significant Interior Spaces

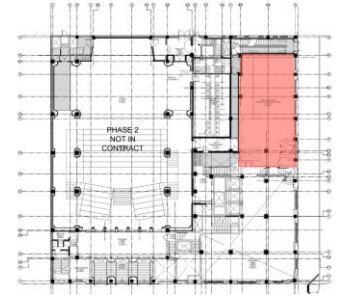
Lobby (Ground Floor) and Ladies' Mezzanine



"100 McAllister" Preliminary Consultation Meeting

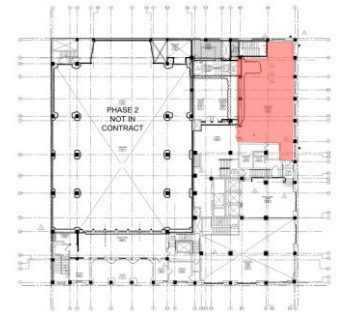
Primary Significant Interior Spaces

Walnut Room/Coffee Shop (1st Floor Mezzanine)



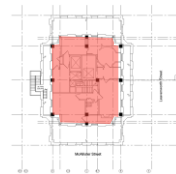
Primary Significant Interior Spaces

Dining Room (2nd Floor)



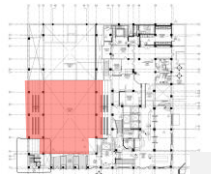
Secondary Significant Interior Spaces

Penthouse Suites (25th and 26th Floors)



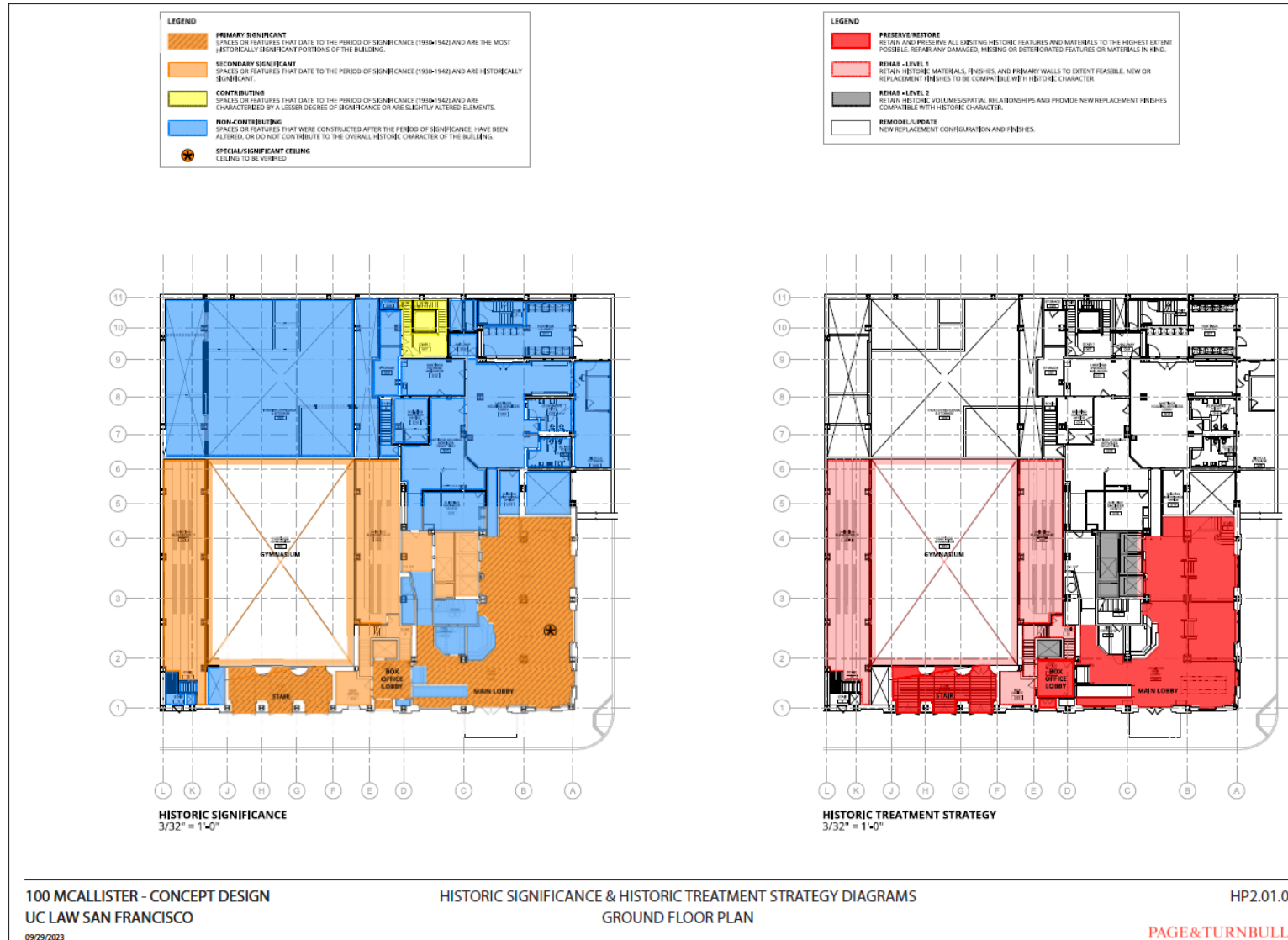
“100 McAllister” Preliminary Consultation Meeting

Gymnasium (Basement)



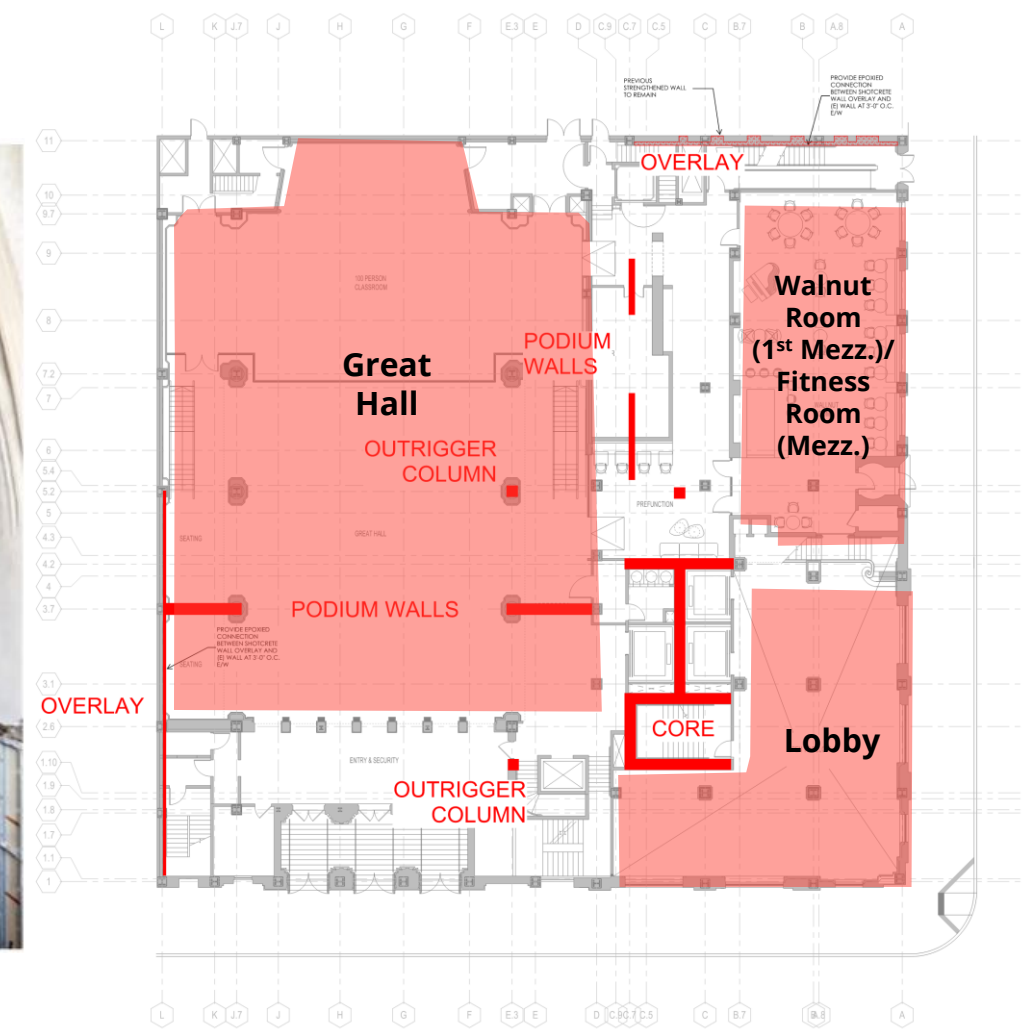
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Significance Diagrams and Treatment Plans



Discussion Topic – Great Hall Treatment

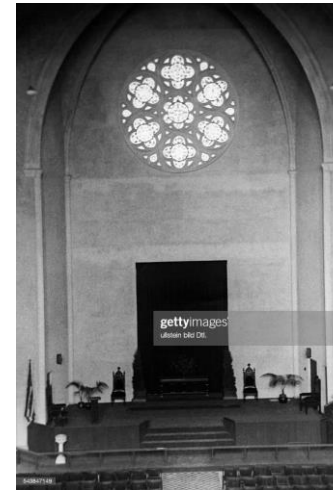
What is the best treatment of the Great Hall in the context of this phased HTC?



Great Hall – Evolution

Chronology / Use

- 1930-1934 – Temple Methodist Church
 - 4% of building lifetime
- 1937-1942 – Empire Hotel parking garage
- 1942-1977 – Federal government offices
- 1978 – UC Hastings acquisition of entire building
- 1978-1989 – Vacant
- 1990-2000 – Experimental theater lease
 - Rent free
 - Avg. 30 days use/year
- 2000-present – Vacant (unsafe condition)



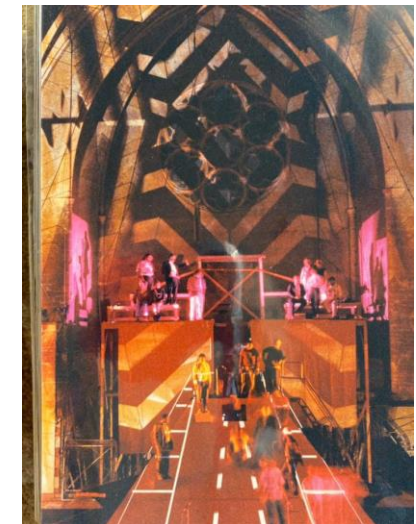
ca. 1930-1934 church



ca. 1937-1942 garage



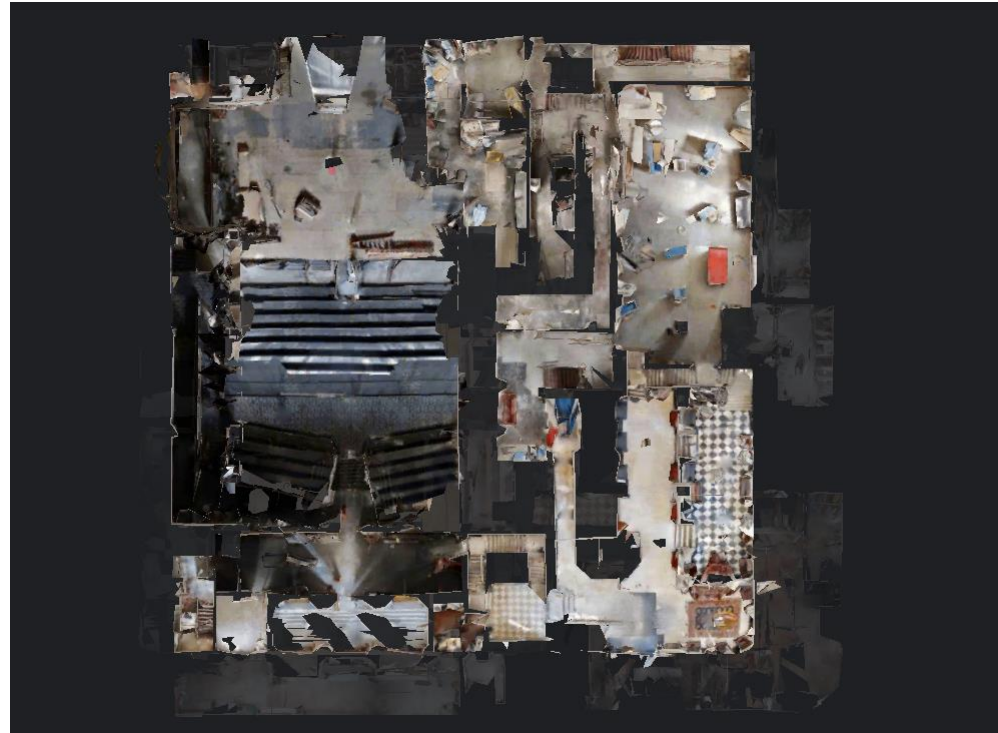
ca. 1942-1977 federal gov. offices



ca. 1990 theater

Great Hall – Existing Interior Conditions

Matterport Walk-Through →



Great Hall – Interior Integrity

Federal government used space as office (1942-1977)

- Removed Gothic Revival elements to convert to modern office space
- Removed and/or damaged plaster finishes; altered walls/columns below clerestory level



ca. 1942-1977



Present

Great Hall – Condition Issues

1. Multiple hazmat tests showed historic plaster wall, ceiling, and decorative finishes contain **friable asbestos**
 - Tests showed asbestos-containing finishes can't be consolidated and encapsulated
 - Must be abated
2. Historic **plaster finishes damaged** from previous uses
 - Hundreds of holes in ceiling from previous dropped ceiling
 - All plaster below clerestory level removed
3. Structural deficiencies
 - Framework behind the vaulted ceiling lacks sufficient lateral bracing
 - Overall building **seismic retrofit** and access



Great Hall – Treatment

PROPOSED TREATMENT – OHP Pre-App 12/23

- **Abatement**, which includes removal of all hazardous plaster finishes and underlying integrated structural framework
 - Exposed concrete structure
 - Retain lancet windows and rose window
 - Retain and encapsulate south wall and tracery windows (including reception room wall and choir loft)
- Complete **seismic strengthening**
- Install ductwork for overall systems upgrade.
 - Will be routed to be tight to ceiling and avoid windows
- **Mothball** per applicable guidance in *NPS Preservation Brief 31*
 - Weatherproofing
 - Ventilation
 - Security

Great Hall Treatment – Abate and Mothball

View looking South



Existing Hazardous Condition



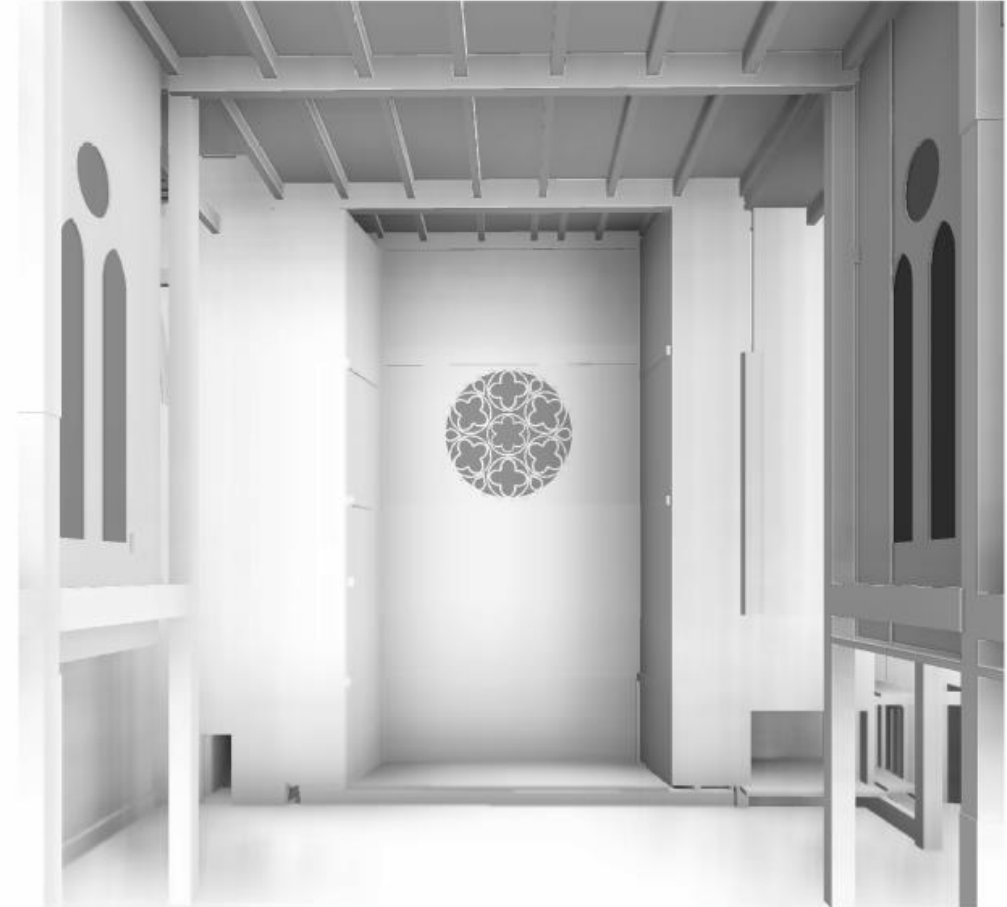
Abated /Mothball Condition

Great Hall Treatment – Abate and Mothball

View looking North



Existing Hazardous Condition








Abated /Mothball Condition

Key Considerations:

- **Retain Significance** as a contributor to the Uptown Tenderloin Historic District
 - Be a catalyst for its neighborhood revitalization
- Key to **seismic strengthening** for whole building
 - Balances and transfers load of tower
- Hazardous material **composition issues**
 - Integral to wall/ceiling/decorative finishes
 - Friable due to Federal era activities
 - Structural vulnerability
- **Abatement** is Mandatory
 - Abatement is expensive
 - Unacceptable liability exposure
 - Step 1 for any occupancy
- **Not part of current project scope or budget**
 - 4.5% gsf of overall 250,000 gsf
 - Severely compromised integrity

Great Hall – Treatment Comparison

GREAT HALL HISTORIC TREATMENTS					
TREATMENT	1	2	3	4	5
Photo					
Scope	Lock the doors	Abate and Mothball (Exposed Concrete)	"Traced Lines" - Abate and Mothball + Install Lightweight Ribbed Structure	"Bars" -Abate and Mothball + Install Lightweight Frame with Suspended Lights/Ornaments	Abate, Reconstruct, & Rehab
Estimated Cost		\$875K	\$2.5M	\$1.9M	\$11.9M

Not Feasible

Preferred

Not Feasible

Questions? / Next Steps

*Thank you for your time –
We look forward to working with you to achieve HTCs!*

REPORT ITEM

1. **REPORT BY:** Chief Financial Officer David Seward
2. **SUBJECT:** State Budget Update for 2024-25
3. **BACKGROUND:**

The Governor's 2024-25 budget proposal for the State of California is being reviewed by the budget committees of the Senate and Assembly.

The Governor's proposed budget for fiscal year 2024-25 includes an ongoing increase in state General Fund equivalent to a 3% workload budget adjustment. This equates to an increase of \$2.2 million (9%). The budget plan also integrates revenue from the 5% fee increase approved by the Board of Directors at its September 2023 meeting.

Budget hearings are scheduled for Senate Budget & Fiscal Review Subcommittee #1 on March 7 and Assembly Budget Subcommittee #3 on May 7, 2024.

Attachment:

- Governor's Budget Higher Education Budget Summary

REPORT ITEM

- 1. REPORT BY:** Chief Financial Officer David Seward
- 2. SUBJECT:** Five-Year Budget Plan Updates
– Review and Discussion
- 3. BACKGROUND:**

The primary financial planning tool used by the College is the Five-Year Budget Model. This pro forma is used to summarize at a high level of the current year budget status, factoring in estimations of the impact of changes in key financial variables reflective of policy directions and key planning assumptions.

Excluded from this five-year budget model are nonstate activities including but not limited to research centers, grants and contracts, and activities funded by donations, program revenues and activities supported by endowed funds.

Attached is the Five-Year Budget Model based on the 2023-24 midyear revised budgets under consideration by the Board of Directors at this February 2024 meeting. Underlying assumptions are outlined in the attached.

Attachment: Update of Five-Year Budget Model

Reserves	Midyear Revised Budget 2023-24	Projection 2024-25	Projection 2025-26	Projection 2026-27	Projection 2027-28
Reserves, Beginning					
State Operating	25,899,200	24,528,387	21,829,752	20,096,408	22,250,302
State Plant Fund	4,987,881	5,019,881	5,051,881	5,083,881	5,115,881
Subtotal - State	30,887,081	29,548,268	26,881,633	25,180,289	27,366,183
Auxiliary Enterprises	2,617,643	2,268,196	2,270,798	2,294,005	2,362,797
Hastings-Digardi-Hall Unrestricted	5,707,262	1,356,529	1,068,459	1,253,839	1,439,219
Hastings Campus Housing Finance Authority (198 McAllister)	(71,398)	2,906,202	5,776,165	8,841,893	12,000,457
Subtotal - Nonstate	8,253,507	6,530,927	9,115,422	12,389,737	15,802,472
Total Reserves, Beginning	\$39,140,588	\$36,079,194	\$35,997,055	\$37,570,026	\$43,168,656
Results from Operations	--Tower Offline--	--Tower Offline--	--Tower Offline--	--Tower Offline--	--Tower Offline--
State Operating	(1,370,813)	(2,698,634)	(1,733,344)	2,153,894	5,091,189
State Plant Fund	32,000	32,000	32,000	32,000	32,000
Subtotal - State	(1,338,813)	(2,666,634)	(1,701,344)	2,185,894	5,123,189
Auxiliary Enterprises	(349,447)	2,602	23,207	68,792	871,470
Subtotal - Core Operations	(1,688,260)	(2,664,032)	(1,678,137)	2,254,686	5,994,659
Hastings-Digardi-Hall Unrestricted*	(4,350,733)	(288,070)	185,380	185,380	185,380
Hastings Campus Housing Finance Authority (198 McAllister)	2,977,600	2,869,963	3,065,728	3,158,564	3,251,000
Total Operations	(3,061,393)	(82,139)	1,572,970	5,598,630	9,431,039
Capital Outlay Projections					
LRCP Development Funding	-	-	-	-	-
Total Capital Outlay	0	0	0	0	0
Total Change in Reserves	(3,061,393)	(82,139)	1,572,970	5,598,630	9,431,039
Total Reserves, Ending	\$36,079,194	\$35,997,055	\$37,570,026	\$43,168,656	\$52,599,695

OPERATIONS		Midyear Revised Budget 2023-24	Projection 2024-25	Projection 2025-26	Projection 2026-27	Projection 2027-28
Core Operations						
	Revenues	80,051,313	81,441,025	86,608,457	92,851,413	98,688,237
	Expenditures	66,911,040	67,477,770	70,079,078	71,638,480	73,586,302
	Student Financial Aid	14,511,086	16,661,889	18,262,723	19,059,038	20,010,746
	Income/(Loss)	(\$1,370,813)	(\$2,698,634)	(\$1,733,344)	\$2,153,894	\$5,091,189
Auxiliary Enterprises						
		----- Tower Offline -----				
	Revenues	4,661,900	4,457,347	4,667,545	4,804,905	4,932,937
	Expenditures	3,073,226	2,430,514	2,498,953	2,550,115	2,592,103
	Overhead	233,096	222,868	233,377	240,245	246,647
	Income/(Loss) from Operations	1,355,578	1,803,965	1,935,215	2,014,545	2,094,187
	Non-operating, incl. Debt Service	(1,705,025)	(1,801,363)	(1,912,008)	(1,945,753)	(1,222,717)
	Income/(Loss)	(\$349,447)	\$2,602	\$23,207	\$68,792	\$871,470
Campus Housing Finance Authority (198 McAllister)		\$2,977,600	\$2,869,963	\$3,065,728	\$3,158,564	\$3,251,000
Total Operations Income/(Loss)		\$1,257,340	\$173,931	\$1,355,590	\$5,381,250	\$9,213,659

Key Assumptions:		2023-24	2024-25	2025-26	2026-27	2027-28
1.	JD Enrollment Fee Increase	5.0%	5.0%	5.0%	5.0%	5.0%
	JD General Enrollment Fee	\$47,031	\$49,383	\$51,852	\$54,445	\$57,167
2.	1L JD Student Discount Rate	30.0%	30.0%	30.0%	30.0%	30.0%
	1L JD Student Class Size	375.5	390.0	390.0	390.0	390.0
3.	FTE Student Enrollment					
	JD	1093.0	1083.0	1083.0	1097.0	1097.0
	LLM	25.2	26.5	27.8	29.2	30.7
	MSL	12.9	13.6	14.3	15.0	15.8
	HPL	17.0	20.0	20.0	20.0	20.0
	TOTAL	1148.1	1143.1	1145.1	1161.2	1163.5
4.	LLM Enrollment Fee	\$47,500	\$47,500	\$47,500	\$47,500	\$47,500
5.	MSL Enrollment Fee	\$39,000	\$39,000	\$39,000	\$39,000	\$39,000
6.	Employee Compensation Growth (Pool)		3.0%	3.0%	3.0%	3.0%
7.	Operating Cost Growth		1.5%	1.5%	1.5%	1.5%
8.	State General Fund Support, Ongoing	\$23,956,000	\$23,207,000	\$25,590,000	\$28,127,000	\$30,850,000
9.	Administrative Overhead Rates, percent of operating revenue					
	Auxiliaries: Tower	5%	0%	0%	0%	0%
	Auxiliaries: Parking Garage & Events	5%	5%	5%	5%	5%
	Auxiliaries: Student Health Services	5%	5%	5%	5%	5%
	Auxiliaries: Special Event and Guest Services	5%	5%	5%	5%	5%
10.	Academic Village (198 McAllister)					
	Instructional Space Rent (State Expense)	\$1,925,050	\$1,910,650	\$1,967,970	\$2,027,009	\$2,087,819
	Common Area Charges (State Expense)	\$232,580	\$239,557	\$246,744	\$254,146	\$261,770
	Office Space Rent (State Expense)	\$632,434				
	HCHFA Net Cash Flow After Debt Service	\$2,977,600	\$2,869,963	\$3,065,728	\$3,158,564	\$3,251,000
11.	State Reduction, Tower Office Rent	-\$229,416	-\$458,832	-\$458,832	-\$458,832	-\$458,832
12.	State General Fund debt service for 333 Golden Gate not included in above	\$ 3,096,000	\$ 3,092,000	\$ 3,092,000	\$ 3,092,000	\$ 3,092,000

**AUXILIARY ENTERPRISES
FIVE-YEAR BUDGET MODEL SUMMARY**

	Midyear Revised Budget 2023-24	Projection 2024-25	Projection 2025-26	Projection 2026-27	Projection 2027-28
BASE BUDGET	Tower offline	Tower offline	Tower offline	Tower offline	Tower offline
Revenues	\$4,661,900	\$4,457,347	\$4,667,545	\$4,804,905	\$4,932,937
Expenditures	3,073,226	2,430,514	2,498,953	2,550,115	2,592,103
Overhead	233,096	222,868	233,377	240,245	246,647
Net Operations	\$1,355,578	\$1,803,965	\$1,935,215	\$2,014,545	\$2,094,187
Nonoperating Revenues/(Expenses)					
Investment Income	94,400	95,774	97,168	98,583	100,019
Real/Unrealized Gain/Loss on Investments	-	-	-	-	-
Funded from Bond Proceeds	13,936	13,936	13,936	13,936	13,936
Transfers	(324,175)	(419,137)	(535,426)	(566,586)	(599,422)
Debt Service (Principal & Interest)	(1,489,186)	(1,491,936)	(1,487,686)	(1,491,686)	(737,250)
Net Non-operations	(1,705,025)	(\$1,801,363)	(\$1,912,008)	(\$1,945,753)	(\$1,222,717)
Change in Net Assets	(\$349,447)	\$2,602	\$23,207	\$68,792	\$871,470
Beginning Reserves - Operations	2,617,643	\$2,268,196	\$2,270,798	\$2,294,005	\$2,362,797
Capital Projects	-	-	-	-	-
Ending Reserves	\$2,268,196	\$2,270,798	\$2,294,005	\$2,362,797	\$3,234,267

AUXILIARY ENTERPRISES

	Midyear Revised Budget 2023-24	Projection 2024-25	Projection 2025-26	Projection 2026-27	Projection 2027-28
Revenues					
Auxiliary Enterprises	Tower offline	Tower offline	Tower offline	Tower offline	Tower offline
McAllister Tower	357,630	-	-	-	-
Parking Garage (net of tax)	2,373,999	2,445,219	2,518,576	2,594,133	2,671,957
Retail Leases (Garage)	226,925	233,733	240,745	247,967	255,406
Student Health Services	1,170,846	1,139,395	1,141,425	1,157,665	1,160,178
Business Center	-	-	-	-	-
Client Services Center	532,500	639,000	766,800	805,140	845,397
Total Revenues	\$ 4,661,900	\$ 4,457,347	\$ 4,667,545	\$ 4,804,905	\$ 4,932,937
Expenditures					
Salaries and Benefits	767,595	787,423	811,045	835,377	860,438
Operating Expenses	2,305,631	1,643,092	1,687,908	1,714,738	1,731,665
Overhead	233,096	222,868	233,377	240,245	246,647
Total Expenditures	\$ 3,306,322	\$ 2,653,382	\$ 2,732,330	\$ 2,790,360	\$ 2,838,750
Net Operations	\$ 1,355,578	\$ 1,803,965	\$ 1,935,215	\$ 2,014,545	\$ 2,094,187
Nonoperating Revenues/(Expenses)					
Investment Income	94,400	95,774	97,168	98,583	100,019
Realized/Unrealized Gain/Loss on Investments	0	0	0	0	0
Funded from Bond Proceeds	13,936	13,936	13,936	13,936	13,936
Debt Service (Principal & Interest)	(1,489,186)	(1,491,936)	(1,487,686)	(1,491,686)	(737,250)
Transfers From/(To) Other Funds	(324,175)	(419,137)	(535,426)	(566,586)	(599,422)
Total Nonoperating Revenues/(Expenses)	(\$1,705,025)	(\$1,801,363)	(\$1,912,008)	(\$1,945,753)	(\$1,222,717)
CHANGE IN NET ASSETS	(\$349,447)	\$2,602	\$23,207	\$68,792	\$871,470

NOTES

Capital projects are funded by debt, private donations or reserves.

Projections, Escalation Factors:

Annual Change

Parking Operations	3.0%
Garage Retail Leases	3.0%
Residential and office rents	0.0%
Student Health Center fee	0.0%
Client Services Center revenue	20.0% 20% for FY25, FY26, 5% for FY 27, FY28
Operating Expenses	2-3%
Salaries	3.0%
Investment Income	1.5%
Debt Service, Garage	scheduled

ACTION ITEM

1. **REPORT BY:** Chancellor & Dean David Faigman
Chief Financial Officer David Seward
Provost & Academic Dean Morris Ratner
2. **SUBJECT:** Addition of New Ladder Faculty Steps 12-14
3. **RECOMMENDATION:**

That the Board of Directors approves modification of the Ladder Faculty step scales to add additional steps, as part of a broader UC Law SF effort to narrow the gap between UC Law SF and peer University of California law school faculty compensation.

4. **BACKGROUND:**

Pursuant to By-Laws Section 8.2(h),¹ the UC Law SF administration seeks approval of three additional steps to be added to the Ladder Faculty compensation scales. Scales are used as reference points when hiring new faculty and when making adjustments to the compensation of existing faculty when administering compensation growth policies the Board has already approved.

UC Law SF has three primary ranks of full-time faculty constituted by the Faculty Rules and Procedures: Ladder Faculty (tenured and tenure-track research and teaching faculty), Long-Term Contract Faculty (mostly clinical professors), and Lecturers (contract teaching faculty on contracts of 1-5 years). The law school is assessing compensation scales for all three ranks, starting with Ladder Faculty.

Peer University of California law schools' step scales top out at higher numbers than does the UC Law SF step scale. Currently, the UC Law SF Ladder Faculty step scales start at Step 1 (\$161,474.90) and hit a base compensation ceiling at Step 11 (\$252,884.10). Peer UC law schools' step scales top out at higher numbers, which creates more compensation growth opportunities for high-performing faculty. For example, the UC Davis School of Law² professor scales go up to \$284,900 as of October 2023. The Berkeley Law³ and UC Irvine Law⁴ scales go up to \$276,600.

¹ Section 8.2(h) states that the Finance Committee shall “[c]onsider and make recommendations to the Board regarding compensation plans for all faculty....”

² See <https://aadocs.ucdavis.edu/policies/step-plus/salary-scales/october-2023/steplussystemsalaryscale-1october2023-table8.pdf>.

³ See https://apo.berkeley.edu/sites/default/files/ay_law_.5_.9_steps_10-1-23.pdf.

⁴ See <https://drive.google.com/file/d/1cBFdHC3iz-MfldT9pz6-jenAY7cQTdRC/view>.

The current UC Law SF step scales set forth below in Appendix A. The Chancellor & Dean and Provost & Academic Dean propose to add additional steps to the UC Law SF

Ladder Faculty step scales, Steps 12-14. If this proposal is adopted, UC Law SF will have more steps than do peer UC law schools, but UC Law SF already makes merit based adjustments to Ladder Faculty members' steps using fractional step changes (0.25-2.0, in a typical merit cycle). So having more steps just tracks the nuanced changes in compensation the law school's regular compensation pool allocation policies already permit.

The chief virtue of adding the additional proposed steps is that they would give UC Law SF room to implement merit-based compensation adjustments and to be more aligned with UC peers for top-performing faculty.

The new proposed Ladder Faculty steps are as follows:

Step	Base Compensation
12	\$ 262,884.10
13	\$ 272,884.10
14	\$ 282,884.10

There is no immediate fiscal impact of this change.

5. PROPOSED RESOLUTION:

Resolved, that the Board of Directors approve the Chancellor & Dean's decision to add Steps 12-14 to the Ladder Faculty step scales.

Appendix A: Existing Ladder Faculty Step Scales

Step	Current Base Comp
1	\$ 161,474.90
2	\$ 168,590.65
3	\$ 177,432.11
4	\$ 185,390.65
5	\$ 192,734.98
6	\$ 200,877.66
7	\$ 210,669.23
8	\$ 219,873.33
9	\$ 232,080.29
10	\$ 241,903.46
11	\$ 252,884.10

REPORT ITEM

1. **REPORT BY:** Chief Financial Officer David Seward
2. **SUBJECT:** Ripples – Rotating Art Program – Program Summary
3. **BACKGROUND:**

Attached is an update on the Ripples art program. A community celebration is scheduled for Wednesday, April 10 at 4:30pm where the artists will be invited to the campus. This event is also being used to help promote the Academic Village as students from UCSF, UOP, UC Davis, SFSU and USF will also be invited.

Attachment:

- Ripples UC Law SF Rotating Art Program

RIPPLES

UC Law, SF
Rotating Art Program



ABOUT

Ripples' is an annual rotating art program. Its objective is to illuminate UC Law, SF' influence in advancing the rule of law, furthering justice, and increasing inclusion and community cohesion.

The art underpins UC Law, SF' legacy, the rule of law, social justice/change, sustainability, environmental stewardship, science, health, economic empowerment and innovation. The art aims to enhance the experience of staff, faculty, student, alumni, local communities, and visitors alike.

Of the highest quality, it connects the Academic Village (AV) and its members to each other, showcases the diversity of its constituents, and links it to its environment. It captures UC Law's character and energy, and projects a forward outlook onto the future.



GUIDING PRINCIPLES

The art program at UC Law, SF aspires to:

- + Celebrate diversity and inclusivity
- + Instill a sense of excellence
- + Be inspired by the academic programs of each of the AV elements
- + Incorporate the essence of innovation
- + Celebrate diverse experiences, orientations, and viewpoints
- + Enrich the spirit through a diversity of media, cultures and perspectives
- + Engage and connect Alumni
- + Boost community pride
- + Illustrate branding



CREATIVE PATHWAY

For each of the selected floors throughout the AV the guiding principles are expressed through different approaches that are aligned with the functions of each of the floors.

The creative pathway defines the character of each floor and informs the art on loan program, the way art is commissioned, and/or acquired for different areas throughout the AV.



ART SELECTION

The art curation, placements and acquisition processes are managed by the art consultant | curator, Esther Mallouh. She works in collaboration with UC Law's Art Committees. The Art Committees are a select group of individuals associated with the academic programs of each of the pre-identified AV floors.

The committee provides insight , reviews the proposed art, and select the artwork to be exhibited on their respective floors.

Esther developed the AV Art Master Plan and is implementing the rotating art program, and the management of:

- commissions, acquisitions;
- artists relationships;
- partnerships with community organizations;
- art selection processes, communications, & logistics;
- placements, framing, transportation & installations;
- catalogues, assesses and manages UC Law's art inventory;
- curates art exhibits as requested



Ripples 1 – 2001 -2002

www.ripples-art.com

<https://www.youtube.com/watch?v=WEF5s1GMfp8&t=4s>

Ripples 2 – 2003-2004

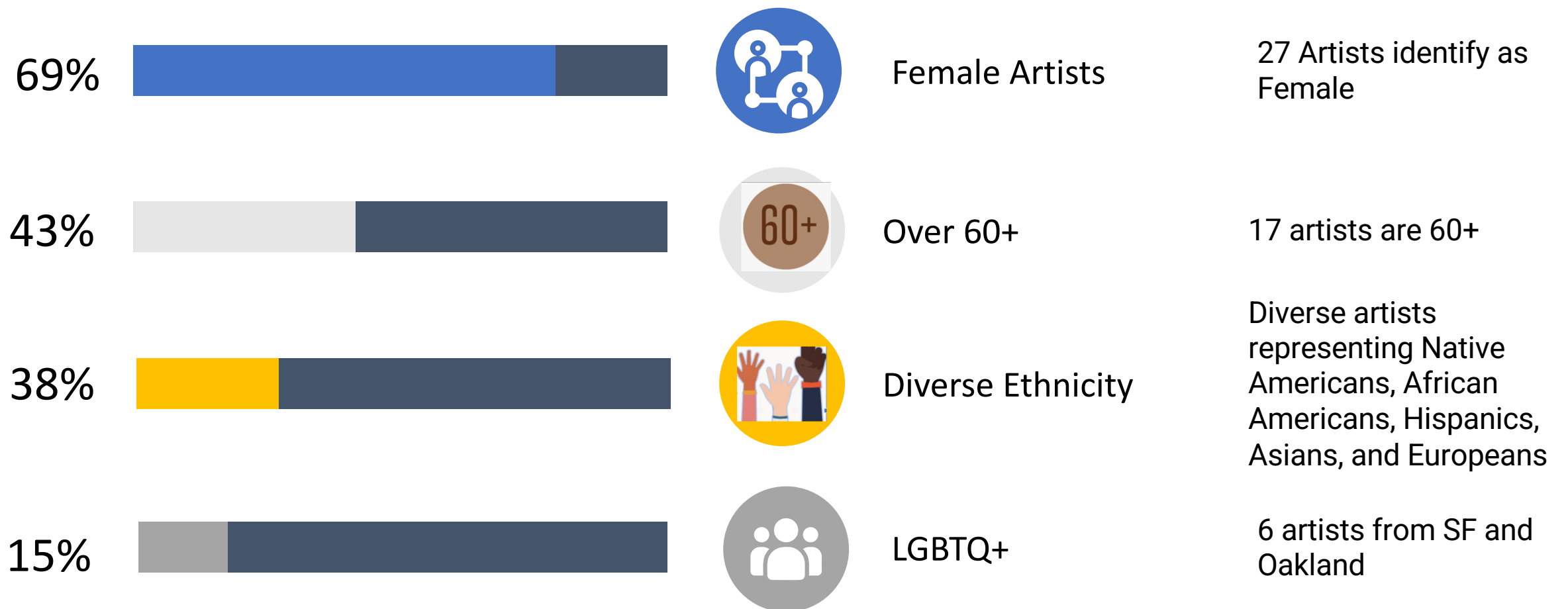
April 10, 2024- Community Art Event

RIPPLES 1

Diversity & Inclusion Chart

37 Artists at a glance

Percentage





Ripples 2 - Following are few examples of the current art on exhibit across AV's 333 and 200 campus



Simo Neri

Listen!, 2020

Digital Giclee Prints on Stretched Canvas
35" x 35" (each panel)

Gift of Clinical Professor Ascanio Piomelli to the Department of Social
Justice



[Simo Neri](#)

Artist Statement:

In my view an artist is first and foremost an observer, and I consider an artist's work a personal interpretation of the subjects observed. During the summer of 2020, inspired by the urgency of the protests against systemic racial injustice, I felt an overwhelming need to pay attention to and represent the many voices on the street as well as those from the past, in a triptych, 'Listen!'. Words matter.

333-4



[Nyame Brown](#)
Monumental, 2022

Oil on Linen
84"W x 96"L

Artist Statement

Nyame Brown

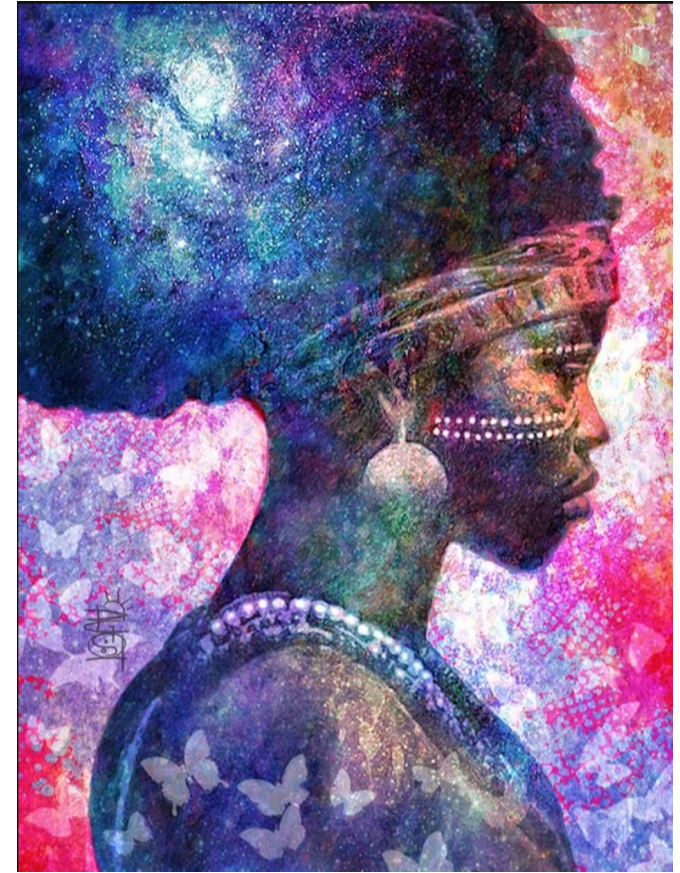


My work addresses the Black imagination as a space for new ways to perceive the Diaspora as trans-Atlantic, psychic, and imagined—not just through unity and similarity, but by looking at the dynamics of difference.

Building narratives like scaffolding around art historical references, hip hop, and personal history, I draws on these precedents as a fluid source of reference rather than a fixed and linear projection.

Reimagining contemporary notions of Blackness in visual culture, I challenge traditional representation and subvert it for a richer surreal language found in folklore and African American hyperbole. My depictions provide different ways to access African American culture through an approach that seeks social transformation and community revolution. I pursue complex themes through serial bodies of work, sourcing from a rich legacy of cultural practices and symbols, in which allegories and events interact with visions of future potentiality to make paintings of contemporary Black mythologies.

My Afro surreal discourses use cultural practices and symbols from the Diaspora to build worlds of contemporary Black mythologies.



Left to right
[David Bruce Graves](#)

Black Swan, 2022

The Traveler, 2015

Queen of Dreams, 2017

Mixed Media on Wood Panel
30"W x 40"L - each

Black Swan - A twist on then much depicted myth of Leda and the Swan .This artwork speaks to the beauty of black women, a reverence for nature, and the allegories within mythology.

The Traveler - A young Muslim boy strides across the African plains and his motion is echoed by a shooting star. This piece is about freedom and self-determination.

Queen of Dreams - A regally adorned African maiden in quiet-meditation with universal spirit. It celebrates our freedom and connect with higher powers.

David Bruce Graves

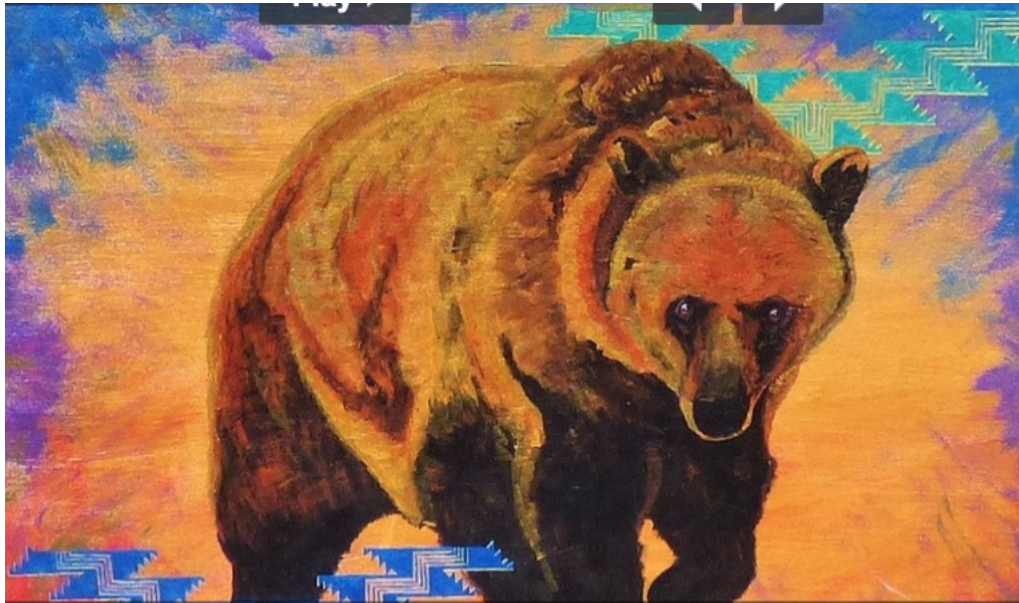


About

David Bruce Graves is an American fine artist and illustrator with thirty plus years of professional experience. His career began in New York City, where he worked with many of the top advertising agencies as an art director, illustrator, and photo retoucher. A native of Pittsburgh, Pa., David now resides in the East Bay region of Northern Ca. where he continues his passion for creating art which predominantly celebrates his African-American heritage.

His multi-media techniques are derived from many years of experimentation with various traditional art mediums, digital media, and photography. David creates impactful, symbolic images which are archival, visually poetic, and which often invite individual reflection and interpretation from the viewer.

200-L



Community Partnership

San Quentin Art Prison Program

Left to Right

[Henry Franks](#)

South Paw, 2008

Comfort Spot, 2015

Acrylic on Canvas

36"W x 24"L

18"W x 24"L

On loan courtesy of the artist

200-6



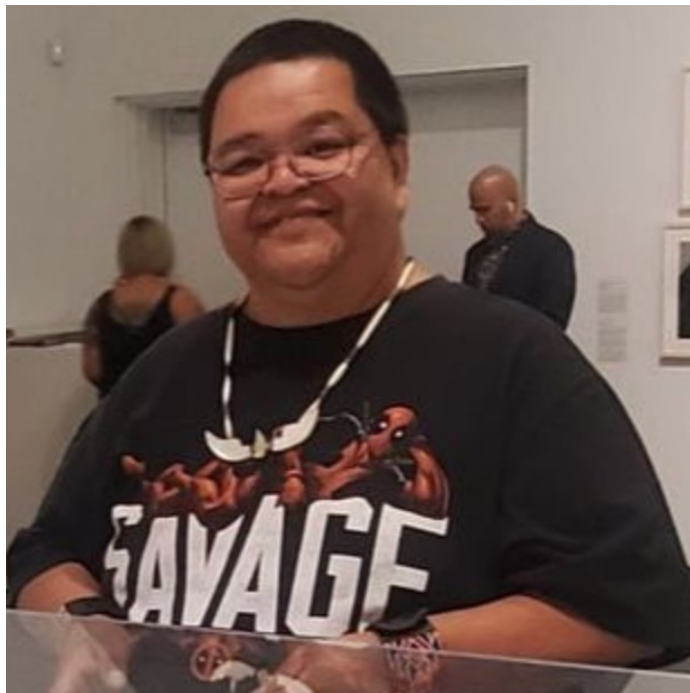
South Paw

The Paw Marks the Spot a representation of the spirit of the Bear Dancers. It was painted in San Quentin Prison Arts Studio while serving a life sentence.

Comfort Spot

The mountain lion is my Father, he is Pay-Lin Ke-Gat (Great Mountain Lion). For most of his life, besides his family, he was a solitude person. Spiritually, the mountain lion is one of my protectors.

[Henry Franks](#)



About

I am a descendant of the great nations of the Yurok and Pomo Tribes. I am a returning resident, former Arts In Corrections participant/clerk, and currently working for the William James Association as the Communications Administrator and Teaching Artist at California Medical Facility (CMF), High Desert State Prison (HDSP), and California Correctional Center (CCC).

I use my art to amplify the voices of people of color (specifically Native Americans), people who are currently experiencing incarceration, and returning residents (aka formerly incarcerated) to expose the mistreatment, dehumanization, and desolation.

These people have voices, my contribution is to make sure it is heard beyond the reservations and prison walls. My connection and coexistence within the natural world, my heritage, my culture, and incarceration experience inspire and shapes my artistic expression.

I draw from my childhood, my spiritual practice, my memories/treatment from my incarceration and living as a Native American in a colonized based society. Art has freed and expanded my scope of humanity and myself, it has been a tool for introspection, connection, and expression.

"Art has been a part of my life for as long as I can remember. It has let me express things within me that I could not ever put into words. It has given me healing, strength, insight, and patience. If it was not for artistic expression...I would not be the human being that I am today."



1 of 5 artists on exhibit

Community Partnership
Love without Borders
for Refugees in Need

Ahmed, Syria
Untitled 1

Acrylic on Canvas
36"W x 24"L

On loan courtesy of the artist

Ahmed

In Syria, Ahmed practiced both civil and criminal law. He developed an interest in painting while living in Syria and studied art at the Art Institute in Al Raqqa for two years. His paintings often convey the images of his country's history and civilization. He takes pride in sharing these images with the world.

Love Without Borders For Refugees in Need

About

Love Without Borders for Refugees in Need seeks to help support refugees in Greece regain stability and autonomy over their lives. Using art as a means for self-expression and a tool for economic independence, our work strives to give refugees a platform through which to express themselves, share their experiences, and forge relationships with both a local and global community. In addition to supporting refugees, we strive to educate the public about the struggles refugees face; to humanize the refugee experience; and to generate compassion and empathy for all people in this world.

200-6



1 of 4 artists on exhibit

Community Partnership
[NIAD](#)

Danny Thach
After Keith Haring (P0248), 2022

Acrylic on Canvas
30" x 30"

On loan courtesy of NIAD

A meticulous craftsman, Danny's process is precise and methodical. He has been a prolific artist since childhood and has used internet searches and resources to feed into his work at NIAD.

[NIAD](#)

About

NIAD Art Center is a progressive art studio in Richmond, CA. Its mission is to promote creative expression, independence, dignity and community integration for people with disabilities.

Frequently remarkable, surprising, and engaging, work by NIAD artists garners attention from the contemporary art world on a global scale.

Each work created at NIAD is an original piece of contemporary art that tells an individual story from the perspective of an artist with disabilities.

In the Studios and Galleries, NIAD artists develop a sense of pride in their artistic abilities, connect with each other and with NIAD's community of supporters, and earn an income from the sale of their work.

END

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 11/30/23-1/31/24:

Check Date	Check Number	Vendor	Check Amount	Description
11/7/23	ACH2353	Regents of the University of California	\$ 3,888,409.34	Payroll September 2023
11/14/23	E0073891	SCELC	\$ 105,645.68	Library JSTOR Arts and Sciences Book
11/14/23	E0073895	One Work Place	\$ 883,266.76	Furniture for Academe at 198
11/21/23	E0073940	George S. Hall, Inc.	\$ 164,262.00	Engineering Services - October 2023
11/21/23	E0073959	One Work Place	\$ 849,714.69	Furniture for Academe at 198
11/24/23	E0074001	One Work Place	\$ 429,014.46	Furniture for Academe at 198
12/1/23	E0074079	Langan Engineering and Environmental	\$ 133,322.78	100 McAllister Renovation – Geotechnical Services
12/5/23	ACH2359	Regents of the University of California	\$ 4,144,432.50	Payroll October 2023
12/8/23	E0074111	Perkins and Will, Inc.	\$ 807,704.29	100 McAllister Renovation – A & E Services
12/8/23	E0074119	UCSF Police Department	\$ 310,711.40	UCSF Security – 7/1/23 – 9/30/23
12/8/23	E0074121	Mid-Market Foundation	\$ 243,889.89	Urban Alchemy – October 2023
12/19/23	280890	Build Group, Inc.	\$ 162,141.55	198 McAllister – Coffee Shop Buildout
12/22/2023	E0074237	George S. Hall	\$ 177,946.00	Engineering Services – November 2023
1/3/24	280945	California Department of Taxation	\$ 139,388.76	City Tax – Hazmat - 2022
1/19/24	E0075021	Carbon Health Technologies, Inc.	\$ 139,897.50	Health Services Fee – Spring 2024
1/19/24	E0075024	George S. Hall	\$ 177,946.00	Engineering Services – December 2023
01/19/24	E0075039	Township Building Services	\$ 147,524.01	Janitorial Services – January 2024
01/26/24	E0075098	Regents of the University of California	\$ 199,797.12	UCPath – Debt Service 7/1/23 – 9/30/23